

# Agent Copilot (Agent Assist)

## Study Notes

Topic	Description
Agent Copilot	AI-powered real-time guidance system for agents
Also Known As	Agent Assist, Copilot Assistant
Purpose	Provides real-time recommendations and knowledge during customer interactions
Activation	Requires Premium edition and Customer Insights module
Benefit	Reduces handle time, improves first-contact resolution, enhances agent confidence

## Navigation

Admin → Architect → Agent Copilot OR Admin → Contact Center → Agent Assistance → Copilot Configuration

## Agent Copilot Overview

Agent Copilot is an AI-powered assistant that provides real-time guidance and recommendations to agents during customer interactions. It analyzes the conversation in real-time and suggests relevant knowledge articles, scripts, and next steps to improve interaction quality and resolution.

## Key Capabilities

- **Real-time recommendations** - Suggests actions based on conversation context
- **Knowledge article suggestions** - Recommends relevant articles automatically
- **Script guidance** - Provides talking points and recommended language

- **Sentiment analysis** - Monitors customer emotion and suggests de-escalation
- **Next action recommendations** - Predicts optimal next steps
- **Agent learning** - Improves over time with agent feedback

## How It Works

1. Agent answers contact
2. Copilot monitors conversation in real-time
3. AI analyzes conversation intent and context
4. System searches knowledge base for relevant information
5. Recommendations displayed in agent interface
6. Agent reviews and applies suggestions
7. Feedback loop improves future recommendations

## Edition & Module Requirements

Requirement	Details
Minimum Edition	Premium Edition required
Module	Customer Insights add-on module
License Type	Agent licenses with Copilot enabled
Setup	Admin configuration in Architect
Integration	Knowledge management system required

## Study Notes - Copilot Features

Feature	Description	Use Case
Knowledge Recommendations	AI-suggested articles from knowledge base	Technical support, FAQs
Script Guidance	Real-time conversation scripts and talking points	Sales, compliance-heavy calls
Sentiment Monitoring	Real-time emotion analysis of customer	De-escalation, empathy guidance
Next Action Suggestions	Recommended next steps for agent	Call routing, transfer decisions
Agent Performance Tips	Real-time coaching during interaction	Training reinforcement

Feature	Description	Use Case
Historical Context	Customer interaction history suggestions	Personalization, context
Product Recommendations	Sales-specific recommendations	Upsell, cross-sell opportunities
Compliance Reminders	Real-time compliance guidance	Regulatory requirements

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# Implementation Guide

## Step 1: Prerequisites & Planning

1. Ensure organization has Premium edition
2. Purchase Customer Insights module
3. Audit existing knowledge base
4. Document Copilot use cases by queue
5. Plan knowledge article optimization
6. Review agent readiness and training needs

## Step 2: Knowledge Base Configuration

1. Navigate to Admin → Knowledge Management
2. Create/organize knowledge articles
3. Tag articles with metadata (category, queue, intent)
4. Add keywords and synonyms for better matching
5. Ensure article quality and accuracy
6. Set article access permissions

## Step 3: Enable Agent Copilot

1. Go to Admin → Architect → Agent Copilot
2. Enable "Agent Copilot" toggle
3. Select knowledge base source
4. Configure recommendation parameters
5. Set recommendation types to display
6. Choose recommendation frequency

## Step 4: Customize by Queue

1. Create queue-specific Copilot settings
2. Configure knowledge sources per queue
3. Set relevance thresholds
4. Define script templates
5. Establish sentiment trigger rules
6. Test queue-specific configurations

## Step 5: Agent Training & Rollout

1. Train agents on Copilot interface
2. Explain recommendation types
3. Practice with sample interactions
4. Gather initial feedback
5. Monitor early adoption
6. Provide ongoing support

## Step 6: Monitoring & Optimization

1. Review Copilot engagement metrics
  2. Monitor agent utilization of recommendations
  3. Track recommendation accuracy
  4. Gather agent feedback
  5. Optimize knowledge articles
  6. Adjust recommendation parameters
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## How to Implement

Phase	Description	Timeline
Planning	Audit knowledge base and define use cases	Week 1-2
Setup	Configure Copilot and knowledge sources	Week 2-3
Content	Create/optimize knowledge articles	Week 3-5
Training	Educate agents on features and usage	Week 5-6
Pilot	Deploy to single queue with monitoring	Week 6-7
Rollout	Enable across all queues	Week 7-8
Optimization	Monitor and tune performance	Ongoing

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# Agent Copilot Architecture



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## Real-Time Recommendation Flow

Customer Says: "I've been trying to reset my password for hours"

Copilot Analyzes:

└─ Intent: Password Reset Help

└─ Sentiment: Frustrated/Angry

└─ Context: Technical Issue

└─ Duration: Extended problem

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Copilot Recommendations Display:

1. KNOWLEDGE ARTICLE (High Confidence)

└─ "Password Reset Troubleshooting"

└─ Relevance: 94%

└─ Steps: 5-7 minute resolution

2. SENTIMENT GUIDANCE (Urgent)

└─ Suggest: Apologize for inconvenience

└─ Tone: Empathetic

└─ De-escalation: Acknowledge frustration

3. NEXT ACTION (Suggested)

└─ Offer: Manual password reset

└─ Escalation: If still unresolved

└─ Followup: Offer premium support

4. SCRIPT SUGGESTION (Optional)

└─ "I completely understand how frustrating that is..."

└─ "Let me walk you through the fastest solution..."

└─ "If this doesn't work, I'll reset it for you personally"

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Agent Applies Recommendations

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Customer Issue Resolved

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System Captures Feedback

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# Copilot Interface Components

Agent Desktop View:

Current Interaction
Customer: John Smith
Queue: Technical Support
Duration: 3:45
COPILOT RECOMMENDATIONS
<input type="checkbox"/> KNOWLEDGE ARTICLES
└ Password Reset Guide (94% match)
└ Two-Factor Auth Setup (87% match)
└ Account Recovery (76% match)
<input type="checkbox"/> SENTIMENT ALERT
└ Customer: FRUSTRATED
└ Suggestion: De-escalate & empathize
➔ NEXT ACTIONS
└ Offer manual password reset
└ Provide security questions
└ Escalate if unsuccessful
<input type="checkbox"/> SUGGESTED SCRIPT
"I understand how frustrating this is.   Let me walk you through the quickest   way to get this resolved..."
<input type="checkbox"/> Helpful] <input type="checkbox"/> Not Helpful]

# Real Flow Scenario: Sales Queue with Copilot

Agent: "Hi, thanks for calling. How can I help?"

Customer: "I'm interested in upgrading my plan"

Copilot Recommendations Appear:

1. KNOWLEDGE - Sales Playbook

- └ Current Plan Analysis
- └ Available Upgrades
- └ Pricing Information

2. PRODUCT RECOMMENDATIONS

- └ Upsell: Premium Plan (+40% revenue potential)
- └ Cross-sell: Support Package
- └ Offer: 2-month discount if upgrading today

3. NEXT ACTION SUGGESTIONS

- └ Qualify: Ask about usage patterns
- └ Present: Show cost-benefit analysis
- └ Close: Offer contract details

4. SCRIPT SUGGESTION

"Based on your usage, the Premium Plan would save you money and give you these benefits: [list]. Can I set that up?"

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Agent Applies Script & Recommendations

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Customer Upgrades (upsell successful)

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System Logs: Agent applied recommendation

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Next Sale: System learns and improves recommendations

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# Real Flow Scenario: Support Queue with Sentiment

Customer Calls (Angry Tone)

Agent Answers

Copilot Immediately Detects:

├ Sentiment: NEGATIVE (85% confidence)

├ Emotion: Frustrated/Angry

├ Risk: Potential churn

└ Recommended Action: De-escalate NOW

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Sentiment Alert in Copilot:

"Customer is frustrated.

Suggested response:

'I'm sorry you're experiencing this issue.

I'm going to personally make sure we get  
this resolved for you right now.'"

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Copilot Provides Knowledge:

├ Issue Resolution Articles

├ Escalation Path (if needed)

└ Retention Options

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Agent Applies De-escalation Approach

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Customer Sentiment Improves

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System Logs Improvement

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Issue Resolved Successfully

# Omnichannel Copilot Support

## Voice Interactions

Real-time Copilot assistance during calls

├ Conversation transcription

- └ Intent analysis
- └ Real-time knowledge suggestions
- └ Sentiment monitoring

## Chat Interactions

Suggested responses during chat

- └ Pre-written messages
- └ Quick knowledge links
- └ Canned responses with personalization
- └ Sentiment-based guidance

## Email Interactions

Copilot assistance with draft responses

- └ Knowledge recommendations
- └ Tone suggestions
- └ Template recommendations
- └ Compliance checking

## Social Media Interactions

Real-time assistance for public responses

- └ Tone and brand consistency
- └ Knowledge suggestions
- └ De-escalation for negative sentiment
- └ Escalation recommendations

## Usage Scenarios

Scenario	Solution	Outcome
High call volume with complex issues	Copilot suggests knowledge articles	Reduced AHT, faster resolution
New agents lacking experience	Real-time script and guidance	Improved FCR, faster ramp-up

Scenario	Solution	Outcome
Compliance-heavy calls	Compliance reminders and scripts	Reduced risk, better compliance
Frustrated customers	Sentiment analysis with de-escalation tips	Improved satisfaction, retention
Sales team underperforming	Upsell/cross-sell recommendations	Increased revenue per interaction
Quality issues with call handling	Real-time coaching suggestions	Improved quality scores
Agent knowledge gaps	Targeted knowledge recommendations	Improved FCR, fewer escalations
Multilingual support	Language-specific scripts and guidance	Consistent quality across languages

# Knowledge Base Organization for Copilot

Knowledge Base Structure:

- └ TECHNICAL SUPPORT
  - | └ Password Reset
    - | | └ Steps 1-5
    - | | └ Common Issues
    - | | └ When to Escalate
  - | └ Two-Factor Auth
  - | └ Account Recovery
  - | └ Billing Issues
- |
- └ SALES
  - | └ Plan Comparison
  - | └ Pricing Information
  - | └ Promotional Offers
  - | └ Upsell Scenarios
  - | └ Contract Terms
- |
- └ CUSTOMER SUCCESS
  - | └ Onboarding Steps
  - | └ Best Practices

- | └ Feature Usage
- | └ Integration Guides
- |
- └ COMPLIANCE
  - └ Required Disclosures
  - └ Privacy Policies
  - └ Legal Requirements
  - └ Prohibited Actions

# Copilot Performance Metrics

## Recommendation Quality

Metric	Target	Purpose
Recommendation Accuracy	>85%	Agent finds recommendations helpful
Agent Acceptance Rate	>60%	Agents actively use suggestions
Relevance Score	>4/5	Recommendations match context
Time to Resolution	-15%	Faster with Copilot assistance
Knowledge Article Match Rate	>90%	Correct article suggested

## Agent Performance

Metric	Target	Purpose
First Contact Resolution	+10-25%	Copilot guidance improves outcomes
Average Handle Time	-10-20%	Faster resolution with suggestions
Customer Satisfaction	+5-15%	Better agent performance
Quality Score	+5-10%	Improved call quality
Agent Confidence	+20-30%	Subjective improvement

## Best Practices

# Knowledge Base Optimization

- **Keep articles current** - Update quarterly or when processes change
- **Write for clarity** - Use simple language agents can understand quickly
- **Include visuals** - Screenshots and diagrams help comprehension
- **Provide examples** - Real scenarios help agents apply knowledge
- **Tag thoroughly** - Use keywords and metadata for better matching
- **Test accuracy** - Verify all knowledge is correct before publishing

# Copilot Configuration

- **Start simple** - Begin with high-confidence recommendations only
- **Tune relevance** - Adjust thresholds based on agent feedback
- **Monitor adoption** - Track which recommendations agents use
- **Gather feedback** - Ask agents what would help them more
- **Iterate quickly** - Update knowledge and rules frequently
- **A/B test** - Try different recommendation approaches

# Agent Enablement

- **Provide training** - Agents need to understand Copilot features
- **Share success stories** - Show how other agents use it effectively
- **Encourage experimentation** - Let agents find what works for them
- **Make feedback easy** - Simple thumbs up/down for recommendations
- **Celebrate improvements** - Recognize agents who adopt well
- **Continuous learning** - Regular coaching on Copilot usage

# Monitoring & Optimization

- **Track recommendations** - See which articles agents use most
  - **Monitor accuracy** - Ensure recommendations are helpful
  - **Gather sentiment** - Ask agents about Copilot effectiveness
  - **Review metrics** - Check impact on FCR, AHT, CSAT
  - **Optimize content** - Update articles agents find unhelpful
  - **Plan improvements** - Use data to guide enhancements
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# Common Implementation Scenarios

## Scenario 1: Technical Support with Knowledge-Heavy Topics

### Configuration:

- └ Knowledge base with 200+ articles
- └ Intent-based recommendation
- └ Sentiment monitoring enabled
- └ De-escalation scripts
- └ Escalation pathways

### Expected Results:

- └ FCR improvement: 15-25%
- └ AHT reduction: 12-18%
- └ Agent confidence: +25%

## Scenario 2: Sales Team with Upsell Focus

### Configuration:

- └ Product recommendation engine
- └ Upsell/cross-sell playbooks
- └ Customer history integration
- └ Pricing recommendations
- └ Contract template suggestions

### Expected Results:

- └ Revenue per call: +15-30%
- └ Sales conversion: +10-20%
- └ Agent productivity: +20%

## Scenario 3: Multilingual Support

Configuration:

- └ Knowledge base in multiple languages
- └ Language-specific scripts
- └ Tone guidance per language
- └ Cultural sensitivity prompts
- └ Translation recommendations

Expected Results:

- └ FCR consistent across languages
- └ Quality standardization
- └ Customer satisfaction: +10-15%

# Troubleshooting Guide

Issue	Cause	Resolution
No recommendations appearing	Knowledge base empty or not indexed	Populate knowledge base and index
Irrelevant recommendations	Poor knowledge article tagging	Review and improve metadata/keywords
Agents ignoring recommendations	Not helpful or slow to appear	Adjust relevance thresholds and review content
Slow recommendation loading	Too many articles to search	Add more specific keywords and metadata
Sentiment detection inaccurate	Model needs more training data	Collect more interactions and retrain
High false positive sentiment	Threshold too sensitive	Adjust sensitivity settings lower
Copilot not working for all queues	Not enabled for specific queues	Enable in queue configuration
Knowledge articles outdated	No review process	Establish content review cycle
Low agent adoption	Agents don't understand value	Provide additional training
Module not appearing	License not purchased or enabled	Verify Premium edition and module purchase

# Agent Copilot vs. Traditional Knowledge Base

Feature	Agent Copilot	Traditional Knowledge
Real-time suggestions	Yes, automatic	Manual search required
Context awareness	AI-powered, contextual	Search-based only
Sentiment analysis	Yes	No
Next action prediction	Yes	No
Script guidance	Automatic	Manual lookup
Learning capability	Improves over time	Static
Setup complexity	Medium-High	Low
Ongoing maintenance	High (ML tuning)	Medium
Agent productivity	+20-30% potential	Baseline
Customer satisfaction	+5-15% improvement	Baseline

# Sentiment Analysis in Copilot

## Sentiment Detection Levels

### Extremely Negative (-2)

- └ Angry, frustrated, hostile
- └ Risk: High churn likelihood
- └ Action: Immediate de-escalation

### Negative (-1)

- └ Disappointed, concerned
- └ Risk: Medium churn likelihood
- └ Action: Empathy + quick resolution

### Neutral (0)

- └ Standard interaction tone
- └ Risk: Low
- └ Action: Normal service

### Positive (+1)

- └ Satisfied, pleased
- └ Risk: None

└ Action: Reinforce positive experience

Extremely Positive (+2)

└ Happy, delighted

└ Opportunity: Upsell/cross-sell

└ Action: Leverage positive sentiment

# Integration Scenarios

## With Workforce Optimization

Copilot + WFO

└ Agent assisted by Copilot

└ Interaction recorded

└ Quality scored with AI

└ Coaching recommendations generated

└ Coaching delivered back to agent

## With Predictive Routing

Copilot + Predictive Routing

└ Best agent routed to contact

└ Copilot assists during interaction

└ Recommendations improve outcome

└ System learns for future routing

## With Analytics

Copilot + Analytics

└ Copilot recommendation usage tracked

└ Impact on metrics measured

└ Dashboards show Copilot effectiveness

└ Data guides optimization

# Interview Cheat Sheet

Question	Answer
What is Agent Copilot?	AI-powered real-time guidance system for agents
Also known as?	Agent Assist or Copilot Assistant
What are the requirements?	Premium edition + Customer Insights module
What does it recommend?	Knowledge articles, scripts, next actions, sentiment guidance
How does sentiment analysis help?	Detects customer frustration and suggests de-escalation
Where is it configured?	Admin → Architect → Agent Copilot
What channels does it support?	Voice, chat, email, social media
How does it improve performance?	FCR +10-25%, AHT -10-20%, CSAT +5-15%
What's required for success?	Quality knowledge base and agent training
How does machine learning help?	System learns from recommendations agents use vs. ignore
Can agents reject recommendations?	Yes, agents decide what to apply
How long until ROI?	4-8 weeks to see significant improvement
What if knowledge base is empty?	Copilot won't have content to recommend
How does it work with omnichannel?	Provides channel-specific guidance (voice, chat, email, etc.)
What's the biggest success factor?	Quality, current, well-organized knowledge base

## Key Takeaways

- **Real-Time AI Assistance** - Copilot provides in-the-moment guidance during interactions
- **Knowledge-Driven** - Quality depends on knowledge base content and organization
- **Sentiment Awareness** - Monitors emotion and suggests appropriate responses
- **Omnichannel Support** - Works across voice, chat, email, and social channels
- **Premium Feature** - Requires Premium edition and Customer Insights module
- **Significant Impact** - FCR improvements of 10-25% typical
- **Machine Learning** - System improves recommendations based on agent actions
- **Agent Adoption Critical** - Success depends on agents trusting and using recommendations
- **Ongoing Content Management** - Knowledge base requires regular updates
- **Quick ROI** - 4-8 weeks to measurable improvements

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# Migration Path from Manual Knowledge Search

## Phase 1: Assessment (Weeks 1-2)

- └ Audit current knowledge base
- └ Identify content gaps
- └ Plan reorganization
- └ Set quality standards

## Phase 2: Content Preparation (Weeks 2-4)

- └ Create/update knowledge articles
- └ Add metadata and keywords
- └ Organize by intent and queue
- └ Quality review all content

## Phase 3: Copilot Setup (Weeks 4-5)

- └ Enable Agent Copilot
- └ Configure recommendations
- └ Set relevance thresholds
- └ Establish monitoring

## Phase 4: Agent Training (Week 5-6)

- └ Educate on Copilot features
- └ Practice with sample interactions
- └ Explain recommendation types
- └ Share best practices

## Phase 5: Pilot & Optimization (Weeks 6-8)

- └ Deploy to single queue
- └ Monitor and gather feedback
- └ Optimize recommendations
- └ Plan full rollout

## Phase 6: Full Deployment (Week 8+)

- └ Enable across all queues
- └ Provide ongoing support
- └ Monitor metrics
- └ Continuous improvement

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## Additional Resources

### Official Documentation Links

- Genesys Cloud Agent Copilot Guide: <https://help.genesys.com/genesyscloud/current/en-us/AgentCopilot.html>
- Knowledge Management Setup: <https://help.genesys.com/genesyscloud/current/en-us/KnowledgeManagement.html>
- Customer Insights Module: <https://help.genesys.com/genesyscloud/current/en-us/CustomerInsights.html>

### Support Contacts

- Genesys Sales: [sales@genesys.com](mailto:sales@genesys.com)
- Genesys Support: <https://support.genesys.com>
- Community Forums: <https://community.genesys.com>

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