

External Metrics

External Metrics (Genesys Cloud Performance and Engagement)

Section	Description
Feature Area	Performance and Engagement
Admin Location	Admin → Performance and Engagement → External Metrics Definitions
Primary Function	Define externally sourced performance metrics so they can be loaded into an employee's scorecard
Typical Use Cases	Import CSAT , sales , revenue, quality indicators, or other third-party KPIs into performance management
Metric Units Mentioned in Training	Number, Seconds, Percent, Currency
Transcript Focus	Metric definition, unit selection, and rounding precision
Key Dependency	Performance management / scorecards capability must be available in the organization. Genesys positions performance management as part of its WEM and agent performance tooling. :contentReference[oaicite:0]{index=0}

External Metrics Definitions let administrators define the metadata for non-Genesys performance measures so those values can be incorporated into an employee scorecard. In the transcript, the instructor specifically calls out importing third-party data such as **CSAT scores** or **sales** and configuring each metric's **unit** and **rounding precision**. Genesys documents performance management as part of the platform's agent performance toolset, alongside scorecards, feedback, and related engagement features. :contentReference[oaicite:1]{index=1}

Summary Table

Attribute	Details
Feature Type	Scorecard metric definition
Data Origin	External / third-party systems
Business Purpose	Enrich employee scorecards with business KPIs not generated natively by Genesys Cloud
Common Examples	CSAT, sales, revenue, handle-time targets from external systems, business outcome metrics
Definition Inputs from Transcript	Metric unit and rounding precision
Assignment / Data Load Method	Not explicitly documented in Genesys UI documentation in the provided source set
Feature Family	Performance Management / WEM :contentReference[oaicite:2]{index=2}

Study Notes

Topic	Explanation
External Metric	A KPI that originates outside native Genesys interaction analytics
Metric Definition	The schema/metadata that tells Genesys how to interpret imported values
Scorecard	Employee performance view where external metrics can appear
Metric Unit	Defines how values are displayed and interpreted
Rounding Precision	Controls display precision for the imported value
Business KPI Enrichment	Allows scorecards to reflect broader business outcomes, not only contact center metrics

Genesys positions performance management as a capability that helps improve agent performance and engagement through scorecards, feedback, and related tooling. External Metrics extends that model by allowing business data from outside Genesys to be represented in scorecards.

:contentReference[oaicite:3]{index=3}

Transcript Implementation Notes

Source: Transcript

The instructor describes External Metrics Definitions as a way to **import third-party data** into an employee's scorecard.

Step	Instruction
Step 1	Navigate to Performance and Engagement → External Metrics Definitions
Step 2	Create or define an external metric
Step 3	Choose the metric unit
Step 4	Configure rounding precision
Step 5	Use the definition so third-party KPI data can appear in an employee scorecard

Transcript-derived guidance:

Item	Guidance
Recommended Use	Use external metrics for KPIs like CSAT , sales , or other non-native performance measures
Metric Unit Selection	Match the display type to the source data: number, seconds, percent, or currency
Precision Strategy	Use rounding precision that preserves business meaning without cluttering scorecards
Character Limits	Not explicitly documented in the transcript
Required Fields	Metric unit is explicitly mentioned; other required fields are not explicitly documented in Genesys UI documentation

Navigation

Task	Navigation Path
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Open External Metrics Definitions	Admin → Performance and Engagement → External Metrics Definitions
View existing definitions	Admin → Performance and Engagement → External Metrics Definitions
Create metric definition	Admin → Performance and Engagement → External Metrics Definitions → Create
Edit metric definition	Admin → Performance and Engagement → External Metrics Definitions → Edit
Delete metric definition	Admin → Performance and Engagement → External Metrics Definitions → Delete
Review scorecards	Agent/Supervisor performance scorecard area; exact path not explicitly documented in Genesys UI documentation

Configuration Fields (UI Form Fields)

Main Page

UI Field	Description	Options
External Metric Definitions List	Displays configured metric definitions	Read-only
Metric Name	Name of the external metric	Read-only in list
Metric Unit	Unit associated with the metric	Number / Seconds / Percent / Currency
Rounding Precision	Display precision for the metric	Numeric precision value
Search	Search existing metric definitions	Text
Create	Start a new external metric definition	Button
Edit	Modify selected metric definition	Button
Delete	Remove selected metric definition	Button
Refresh	Reload definitions list	Button

Some list-view columns beyond **Metric Name**, **Metric Unit**, and **Rounding Precision** are **not explicitly documented in Genesys UI documentation** in the provided source set.

Create/Edit Form

UI Field	Description	Options
Metric Name	Unique name for the external metric definition	Text
Description	Explains what the metric represents	Text area
Metric Unit	Defines how the value is interpreted and displayed	Number / Seconds / Percent / Currency
Rounding Precision	Number of decimal places or display precision	Numeric field
Save	Save the metric definition	Button
Cancel	Cancel changes	Button

Additional create/edit fields such as source mapping keys, import identifiers, or visibility controls are **not explicitly documented in Genesys UI documentation** in the provided source set.

Character limits for **Metric Name** and **Description** are **not explicitly documented in Genesys UI documentation**.

Tabs, Toggles, Dropdowns, Action Buttons

Element Type	Items
Dropdowns	Metric Unit
Numeric Inputs	Rounding Precision
Text Inputs	Metric Name / Description
Buttons	Create / Save / Cancel / Edit / Delete / Refresh
Tabs	Not explicitly documented in Genesys UI documentation
Toggles	Not explicitly documented in Genesys UI documentation

Dependencies

Component	Purpose
Performance Management	External metrics feed employee scorecards within performance tooling :contentReference[oaicite:4]{index=4}
Employee Scorecards	Destination where defined external metrics are surfaced
Third-Party Data Source	Provides the source KPI values
Identity / User Mapping	Needed so imported values are tied to the correct employee
Data Load / Integration Process	Needed to move metric values from external source into Genesys ecosystem; exact method not explicitly documented in Genesys UI documentation

Platform Integration / Related Components

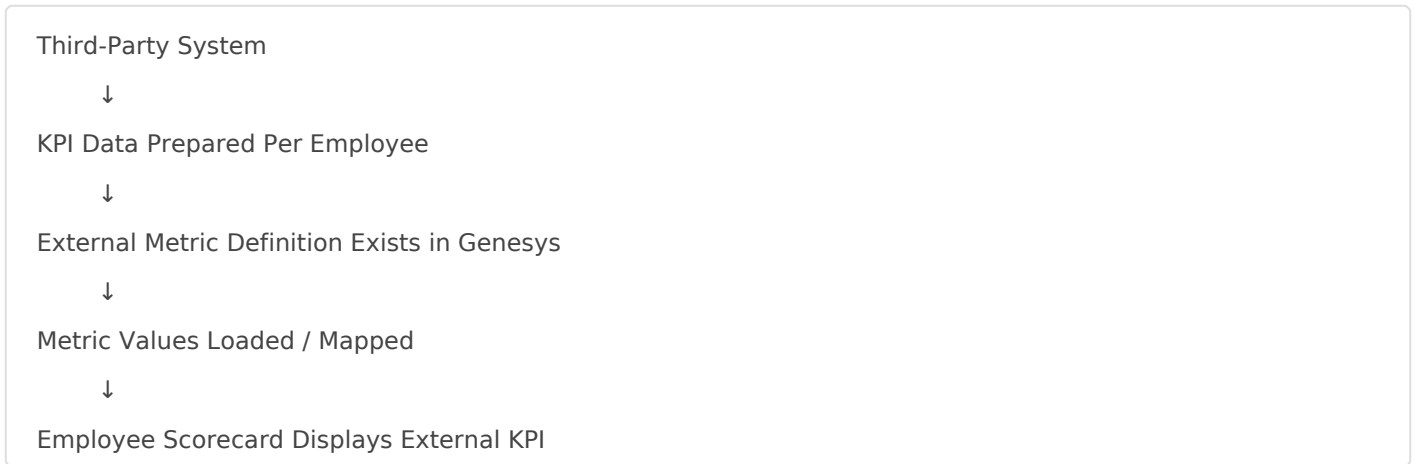
Component	Relationship
Scorecards	External metrics are displayed as part of employee performance scorecards
Development and Feedback	External metrics can help identify training needs
Gamification	External metrics may complement gamification goals in broader performance strategies
Reports, Views, and Dashboards	Used to analyze performance impact across teams and time
Workforce Engagement Management	External metrics fit into the broader performance and engagement toolset that Genesys associates with WEM/performance management. :contentReference[oaicite:5]{index=5}

Integration Examples

Integration	Description
CRM Integration	Import closed sales or revenue by employee from Salesforce or another CRM

Integration	Description
Survey Platform Integration	Import CSAT or post-contact survey outcome from an external survey system
ERP / Billing Integration	Import collections, revenue, or billing accuracy metrics
Data Warehouse Feed	Load curated KPI values from enterprise BI or analytics platforms

Example integration workflow:



Related Topics / Further Reading

Topic	Description
Performance Management	Parent feature area for scorecards and engagement tooling ([Genesys Cloud Resource Center][1])
Development and Feedback	Use scorecard gaps to trigger targeted training assignments
Gamification	Use performance metrics to motivate and reinforce goals
Reports, Views, and Dashboards	Monitor performance trends using Genesys reporting capabilities ([Genesys Cloud Resource Center][1])
Workforce Engagement Management	Broader suite containing performance-related features ([Genesys Cloud Resource Center][1])

Implementation Checklist

Task	Status
Confirm performance management capability is available	<input type="checkbox"/>
Identify external KPI source systems	<input type="checkbox"/>
Define employee/user mapping strategy	<input type="checkbox"/>
Create external metric definition	<input type="checkbox"/>
Select correct metric unit	<input type="checkbox"/>
Set rounding precision	<input type="checkbox"/>
Validate scorecard display behavior	<input type="checkbox"/>
Test import with pilot users	<input type="checkbox"/>
Document data ownership and refresh cadence	<input type="checkbox"/>

Implementation Guide

Step	Action
Step 1	Identify the business KPI to import
Step 2	Confirm the KPI is tied to individual employees
Step 3	Navigate to <code>Admin → Performance and Engagement → External Metrics Definitions</code>
Step 4	Click Create
Step 5	Enter a Metric Name and optional Description
Step 6	Select the correct Metric Unit
Step 7	Set Rounding Precision
Step 8	Save the definition
Step 9	Validate that incoming data maps correctly to employee scorecards

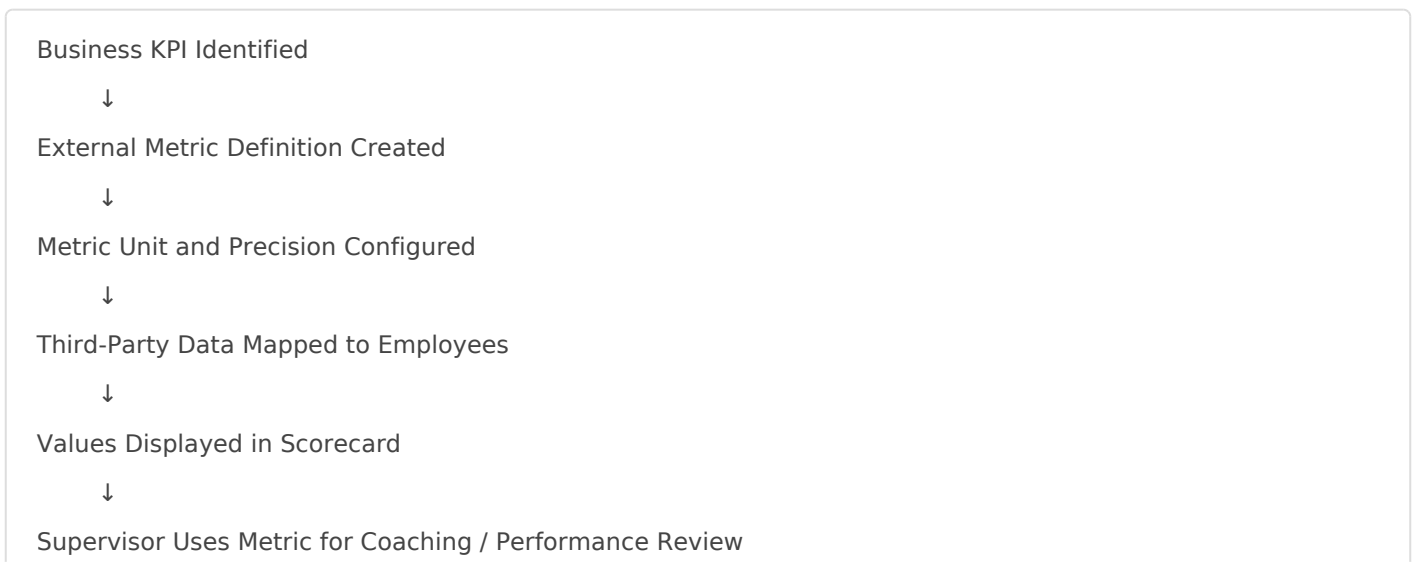
How to Implement

Phase	Description
KPI Design	Decide which external KPI belongs in the scorecard
Definition Build	Create the metric definition and choose display rules
Data Mapping	Ensure values map to the correct employee identity
Validation	Confirm value formatting and scorecard behavior
Rollout	Expand from pilot to broader population
Governance	Maintain owner, refresh frequency, and business definition

Recommended unit selection:

Data Type	Recommended Unit
Count of events or items	Number
Time-based KPI	Seconds
Ratio or satisfaction rate	Percent
Revenue / sales amount	Currency

Workflow



Architecture Diagram

External Business System



KPI Extraction / Transformation



Employee Mapping



Genesys External Metric Definition



Performance Scorecard



Supervisor Review / Coaching / Gamification

Real Flow Scenarios

Scenario 1 – CSAT from External Survey Tool

External survey tool calculates CSAT by agent



Admin defines metric = Customer Satisfaction



Metric unit = Percent



Rounding precision configured



CSAT appears in employee scorecard

Scenario 2 – Sales Revenue from CRM

CRM stores closed sales by employee
 ↓
 Admin defines metric = Sales Revenue
 ↓
 Metric unit = Currency
 ↓
 Values imported and mapped by employee
 ↓
 Supervisor compares sales KPI to coaching results

Usage Scenarios

Scenario	Description
CX measurement	Display CSAT or NPS-like results from an external survey platform
Sales enablement	Bring revenue or conversion values into scorecards
Collections / recovery	Measure payment recovery or settlement outcomes
Back-office QA	Track externally measured accuracy or completion KPIs
Business outcome alignment	Blend operational contact center performance with business KPIs

Implementation Examples

Example	Configuration
CSAT Metric	Unit = Percent / Precision = whole number or one decimal
Revenue Metric	Unit = Currency / Precision = 2 decimals
Sales Count	Unit = Number / Precision = 0 decimals
External Handle-Time Target	Unit = Seconds / Precision based on reporting standard

Design Example

Metric Name: Billing_CSAT

Description: Customer satisfaction result from external survey system

Metric Unit: Percent

Rounding Precision: 1

Data Source: Survey platform

Scorecard Audience: Billing agents

Best Practices

Practice	Reason
Define clear business ownership for each metric	Prevents disputes over KPI meaning
Match the unit to the source data exactly	Avoids misleading scorecard display
Keep rounding precision consistent across similar KPIs	Improves readability and comparison
Pilot with a small user group first	Validates mapping and formatting
Document employee mapping logic	Prevents scorecard attribution errors
Use meaningful metric names	Makes scorecards easier to interpret
Review refresh cadence with stakeholders	Ensures expectations match data timeliness

Source: Operational Best Practice

Naming Convention

Resource	Example
CSAT Metric	CX_CSAT_Percent
Sales Metric	Sales_Revenue_USD
Time Metric	Service_Resolution_Seconds
Quality Metric	BackOffice_Accuracy_Percent

Naming pattern:

<BusinessArea>_<MetricName>_<Unit>

Examples:

Support_CSAT_Percent

Sales_Revenue_Currency

Collections_Payments_Number

Security Considerations

Control	Description
Role-Based Access	Limit who can create and edit external metric definitions
Data Minimization	Import only needed KPI values
Employee Mapping Controls	Ensure values are attached to the correct user
Sensitive Financial Data Handling	Treat currency and sales metrics as potentially confidential
Auditability	Keep a record of metric purpose, owner, and source
Least Privilege	Restrict integration accounts and administrative access

Limitations / Constraints

Constraint	Description
Supported Units in Transcript	Number / Seconds / Percent / Currency
Precision Setting	Rounding precision is configurable per metric definition
Character Limits	Not explicitly documented in Genesys UI documentation
Exact Import Method	Not explicitly documented in Genesys UI documentation in the provided source set
Additional Advanced Fields	Not explicitly documented in Genesys UI documentation in the provided source set
User Mapping Requirement	External data must be attributable to the correct employee for scorecard usefulness

Constraint	Description
Scorecard Dependency	External metrics are only useful if scorecards/performance tooling is enabled. Genesys positions performance management and scorecards as part of this feature family. ([Genesys Cloud Resource Center][1])

Troubleshooting

Issue	Cause	Resolution
Metric not visible in scorecard	Definition exists but values not loaded or not mapped	Validate data pipeline and employee mapping
Incorrect number format	Wrong unit selected	Update metric unit to match source data
Too many decimals displayed	Rounding precision not aligned	Adjust rounding precision
Wrong employee receives KPI	Mapping logic incorrect	Review source identifiers and identity matching
Stakeholders dispute KPI meaning	Poor naming/definition	Update description and ownership documentation
Data arrives late	Upstream integration or refresh issue	Review source cadence and integration process

Interview Cheat Sheet

Question	Answer
What is External Metrics Definitions?	A feature used to define third-party KPIs so they can appear in employee scorecards
What metric units are mentioned in the training?	Number, Seconds, Percent, Currency
What is rounding precision used for?	It controls how imported values are displayed
Give examples of external metrics	CSAT, sales, revenue, or other business KPIs
Is an API or import method a UI field?	No, integrations belong under platform integration, not UI fields
Why use external metrics?	To enrich scorecards with business outcomes not generated natively by Genesys

Key Takeaways

Topic	Summary
External Metrics	Bring third-party KPI values into employee scorecards
Metric Unit	Determines how the KPI is displayed and interpreted
Rounding Precision	Controls scorecard value presentation
Business Value	Connects contact center performance with external business outcomes
Documentation Caveat	Some advanced UI and import details are not explicitly documented in the provided official UI source set

Screenshots

New External Metric

External Metrics data must be supplied by [your own API connection](#). Click 'New External Metric' to define how the supplied data is presented for use in Gamification.

Name	External ID	Unit
MindfulFeedbackScoreDefinition	7e716603-5772-4c92-a6ce-d9248977176b	Percent

New External Metric Disabled

Metric Name *
i.e. My Metric

Metric Unit *
Select Unit...

Rounding Precision * **Default Objective Type ***
Select Precision... Select Type...

Save Metric **Cancel**

Settings

Actions

General

These settings apply to all gamification profiles.

Gamification

Enabled

Start Date

03/27/2023 

Default Membership

The following setting determines if users are automatically assigned to the Default profile if not otherwise assigned.

Auto Assignment

Off

Settings

Actions

Reset Personal Best

This setting will clear all personal bests achieved prior to the start date selected, this applies to all gamification profiles.

Start Date

MM/DD/YYYY 

Gamification: began on Mar 27, 2023 

New Profile

Active Only

Name	Description	Members	Reporting Interval(s)	Division	Max Rank	Created Date	Active
Default Profile	Default set of gamified metrics and membership that your organization uses.	0	13 week(s), 4 week(s)	All	300	Nov 3, 2021	<input checked="" type="checkbox"/>

Details Metrics Members (0)

Profile Name *

i.e. Support Profile

Description

i.e. Agents responsible for customer support

Division * ⓘ

Select Division... ▾

Reporting Interval(s)

4 × ⬆ ⬇ Week(s) ▾ ×

13 × ⬆ ⬇ Week(s) ▾ ×

Leaderboard Rank Limit for Agents * ⓘ

Top 300 ▾

Copy Default Metrics?

Choose 'Yes' to copy the metrics from the Default profile to this profile, or 'No' to start fresh with an empty list of metrics.

Note: Default profile metrics can be copied to this profile using the 'Copy Metric' button at any time.

No, Start Fresh

Yes, Copy Metrics

Details Metrics Members (0) Deactivate Profile Close

Create Metric

Position	Display Name	Max Points	Source	Enabled
	Punctuality	300	Default Profile	<input type="checkbox"/>
1.	MindfulFeedbackScore	100	Default Profile	<input type="checkbox"/>
2.	Average Hold	500	Default Profile	<input type="checkbox"/>
3.	Average Handle Time	350	Default Profile	<input type="checkbox"/>
4.	After Call Work Time Ratio	300	Default Profile	<input type="checkbox"/>
5.	Calls Transferred Ratio	500	Default Profile	<input type="checkbox"/>

6 metrics

New Metric Enabled

Details Objective

Display Name

Metric Type

Create Discard Changes Close

New Metric Enabled

Details Objective

Objective Type

	Number	Points
↓	Out of Bounds	
	<input type="text" value="0"/>	
★	Target	<input type="text" value="350"/>
	<input type="text" value="0"/>	
↑	Out of Bounds	

Create Discard Changes Close

Details Metrics Members (0) Deactivate Profile Close

Add Members

Agent

No members found
Add Members to this profile by clicking the "Add Members" button above

Add Members

By Agent Add To List

Agent	Remove
No agents listed Add agents with the section above	

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