Dynamic People Process Management
Revolutionize Your CX

• Tibor Vass (Genesys), Todd Sherman (Eccentex)
A DYNAMIC PROCESS IN REALITY
Agenda

- Genesys DPPM (Dynamic People Process Management)
  - Hyper Personalization need Dynamic Workflows
  - Managing Unstructured Work
  - High level DPPM concept
  - What makes DCM Dynamic?
  - Platforms and availability

- DPPM Demo

- Customer Case Studies

- Q&A
WHAT IS DRIVING COMPLEXITY?

- SERVICE / PRODUCT DIFFERENTIATION
- TRANSACTION BASED PRICING
- HYPER PERSONALIZATION
- MICRO APPLICATIONS
- CX ORCHESTRATION
- OMNICHANNEL
- INSIGHTS
- IOT
- AI
Meet my daughter Gabriella

- She has two iPhones (but never pick them up) – “text only Dad!”
- She has no TV (never had)
- She is on Insta, Tinder, Tango, xyz??
- She buys things 95% on-line
- 95%+ of her friends are virtual
- Speaks 3 languages
- She’s opinion influenced by 9Gag
- 100% of her data on cloud
- 24 hours on-line

- She prefers: ZERO effort, 24x7 Access, Omnichannel, Personalized Services
WHY PERSONALIZATION?
NEED TO FIND THE RIGHT BALANCE

CONTEXT / DATA

BUSINESS VALUE / COST

HIGH

LOW

BEST FOR YOUR CUSTOMERS

VALUABLE
SEAMLESS
EFFORTLESS

Awesome

Creepy

BEST FOR YOU

VALUABLE
RELIABLE
AFFORDABLE

Annoying
We need to orchestrate WHAT should be done to WHOM, WHEN and HOW...

PERSONALIZATION EVERYWHERE

CAPTURE
- All channels
- All customers
- All interactions

CLASSIFY
- Work type
- Context
- Due date

CREATE
- Case
- Task
- Action

PRIORITIZE
- Business value
- Importance
- Urgency

DISTRIBUTE
- Skill
- Presence
- Load balance

RESOLVE
- Case container
- Workflow
- Disposition

REPORT
- AHTs
- KPIs
- Volumes

REAL-TIME CONTEXT MAY CHANGE THE WORKFLOW
Evolution of Process Automation

- **ACM / DCM**: Reduce manpower and automate as much work as possible (Outcome, CX & Goal Driven)
- **BPM**: Manage customer information, contacts and related workflows (Process & Efficiency Focused)
- **CRM**: Store and manage various type of documents and repositories
- **ECM**: DCM is designed to manage the chaos

**PROCESS UNPREDICTABILITY**

**PROCESS COMPLEXITY**
Studies and surveys of CIOs of major organizations “...show a clear recognition that older process automation approaches based on old mass production concepts are no longer adequate in an era of knowledge worker processes that benefit from autonomous decision-making and highly social collaborative tools.”

**Structured Processes:**
Can be handled with classic BPM / Workflow tools
- Predictable and repeatable work patterns / no exceptions
- Structured data in well defined format

**Unstructured / Adaptive Processes:**
Importance of knowledge workers
- Unpredictable work / ad-hoc process steps
- Unstructured data in different formats
- Resolution / outcome oriented work patterns
- Document-centric (need for a case container)

WHY DYNAMIC CASE MANAGEMENT?
CONSIDERATIONS ABOUT UNSTRUCTURED WORK

1. Unstructured process is about **how to get things done**

2. Not all business processes are predictable and more work is unstructured **than we realize** (60%+ precisely)

3. Traditional **BPM / Workflow tools does not help** with unstructured processes (using them can be even counterproductive)

4. In most of the cases unstructured processes **creating better CX and higher Value**
Capture, Create Tasks and Drive Dynamic Workflows with Active Push to Skill Distribution

**DPPM (Dynamic People Process Management)**

- **Genesys**
  - Driving the Dynamic Workflow
  - Continuous Reprioritization
  - SLA Enforcement / Fair Load balancing
  - Intraday / Dashboard / Historic Reports

- **Eccentex**
  - Storing and Archiving all Customer Data
  - Based on Business Value / Due Date / Importance
  - Matching task with the best available resource based on Context

- **Genesys**
  - DCM Update
  - DCM

**Capture, Create Task**

**Work-item / Task Capture**

**iWD Global Task List**

**iWD Push to Skill / Presence**

**Report / Update / Follow up**

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CAPTURE, CREATE TASKS AND DRIVE DYNAMIC WORKFLOWS WITH ACTIVE PUSH TO SKILL DISTRIBUTION
WHAT MAKES DCM AGILE & DYNAMIC?

Ability to make changes on configuration and processes by

- Business Analyst
  - Case Procedures
  - Automate Tasks
  - Setup Case Screen Layouts
  - Document Types
  - Case Status
  - Case Participants
  - SLA’s

- Knowledge Workers
  - Insert Ad-Hoc procedures
  - Make Changes to Flow on the fly
  - Collaboration
  - Creating Subcase
  - Add Participants
  - Attach Unstructured Data

without coding knowledge
<table>
<thead>
<tr>
<th>Rich Library of Pre-packed Applications</th>
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<tbody>
<tr>
<td>• Appeals</td>
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<tr>
<td>• Complaints</td>
</tr>
<tr>
<td>• Citizens Portals</td>
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<tr>
<td>• Civil Investigations</td>
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<tr>
<td>• Dispute Resolutions</td>
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<tr>
<td>• Frauds Investigations</td>
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<tr>
<td>• Gov. CRM</td>
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<tr>
<td>• 911 Emergency Response CM</td>
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<tr>
<td>• FOIA/PRR Tracking</td>
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<tr>
<td>• HR Case Management</td>
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<tr>
<td>• Health, P&amp;C, Life Insurance filings</td>
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<td>• Incident Management</td>
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<tr>
<td>• Internal Approvals Automation</td>
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<td>• Internal Affair Case Management</td>
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<tr>
<td>• Legal/OGC Case Tracking</td>
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<tr>
<td>• Permit and Licensing Management</td>
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<tr>
<td>• Social Services Case Management</td>
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<td>• Service Requests</td>
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Icons:
- Contract Management
- Custody Case Management
- Customer Complaint
- Emergency Response
- Enterprise Risk
- MyCare Plan
- Policy Referrals
- Fraud Investigation
DYNAMIC PEOPLE PROCESS MANAGEMENT PLATFORMS

PURECLOUD
COMING SOON

PURECONNECT
AVAILABLE

PUREENGAGE
AVAILABLE

CLOUD
PREMISE
HYBRID

CLOUD
PREMISE
HYBRID

CLOUD
PREMISE
HYBRID
The Future Of Dynamic Case Management & BPM

Eccentex transforms how knowledge workers work, improving productivity and job satisfaction while ultimately generating greater customer satisfaction.
DCM References & Case studies
GLOBALLY PROVEN ACROSS DIFFERENT VERTICALS
NEW YORK STATE - COMPLAINTS CASE MANAGEMENT

Challenges
More than 300 government personnel working across multiple departments, dispersed offices and interfacing with numerous third parties to investigate insurance complaints against insurers. The problem: due to continual compliance and regulatory changes and a large increase in case numbers, the business processes within NYSDFS were becoming outdated and the existing systems could no longer handle the required case volume.

Solution
NYSDFS now runs an innovative, 100% web-based complaints management system. The workflow module handles case allocation for knowledge workers based on their expertise, availability and other parameters. The system automatically detects duplicate cases and creates alerts for due dates, new events, modifications, etc. Documents are stored in an electronic format, allowing easy access, annotations, flexible collaboration and automated letter generation. Managers schedule reports for automated delivery and review.

Business Impact
- Improved case processing times by 40%
- Automated repetitive steps resulting in 22% bottom-line costs reduction
- Enabled direct connectivity with consumers, external stakeholders, insurance companies and brokers

6 Million Documents
5K Cases a Month
10K Docs a Month
1500+ Users
Dispute resolution services across multiple verticals, including medical, insurance, disability, employment, real estate, telecommunication and commercial matters. Manual submission of all complaint documents, supporting claim information and medical records slowed down the process and led to human error.

85% of the cases fell within a complex, multi-process workflow that required manual completion often leading to cases being improperly processed. Financial information was potentially exposed to those that should not have access to it.

Security improved through the web portal, allowing consumers to feel safe about their finances and privacy.

Documentation stored with the electronic case, decreasing errors and eliminating lost documentation.

Eccentex DCM has been implemented as a centralized case management system, to automate dispute case processing with built-in workflow across various case types.
<table>
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<tr>
<th>Challenges</th>
<th>Business Impact</th>
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<td>Legacy system uses multiple stand-alone systems and manual processes to respond to citizen emergencies, such as fire, safety and police matters. Response to incidents often slow and inefficient, creating a public safety hazard and reducing citizen confidence. First responders did not have access to the information they needed in the field, further increasing safety risks. Coordination across multiple branches (e.g., fire, police, EMTs) was often difficult or impossible to achieve in a timely manner. As the region was growing, the need for an improved system became critical.</td>
<td>Integrated call management, CTI and GIS systems, decreasing response time and improving accuracy of the response.</td>
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<th>Solution</th>
<th>* Dispatching automated based on incident type, reducing human error</th>
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<td>Eccentex DCM for EIR to integrate existing systems and provide access to multiple branches of responders from anywhere, anytime.</td>
<td>* Real-time dashboards are now used to view incidents in progress and status of the response</td>
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<th>* First responders can view information via the web for real-time updates and status</th>
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**Challenge:**

- **Mobile Image Capture**
- **High-Performance**
- **Distributed System**
- **6000 Users**

**Business Impact:**

- Integrated call management, CTI and GIS systems, decreasing response time and improving accuracy of the response.
- Dispatching automated based on incident type, reducing human error.
- Real-time dashboards are now used to view incidents in progress and status of the response.
- First responders can view information via the web for real-time updates and status.
CALL TO ACTION

1. Visit us in the Partner Pavilion to see the detailed DPPM demo

2. Apply for DCAP initiative benefits and leverage free solution assessment
   Email to Martin.Vagner@genesys.com (EMEA), Philip.Alderson@genesys.com (APAC)
   Will.McLaughlin@genesys.com (NA), Ester.Muller@genesys.com (LATAM)

3. Schedule a free consultancy session with the solution experts
   Mail: tiborvass@genesys.com
   Call or text: +36 70 7030662
Thank you for your attention

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