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SOFTWARE
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Genesys and SAP

Working Together to Power Customer Interactions

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Executive Summary

SAP, the recognized leader in providing collaborative business solutions for all industries, and Genesys, a leader in contact center software tying together customer interactions, enterprise resources and customer information, have joined forces to merge communications and data within the enterprise, integrating the back office with the front office.

Allying best of breed products in their respective domains, the Genesys and SAP proposition erases borders between back office, front office, and customer communications, providing a seamless interface. Genesys and SAP developed productized adapters providing repeatable, best of breed integration without the need for custom services or an incremental level of abstraction or third-party interfaces to accomplish tight integration. The functionality of the Genesys co-developed integrations to SAP dramatically reduces a company's cost required to test, integrate, and deploy applications. Genesys and SAP improve the total cost of ownership for customers, while improving ROI by reducing the complexity of integrating the Genesys Suite and SAP applications. The result is faster implementation time and decreased costs, the benefits of a unified multimedia desktop and single point of administration.

Business Communication Challenges

Today's enterprises face many challenges, the most important of which is interacting with customers. Interactions take many forms – by telephone, email, the web, or even via handwritten documents that must be signed, processed, and acted on by various parties. For example, contact centers no longer handle only voice calls, as companies aim to make it easy for customers to contact them in which ever way they prefer. While changes are occurring in the front office, they are similarly taking place across the back office. Many of the lessons learned in the contact center can be used to help the flow of information throughout the enterprise, and tools that have traditionally been used to help contact center agents interact with customers are expanding beyond the walls of the contact center to the rest of the enterprise.

Genesys and SAP have partnered together to ensure that customer data from any source can be used in routing decisions, and that data can be used to personalize interactions via screen pop and agent scripting. These personalized interactions can substantially improved customer satisfaction. Building upon their joint efforts in the contact center, SAP and Genesys are continuing to work together to provide tools that can be used throughout the enterprise.

Genesys has developed several adapters jointly with SAP, thereby empowering all SAP customers with a rich and time-saving cross platform integration.

More specifically, the available Adapters include:
- Gplus SAP ICI (Integrated Communication Interface) Multi-Channel Adapter: a server-side integration primarily aimed for customers using SAP WebClient.
- Gplus SAP WinClient Adapter: a client-side integration aimed exclusively at customers using SAP WinClient.

- Gplus SAP ERP Adapter: a server-side integration based upon the SAP RFC SAPphone Interface. It is applicable for customers using both ERP CIC (Customer Interaction Center) as well as WinClient.
- Gplus Data Access for SAP: a server-side integration enabling real-time Business Partner Data Lookups within Genesys routing strategies and using SAP RFC technology.

Genesys and SAP CRM Solutions – Working Together

Two market leaders with extensive track records, Genesys and SAP jointly and actively collaborated in bringing the Genesys Gplus Adapter for mySAP CRM to market. Through their reciprocal relationship, Genesys and SAP commit to customers that they will support each other's products as they evolve. By having two market leaders with certified solutions working together, end users can be assured that this is a strong partnership, designed to make interaction management integration reliable.

Traditionally, the back office and front office have been separate, with the back office focusing on tasks dedicated to running the company, such as Enterprise Resource Planning, as well as specific areas such as accounting, human resources, and supply chain management. In contrast, the front office refers to the parts of a company that involve interactions with customers, such as the contact center.

By integrating both worlds, the Genesys Gplus Adapter for mySAP CRM provides an easy to install and use solution. Allying best of breed products in their respective domains, the Genesys and SAP proposition wipes off borders between back office, front office, and customer communication.

Traditionally, companies had to choose between integrating best-of-breed CTI and CRM solutions themselves (or through system integrators), or buying a total solution that lacks many of the desired features. The union of SAP and Genesys vis-à-vis the Genesys Gplus Adapter for mySAP CRM provides a best-of-breed solution, while removing the expense, project risk, integration headaches, and lengthy implementation that is regularly associated with similar integrations. This allows companies to focus on refining business processes to meet corporate goals.

A Market-Driven Collaboration –The Gplus Adapter for mySAP CRM

The Genesys Gplus Adapter for mySAP CRM is a jointly developed software component that enables the mySAP CRM Interaction Center and Genesys interaction management technologies to integrate to exchange data or events from one system to another. With the Gplus Adapter, SAP customers gain the unique advantage of a unified agent desktop for managing customer service inquiries and ongoing customer interactions. The Gplus solution enables intelligent customer interaction routing in mySAP CRM environments, factoring in real-time and

historical customer information from Genesys and historical enterprise-wide customer data from SAP applications.

The key features and functions provided by the Genesys Gplus Adapter for mySAP CRM include:

- Blending interactions across all media channels and pertinent domains within an organization, such as front and back-office functions, including sales, service, support and fulfillment. This includes voice calls, email response management, and web-based interactions, such as agent-customer chat and web dynamic collaboration.
- Adding multi-channel communication capabilities to mySAP CRM Interaction Center. Voice calls, emails, and chat requests are routed through the Genesys Universal Queuing mechanism to the right agent, who utilizes the seamlessly integrated and specialized tools in their mySAP CRM Interaction Center application window.
- The Genesys Outbound Voice solution, allowing for Preview, Progressive and Predictive dialing campaigns, plus Inbound/Outbound blending. Call lists are created and managed in the mySAP CRM application and transferred to the Genesys Outbound Voice solution. The Genesys system can import the call list from the SAP application, and make the call lists available to the Genesys outbound contact server. Providing a unique capability, the Genesys outbound server can push back the results of the campaign to SAP, identifying the specific results and success of each call, which SAP can then display. The integrated desk top includes the outbound telephony controls.
- A unified desktop for both CRM functionality and interaction ianagement. The SAP agent desktop interface is enhanced with Genesys' views, control buttons, agent desktop telephony controls, multimedia handling tools, and so on, but with SAP's graphical "look and feel." The agent sees their usual SAP screen with the addition of a tab for Genesys components such as voice including outbound functions, e-mail, and web chat..
- Customer information is provided on the agent's screen so that when an interaction is delivered to the agent using the mySAP CRM interface, the Genesys system will populate the screen with the Genesys-stored relevant customer history and other information, and triggers which data are displayed. At the same time, SAP identifies the customer and displays the activity history and all other related customer information from the SAP database.

While all of this functionality would in other cases require custom integration to enable these media-blended, Outbound and Routing features in the mySAP CRM Interaction Center, the Genesys Gplus Adapter provides this in a packaged solution. These capabilities enable contact center agents to know who the customer is, the customer's history with the company, what the customer is contacting the company about, and so on, allowing the agents to provide optimal customer service.

Taking advantage of the adapter, SAP routing decisions can easily be made using pre-defined routing rules to segment customers. For example, when customers with overdue unpaid bills call the customer service department, they can instead be routed to an accounts receivable

agent, while the agent simultaneously views the caller's customer history on their mySAP CRM Interaction Center agent screen.

The newest and potentially most significant trend in years is presence awareness, and Genesys and SAP are working hard to presence enable SAP user desktops via server side integration. Knowing if an information worker is available or where to send a customer introduces a new set of benefits and cost savings for companies.

Benefits of the Genesys Gplus Adapter for mySAP CRM

The value proposition of the Genesys Gplus Adapter for mySAP CRM is based on many factors, as the product benefits companies that implement the solution and their customers who benefit from the flexibility of communication channels offered. Such benefits include:

- Accelerated implementation time due to pre-integration, while reducing customer project risk. The adapter radically reduces the amount of time and money spent on integration, dramatically reducing the need for costly professional services. Reduced agent training costs attributed to having a single, unified agent desktop capable of handling interactions across all media for sales, service and marketing. Agents do not have to be trained on a new user interface, as they continue to work with the SAP interface that they are already accustomed to.

- An enriched overall customer experience, allowing enterprises to meet the customer needs throughout the customer interaction cycle - including customer acquisition, multi-channel sales, order processing, and service.

- The intelligent matching of a customer with the resource best able to meet the business objectives such as quality of service level, up-sale or cross-sale, and improved customer satisfaction.

- Leveraging of enterprise-wide customer and resource data in executing strategies that efficiently blend interactions across all media channels and domains of the enterprise.

- A seamless unification of the front office with the back office so that interactions are only handled once. A 360-degree view of the customer, providing a consistent view across all customer aspects based on the customer's lifetime value.

- Multimedia routing and true universal queuing for SAP customers.

- Consolidated reporting across all interaction channels (including business attributes) and enterprise resources to ensure quality of service to customers.

- Integrated agent real-time statistics. Interaction Center managers can monitor the efficiency of their environment and ensure service levels are maintained.

Technical Overview

The Gplus Adapter displays in business real time a variety of agent session statistics, including cumulative average handle time, average handle time by media type, cumulative total number of interactions handled, and total number of interactions handled by media type. While other solutions simply provide a basic interface between the systems, Genesys and SAP have a statistical link between the systems, delivering full historical and real-time information used for reporting and managing resources. All interactions are tracked by the Genesys real-time monitoring system and then used with the Genesys reporting tools, so that every interaction conducted within mySAP CRM using the Gplus Adapter is available for reporting in both SAP or Genesys. In that way, the joint solution ensures that SAP users gain an increased understanding of how, when, and how frequently customers interact with the enterprise, providing a true 360-degree view of the customer. Interaction data and business-level information can be added to the real-time monitoring, identifying in real time the value and success of the interaction.

While both Genesys and SAP are established leaders offering leading-edge solutions, separately they each offer a partial view of the customer, and a partial means of handling the customer interactions. Genesys' universal queue and interaction management system requires CRM customer data to provide the customer history and business or routing rules, as well as the integration to other SAP back-office capabilities. mySAP CRM requires Genesys' multi-channel routing capabilities for routing and queuing phone, email, web chat, and web callback contacts, as well as Genesys' real-time monitoring to provide supervisors with a real-time view of the contact center. By combining the two solutions, customers can fully manage the cycle of customer interactions.

Integrating the Front and Back Office

Outside of the formal contact center lie a vast opportunity for interaction management products and applications. Often times there are specialists in the back office who need to provide the same personalized, consistent experience to the customer, yet they are not part of the contact center. Genesys and SAP are working to provide interaction capabilities to users outside of the formal contact center, such as in billing, accounts payable, and other areas within the company.

Weaving Together Genesys Voice Platform and SAP NetWeaver

Self-service capabilities based on traditional IVRs have been around for many years, enabling users to receive information or make transactions quickly and easily. In the past few years, VoiceXML standards-based voice portals have begun replacing IVRs as the self-service solution of choice to make business transactions accessible anytime, anywhere, while handling high volume requests. Genesys Voice Platform is an advanced software-only solution that offers VoiceXML standards-based development, flexible deployment options, simplified integration, and improved time to market for voice applications. Telephone access to SAP via Genesys Voice

Platform, using SAP NetWeaver Voice, is an effective and economic alternative when computer access is not an option or is more cumbersome.

Expensive live agents still handle a large volume of simple tasks, costing companies in both resources and money. Using SAP + Genesys Voice Platform, queries can be directed and routed to "virtual" agents rather than live contact center agents. The solution automates common tasks, reserving live agents for more complex calls. The costs savings of using virtual agents or voice self-service
can be immense. The per minute cost of using a live agent can cost up to $5 per minute, while using virtual agents and automating the handling of requests costs only 20 cents per minute. Not only does voice self service greatly reduce costs, it also results in faster handle time, reducing or eliminating the amount of time callers need to spend waiting on hold, and is available 24x7.

Going beyond basic IVR capabilities, Genesys Voice Platform can be used for a variety of applications, such as order status, account status, making a service request, time and attendance, expense reporting, inventory query, password reset, and so on. Entering travel expenses after a trip can be very
time consuming, but with a SAP Genesys solution, employees can call into the SAP Business suite and use speech to enter their ID number, PIN, or other information. The system provides the caller with available self service options based on capabilities available via the company's web site. The system prompts the caller to enter the necessary information (i.e.; enter the city you traveled to), and using either DTMF or speech capabilities the employee can enter the day/date, location, amount, and other information, and the system then provides the caller with an expense report number when the interaction is completed, and can then submit the report to a manager for approval.

Integrating with my SAP Business Suite and SAP Voice Application Framework, SAP NetWeaver Voice incorporates the latest VoiceXML technology, allowing access to valuable data within mySAP Business Suite applications for partners and customers. Building upon Genesys' integrated self and agent-assisted service, if a caller is transferred from a self-service application the agent receives a screen pop with the attached SAP data, making the agent better able to handle the customer inquiry in a timely manner.

SAP Business Warehouse – Providing a Consolidated View

To stay competitive, enterprises must have the business data they need in order to make sound, informed decisions. Without this information, companies are working in a vacuum, and do not have the tools necessary to stay ahead of their competitors. Tools to collect, aggregate and pres-

ent data to managers and supervisors are helping companies better understand what is driving their business and how to improve operations.

SAP's Business Warehouse, a packaged, comprehensive business intelligence product, is a combination of databases and database management tools that are used to build reports, aimed at supporting management decision making. SAP Business Warehouse pools together the data from a company's disparate systems and presents it to the business user to help them make more informed decisions. Genesys is developing a Gplus adapter to feed Genesys interaction data into SAP Business Warehouse to enable fully integrated reporting and analytics. The Gplus Adapter for SAP Analytics enables customers to import Genesys Interaction Details into SAP Business Warehouse for centralized Analytics Processing, enabling SAP Business Warehouse end users to initiate an import of Genesys Interaction Details inside Business Warehouse by providing the desired reporting data time interval.

Previously, customers had two separate sources for reporting, requiring custom integration to integrate mySAP CRM reporting and the Genesys contact center reporting. The Gplus Adapter for SAP Analytics will make it easier for SAP business users to have an integrated approach to reporting and analytics.

Genesys and SAP ERP Solutions

Moving beyond the contact center to the enterprise, Genesys and SAP have collaborated to provide a Genesys Gplus Adapter for mySAP Enterprise Resource Planning (mySAP ERP). Until now, computer telephony integration (CTI) capabilities have been limited to the contact center, making it difficult and costly for knowledge workers outside of the contact center to take advantage of these time-saving and productivity-enhancing capabilities. Genesys and SAP, working jointly, have broken down the barriers, making it possible for knowledge workers to benefit from the same tools that have been used effectively in the contact center for years.

Utilizing Genesys' expertise in providing screen pop capabilities within the contact center and moving beyond the walls of the contact center to the enterprise, the Gplus mySAP ERP Adapter provides screen pop functionality to SAP applications in the enterprise, allowing enterprise workers to view information about who is calling, their profile and calling history, before answering the call. The Genesys adapter works with SAP's SAPphone interface, which provides a telephony tool bar that can be activated inside an SAP application. Providing basic voice functions, the ERP Adapter performs tasks such as initiating, terminating, receiving, and transferring calls, placing calls on hold, setting up conference calls, identifying inbound callers, automatically launching an application when an inbound call is received, displaying caller data, provisioning caller information stored in the SAP System, storing data on unanswered calls with callback function, linking notes to calls, using telephone calls to start workflows, integrating calls in SAP Business Workflow, and attaching calls to documents, work items and business objects – all from within the SAP ERP application.

Companies in all verticals can take advantage of these capabilities. For example, a human resource professional using a SAPphone-enabled SAP HR application could get information popped into their SAP HR screen indicating who the caller is, their current employee medical benefits, and other relevant information at the same time they receive the phone call.

In a service management example, the service technician receives an inbound call, and via screen pop can identify the caller and their address, and then initiate the Create Service Notification application, which is integrated with SAP Workflow. Using the SAPphone capabilities, enabled by Genesys, the service technician can accept and answer the call, forward it to someone else, conference in another party, consult with an expert, and so on.

In both these cases, data can be used to personalize interactions via screen pop, which greatly enhances worker productivity, saving time on each call, and enabling workers to provide better and more personalized service and improved caller satisfaction. By merging telephone and onscreen work activities for back office workers, telephony is more closely integrated in day-to-day activities.

Future Directions

Being able to determine the correct processing agent and deliver an event in the right context through the right channel is crucial for any event-based architecture. An employee receiving 100 emails a day may very well create 10,000 business events in the future, making pre-processing and proper delivery or routing of the events critical. Work items in the enterprise routinely fall through the cracks and sit unattended for hours, days, or weeks. Whether it is an order received via fax that was not managed efficiently, an RFQ coming in via the postal service that sits in the mailroom, or cards from a marketing campaign that lie unattended, these work items need to be intelligently routed to the appropriate resources, and then managed and tracked.

Genesys and SAP are building upon their integrations and using the Genesys platform to intelligently route SAP work items. Leveraging the Genesys Open Media interface, you can apply intelligent real-time routing, tracking, reporting and management capabilities to work items and interactions over any channel inside the contact center and across the enterprise, so that all processes and systems within an organization can be funneled into the single, prioritized queue, which may include adjacent groups, functions, processes, such as claims processing, mortgage processing, and other paper and work items that need to be distributed. You can imagine all of the relevant uses of BPR in an SAP enterprise –mortgage loan processing, credit card applications, claims processing, new insurance policies – any application that involves back office work to be routed, tracked, and processed.

The Genesys solution recognizes any signal coming from SAP and can route SAP work items, such as scheduling requests, and automatically escalate work items. SAP feeds business events such as equipment failure, service disruption, vacation requests, returned goods, unpaid invoices and so on to the Genesys enterprise routing applications, and Genesys routes these events to the proper resource.

Genesys and SAP applications working together allow for real-time intelligent routing, based on the resources available at the time. For example, an oil company that has oil rigs around the country determines that there is a malfunction with one of the rigs, but their field service reps are out in remote areas without access to PCs. The Genesys system could route instructions on how to fix the oil rig to the field service technician's wireless PDA, enabling the technician to best perform his job.

An employee who completed an expense report would normally send it to their manager, but if the manager was out of town, the report would sit in his inbox. With Genesys, the system would make a routing decision based on the manager's location and send the expense report either as a text message to the manager's PDA, as a voice call to his mobile phone, or to another line of contact. For example, a delivery truck driver who is stuck in traffic could enter her delayed status into the SAP system, which informs the company expecting the shipment that the delivery will be late, and subsequently routes the delivery to another truck in route.

In the near future, Genesys and SAP will jointly offer an adapter to more tightly integrate Genesys routing with SAP applications.

Genesys and SAP Solutions – Working Together

SAP and Genesys are equal partners, working together to define, test, and support a co-developed product. Customers can receive support from either SAP or Genesys, whose support teams work together to solve customer issues and can speak knowledgably about the other partner's solution in order to provide first-level support. As the Genesys Gplus Adapters are fully supported by both Genesys and SAP, future versions of the products will be synchronized with Genesys' and SAP's new releases and versions so that as new features become available from Genesys and SAP, they will be provided and supported through the adapter.
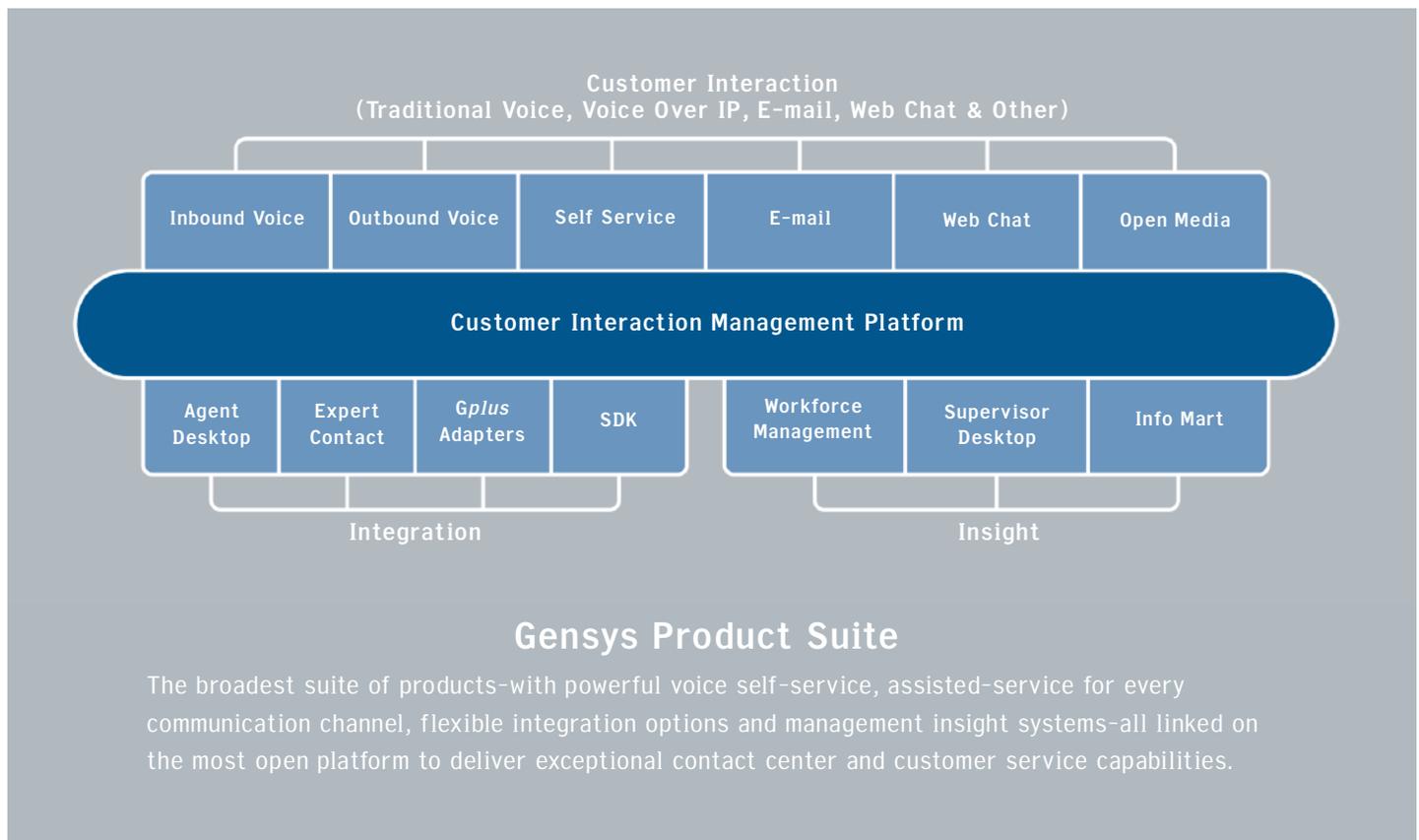
The Genesys and SAP partnership brings together the strengths of both companies to ensure customer satisfaction and to drive business success with tested and productized development. As leaders in their individual fields, SAP controls the business processes and the data, while Genesys manages communication and customer interactions across all channels.

Working together for over five years, SAP and Genesys have a cooperative development agreement, certified integrations global support agreement, as well as joint, dedicated engineering As an official SAP Software Partner, Genesys earned the SAP Pinnacle Award for Co-Development in 2004. The two companies have over 80 joint customers spanning the world.

Conclusion

With the Genesys Gplus Adapter for mySAP CRM and mySAP ERP, as well as the integration between Genesys Voice Platform and SAP NetWeaver, Genesys and SAP deliver the most tightly integrated solution available, using customer knowledge to help manage customer profitability and retention. With these solutions, businesses can meet customer needs throughout all phases of the customer interaction cycle - whether it is a customer acquisition, multichannel transaction, order processing, or service.

The combination of Genesys' scalable, open infrastructure capabilities with mySAP Business Suite tightly integrates the front and back office and manages the entire customer interaction cycle, providing companies with a sustainable competitive advantage, increased customer satisfaction and retention, and increased employee empowerment.

Customer Interaction
(Traditional Voice, Voice Over IP, E-mail, Web Chat & Other)

| Inbound Voice | Outbound Voice | Self Service | E-mail | Web Chat | Open Media |

Customer Interaction Management Platform

| Agent Desktop | Expert Contact | G*plus* Adapters | SDK | Workforce Management | Supervisor Desktop | Info Mart |

Integration   Insight

Gensys Product Suite

The broadest suite of products-with powerful voice self-service, assisted-service for every communication channel, flexible integration options and management insight systems-all linked on the most open platform to deliver exceptional contact center and customer service capabilities.

Customer Interaction Management Platform (Traditional Voice and Voice over IP)

Genesys Inbound Voice manages all incoming calls (TDM as well as IP) and delivers the caller to the right agent with the right information the first time, regardless of location and across any contact center infrastructure.

Genesys Outbound Voice is a software-only solution for outbound calling campaigns. It delivers advanced dialing capabilities on existing telecom infrastructure without costly hardware.

Virtual Hold for Genesys is a queue management solution that allows contact centers to better manage during peak times. Each customer's line in the queue is saved with a virtual place-holder, enabling them to receive a callback when it's their turn to speak with an agent.

Genesys Voice Platform (Self-Service) brings Internet technologies to voice self-service. It transforms the phone into a powerful, anywhere-anytime information access tool and enables a new breed of voice self-service applications.

Genesys IP Contact Center provides all the capabilities of Genesys voice products for Voice over IP (VoIP) calling environments.

Customer Interaction (E-mail, Web Chat and Other)

Genesys E-mail applies the same personalized care and flexibility provided in Genesys-powered voice centers to e-mail.

Genesys Web adds Web chat capability so contact centers can offer live chat sessions to customers.

Genesys Open Media adds the capability to integrate and intelligently route other interactions, such as faxes, into the contact center. Open Media also links other applications (e.g. existing document management systems, Web applications, etc.) with the interaction routing capabilities of the Genesys platform.

About the Author

Blair Pleasant is President & Principal Analyst of COMMfusion LLC. COMMfusion LLC provides consulting and market research analysis on voice/data convergence markets and technologies, aimed at helping end-user and vendor clients both strategically and tactically. Prior to COMMfusion, Ms. Pleasant was Director of Communications Analysis for The PELORUS Group, a market research and consulting firm, and President of Lower Falls Consulting.

With over 18 years experience, her primary areas of focus are convergence applications, including contact center software, Unified Communications, Unified Messaging, computer telephony integration (CTI), and voice processing. Blair has authored many highly acclaimed multi-client market studies and white papers, as well as custom research reports, and provides market research analysis and consulting services to both end user and vendor clients.

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