GENESYS

Six stories of
SUCCESSFUL CLOUD MIGRATIONS

Introduction

According to Gartner, more than **85% OF ORGANIZATIONS** will embrace a **CLOUD-FIRST APPROACH BY 2025.** Those companies feel competitive pressures mounting.

As technology evolves, and your customers expect more personal and frictionless engagement, cloud-based solutions are the way forward.

But you don't want just any cloud. You need software that makes it easy to orchestrate every step of the customer experience (CX). You need the flexibility, scalability and reliability that a cloud-based orchestration platform provides.

In the following chapters, you'll read about six companies that migrated to the cloud — in as little as 10 weeks — leveraging Genesys to drive efficiency and productivity within their support organization while improving customer and employee satisfaction.

SUCCESS STORIES FROM

1. Rabobank
2. HELPLINE
3. eFinancial
4. PATLive
5. Dolfi 1920 Baggage services
6. HEINEKEN MÉXICO

Rabobank

Rabobank is on a mission to create a positive influence on people and society through financial services. The cooperative bank serves retail and corporate clients in the Netherlands, focusing on the global food and agriculture sectors. These operations comprise 89 local Rabobank branches, a central organization and specialized international offices.

Consistently delivering an excellent customer experience is integral to its success. Yet disconnected on-premises products — including legacy Genesys and Cisco systems — meant its contact center teams couldn't transfer contacts between branches, get a unified view of the customer or capture meaningful real-time data. Meanwhile, essential requirements like IP telephony, routing, reporting, voice recording and CRM system integration were getting more complex and harder to manage.

The bank had previously deployed live chat and created Nina, a chatbot built on Nuance artificial intelligence (AI) software. However, that solution operated in a siloed fashion. Security compliance was another concern; software releases from the previous supplier tended to contain bug fixes only — not new features and functionality.

Rabobank

$2.2 million saved
in hardware and IT staff costs

90% customer satisfaction
in digital channels

25% productivity increase
with web messaging

45% of questions answered
by virtual assistants

Entering the matrix

Coupled with a company-wide, cloud-first strategy, Rabobank has created a new conversational banking service model that runs on the Genesys Cloud CX™ platform.

"We wanted a partner with a native cloud solution built from the ground up, rather than an on-premises product repackaged for the cloud," said Thom Kokhuis, Head of Conversational Banking at Rabobank. "One that leaned toward DevOps wizardry and rapid innovation with open APIs and a microservices architecture."

A first for the Dutch financial services market, the new approach plots customer journeys on a matrix, with value to the customer on one axis and value to the bank on the other. For day-to-day functions, the bottom-left focus is "Time well saved." Where human interactions are key for high impact, the top-right subject changes to "Time well spent." Genesys Workforce Engagement Management ensures the bank always has the right human expertise in the right place at the right time.

✳ THE RABOBANK CHANNEL STRATEGY FRAMEWORK ⚡⚡

High = Face-to-face

Impact to the bank

Whatever suits you

Steer toward ultimate customer convenience, making it easy to do business with us.

Time well spent

Steer toward a memorable, personalized and rewarding human interaction.

Time well saved

Steer toward fast, simple and easy digital interactions without closing channels for those who need it.

Digital red carpet

Steer customers toward self-reliance.

Impact to the customer

Low = Digital   High = Face-to-face

Seamlessly migrating over 80 departments

The first private banking units with 600 concurrent users went live within 88 days. Rabobank repeated the process across more than 80 departments spanning the organization. It successfully migrated all 15,000 advisors (5,000 front office and 10,000 back office or branch workers) within nine months — a feat accomplished in-house with minimal outside resources used.

THROUGHOUT THE PROJECT, WE MET OUR TARGET OF ZERO INCIDENTS, LOSS OF FEATURES OR CUSTOMER SERVICE DISRUPTION," said Kokhuis.

The bank has three principal customer channels: web messaging with a virtual assistant or live agent; voice, which has become a main channel since the COVID-19 pandemic began; and video, which plays an empathetic role for customers making big financial decisions. Meanwhile, outbound communications proactively support its marketing campaigns and security alerts.

Useful bot and video integration

Within a short time, Rabobank launched two virtual assistants running on Microsoft Power Virtual Agents that are integrated with Genesys Cloud CX via the Genesys Open Bot Connector; a new messaging channel to replace live chat; and 24sessions, a **Genesys AppFoundry® Marketplace** solution that enables agents to instantly send messages containing video call invites.

"Our advisors can easily switch from a phone call or web messaging and escalate to a video conversation in a single click," added Kokhuis. "We arrange around 15,000 video calls with customers each month, often for emotional life events such as buying a new house or dealing with a bereavement."

Less effort, better engagement, happier employees

Moving to a single omnichannel solution has positively impacted the bank's top and bottom lines and KPIs. Decommissioning on-premises systems provided an annual savings of $750,000 on hardware and $1.5 million on IT staff costs. Business changes like new features or routing policies can be delivered in days — compared to a month before.

"With asynchronous web messaging, we no longer have lengthy, hard-to-manage live chat queues as agents and customers can interact when the other party is offline," said Kokhuis. "We're also able to hold the customer's place in the queue, reducing effort for them and us. And conversations can be easily resumed so they don't have to start from scratch."

Employees also get a better experience. With more digital tools to help solve complex, emotional situations, advisors enjoy greater job enrichment. And they have more control over their workloads and personal performance against targets.

READ THE FULL STORY.

> **WEB MESSAGING IS (25%) MORE EFFICIENT** compared to call handling, meaning we can serve more customers without increasing headcount. And since introducing video calls we've seen a noticeable uplift in new mortgage sales.

Thom Kokhuis
Head of Conversational Banking

Rabobank

HELPLINE

With over 200 customers, HELPLINE is the European user experience leader. At the heart of this French business are nine contact centers and 2,000 skilled technicians who help customers fix IT issues on the spot — via phone, email or chat. More complex issues can involve desktop sharing or a site visit.

All of that was managed using the Genesys PureConnect™ solution, deployed on-premises and neatly integrated with the company's dashboard reporting tools, IT service management and Microsoft Active Directory systems.

"We grew from 1,000 to 2,000 agents in four years and are proud to have a 97% client retention rate, one of the best in the industry," said Lionel Florence, Director Users Digital Journeys at HELPLINE. "Genesys has been by our side throughout."

HELPLINE

97% client retenton rate

80% reduction
in client onboarding

Over 80% FCR

50,000 requests
handled daily

Increased client satisfaction
despite 30% volume increase

Prepared for anything

Business continuity planning (BCP) is vital to a leading IT services company like HELPLINE, which provides critical support for major public organizations, financial institutions and retailers. In late 2019, the company put the Genesys Cloud CX platform to the test at one of its Paris sites.

"As well as improving BCP, we were keen to see how Genesys could support the next stage of our digital strategy," said Florence. "For example, moving to Customer Experience as a Service — anticipating, automating and bringing fresh innovation like callbacks and AI-enabled bots. The trial confirmed we could do lots more for about the same level of spend."

WE HANDLE AROUND 50,000 REQUESTS DAILY, answering calls in under 20 SECONDS with a FIRST-CONTACT RESOLUTION RATE OF MORE THAN 80%. Through AI and automation, we are reducing our global cost of service for the customer. ULTIMATELY, THIS MAKES US MORE ATTRACTIVE THAN OUR COMPETITORS.

Lionel Florence
Director Users Digital Journeys
HELPLINE

An easy migration

A few months later, the trial moved to a full rollout when the COVID-19 pandemic put France into lockdown. "We signed up for Genesys Cloud CX on Friday and went live the following Tuesday with remote working," said Florence. "We took care of the implementation ourselves and, within a couple of hours, our customer support technicians were familiar with the system."

In the first days of the lockdown, HELPLINE received three times more calls compared to its largest previous spike. Over the next two weeks, volumes rose by up to 30% before eventually easing. Despite these remarkable challenges, HELPLINE saw an increase in customer satisfaction ratings. And with less complexity, servers, network components and backups, the company also saw cost savings.

READ THE FULL STORY.

> **WE TOOK CARE OF THE IMPLEMENTATION** ourselves and, within a couple of hours, **OUR CUSTOMER SUPPORT TECHNICIANS WERE FAMILIAR WITH THE SYSTEM.**

Lionel Florence
Director Users Digital Journeys
HELPLINE

eFinancial

One of America's largest direct brokerages, eFinancial helps customers get the right life insurance easier, faster and more affordably. Service is delivered from contact centers in Chicago; Bellevue, Washington; and Tempe, Arizona. Together, they handle around 50,000 contacts a week via inbound, outbound, email and text.

A lifelong Genesys on-premises customer, eFinancial decided to move to the cloud. "We needed to scale up the business and wanted a system that would move around with us, giving people the option to work securely from home," said Paul Bourdeaux, Chief Information Officer at Vericity (Fidelity Life Association and eFinancial). "We also wanted to make resources stretch through greater automation and a model where hardware and software updates were managed for us."

80% reduction
in web response time

25% increase
in dials and contacts

100% remote agents

Eliminated four annual software updates

Thoroughly benchmarked and tested

As an existing Genesys customer, it would have been easy to simply choose Genesys Cloud CX. But eFinancial conducted its own due diligence and explored all the options.

"We did a six-month deep evaluation of several providers, arriving at a short list of three, which we piloted," said Bourdeaux.

GENESYS CLOUD CX PERFORMED BEST FOR USER EXPERIENCE, SOFTWARE UPDATES, DIAL PERFORMANCE, OMNICHANNEL ROADMAP AND ROUTING CAPABILITIES."

A three-month plan achieved in three weeks

Bourdeaux and his team did the first implementation in about a month using out-of-the-box tools and scripting. Then the COVID-19 pandemic hit, suddenly throwing a three-month migration plan into a tailspin.

"Genesys Professional Services were part of our SWAT team and present in our standups and scrums," said Bourdeaux. "On March 22, we still had two call centers running on-premises. By the end of the next day, we were 100% on Genesys Cloud CX, with 400 staff relieved to be working from home. April turned out to be one of our best-performing months on record."

During April and May, the number of dials and contacts rose by 25%, fueled by increased customer demand and agent availability. About to go live, Genesys Workforce Engagement Management will facilitate resource scheduling, increasing accuracy for less effort. "Getting an analytical platform that helps schedule and properly staff as demand peaks and falls was another big factor in our decision to go with Genesys," added Bourdeaux.

Pushing new boundaries

Now the outbound team quickly spins up campaigns without having to involve IT. Plus, the IT team no longer needs to maintain hardware and software. "We'd carry four major updates a year, running a full suite of regression tests, each taking about two weeks," said Bourdeaux. "Now, that's time in the bank for value creation."

"I am excited for the future," Bourdeaux concluded. "There was always the thought about working remote but until we were able to implement it, and prove it on a large scale, we didn't know what that would look like. We didn't know if we'd be able to perform as well as we did working in the call center. We didn't know what training would look like. And for good or bad, due to COVID-19, we were forced to find that out very quickly, and it was largely successful. We have learned that we can, in fact, be productive and successful in a 100% remote environment. And that extends to our agents, our transfer reps, our case managers, our IT support. And without a contact center — that really served as the backbone behind our sales platform — we wouldn't have been able to."

READ THE FULL STORY.

OUR ROI FOR MOVING TO GENESYS CLOUD CX is that the business is not only solvent but IS PROFITABLE AND POSTING RECORD SALES.

Paul Bourdeaux
Chief Information Officer
Vericity (Fidelity Life Association and eFinancial)

PATLive

PATLive is the first point of contact for customers of many US government agencies, as well as real estate, medical and legal companies. Agents are its most valuable asset — handling over 2 million calls annually with enthusiasm and a strong sense of purpose.

"As an outsourced answering service, we pride ourselves on being the best, which means fast, efficient, accurate and friendly customer service," said Jackie Gonzalez, Vice President, Operations at PATLive.

For two decades, PATLive had been on the Genesys PureConnect solution. While it had performed well over the years, company officials felt it was time to look beyond robust on-premises technology toward a more agile, on-demand cloud model. That search was already in motion before the COVID-19 pandemic hit, but the crisis increased the level of urgency. The pandemic increased pressure from its clients, including many COVID-19 frontline and key worker organizations.

"We considered extending our on-premises system with a VPN, but with lots of Citrix and software installs — and only a relatively small IT team — it just wasn't practical," added Gonzalez. "So, pretty much overnight, we had to come up with a better home-working option."

PATLive

59% reduction
in agent churn

1,000
agents onboarded

Significant increase
in real-time schedule adherence

Improved employee visibility and management
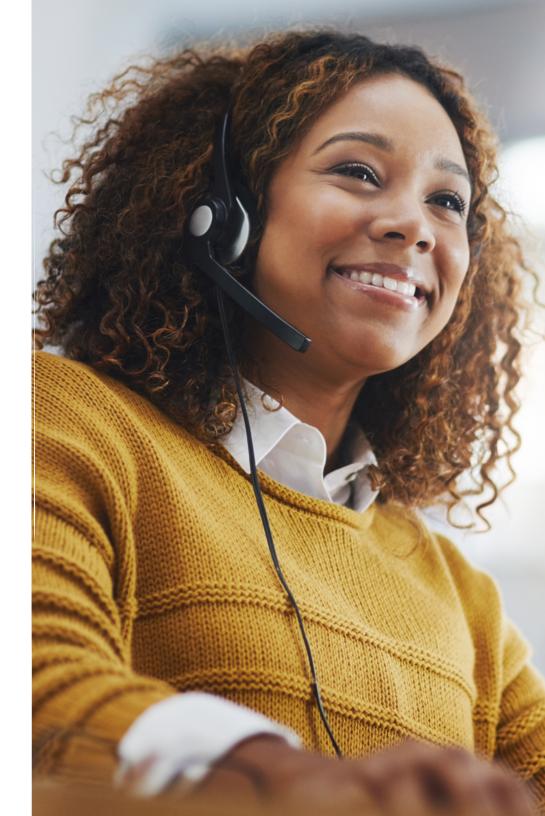
Enhanced employee engagement
via gamification

Fast-tracking deployment in a weekend

Despite positive experiences with its previous Genesys solution, PATLive left no stone unturned. "We looked at all the major players," said Gonzalez. "There wasn't much time for training, and we kept coming back to Genesys Cloud CX.

THE USER EXPERIENCE WAS SIMPLY BETTER. ALSO, BECAUSE IT'S DESIGNED FOR OPERATIONS PEOPLE TO SELF-SERVE, THE FEAR OF STEPPING INTO THE UNKNOWN NEVER HAPPENED.

PATLive quickly spun up Genesys Cloud CX for 100 agents, and soon added 150 more.

"We deployed and tested the solution on Saturday, trained our agents on Sunday and went live first-thing Monday morning," said Gonzalez. "We expected traffic spikes and knew call scripts and handling instructions could change by the hour. Genesys Cloud CX coped with absolutely everything thrown our way."

Assuring remote resource and quality management

Along with maintaining existing services, PATLive rapidly created 24/7 COVID-19 helplines for citizens urgently needing information and support. Following the success of the first two deployments, a third government client was onboarded — bringing the total to over 1,000 agents within 90 days of launch.

"Most of them were new hires, further testimony to the ease of use of Genesys Cloud CX," said Gonzalez. "And they did a fantastic job. Events were moving quickly, and we were receiving press and media inquiries. So, we had to be at the top of our game with consistent, accurate call handling."

The Genesys Cloud CX platform allowed PATLive to make several key changes. Combining call and screen recordings made a huge difference, which now feeds directly into the company's training processes. In addition, integrations helped unify processes, data and people — at home and in the office.

"Connecting our contact center with Slack messaging and Tableau business intelligence — as well as in-house call scripting and CRM systems — was massive," concluded Gonzalez. "Because of the ease of working with Genesys Cloud CX, if we ask IT if they can do something, the answer's usually 'Yes'."

READ THE FULL STORY.

Dolfi1920

A trusted partner to over 100 airlines, Dolfi1920 steps in when passengers need to recover, repair, or replace lost or damaged baggage. The first touchpoint is the company's contact center in Warsaw, Poland, where 80 agents handle around 15,000 monthly interactions in 12 languages. Their work involves close coordination with colleagues worldwide.

"The airline has the liability, but we own the customer journey in guiding them through the claim process and resolving luggage problems," said Tal Fridman, Operations and Business Development Director Europe for Dolfi1920. "Our contacts tend to be one-off transactions. We don't know the customer personally and, without a history, it's hard to build close relationships."

Dolfi1920 has a clearly defined strategy to delight its customers — based around a functional and emotional customer experience executed in an agile manner.

"We observe and analyze data to compare the customer's expectations and actual experience, and then reverse engineer the processes to close gaps," added Fridman.

9% gain in productivity

49% ROI

12% increase in CSAT

2% boost in FCR

Rise of the hyperconnected traveler

Since 2014, Dolfi1920 relied on Genesys PureConnect to meet its CX strategy, which included a remote agent capability. "Back then, we only had around 5% of seats working from home, which helped us respond to challenges like Monday staffing issues," said Fridman.

Six years later, Dolfi1920 went all-in with remote working.

"The pandemic offered an opportunity for positive change," said Fridman. "Forty percent of travelers today are digital-first consumers. They have shrinking attention spans and prefer digital interactions over calls. Also, as industry boundaries have evaporated, they compare our services with those of companies like Amazon, Uber and Starbucks."

These growing expectations put agents under even more pressure to resolve issues quickly the first time. And that meant accelerating experimentation and innovation times with digital technologies and Software as a Service models.

Soaring with cloud-native tech

Dolfi1920 migrated to Genesys Cloud CX because it offered several out-of-the box integrations and fast deployment capabilities. Other deciding factors included a highly scalable, cloud-native architecture; a simple user interface; and advanced routing and omnichannel capabilities.

"We cloned configurations and went live with voice within a week — and by the second week we were fully migrated," said Fridman. "It was the quickest, most seamless deployment I've ever witnessed. Our agents are happier and have a bird's-eye view of the customer. Also, we've removed distractions like IT management and can concentrate on providing exceptional service."

The migration also enabled Dolfi1920 to address increased pressures — at the pace it needed to stay competitive. As a result, the business has seen a 12% uplift in CSAT, 21% improvement in FCR and a 9% increase in agent productivity.

"We saw a 49% return on investment, plus carbon reductions and other environmental benefits," concluded Fridman. "Greater contact center elasticity means the business can adapt faster to events like seasonal peaks, airport strikes, pandemic-related travel restrictions and extreme weather disruptions."

Dolfi1920 plans to leverage Genesys to enhance digital self-service, with a chatbot handling most standard requests. It also intends to integrate Genesys Cloud CX with Salesforce for consolidated real-time data.

READ THE FULL STORY.

Heineken Mexico

Heineken, the largest brewer in Europe, operates in 70 countries with more than 250 brands worldwide. For more than 20 years, Heineken has operated in Mexico, where it runs six plants and employs more than 16,000 people.

A constantly evolving company, Heineken Mexico is a market leader with a portfolio of more than 20 products. But its contact center — the preferred touchpoint for most of its customers — relied on a disjointed process to manage 190,000 outbound calls and 40,000 inbound calls each month.

"We have always been focused on achieving continuous improvement, especially when it comes to implementing new technologies and access to the latest innovations," said Adrián Lozano Cantú, Customer Service Manager at Heineken Mexico. "A modern, flexible all-in-one platform from Genesys was just what we needed. Everything flowed better, and in less time, than we expected."

4% improvement in customer service

92% customer satisfaction

Nearly doubled commercial sales

Unified digital channels

Evolving to automation

The contact center transformation journey started several years ago — taking Heineken Mexico from a legacy Cisco system to the Genesys PureConnect on-premises application. This was a huge step in the company's transformation, enabling increased employee productivity, improved CX and enhanced visibility.

While Heineken Mexico had a very positive experience with Genesys PureConnect, the team wanted to leverage the benefits of the cloud. In 2020, it migrated to the Genesys Cloud CX platform to unify its digital channels — webchat, email, SMS and chatbots. The platform has also allowed it to test voicebot capabilities, where customers can call outside of business hours and interact with a bot. The next day, they receive a callback based on their need and the timeframe that best suits them.

With a clear migration roadmap in place, Heineken Mexico worked with partner Sixbell to ensure a smooth and efficient transition to Genesys Cloud CX. Building on the success of the implementation, Heineken Mexico was able to further enhance its customer experience.

WE KNEW IT WAS TIME TO MIGRATE TO A GENESYS CLOUD CX SOLUTION THAT WOULD TRANSFORM THE CONTACT CENTER BY DELIVERING THE INNOVATION AND AUTOMATING BUSINESS PROCESSES THAT OUR COMPANY NEEDED," said Lozano Cantú.

"Now, we have a robust platform with all the features to empower our agents with a superior user experience. And it's taken our customer service to another level."

Modernizing a contact center

Heineken Mexico knew the migration to the Genesys Cloud CX platform included redesigning the contact center with a cloud-based customer service model. Its contact center receives sales requests, tracks product deliveries and ensures efficient ticket resolution in after-sales services. Now, agents can design, monitor and fine-tune the entire customer journey — achieving more personalized customer service. Similarly, it has enabled new self-service digital webchat channels, which has raised its customer satisfaction to 92%.

"With the Genesys Cloud CX solution, we redesigned the entire contact center, from the agent experience to the customer experience, incorporating new functionalities to route, measure and expand these new digital channels as customer preferences change," said Lozano Cantú. "Also, we enabled new tools so that customers can resolve requests quickly themselves, without having to wait."

The modernization of the contact center also included remote training for employees using the Genesys Cloud CX platform. In addition to an optimal home-office implementation, Heineken Mexico improved employee satisfaction levels by two percentage points in the latest internal surveys that monitor the work environment.

READ THE FULL STORY.

SERVICE LEVELS IMPROVED MARKEDLY, FROM 95% TO 99%, while maintaining an average handle time of less than 20 seconds. We have also done very well on the commercial side. **SALES HAVE ALMOST DOUBLED, FROM 6% TO 12%.**

Edgar Muñoz Hernández
Head of Analytics and Support
Heineken Mexico

Summary

Your future is bright

Moving to the cloud promises many benefits: increased resilience, agility, cost reduction and most importantly, the ability to innovate.

No matter where you are in your migration journey, prioritize a partner that knows your business, your goals and your technology.

Genesys is a market leader with a proven approach. We've helped over 4,000 organizations migrate to the cloud and orchestrate every step of every experience through a single platform.

We're here to help you and your business gain insights, evaluate your readiness and map your future actions step by step so you can transform your CX with confidence. Let's take this journey together.

See how Genesys can help you prepare for your migration.