

# AI Overview & Licensing

## Study Notes

Topic	Description
Genesys AI	Suite of artificial intelligence capabilities integrated across PureCloud
Purpose	Enhance agent productivity, automate interactions, improve customer experience
Licensing Model	AI features available as add-on modules to Premium edition
Deployment	Cloud-native, no infrastructure required
Scope	Covers analytics, automation, agent assist, and autonomous agents

## Navigation

Admin → Organization Settings → Licensing → AI Modules OR Admin → Billing & Subscriptions → AI Products

## Genesys AI Suite Overview

Genesys PureCloud AI is an integrated suite of artificial intelligence capabilities designed to enhance every aspect of contact center operations. From agent assistance to autonomous automation, AI is embedded throughout the platform.

## Core AI Components

- **Customer Insights** - Advanced analytics and AI-powered quality management
- **Agent Copilot** - Real-time intelligent agent assistance

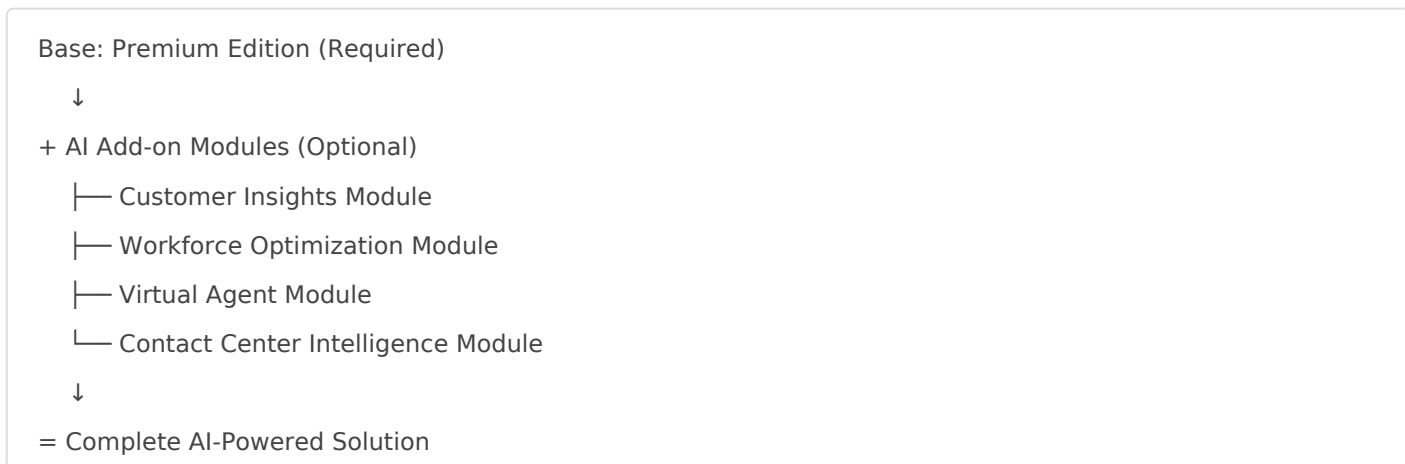
- **Predictive Routing** - AI-optimized contact-to-agent matching
- **Virtual Agent Flows** - Autonomous conversational AI agents
- **Workforce Optimization** - AI-driven forecasting and scheduling
- **Interaction Analytics** - Deep conversation analysis and insights
- **Quality Management** - AI-assisted quality evaluation

## Key Benefits

- **Increased Productivity** - Agents handle more contacts with guidance
- **Better Decisions** - Data-driven insights inform strategy
- **Cost Reduction** - Automation reduces operational expenses
- **Improved Quality** - AI ensures consistency and compliance
- **Enhanced Experience** - Faster resolution and personalized service
- **Risk Mitigation** - Proactive compliance and fraud detection

## AI Licensing Model

### Premium Edition Requirement



## Licensing Structure

Component	Type	Cost Model	Required
Premium Edition	Base license	Per-user monthly	Yes
Customer Insights	Add-on module	Per-user or pool	No (recommended)
Workforce Optimization	Add-on module	Organizational	No

Component	Type	Cost Model	Required
Virtual Agent	Add-on module	Per-agent license	No
Advanced Analytics	Add-on module	Organizational	No

# Study Notes - AI Capabilities by Module

Module	Primary Capability	Sub-features	License Type
Customer Insights	Interaction analytics and quality management	Sentiment analysis, topic detection, quality evaluation, agent coaching	Per-user
Workforce Optimization	Forecasting, scheduling, and performance management	Demand forecasting, schedule optimization, workforce analytics, productivity tracking	Organizational
Agent Copilot	Real-time agent assistance	Knowledge recommendations, script guidance, sentiment alerts, next-action suggestions	Per-user
Virtual Agent	Autonomous conversation handling	Intent recognition, multi-turn dialogue, escalation logic, omnichannel support	Per-agent
Predictive Routing	Intelligent contact routing	Skill matching, availability prediction, performance prediction, load balancing	Included in WFO
Contact Center Intelligence	Deep conversation insights	Speech analytics, text analytics, compliance monitoring, competitive intelligence	Organizational
Advanced Analytics	Custom reporting and dashboards	Business analytics, predictive metrics, custom visualizations	Organizational

# AI Capabilities by Use Case

# For Agents

## Agent Experience Enhancements:

- └ Agent Copilot
  - | └ Real-time knowledge suggestions
  - | └ Script guidance
  - | └ Sentiment monitoring
  - | └ Next-action recommendations
- └ Predictive Routing
  - | └ Optimal contact matching
  - | └ Skill-based distribution
  - | └ Workload balancing
- └ Performance Insights
  - | └ Real-time coaching
  - | └ Quality feedback
  - └ Training recommendations

# For Supervisors

## Supervisor Experience Enhancements:

- └ Workforce Optimization
  - | └ Real-time dashboards
  - | └ Agent performance metrics
  - | └ Coaching opportunities
  - | └ Compliance alerts
- └ Customer Insights
  - | └ Quality management
  - | └ Interaction analytics
  - | └ Team performance trends
  - | └ Automated evaluations
- └ Advanced Analytics
  - | └ Custom reports
  - | └ Predictive metrics
  - | └ Trend analysis
  - └ Business intelligence

# For Customers

#### Customer Experience Enhancements:

- └─ Faster Resolution
  - | └─ Agent Copilot speeds answers
  - | └─ Virtual agents 24/7 availability
  - | └─ Predictive routing reduces wait
- └─ Better Experience
  - | └─ Skilled agent matching
  - | └─ Personalized service
  - | └─ Appropriate escalation
  - | └─ Consistent quality
- └─ Self-Service Options
  - └─ Virtual agent automation
  - └─ Knowledge base access
  - └─ Portal access
  - └─ Omnichannel support

## For Managers/Executives

#### Management Experience Enhancements:

- └─ Business Intelligence
  - | └─ Advanced analytics dashboards
  - | └─ Custom reporting
  - | └─ Predictive forecasting
  - | └─ Trend analysis
- └─ Strategic Planning
  - | └─ Capacity forecasting
  - | └─ ROI measurement
  - | └─ Competitive intelligence
  - | └─ Market insights
- └─ Performance Optimization
  - └─ Cost analysis
  - └─ Efficiency metrics
  - └─ Quality improvement
  - └─ Customer satisfaction tracking

## Implementation Guide

# Step 1: Assessment & Planning

1. Audit current contact center operations
2. Identify pain points and improvement opportunities
3. Document baseline metrics (AHT, FCR, CSAT, costs)
4. Assess readiness for AI adoption
5. Define success metrics and KPIs
6. Estimate ROI for each module
7. Plan implementation timeline

# Step 2: Module Selection

1. Evaluate all available AI modules
2. Prioritize based on business needs
3. Assess agent and supervisor readiness
4. Determine implementation sequence
5. Calculate total cost of ownership
6. Secure budget approval
7. Obtain licenses from Genesys

# Step 3: Foundation Setup

1. Ensure Premium Edition active
2. Purchase selected AI modules
3. Assign licenses to users
4. Set up knowledge management system
5. Configure backend integrations
6. Enable audit logging and monitoring
7. Establish governance policies

# Step 4: Module-Specific Configuration

1. **Customer Insights:** Configure quality evaluation rules
2. **Workforce Optimization:** Set up forecasting models
3. **Agent Copilot:** Populate knowledge base
4. **Virtual Agent:** Design conversation flows
5. **Predictive Routing:** Define skills and proficiency levels
6. **Advanced Analytics:** Create custom dashboards
7. **Contact Center Intelligence:** Enable analytics engines

# Step 5: Training & Change Management

1. Develop training curriculum
2. Train supervisors first
3. Train agents on their tools
4. Provide ongoing support
5. Gather feedback early
6. Address concerns and resistance
7. Celebrate early wins

# Step 6: Phased Rollout

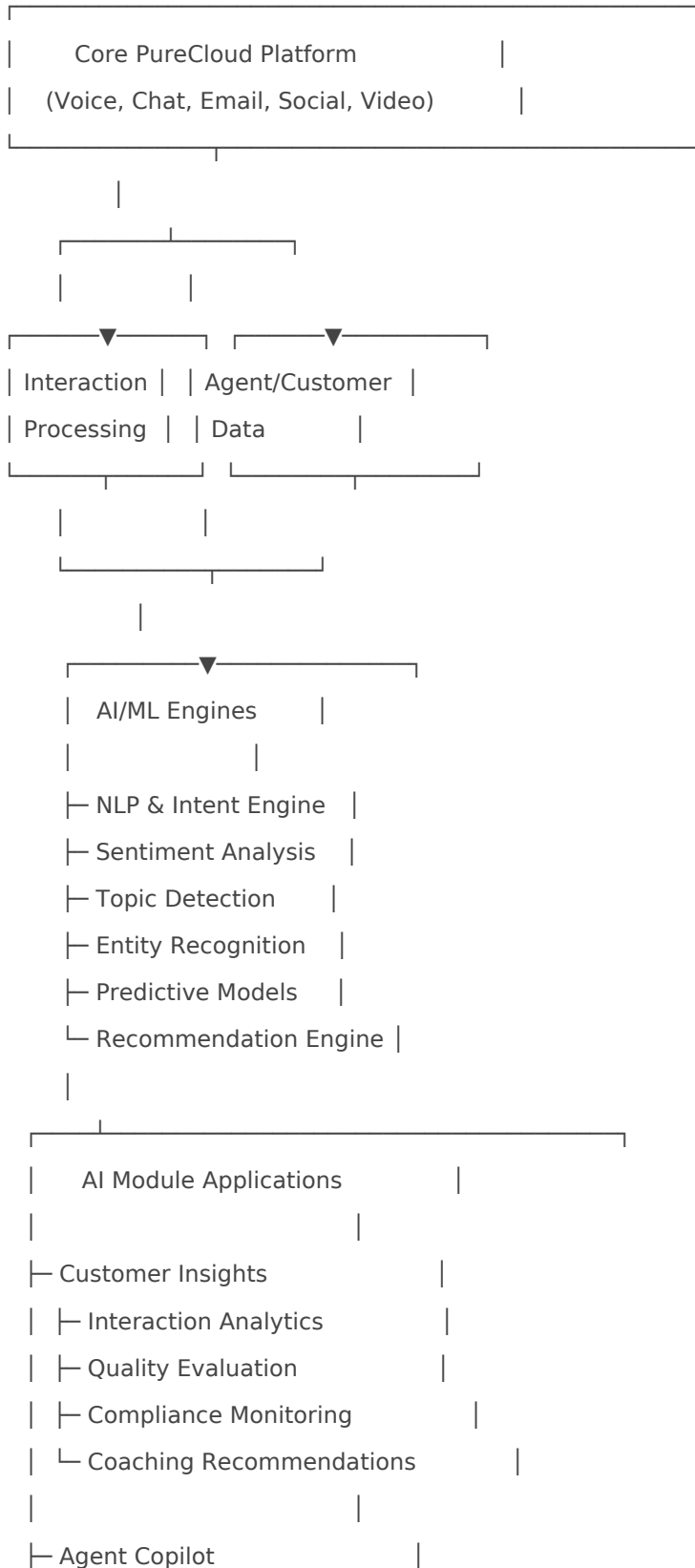
1. Start with single department/queue
2. Monitor metrics closely
3. Gather user feedback
4. Optimize based on learnings
5. Expand to additional queues
6. Scale across entire organization
7. Continuous improvement process

# How to Implement

Phase	Description	Timeline	Modules
Planning	Assess needs, select modules, plan approach	Week 1-2	All
Foundation	Set up licenses, integrations, governance	Week 2-4	All
Configuration	Configure each module's settings	Week 4-6	Module-specific
Training	Educate teams on features and benefits	Week 6-7	All
Pilot	Deploy to test group, monitor metrics	Week 7-8	All
Rollout	Expand to production, scale up	Week 8-10	All
Optimization	Monitor, tune, improve continuously	Week 10+	All

# Genesys AI Platform Architecture

## Genesys PureCloud AI Platform





# AI Modules Detailed Comparison

## Customer Insights Module

Primary Use: Quality Management & Interaction Analytics

Features:

- └ Interaction Recording & Analysis
- └ Sentiment Detection (Real-time & historical)
- └ Topic Detection (Automatic issue categorization)
- └ Speech Analytics (Word/phrase analysis)
- └ Quality Evaluation (AI-assisted scoring)
- └ Compliance Monitoring (Regulation checking)
- └ Agent Coaching (Targeted improvements)
- └ Custom Metrics (Business-specific analysis)

Pricing: Per-user monthly (\$XX-XXX depending on tier)

ROI: 10-20% quality improvement, reduced audit burden

Best For: Quality-focused, compliance-heavy organizations

Typical Users: QA teams, supervisors, compliance officers

## Workforce Optimization Module

Primary Use: Forecasting, Scheduling, Performance Analytics

Features:

- └ Demand Forecasting (Historical + predictive)
- └ Schedule Optimization (Auto-scheduling)
- └ Workforce Analytics (Performance metrics)
- └ Productivity Tracking (Real-time dashboards)
- └ Absence & Leave Management
- └ Skills-based Workforce Planning
- └ Performance Management
- └ Adherence Monitoring

Pricing: Organizational license (negotiated)

ROI: 5-15% labor cost reduction, improved efficiency  
Best For: Large organizations, complex scheduling needs  
Typical Users: Workforce planners, managers, analysts

## Agent Copilot Module

Primary Use: Real-Time Agent Assistance

Features:

- └ Knowledge Recommendations
- └ Script Guidance
- └ Sentiment Monitoring
- └ Next Action Suggestions
- └ Real-time Coaching
- └ Performance Insights
- └ Learning Reinforcement
- └ Omnichannel Support

Pricing: Per-user monthly (\$XX-XXX depending on tier)

ROI: 10-30% AHT reduction, 15-25% FCR improvement

Best For: Agent productivity, customer satisfaction

Typical Users: All agents, supervisors

## Virtual Agent Module

Primary Use: Autonomous Customer Interaction Handling

Features:

- └ Conversational AI
- └ Intent Recognition
- └ Multi-turn Dialogue
- └ Transaction Processing
- └ Escalation Logic
- └ 24/7 Availability
- └ Omnichannel Support
- └ Sentiment Awareness

Pricing: Per-virtual agent (negotiated)

ROI: 60-80% cost reduction for automated interactions

Best For: High-volume routine interactions

Typical Users: Customers, supervisors (monitoring)

## Advanced Analytics Module

Primary Use: Business Intelligence & Custom Reporting

Features:

- └ Custom Dashboard Creation
- └ Predictive Analytics
- └ Trend Analysis
- └ Business Intelligence
- └ Data Visualization
- └ Scheduled Reports
- └ Data Export
- └ Integration APIs

Pricing: Organizational license (negotiated)

ROI: Better decision-making, strategic insights

Best For: Data-driven organizations, large enterprises

Typical Users: Managers, executives, analysts

# AI Licensing Structure Comparison

## Small Organization (50 agents)

Premium Edition: 50 users x \$XX/month = \$XXXX

Agent Copilot: 50 users x \$XX/month = \$XXXX

Customer Insights: 10 supervisors x \$XX/month = \$XXXX

Workforce Optimization: Organizational = \$XXXX

Total Monthly: \$XXXX

Cost per Agent: \$XXX/month

ROI: 12-18 months through efficiency gains

## Mid-Market (200 agents)

Premium Edition: 200 users x \$XX/month = \$XXXX

Agent Copilot: 200 users x \$XX/month = \$XXXX

Customer Insights: 50 supervisors x \$XX/month = \$XXXX

Workforce Optimization: Organizational = \$XXXX

Virtual Agent: 5 agents x \$XXXX/month = \$XXXX

Advanced Analytics: Organizational = \$XXXX

Total Monthly: \$XXXX

Cost per Agent: \$XXX/month

ROI: 6-12 months through automation + efficiency

## Enterprise (1000+ agents)

Premium Edition: 1000 users x \$XX/month = \$XXXXX

Agent Copilot: 1000 users x \$XX/month = \$XXXXX

Customer Insights: 200 supervisors x \$XX/month = \$XXXXX

Workforce Optimization: Organizational = \$XXXXX

Virtual Agent: 20 agents x \$XXXX/month = \$XXXXX

Contact Center Intelligence: Organizational = \$XXXXX

Advanced Analytics: Organizational = \$XXXXX

Total Monthly: \$XXXXX

Cost per Agent: \$XXX/month

ROI: 3-6 months through massive automation + efficiency

# Implementation Roadmap

## Phase 1: Foundation (Month 1-2)

Quick Wins:

- └ Enable Predictive Routing
  - | └ Immediate improvement in routing efficiency
- └ Enable Customer Insights
  - | └ Gain visibility into interaction quality
- └ Activate Agent Copilot
  - | └ First-touch improvement in agent effectiveness

Expected Impact:

- └ Routing efficiency: +10-15%
- └ Agent confidence: +20-30%
- └ FCR improvement: +5-10%
- └ Cost per contact: -5-10%

## Phase 2: Intelligence (Month 2-4)

Expansion:

- └ Deploy Workforce Optimization
  - | └ Optimize scheduling and forecasting
- └ Enhance Customer Insights
  - | └ Add compliance monitoring
- └ Optimize Agent Copilot
  - | └ Improve knowledge base quality

Expected Impact:

- └ Labor efficiency: +10-15%
- └ Quality improvement: +15-20%
- └ FCR improvement: +10-20%
- └ CSAT improvement: +10-15%

## Phase 3: Automation (Month 4-6)

Advanced:

- └ Deploy Virtual Agent Flows
  - | └ Automate routine interactions
- └ Activate Advanced Analytics
  - | └ Enable strategic decision-making

- └ Integrate all modules
  - └ Seamless intelligence platform

Expected Impact:

- └ Automation rate: 50-70% of routine volume
- └ Cost reduction: 30-50%
- └ Customer satisfaction: +15-25%
- └ Operational efficiency: +25-35%

# Real-World Implementation Timeline

## Week 1-2: Assessment & Planning

Day 1-3:

- └ Kick-off meeting
- └ Current state assessment
- └ Identify pain points
- └ Document baseline metrics

Day 4-10:

- └ Module evaluation
- └ ROI analysis
- └ Risk assessment
- └ Develop implementation plan

Day 11-14:

- └ Secure approvals
- └ License procurement
- └ Team assignments
- └ Detailed project plan

## Week 3-4: Foundation Setup

Day 15-21:

- └ Activate Premium Edition
- └ Purchase AI modules
- └ License assignment
- └ Infrastructure setup

Day 22-28:

- └ Knowledge base creation
- └ Integration testing
- └ Security validation
- └ Documentation

## Week 5-6: Configuration

Day 29-35:

- └ Customer Insights setup
- └ Quality rules configuration
- └ Analytics dashboards
- └ Coaching workflows

Day 36-42:

- └ Agent Copilot setup
- └ Knowledge population
- └ Sentiment analysis
- └ Relevance tuning

## Week 7-8: Training & Pilot

Day 43-49:

- └ Supervisor training
- └ Agent training
- └ Pilot queue selection
- └ Monitoring setup

Day 50-56:

- └ Pilot deployment
- └ Daily monitoring

- └ Feedback collection
- └ Quick optimizations
- └ Success validation

## Week 9-10: Rollout

Day 57-63:

- └ Production deployment
- └ Agent onboarding
- └ Supervisor monitoring
- └ Support availability

Day 64-70:

- └ Scale to all queues
- └ Monitor close for issues
- └ Gather feedback
- └ Celebrate successes

# AI Features by Job Role

## For Agents

Feature	Module	Benefit
Real-time knowledge suggestions	Agent Copilot	Faster resolution, fewer transfers
Script guidance	Agent Copilot	Better quality, compliance adherence
Sentiment alerts	Agent Copilot	De-escalation, higher satisfaction
Optimal contact matching	Predictive Routing	Better skill match, faster resolution
Performance insights	Customer Insights	Learning and improvement
Interaction recording	Customer Insights	Quality and coaching

## For Supervisors

Feature	Module	Benefit
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Real-time agent dashboards	Workforce Optimization	Team visibility and coaching
Quality evaluation	Customer Insights	Objective performance assessment
Automated coaching	Customer Insights	Targeted development
Schedule optimization	Workforce Optimization	Better coverage, agent satisfaction
Compliance monitoring	Customer Insights	Risk mitigation
Performance trends	Advanced Analytics	Identify patterns and opportunities

## For Managers

Feature	Module	Benefit
Demand forecasting	Workforce Optimization	Budget planning, capacity management
Cost analysis	Workforce Optimization	ROI tracking, budget optimization
Team performance analytics	Customer Insights	Performance visibility
Custom dashboards	Advanced Analytics	Strategic decision-making
Predictive insights	Advanced Analytics	Proactive management
Business intelligence	Advanced Analytics	Competitive advantage

## For Executives

Feature	Module	Benefit
Revenue impact analysis	Advanced Analytics	Business value justification
Cost savings tracking	Workforce Optimization	ROI demonstration
Customer satisfaction trends	Customer Insights	Service quality visibility
Market intelligence	Contact Center Intelligence	Competitive positioning
Strategic dashboards	Advanced Analytics	Executive visibility
Predictive metrics	Advanced Analytics	Forward-looking planning

# Best Practices for AI Implementation

# Governance & Management

- **Clear ownership** - Assign AI program owner and team
- **Success metrics** - Define measurable KPIs before implementation
- **Change management** - Plan for organizational change
- **Training program** - Invest in comprehensive user education
- **Governance policies** - Establish AI usage guidelines
- **Regular reviews** - Monthly assessment and optimization

# Technical Implementation

- **Phased approach** - Start with one module, expand gradually
- **Integration planning** - Ensure backend system connectivity
- **Data quality** - Ensure clean, accurate data for AI models
- **Security protocols** - Implement proper access controls
- **Audit trails** - Enable logging for compliance and learning
- **Monitoring** - Set up dashboards for tracking performance

# User Adoption

- **Executive sponsorship** - Strong leadership support
- **Early adopters** - Start with enthusiastic teams
- **Success stories** - Share wins to build confidence
- **Continuous learning** - Regular training and tips
- **Feedback loops** - Listen to user concerns
- **Support availability** - Easy access to help and troubleshooting

# Continuous Improvement

- **Daily monitoring** - Track key metrics continuously
  - **Weekly reviews** - Assess performance and issues
  - **Monthly optimization** - Tune settings and rules
  - **Quarterly planning** - Assess and plan enhancements
  - **Annual strategy** - Review overall AI strategy and ROI
  - **Learning loop** - Capture insights to improve AI models
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# Common Challenges & Solutions

Challenge	Solution
Agents skeptical of AI	Demonstrate time-saving benefits, celebrate wins
Knowledge base quality	Establish content review process, regular updates
Integration complexity	Partner with Genesys professional services
High implementation cost	Show ROI, phased approach to spread costs
Change resistance	Strong change management, executive support
Slow adoption	User-friendly interfaces, comprehensive training
AI accuracy issues	Improve training data, tune models
Compliance concerns	Implement proper audit trails and controls
Technical challenges	Dedicated technical support and monitoring
Low usage of features	Training, communication, usage incentives

# Licensing & Compliance

## License Tracking

System automatically tracks:

- └ Active AI module users
- └ Virtual agent instances in use
- └ Monthly consumption metrics
- └ Grace period usage
- └ Compliance status

Monthly Report includes:

- └ License utilization rate
- └ Cost per user/module
- └ Usage trends
- └ Recommendations for optimization
- └ Billing details

## Compliance Monitoring

- **Audit logs** - All AI actions tracked and logged

- **Data protection** - Customer data encrypted and protected
- **Regulatory compliance** - GDPR, CCPA, HIPAA support
- **Access controls** - Role-based permission system
- **Interaction recording** - Captured for compliance
- **Report generation** - Automated compliance reporting

# Interview Cheat Sheet

Question	Answer
What is Genesys AI?	Suite of AI capabilities across PureCloud (Copilot, Routing, Virtual Agent, etc.)
What edition is required?	Premium Edition (AI modules are add-ons)
What modules are available?	Customer Insights, Workforce Optimization, Agent Copilot, Virtual Agent, Advanced Analytics
How is AI licensed?	Per-user or organizational depending on module
What's the expected ROI?	6-18 months depending on implementation scope
Which module should we start with?	Predictive Routing or Agent Copilot for quick impact
Can we implement gradually?	Yes, phased approach recommended
What's most important for success?	Quality change management and user training
How do we measure AI impact?	Track FCR, AHT, CSAT, cost per contact, automation rate
What about compliance concerns?	Audit trails, access controls, and monitoring built-in
Can we customize AI models?	Yes, tuning available; may require Genesys services for deep customization
What's the implementation timeline?	8-12 weeks for full deployment, quick wins in 2-4 weeks
How do we ensure adoption?	Executive support, training, early wins, continuous communication
What's the cost per agent per month?	\$XX-XXX depending on modules and scale
Where do we start?	Assessment → Licensing → Foundation → Phased Implementation

## Key Takeaways

- **Integrated Suite** - Genesys AI is not standalone products but integrated capabilities
- **Premium Requirement** - Premium Edition is required; AI modules are add-ons

- **Flexible Licensing** - Mix and match modules based on needs
  - **Phased Implementation** - Start with high-impact modules, expand gradually
  - **Significant ROI** - Typical payback of 6-18 months
  - **Change Critical** - Success depends more on change management than technology
  - **Omnichannel Ready** - AI works across all communication channels
  - **Continuous Learning** - AI models improve with more data and interaction
  - **Compliance Built-In** - Security, audit, and compliance features included
  - **Quick Wins Possible** - Can see improvements within 2-4 weeks of implementation
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# Getting Started Checklist

## Pre-Implementation

- Conduct current state assessment
- Document baseline metrics
- Identify pain points and opportunities
- Evaluate all AI modules
- Calculate ROI for each module
- Secure budget and approvals
- Assemble implementation team
- Plan change management approach

## Implementation Preparation

- Purchase Premium Edition
- License required AI modules
- Assign licenses to users
- Set up knowledge management system
- Plan integrations
- Establish governance policies
- Create training curriculum
- Set up monitoring dashboards

## Deployment

- Deploy to pilot group
  - Monitor closely
  - Gather feedback
  - Optimize configuration
  - Scale to production
  - Provide ongoing support
  - Track metrics
  - Plan continuous improvement
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# Additional Resources

## Official Documentation Links

- Genesys Cloud AI Overview: [https://help.genesys.com/genesyscloud/current/en-us/AI\\_Overview.html](https://help.genesys.com/genesyscloud/current/en-us/AI_Overview.html)
- AI Module Licensing: [https://help.genesys.com/genesyscloud/current/en-us/AI\\_Licensing.html](https://help.genesys.com/genesyscloud/current/en-us/AI_Licensing.html)
- Architect Documentation: <https://help.genesys.com/genesyscloud/current/en-us/Architect.html>
- Customer Insights Guide: <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>
  - AI Services Team: [ai-services@genesys.com](mailto:ai-services@genesys.com)
  - Community Forums: <https://community.genesys.com>
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