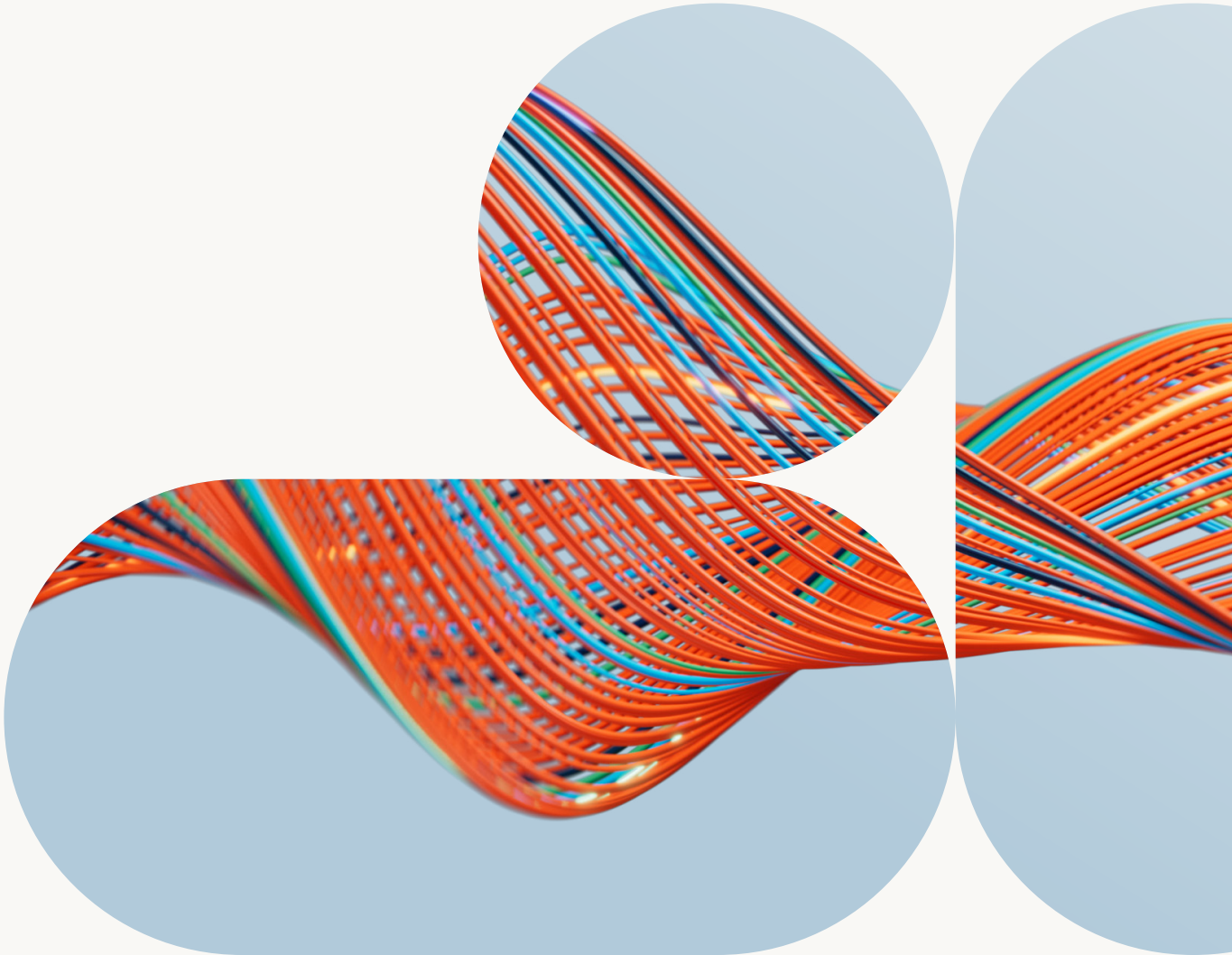
GENESYS™

A comprehensive guide to Genesys Cloud AI



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Introduction

Artificial intelligence (AI) allows you to innovate and easily adapt to shifting demands in customer and employee experience. With the Genesys Cloud™ platform, you can automate repetitive tasks, meet business needs and elevate experiences at every touchpoint.

Our AI-Powered Experience Orchestration platform enables you to collect and analyze data in real time to uncover patterns in customer behavior and predict future behaviors. With the power of Genesys Cloud AI, you can gain the competitive advantage you need to stay ahead now and pave the way for what's next.

We understand that adopting an AI solution requires careful consideration and visibility into how your vendor's AI models are trained, how data is used and secured, and your vendor's stance on AI ethics, as well as bias detection and prevention.

This document is designed to provide a clear, high-level overview of Genesys Cloud AI for both business and technical users. It addresses common questions and concerns that may arise in sales conversations about AI, demonstrating our thoughtful and secure approach. It outlines the key mechanisms we have in place to handle your deployments with safety, security and scalability in mind.

We've compiled a list of some important questions and answers. If you still have questions that weren't addressed in this guide, please reach out to your sales team to https://www.genesys.com/contact-us.

SECTION 1

Why Genesys Cloud AI?

Genesys Cloud AI is built differently to orchestrate differentiated experiences. Here are the four key differentiators.

1. **Security by design:** Designed using strict AI ethics, with data standards that meet the same requirements as your Master Service Agreement (MSA).
2. **Compliant for confidence:** Enables you to deploy quickly without having to worry about being held back by global, local or regional regulations.
3. **Contextual and pre-integrated:** Draws intelligence from every step and interaction on the platform into customer, agent and admin experiences.
4. **Quick time to value:** Genesys Cloud AI is turnkey and ready to implement, use and optimize on Day One.

SECTION 2

FAQs about Genesys Cloud AI

AI mechanisms and technologies

Which AI models are used on your platform?

Genesys has a three-fold AI model strategy — a structured approach that leverages different types of AI models, each serving a unique purpose in our AI-powered platform. This approach enables Genesys Cloud to address a wide range of use cases with precision, flexibility and scalability.

1. **Proprietary machine learning (ML) models:** These are custom, enterprise-grade AI models developed in-house. They're specifically tailored to meet the unique requirements of our customers, with a focus on advanced features and performance.
2. **Open-source models:** We integrate a diverse set of pre-trained, open-source AI models to help facilitate fast adoption and deliver cost-effective AI capabilities. These models are further fine-tuned with task-specific and industry-specific data to help ensure they meet the specialized demands of our customers. This allows us to offer a flexible AI solution that scales across industries and can adapt to unique business requirements.
3. **Foundation models:** These are cutting-edge, large language models (LLMs) delivered as a service within our data and security compliance envelope. Foundation models cater to advanced use cases that require high levels of comprehension. With this option, we can offer our customers advanced AI for complex applications, such as retrieval-augmented generation.
4. **For clients who need custom AI models, our architecture also supports Bring Your Own (BYO) custom model integrations — providing a seamless experience for customers with highly specialized needs.**
    - Transcription with options to connect Google or Microsoft Azure Transcription (with AWS Transcribe coming later).
    - BYO Knowledge Connectors to content management systems.
    - BYO LLM for services, such as summarization (Coming later).

This three-fold approach allows us to deploy AI capabilities that are versatile and powerful, giving our customers the best of proprietary innovation, open-source adaptability and foundation-level advancements.

We now publish and share feature and model cards for all our AI services with our customers (these are available under NDA).

Do you have dedicated processes in place to monitor prompts and validate results?

All LLM-based services have quality assurance acceptance tests. The model is required to pass these tests before being deployed into production. We also monitor customer feedback via the user interface (UI) and other channels. In addition to our internal rigorous LLM testing processes, we have automated testing running against all production instances, assessing the output of LLMs against known-good outputs. All of this allows us to improve the services continually. We are also compliant with the EU AI Act.

Do you offer any products or services that incorporate generative AI solutions?

Yes, we offer generative AI-powered solutions, such as advanced summarization and answer highlighting in Genesys Cloud Agent Copilot, as well as enhancements in our virtual agents to streamline bot building, handle requests, gather information efficiently and automate wrap-ups for self-service interactions. These features are embedded into our secure and compliant Genesys Cloud platform.

How does Genesys Cloud AI scale to support growing business demands and increasing customer interactions?

Genesys Cloud AI leverages a cloud-native architecture to automatically scale resources based on demand, enabling seamless handling of increasing customer interactions. The flexible, token-based pricing model allows you to easily allocate tokens across different AI services, enabling smooth scaling as your business grows and new use cases emerge — without having to be tied to rigid pricing structures.

Data handling, privacy and compliance

What datasets are used to train and refine your AI services or products?

For fine-tuning models, we leverage open-source, purchased and anonymized datasets to improve specific tasks and language coverage. We also work on minimizing hallucinations and validating the LLM outputs to help ensure performance, privacy and compliance around data. We never use customer data for any AI training or fine-tuning purposes without the consent of the customer.

Approach for fine-tuning LLMs:

Hallucinations are mitigated via fine-tuning models with conversational datasets that are selected for the use cases (customer care) and industry verticals (healthcare, financial services, retail, etc.). This can significantly reduce hallucinations by re-weighting the models to the use case.

Prompting best practices are set to instruct the LLM so that it avoids fabricating answers and states “I don’t know” if the question isn’t relevant or answerable. This gives the LLM a high degree of confidence in the answer, constraining the response with examples of correct outputs and setting the deterministic temperature to be as low as possible.

Retrieval-augmented generation (RAG): Constrains responses so that they are derived from a known-good set of data from the business.

Can you provide details about the data sources used to train your LLM?

We curate the data used in model fine-tuning from both open-source conversations and from Genesys Cloud customers that have agreed to participate in product improvement, including voice calls and chats from various digital channels. Care is taken to ensure the data spans multiple domains and industries, and it’s rigorously reviewed for integrity and accuracy through both automated processes and manual annotation.

The data reflects the types of conversations the model is expected to encounter in real-world production scenarios. Measures are in place to mitigate bias related to domain, gender, race or other protected characteristics. We also enforce strict processes to filter out inappropriate language; all data is securely archived in Genesys Cloud with tightly controlled access.

In what cases is customer data used to train your AI models?

Customers can consent to participate in service improvements through a rigorously controlled process. Data is sampled and fully anonymized in the production environment before it can be used for AI model training purposes. By default, our MSA opts customers out of any data donation.

What procedures do you have in place to keep customer data strictly confidential? How is it handled when using AI, including the measures in place to protect it, such as anonymization?

When customers opt-in to help Genesys with service improvements, before we use any data, the data is fully anonymized and human-validated within the production environment to confirm that no personally identifiable information (PII) is present before use in model training or fine-tuning. Anonymization processes are rigorously reviewed by our Compliance and Ethics teams to maintain data security and privacy. View the full Genesys Cloud privacy policy here: **https://help.mypurecloud.com/articles/genesys-cloudprivacy-policy/.**

What is your privacy policy regarding AI services?

Privacy by Design and Privacy by Default are embedded in the processes around the design, set up and update of our products and services — from development to release and improvement. Our standard baseline for compliance with privacy and data protection is the EU General Data Protection Regulation (GDPR) and related legislative pieces, which are foundational for our privacy program.

In addition to that, our risk management framework incorporates AI model actions, including privacy as a pillar. Our corporate and product privacy teams are knowledgeable of other AI risk frameworks incorporating privacy to the assessment of AI products, such as the NIST AI Risk Management Framework, ISO/IEC 23894:2023, and additional resources such as the Assessment List for Trustworthy AI developed by the High-Level Expert Group on AI set up by the European Commission. This provides a robust framework designed to protect fundamental rights from the design phase of AI models.

Here are additional details about the Genesys position on privacy and compliance:

- Building large-scale systems that apply AI to optimize customer experience often requires very large datasets that can contain data on many individuals coming from a variety of sources. Genesys is committed to core principles of privacy by design, limiting the data collected about individuals as the default.
- Beyond enforcing privacy by design principles across systems, Genesys uses rigorous processes to monitor compliance of our AI products with regulations such as GDPR and any other applicable legislation globally.
- While Genesys has technical and administrative controls in place to limit the access to customer data, we have established additional safeguards designed to ensure that all data used for the development of new products is anonymized and governed by a set of processes detailed in the Genesys data anonymization framework.

How does Genesys monitor compliance with industry standards and regulations?

Genesys enables customer compliance with regulations through a robust framework that includes 23 accreditations and certifications for adhering to local, regional and global regulations. More information can be found **here**. Additionally, we require that Genesys Cloud AI solutions successfully pass compliance checks each year to meet market expectations and Genesys regulatory requirements. This can give customers confidence in the security, ethics and compliance of their AI solutions.

Deployment and integration

What are the key steps for deploying Genesys Cloud AI solutions? What best practices should be followed to ensure a smooth rollout?

Every AI implementation is unique, so it's important to tailor the deployment to your specific business goals. Start by selecting the correct AI capabilities, configuring and integrating them with your existing systems, and testing thoroughly.

To further support you, **Genesys Professional Services** experts who specialize in rapid deployment, customization and multivendor integration are available. Our consultants leverage decades of experience so you can avoid common pitfalls and be certain your AI solution is optimized for both customer and employee experience goals.

Can we, as customers, bring our own AI models, choose from existing models or customize models to suit our business needs?

Yes, as a customer, you can bring your own AI models, select from existing models or customize models to suit your business needs. We support a BYO approach through connectors and our open platform, allowing you to build custom versions of solutions like Genesys Cloud Agent Assist or Genesys Cloud Agent Copilot, similar to those in our AppFoundry® Marketplace. Additionally, our platform supports integration with third-party services, such as speech-to-text and text-to-speech engines, providing further flexibility in tailoring the AI capabilities to your specific requirements.

Addressing common concerns

What guardrails does Genesys Cloud AI Ethics provide to protect customer privacy?

Genesys Cloud AI Ethics enables customer privacy through the following key principles:

1. Balance value creation with empathy: Genesys prioritizes understanding and addressing the needs of all stakeholders during the value-creation process, with privacy considerations integral to any decision.
2. Incorporate privacy design principles: Privacy is embedded by design at Genesys. The right to privacy is protected from the outset, governed by explicit customer consent through mechanisms like MSA. This includes opt-in clauses and data-use consent, with a focus on anonymization and regulatory compliance.
3. Understand and reduce bias: Genesys actively works to mitigate bias in AI models to support ethical and fair decision-making, considering the broader context when handling data.
4. Value transparency: Genesys takes measures to make sure that stakeholders are informed and understand the decision-making processes behind AI models, promoting trust and transparency in how data is used and managed.

Do you offer an AI addendum to your MSA? What contractual protections are in place when using Genesys Cloud AI?

We offer contractual protections for AI usage through an AI addendum to our MSA. Since we build AI as discrete services, we specifically list any AI sub-processors in the relevant sections of the agreement.

Additionally, we offer an opt-in clause for training data, which is defaulted to “Off” so you can control how data is used. This provides transparency and flexibility, aligning with your organization’s specific requirements for AI services.

What is your enterprise governance process and risk assessment framework for AI/ML technologies?

Genesys governance processes are tightly coupled with the development processes. As part of these processes, Genesys incorporates mechanisms such as Data Privacy Impact Assessments, Security and Compliance reviews and AI/Model Risk-focused reviews. These reviews occur at various stages of the software lifecycle to promote responsible AI development and risk mitigation.

Our model training and inference pipeline (including metrics, sampling, validation, etc.) follows the standard review process shared by all Genesys Cloud software. The first round of reviews takes place during the design phase as part of the software design lifecycle, where AI architects and data scientists review and approve the design, alongside privacy and security reviews. The second phase of reviews occurs at the development stage, during which all model training and inference code is peer-reviewed before merging and deploying. This stage often includes benchmarks and the addition of model-specific tests.

Additionally, the Genesys AI Ethics Committee, which spans across functions — including privacy, security, architecture, product and AI — holds regular quarterly meetings to assess our products and processes from an ethics and governance perspective.

This comprehensive governance framework helps to ensure that AI/ML technologies deployed by Genesys meet the highest standards for security, privacy and ethical considerations.

What recourse is available in the event of model errors or other AI-related issues that impact customers?

All services and models deployed in the Genesys Cloud ecosystem have defined SLAs on various relevant metrics defined at the design stage, as well as control and rollback mechanisms for models in specific scenarios. For example:

1. Genesys Predictive Routing incorporates failsafe mechanisms to have the call routed to a specific pool of agents if the model is unable to identify a suitable agent within a pre-defined period.
2. Genesys Predictive Engagement has a pacing implementation failsafe that limits the number of engagements offered to customers if the model is erroneously targeting too large of an audience.
3. Model Life Cycle Orchestration would define SLAs on certain metrics and roll back newly deployed active model(s) to the previous version when the number of prediction errors exceeds defined thresholds.

All the above mechanisms are actively monitored following typical processes for cloud software development. This may include alerts to the on-call team if model metrics (e.g., missing feature value thresholds, prediction errors, etc.) exceed pre-defined thresholds.

What approaches have you used to reduce bias and disparate impact in model selection?

The Genesys approach to managing AI bias and model impact is focused primarily on:

1. Assessment and/or curation of model input data to make certain no sensitive features are included in the models.
2. Model monitoring tracks various model metrics to help avoid data drift and concept drift.
3. Model cards and dataset cards document various characteristics of AI models and training datasets in a standardized format. This is also related to bias detection.

SECTION 3

Genesys Cloud AI resources and support

Explore the "Customer experience in the age of AI" report to get the hard facts on how to make AI work for your customers, your employees and your organization.

The Genesys Cloud AI progressive adoption model offers strategic guidance on how to adopt AI capabilities to balance short-term value with your long-term AI strategy.

As you dive into contact center AI, building an AI business case and understanding what AI can do for you are imperatives. This blog post gives you what you need to know.

How leading brands use Genesys Cloud AI

Learn how some Genesys customers are using Genesys Cloud AI to enhance customer satisfaction, improve employee efficiency and continually innovate to stay a step ahead of their competitors.

- Western Sydney University
- Maximus
- King Price Insurance

Contact your sales team today