



Resetting for remote customer experience management

PATLive deployed the Genesys Cloud CX™ platform in a weekend — quickly scaling to 1,000 home workers in response to the pandemic. Now tasks like quality assurance, training and resource scheduling are more efficient and easily managed from a distance, thanks to workforce engagement management (WEM) solutions. And it improved agent efficiency through integrations with Slack, Tableau, in-house scripting and CRM systems.



1,000 agents

onboarded to help with COVID-19 response



Significant increase

in real-time schedule adherence



59% less

agent churn



Integrations

with Slack, Tableau, in-house call scripting and CRM systems



Improved visibility

and management of employees



Enhanced

employee engagement via gamification



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Jackie Gonzalez, Vice President, Operations
PATLive

Providing crucial frontline services

PATLive is the first point of contact for customers of many U.S. 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 in 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™ application. While the solution 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 COVID-19 hit, but the crisis increased the level of urgency. The pandemic piled on pressure from clients, including many COVID-19 frontline and key worker organizations.

"We considered extending our on-prem 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."

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."

At a glance

Customer: **PATLive**

Industry: Business process outsourcing

Location: US

Company size: Over 1,000 agents

Previous solution: Genesys

PureConnect

Challenges

- Rapidly pivot from on-premises to cloud customer experience
- Increase self-sufficiency, integration and innovation
- Scale quickly to increase business demand

Product

Genesys Cloud CX

Capabilities

Inbound
Digital — Email
Workforce Engagement
Management
Integrations

Additional resources

[Blog post](#)



PATLive quickly spun up the Genesys Cloud CX platform for 100 agents, adding 150 soon after that.

"We deployed and tested the solution on Saturday, trained our agents on Sunday and went live first-thing Monday morning," recalled 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," added 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'."

Real-time schedule adherence plus gamification

Crucially, PATLive supported remote operations through Genesys Workforce Engagement Management. "We used to produce forecasts and work schedules manually," said Gonzalez. "We automated with Genesys Workforce Engagement Management, cutting complexity and creating instant snapshots of workloads and performance. That allowed us to bring in two-hour micro-shifts, for example, increasing agility and earning potential for our agents."

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Making it easier for agents to check shifts and breaks, Genesys Workforce Engagement Management has improved schedule adherence significantly. In addition, agents can see immediately how they rank within the team on any measure. Agents also have visibility into which behaviors they need to change to maximize their performance and financial rewards. Issues are quickly flagged and resolved before they affect SLAs.

"Now, if we aren't meeting a certain metric or fall below a staffing threshold, the system immediately alerts our managers via Slack and we jump on it right away," said Gonzalez.

With a 59% reduction in staff turnover, PATLive is well-positioned for continued growth as it looks to add chat to solid voice and email offerings. Other plans include exploring gamification features intrinsic to WEM that keep agents engaged through frequent fun competitions.

"With Genesys Cloud CX, our team was able to pivot quickly to remote working and support customers with COVID-19 related issues," concluded Gonzalez. "We now operate a model that scales to unlimited numbers and offers access to a wider recruitment pool."