



Professional Services Statement of Work

for

Acme Retail Group

SOW #982714

GC Migration and CX Transformation

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Version History

Version	Date	Author	Description of major revisions
1	12 Sep 2025	Kelly Kirkendall	Professional Services SOW – Draft version.
2	15 Jan. 2025		ARG Revisions returned to Genesys for review
3	20 Jan. 2025	Kelly Kirkendall	Genesys review completed. Notes included within doc. Language added around discovery and Value Realization engagement. Returned to ARG.

This Statement of Work ("**SOW**") is entered into by and between Genesys Cloud Services, Inc. ("**Genesys**") and Acme Retail Group ("**Customer**" or ARG) and is governed by the terms and conditions of the Professional Services Agreement, and any applicable Schedules thereto, located at <https://help.mypurecloud.com/articles/professional-services-terms-and-conditions/>, except if you have an existing agreement in place with Genesys for the services subject matter of this SOW, in which case the terms and conditions of such agreement shall govern (the "**Agreement**").

The Services under this SOW are provided in a fixed price model per the pricing schedule provided in the Pricing and Payment Terms sections of this document.

Genesys will deploy a project team for the applicable analysis, design, provisioning, configuration, consultation, and/or deployment of the applicable Genesys product ("Services"). Any applications or deliverables not explicitly stated within this SOW will not be installed or configured. Any features (functionality) not stated within this SOW will be left at their default or out-of-the-box values for all Genesys products and solutions. In summary, if a task is not explicitly stated it is to be assumed that is not in the scope of this SOW unless both parties deem the additional work reasonably necessary to achieve the stated objectives and deliverables, consistent with industry standard implementation practices.

Upon execution of this SOW, Genesys PS will perform the services described in the Scope of Services and Deliverables section of this document and in line with the detailed Terms and Conditions.

Project Objectives and Business Outcomes

The primary objective of this project is to migrate Customer from the current legacy platform to Genesys Cloud,

This engagement will provide Customer with a modern, scalable solution based on Genesys Cloud CX (GCCX) focused on outcomes rather than hours. This engagement is currently built for an approximate duration of 10 months with 6 go-live events which will align with Customer's pre-defined LOB's.

This SOW is based on written information provided by Customer, as well as implementations of similar size and complexity. Genesys has made every effort to create a comprehensive SOW. However, due to the iterative nature of the discovery process, it may be necessary to amend this agreement via a Project Change Request (PCR) which could require additional funding. Genesys will ensure any such amendments to this SOW are socialized and approved by Customer.

In addition, and given the strategic importance of Customer's operations and Genesys' commitment to delivery excellence, Genesys will also provide a Value Realization engagement as part of this effort.

This migration plan is designed to enhance the customer experience while minimizing technical risk, with Genesys as the delivery partner and single point of accountability.

Key deliverables include:

- **Objective 1:** Design, build, and deploy Genesys Cloud (GC2) for ARG's 2000 agents
- **Objective 2:** Provide guidance and recommendations around simplifying the environment and maximizing the GCCX investment.
- **Objective 3:** Proven deployment strategy, utilizing Genesys Use Cases for Voice,, Email, and Web Messaging (Chat)
- **Objective 4:** Integration and API consulting for Customer's integration elements
- **Objective 5:** Identify and educate Customer on quick wins of low-risk and high-impact enhancements leveraging GCCX-native capabilities
- **Objective 6:** Comprehensive cutover, operational readiness validation, and go-live support

The engagement is expected to enable measurable business outcomes that align with the Client's strategic goals. These outcomes may include:

- **Improved Operational Efficiency:** Reduction in manual processes, improved cycle times, and elimination of redundancies.
- **Enhanced Customer Experience:** More seamless, consistent, and personalized interactions across channels.
- **Risk Reduction and Compliance:** Identification of compliance gaps and mitigation strategies aligned with relevant regulations.
- **Cost Optimization:** Recommendations for cost savings through process improvement, automation, or vendor consolidation.
- **Strategic Alignment:** Improved alignment between business goals and enabling technologies/processes.
- **Future Readiness:** Enhanced agility and readiness for digital transformation, market expansion, or regulatory shifts.

Scope of Services and Deliverables

Genesys will deliver the following services as part of this SOW. Any requirements not described below are to be assumed out-of-scope and subject to a project Change Order as defined within the Change Management section of this document or alternatively written as a separate SOW.

1. Project Initiation

The objective of the Initiation phase is to define the goals and responsibilities of Genesys and Customer.

1.1. Kick-off Call

The introduction and kick-off call takes place between the Genesys Project Manager, Genesys Core Team, the Customer Project Manager, and their respective Core Team members as needed. The objective of this call is to review the project objectives, SOW deliverables, roles and responsibilities, communication plan, project milestone objectives and prepare for project kick-off.

1.2. Communication Plan

Genesys Project Manager, in coordination with Customer's Project Manager will develop a formal communication plan including contact information from all key resources from both parties as well as coordinate regular project meetings.

Standardized project logs will be maintained and utilized – as needed – to guide the status discussion.

1.3. Genesys Project Manager

Genesys will assign a Project Manager to work with Customer's Project Manager(s). The Genesys Project Manager will be the single point of contact for Customer throughout the duration of the project and will track all aspects of its delivery. The Genesys Project Manager will guide the project using standard and customary meetings and status reports. These reports will indicate progress against the mutually agreed committed timeline, deliverables, and milestones for each task.

It is expected that Customer will name a Project Manager, to interface with the Genesys Project Manager throughout the delivery of the project.

1.4. Genesys Technical Lead

Genesys will provide a Genesys Cloud Technical Lead to work with Customer. This resource will provide advice and direction of Customer's deployment and will be capped at three hundred forty (340) hours focused in the following areas:

- Review & redesign for call flow consolidation --> up to 100 hours
- Review and configuration of Queues --> up to 40 hours
- Technical Lead --> up to 200 hours

Note:

- If Customer requests on-site resource availability, additional costs for time and travel will be contracted per a Professional Services SOW or billed separately to the customer.

1.5. Project Initiation Deliverables

The Initiation phase shall have the following key deliverables:

- Project Kick off Materials
- Project Kick off Session
- Communication Plan
- Assignment of a Project Manager
- Assignment of a Technical Lead

2. Discovery & Design

The objective and purpose of the Discovery and Design sessions is to:

- Align Customer's requirements with Genesys and industry best practices to ensure the successful development of the final solution to meet business objectives.

- The discovery engagement will help Genesys and Customer establish the collaborative partnership and form a holistic picture of the businesses, key objectives, and processes.
- The partnership and holistic understanding combined will allow the entire Genesys implementation team to work more collaboratively with Customer and to design and implement a system that aligns with and supports Customer's contact center strategy and objectives, minimizes errors and rework, and improves overall service delivery.
- The outcome of this discovery engagement will ensure scope alignment and will set the project on a successful path for value realization.
- Genesys' methodology prescribes key steps and best practice use cases, however recognizing the need to reflect Customer's specific needs and requirements, allowing an interactive and fluid approach, as topics overlap and influence each other.
- The final approach and agenda are customer-specific. Details will be defined during the planning session. SME breakouts for specific topics might also be scheduled, as required.

2.1. Discovery & Design Preparation

A critical success factor to address and expedite the process of requirements gathering for the project, is setting up the baseline of the documented processes and information currently available at Customer (Current State). Prior to the remote workshop sessions, the Genesys team would like to have access to the following documentation (if existent and not already shared previously) to be provided by Customer:

- Existing platform architecture
- Existing capabilities list
- Services and team structure
- Top reasons of contact
- IVR configuration
- Call flows
- Routing strategies
- Skills
- Customizations/ integrations
- Work pattern rules
- Agent statuses
- Call disposition codes
- Quality forms
- Sample recordings of customer calls (good CX and bad CX)
- Sample most used historical reports
- Sample most used real-time dashboards
- Screenshots from agent and supervisor desktop applications

2.2. Discovery & Design Kickoff

Genesys will lead a remote discovery kick-off meeting/call including introductions of both Genesys and Customer project teams, review the SOW and initiating and defining governance i.e.:

1. Review business objectives and goals of the discovery.
2. Identify the project's key success milestones and timeline.
3. Review Project Methodology.
4. Make assignment of key roles.
5. Review Communications Plan.
6. Prepare for requirements and design workshops.

2.3. Discovery & Design Sessions

Genesys will conduct up to twenty (20) Discovery & Design consulting sessions for Customer. The schedule for these sessions will be agreed upon by both parties and included in the project plan. Each of these consulting sessions will have a duration of up to four (4) hours, in which a Genesys consultant will meet remotely with customer technical stakeholders to review the following topics:

- Architecture
- Integrations
- Network
- Communication Channels
- Data

Notes:

- If Customer requests on-site resource availability, additional costs for time and travel will need to be contracted through a PCR as defined within the Change Management section of this document or alternatively written as a separate Professional Services SOW.

2.4. Discovery & Design Deliverables

Genesys will provide the following deliverables:

- Discovery Sessions as defined in Section 2.3 of this SOW.
- Completion of relevant Functional Worksheet(s) / Functional Requirements Specification ("FRS") document which will serve as blueprints to build specified functionality.
- List of identified Critical Risks and Dependencies.

Notes:

- Customer and Genesys will update the Project Preliminary Timeline based on the outcomes of the discovery & design and re-assess project scope. Should the resulting scope be greater than what is detailed in this SOW, the additional scope will need to be assessed through a PCR as defined within the Change Management section of this document or alternatively written as a separate Professional Services SOW.
- Customer shall have five (5) business days (“FRS Acceptance Period”) to submit comments on the FRS documentation. Comments submitted by Customer will be reviewed by Genesys and will adjust FRS worksheet as needed and will re-submit to Customer for review. Up to two (2) FRS review cycles are included. Additional review cycles will require a Project Change Order to be enacted, as detailed in the Change Management section of this SOW.
- Customer must provide acceptance and sign-off of FRS Document for Genesys to start any configuration work. If no comments are received by Genesys during the FRS Acceptance Period, the FRS documentation shall be considered accepted and signed-off.
- Once FRS Document is accepted and configuration work has begun, any changes to the design will require a Project Change Order to be enacted, as detailed in the Change Management section of this SOW.
- If Discovery and Design goes beyond two weeks after project start date, the entire project schedule may be impacted/delayed. Any delays will require a Project Change Order to be enacted, as detailed in the Change Management section of this SOW.

3. Genesys Cloud System Configuration

Genesys will be standing up a single Genesys Cloud Organization (“Genesys Cloud Org”) on which it will be performing the configuration and consultation work described in this section. This Genesys Cloud Org will be referred to as the Genesys Cloud Production System within this document.

Any requirements and/or details not described in the sections cited above are to be assumed out-of-scope and subject to a project Change Order as defined within the Change Management section of this document or alternatively written as a separate SOW.

Genesys will utilize a prescriptive methodology implementing a combination of Genesys standard and predefined use cases. Using Genesys use cases ensures that the Genesys Cloud Production System will be configured following best practices with out-of-box configuration, reducing implementation time and minimizing risk. These use cases will be reviewed with Customer during the Discovery & Design phase of the project.

The configuration and integration work are described in the following sections:

- Section 3.1: Genesys Cloud Base Configuration
- Section 3.2: Genesys Voice Services (Telephony Configuration)
- Section 3.3: Genesys Call Routing
- Section 3.4: Genesys Email Routing
- Section 3.5: Genesys Web Messaging Routing
- Section 3.6: Integrations and API Consulting

3.1. Genesys Cloud Base Configuration

3.1.1. Genesys Cloud Infrastructure Advisory Service

The purpose of the Genesys cloud network consulting is to help customers understand the network configuration required to access Genesys Cloud, and VoIP resources to provide resilient and dynamic streaming audio options.

Genesys will deliver the following items as part of a Genesys Cloud Infrastructure Advisory Service:

1. **Infrastructure Advisory Service:** Genesys will provide an Advisory Service with customer technical resources to present Genesys Cloud VoIP streaming options (WebRTC, SIP, BYOC, Genesys Cloud Voice).
2. **Firewall Configuration Requirements:** Genesys will consult with the customer to present the requirements for successful communications through the customer firewall/infrastructure to Genesys Cloud communications endpoints (AWS, local edges, internet domains, etc.)

Genesys Cloud SIT Assistance (VoIP)

Genesys Cloud System Integration testing will be performed to verify successful communications to Genesys Cloud infrastructure endpoints for seamless streaming VoIP audio.

System Integration Testing (VoIP) will ensure the following:

1. Ability to place and receive calls with bi-directional audio.
2. Troubleshoot communications issues related to successful streaming audio.
3. Troubleshoot/verify SIP/WebRTC audio to Genesys Cloud communications endpoints.
4. Perform packet analysis to troubleshoot/isolated Genesys Cloud Communications issues.

Customer Responsibilities

Any recommendation Genesys provides to deploy and/or remediate identified communications issues will be based on general best practices for deploying Genesys Cloud. Customer is responsible for evaluating the risk of applying these recommendations within their own environment and effecting any changes within their own network.

3.1.2. Audio Quality Assessment

The Audio Quality Assessment is designed to validate the production network for high quality voice performance. The assessment tests the voice paths to confirm end-to-end network metrics, mitigating the risk to audio quality.

Engagement Structure

This is a tailored, remote engagement to analyze the customer infrastructure to determine and baseline expected MOS score and other critical network metrics. Typical engagement is as follows.

- Audio Quality Assessment kick off call.
- Customer identifies test locations.

- Customer returns requested network documentation to Genesys.
- Genesys provides probe access details.
- Genesys confirms access data collected by probe.
- Genesys Begins Audio Quality Assessment.
- Genesys notifies Customer of Assessment results.
- Assessment report prepared by Genesys.
- Final report delivered to customer.

Prerequisites

- Network is configured to recommended Genesys Cloud customer network readiness standards found here (<https://help.mypurecloud.com/articles/customer-network-readiness/>).
- Full Duplex enabled on all network devices.
- Adequate internet bandwidth is available.
- Customer provided test PC's can access URL provided for probes.

3.1.3. People and Workspaces

Genesys will upload / import up to two (2) CSV files containing the information of the users to be configured on the system which will contain the following information:

- Roles
- ACD Skills
- Queue Membership
- Phone set-up and provisioning (WebRTC phone will be set-up by default)
- DID assignment and extensions (1 per user, if applicable).
This assignment is used for inbound calls. Outbound calls may be placed without the need of static DID assignments.
- Up to Two (2) Workspace creations

Notes:

- Customer must provide CSV file with all the necessary information.
- If SSO is to automatically sync Users then bulk upload is not necessary,

3.2. Genesys Voice Services (Telephony Configuration)

Genesys will deploy Voice Services for proper trunk connectivity to the PSTN and to other third-party components. These services are comprised of the following:

3.2.1. Voice Services – Genesys BYOC Cloud

These services are included to provide SIP Trunk connectivity to the PSTN and third-party components, and include the following:

- Provisioning of up to two (2) Sites.
- Provisioning of up to five (5) Locations.
- Provisioning of up to four (4) Trunks.
- Configure Number Plans and Classifications.
- Configure Outbound Routes.

- Configure up to three hundred (300) User DID's
- Testing of overall configuration along with Inbound and Outbound Call testing.
- SIP Consulting to guide you or your carrier through Genesys Cloud specific SIP Trunk requirements.

For more information on Genesys Voice Services for Genesys Cloud, please visit the Resource Center at <https://all.docs.genesys.com/UseCases/Current/GenesysCloud/OP04>.

3.3. Genesys Call Routing

Genesys will deploy Genesys Call Routing with the following components.

For more information on the predefined use case, please visit the Use Cases Resource Center at <https://all.docs.genesys.com/UseCases>.

3.3.1. Call Routing - Schedules

Genesys will configure up to twenty-four (24) Schedules, including:

- Create and Associate Schedule Group
- Assign Called Addresses
- Associate IVR Profiles (Flows)

Notes:

- Schedules will be standardized and shared across Customer's products and end-customers.

3.3.2. Call Routing – Call Flows

Genesys will configure up to two hundred (200) ancillary voice call flows, including:

- Usage of Built-in variables (ANI, DNIS, Email subject, etc.) with simple String function calls
- Simple screen pops included (one (1) page showing text and/or attributes)
- Up to five (5) Tasks per flow.

Notes:

- Customer currently has a large amount of call flows that were developed using 5 standard templates. These flows and templates will be reviewed during the Discovery & Design Sessions described in Section 2.3 with the intention of reducing and consolidating them into a more manageable number of flows. Should additional flows be required beyond the 100 flows scope in this SOW, these will be either configured by Customer or can be contracted through a Change Order by enacting the Change Management process.

3.3.3. Call Routing – Queues

Genesys will configure up to one hundred (100) Queues with the following components:

- Skills and wrap-up codes
- SLA's
- Alerting timeouts
- Membership
- In-queue treatments (On-Hold Music, Callback, Route to Voice Mail, EWT)

Notes:

- Routing logic will be discussed during Discovery & Design Sessions, where resulting routing logic may not be exactly alike to current routing.

3.3.4. Call Routing – Scripts

Genesys will configure up to one hundred (100) Scripts with the following components:

- Simple Inbound/Outbound or Screen Pop using user created variables, up to twelve (12) screens
- Script can update data or call list

3.3.5. Call Recording

Genesys will configure up to two (2) voice recording retention policies which can be associated to trunks or specific call flows.

3.4. Genesys Email Routing

Genesys will deploy Genesys Email Routing leveraging Use Case CE16 with the following components:

For more information on the predefined use case, please visit the Use Cases Resource Center at <https://all.docs.genesys.com/UseCases>.

3.4.1. Media Routing

Genesys will configure the following components:

- Configuration of up to ten (10) email addresses
- Limit to one (1) domain.

3.4.2. Email Queue

Genesys will configure up to one hundred (100) Email Queues (one for each email address). Each queue will be configured with the following components:

- Up to ten (10) skills and wrap-up codes
- SLA's
- Alerting timeouts
- Membership

3.4.3. Email Flow

Genesys will configure the following components:

- Configure up to one hundred (100) Flows for Emails.
- Usage of Built-in variables (ANI, DNIS, Email subject, etc.) with simple String function calls
- Simple screen pops included (one (1) page showing text and/or attributes)

Notes:

- Customer currently has over 700 Email flows, which will be reviewed during the Discovery & Design Sessions described in Section 2.3 with the intention of reducing and consolidating them into a more manageable number of flows. Should additional flows be required beyond the 100 flows scope in this SOW, these will be either configured by Customer or can be contracted through a Change Order by enacting the Change Management process.

3.5. Genesys Web Messaging Routing

Genesys will deploy Genesys Web Messaging leveraging Use Case CE34 with the following components:

For more information on the predefined use case, please visit the Use Cases Resource Center at <https://all.docs.genesys.com/UseCases>.

3.5.1. Media API Consult – Web Messaging

Genesys will provide the following services for the deployment of Web Messaging:

- Up to four (4) consultation sessions not to exceed two (2) hours each with a remote Digital Media Channels API Consultant*, supporting the deployment of web messaging.
- Consultation and configuration assistance for agent roles and permissions, one (1) digital channel deployment, and one (1) digital channel Javascript widget including queue and skill routing options and up to three (3) custom data fields. **
- Review of configured settings and findings to be delivered following the consultation session.

Notes:

- * If Customer requests on-site resource availability, additional costs for time and travel will be contracted per a Professional Services SOW or billed separately to the customer.
- ** Configuration assistance includes parameter configuration for Javascript-based digital channel widgets and guidance regarding client-side implementation strategy; assistance excludes writing, designing, or providing specific client-side browser code assets.

3.5.2. Web Messaging Flows & Queues

Genesys will configure up to two (2) Web Message Flows and up to two (2) Web Message Queues with the following components:

- Usage of Built-in variables (Subject, Body, etc.) with simple String function calls
- Simple screen pops included (one (1) page showing text and/or attributes)

3.6. Integrations and API Consulting

Genesys will configure and deploy the following integrations on the Genesys Cloud Production System for Customer:

- Single Sign-On (SSO).
- Support for Customer's choice of AppFoundry Applications (up to two (2) applications) - Audiohook and Verint Connector for QM).
- Configuration of OAuths to support the integration with Verint WFM (up to three (3) OAuths for CSI, STCI, and ASCM).
- Web Service Data Actions for data-dips and pop-ups to Customer's back-end systems.

3.6.1. Single Sign-On (SSO)

Genesys will provide the following services:

- Add (1) standard SSO integration (SAML).
- Receive assistance with SSO provider configuration.
- Configure Genesys Cloud SSO settings.
- Test user authentication.

Assumptions:

- * Customer must provide required identity provider configuration information and certificates.

3.6.2. Support for AppFoundry Applications

Genesys will provide integration installation assistance* for up to three (3) hours with authorization, authentication, configuration, and basic testing of the integration in Genesys Cloud** for up to two (2) AppFoundry Applications (Audiohook and Verint Connector for QM).

Assumptions:

- Specific configuration of application settings is not in scope and should be provided by the application vendor through a "Quick-start package" or similar.
- * Installation may require collaboration with Genesys Sales, Partner organizations, 3rd-party application vendors, or others.
- ** Testing includes basic operation and access within Genesys Cloud; any defect remediation is the responsibility of the application supplier.

3.6.3. Configuration of OAuths for Verint WFM

Genesys will configure up to three (3) OAuths to support the integration of Genesys Cloud with Customer's WFM systems (Verint - CSI, STCI, and ASCM).

3.6.4. API Consulting

Genesys will provide up to four (4) 2-hour remote* API Consulting sessions to support Customer in the use of the Genesys Cloud Embeddable Framework which will be used for Agent Desktop functionality.

Assumptions:

- It is expected that all development work required for the Agent Desktop functionality will be performed by Customer.
- * If additional sessions are required and/or if Customer requests on-site resource availability, additional costs for time and travel will be contracted per a Professional Services SOW or billed separately to the customer

3.6.5. Web Service Data Actions – CRM Lookup (Block Number / Routing)

Genesys will add and configure up to two (2) Web Service Data Actions, which will be used to interface with Customer's back-end systems to obtain Block Number and Routing information.

For each of these Data Actions, Genesys shall:

- Configure integration credentials.
- Test connection with customer data.
 - Up to (3) actions.

3.6.6. Web Service Data Actions – Script Screen-pop

Genesys will add and configure up to two (2) Web Service Data Actions, which will be used to support Script Screen-pop.

For each of these Data Actions, Genesys shall:

- Configure integration credentials.
- Test connection with customer data.
 - Up to (3) actions.

Assumptions:

- Customer's back end systems should have a web service that meets Genesys Cloud's data action requirements as described in the following link:
<https://help.mypurecloud.com/articles/requirements-for-the-data-actions-integration/>
- Customer is to provide working test data upon completion of the design, prior to system development / configuration.

4. System Testing

System Testing is a crucial step in ensuring the reliability, functionality, and user satisfaction of the deployed Genesys Cloud solution. It typically involves both Unit Testing / Quality Assurance Testing (QA) and User Acceptance Testing (UAT).

4.1. Unit Testing and Quality Assurance Testing (QA)

Genesys is responsible for QA testing the configurations described in Section 3 of this SOW. During QA testing, the Genesys consultant/developer and Genesys tester verify that there are no major errors, base units are working as they were designed, and if deployed today, the application would be functional on the system potentially with some defects. Unit testing is usually done in conjunction with configuration and is finished immediately after configuration/development is finished.

4.2. Smoke Testing

As part of the System Testing, Genesys will provide Smoke Testing Service, as described in the following subsections.

4.2.1. Smoke Test Service Description

The Smoke Testing service will simulate controlled call volume in the customer's deployment to detect potential risks early and help mitigate unexpected issues before full scale Performance and Load test. Its benefits include but not limited to the following benefits:

- Early Detection of Critical Issues – Identifies basic configuration issues, poorly implemented call flows that cause increased CPU and memory usage, Ensure API performance and response times are adequate, carrier trunk configurations, missing components, or critical failures before heavy load testing.
- Saves Time & Resources – identifies most obvious issues ahead of time in preparation for executing a full-scale load test.
- Identify potential problems that users will face during busy hours ahead of production cutover.
- Ensure API performance and response times are adequate under controlled call volume.
- Ensures Test Readiness – Verifies that the environment is properly set up before executing more complex tests.
- Minimizes Downtime & Risks – Reduces the risk of system crashes under full load due to basic issues.
- Improves Confidence in System Stability – Helps ensure that fundamental functions work before proceeding to deeper performance evaluation

4.2.2. Smoke Test Deliverables

Genesys will provide the following:

- **Test Plan & Design** – A structured plan outlining test scenarios, expected outcomes, and execution timelines.
- **Test Execution** – Genesys will run up to five (5) smoke tests.

- **Performance Analysis Report** – A detailed report highlighting findings and potential risks.
- **Post-Test Review Meeting** – A session to discuss test results and suggested next steps with key stakeholders.

4.2.3. Smoke Test Scope & Constraints

- Smoke Testing is designed for pre-Go-Live validation step executed as part of Genesys Quality Assurance and is not intended to replace full-scale load or stress testing.
- Testing will include up to six (6) rounds of testing of up to 500 concurrent test ports to simulate real-world conditions.
- Additional tests beyond the selected package will require a separate agreement.

4.2.4. Smoke Test Responsibilities

Genesys Responsibilities:

- Develop and execute the smoke test plan based on the customer's deployment.
- Provide expert guidance and testing tools to conduct effective testing.
- Analyze test results and provide clear, actionable insights.
- Deliver reports and findings on schedule.

Customer Responsibilities:

- Provide necessary system access for testing.
- Share relevant documentation on system configuration and call flows.
- Ensure key stakeholders are available to review test results, validate findings, and participate in post-test discussions.

4.3. User Acceptance Testing (UAT)

Customer is responsible for designing the System Test Document as well as executing the UAT Test Plan. Customer shall be responsible of testing the desired experience from start to finish. There should be minimal to no issues found at this point and will typically be used to verify that the client experience is acceptable. UAT occurs after QA testing is completed and immediately before Smoke Testing and Go-Live. Any changes to the design that result from UAT need to be retested, first with QA Testing, and then UAT. These changes would be outside the scope of the estimated hours and would likely affect project timeline.

4.4. User Acceptance Testing (UAT) Support

Genesys will provide up to eight (8) hours per day during thirty (30) business days with a named remote resource to provide defect remediation (configuration adjustments) during UAT test execution that is performed by Customer.

Assumptions:

- If Customer requests on-site resource availability, additional costs for time and travel will be contracted per a Professional Services SOW or billed separately to the customer

5. Genesys Cloud Development System Configuration

Genesys will be standing up a Genesys Cloud Organization for Development (“Genesys Cloud Dev Org”) on which it will be performing the configuration and consultation work described in this section. This Genesys Cloud Dev Org will be referred to as the Genesys Cloud Development System within this document.

5.1. Genesys Cloud Dev Org Configuration – Code Replication from Prod Org to Dev Org

Upon completion of QA testing by Genesys as described in Section 4 of this SOW, Genesys shall replicate the configuration performed on Customer’s Genesys Cloud Production Org to Customer’s Genesys Cloud Dev Org.

Notes / Assumptions:

- Promotion of code between Customer’s Genesys Cloud Production Org and Customer’s Genesys Cloud Dev Org **will be done once during normal business hours**. Additional effort will require a Project Change Order to be enacted, as detailed in the Change Management section of this SOW.

6. System Go Live

System Go Live focuses on the final preparation, optimization, and enablement required for a successful go-live of a project. It includes structured activities for deployment readiness, transfer of implementation information, and post-launch support to ensure a seamless transition to production.

6.1. Go Live Planning

Genesys will provide one (1) named resource to conduct up to four (4) 2-hour sessions to collaborate with the Customer to establish a go-live strategy and execution plan, ensuring all technical and business stakeholders are aligned.

Activities Include:

- Defining deployment timelines, roles, and responsibilities for both Genesys and the Customer.
- Establishing risk mitigation strategies and contingency plans for one (1) go-live event.
- Conducting a final pre-launch readiness review to confirm system configuration, integrations, and dependencies.

Notes and Considerations:

- Consider adopting an incremental rollout strategy, releasing functionality to a subset of users or on specific channels initially before a full-scale launch. This allows for monitoring and addressing potential issues in a controlled environment.

- Ensure that all configurations are appropriately set for the production environment. This includes connection settings, security configurations, and any environment-specific parameters.
- Implement monitoring systems to track the system's performance, user interactions, and system health in real-time. This enables quick identification and response to any issues that may arise after deployment.
- Develop a communication plan to inform users, stakeholders, and relevant teams about the system's go-live date, features, and how to access and interact with it.

6.2. Go Live Support

Genesys will provide up to eight (8) hours per day during thirty (30) business days with a named remote resource to provide the following services (based on the assumption that there will be just one Go-Live event):

- Go-Live Support, defect/issue management, and end-user assistance.

Notes and Considerations:

- It is assumed that there will be up to six (6) Go Live events. If Customer requests additional Go Live events, this should be reviewed between the Genesys Project Manager and Customer Project Manager, and if this should result in an impact to project cost or time, it will need to be addressed through a PCR as defined within the Change Management section of this document.
- It is assumed that if critical issues are found during a Go Live event, they will be fixed within a time agreed upon between the Genesys Project Manager and Customer Project Manager. All other issues will be transitioned to Genesys Customer Support.
- It is important that Customer establishes a dedicated support team to monitor the system's performance during the initial go-live period. This team should be equipped to address any issues promptly and provide assistance to users as needed.
- It is important that Customer establishes and has a streamlined process in place for identifying, categorizing, and resolving issues that may emerge during the initial deployment. Prioritize critical issues and implement quick fixes while planning for more comprehensive resolutions.
- It is important that Customer set-up channels for users to seek support, such as a dedicated support email, chat, or a helpdesk system, and communicate these channels clearly to users in case they encounter difficulties.

6.3. Knowledge Transfer / Transfer of Implementation Information (TOI)

To ensure successful adoption, Genesys will provide the following services:

- Conduct up to two (2) remote consultant-led transfer of implementation information sessions to platform administrators Customer support teams, and any other stakeholders who will interact with or support the Genesys
- Genesys recommends that each session be limited to no more than eight (8) participants.
- Each session will have a duration of up to four (4) hours.

Notes and Considerations:

- Sessions will be conducted remotely. If Customer requests on-site resource availability, additional costs for time and travel will need to be contracted through a

PCR as defined within the Change Management section of this SOW or alternatively written as a separate Professional Services SOW.

- It is strongly recommended that platform administrators attending these sessions have taken the following recommended Genesys Beyond training courses:
 - Genesys Cloud: Implementation – Virtual Instructor Led Training (“VLT”).
 - Genesys Cloud: Contact Center Administration – VILT.
 - Genesys Cloud: Reporting and Analytics – VILT.
- If Customer will be configuring additional components onto the Genesys Cloud system, Customer will be required to have at least two staff members receive certification of the courses mentioned in the point above.
- Customer must review and update documentation based on any changes made during the go-live phase, to ensure that documentation accurately reflects the current state of the Genesys Cloud system and provides relevant information for users and support teams.
- Customer must ensure that all relevant documentation, including user manuals, FAQs, and technical documentation, is easily accessible to users and support teams. This documentation serves as a reference for troubleshooting and general usage.

7. Genesys Cloud DevOps Services

Genesys will provide the following services to assist Customer in managing multiple Genesys Cloud environments by orchestrating configuration leveraging the use of CX as Code with a CI/CD pipeline.

7.1. CX as Code QuickStart

This QuickStart will be delivered remotely as an interactive presentation to up to 8 attendees by one of Genesys’ Professional Services Automation Experts.

This presentation will cover the following:

- A summary of findings based on the pre-presentation discovery.
- Review Genesys automation tools, typical use cases & set-up.
- Deep dive into CX as Code including installation and best practices. This includes the available objects, how they relate to the customers Genesys Cloud configuration & reviewing samples.

At the end of the presentation, the attendees should be able to:

- Better understand how CX as Code enables a customer's CI/CD pipeline
- Ask the right questions pertaining to their unique configuration.
- Know how to evaluate and troubleshoot design

Assumptions

- Presentation will be conducted remotely.
- Recording is not allowed.

Pre-Requisites

- Customers who want to expand their understanding of how DevOps best practices fit into Genesys Cloud but have at least some DevOps awareness will find this presentation valuable.
- Conceptual understanding of Genesys Cloud configuration.

7.2. CX as Code Consulting

Engage 1-on-1 with a Genesys expert to get help with Genesys Tools for establishing or tuning your CI/CD pipeline, learn about Genesys Cloud Automation tools available to you such as Archy and/or Genesys Cloud CLI, discuss best practices around CX as Code, answer questions related to the available resources, get set-up for long-term success with the tool and get the support you need post-deployment.

Engagement Structure

Take the first or next step towards leveraging the suite of tools available for Genesys Cloud with a focus on CX as Code. This is a remote, up to 80 hours engagement over four continuous weeks including the following activities provided by a Genesys expert:

- Define – determine where you currently are, what your vision is and map your desired result.
- Education - Discussion around relevant DevOps tools, best practices, and Resource Center information at your disposal.
- Coaching - Coaching per requirements defined in at the beginning of the engagement. (Roles and Group Roles)
- Validation - Review of solution(s) against use case goals with documented steps to demonstrate functionality. This can include activities like:
- Provide consultation into your CI/CD development process by helping you map the pipeline, determine necessary tools & ensure the repositions are set-up properly.
- CX as Code Installation.
- Review of Genesys Cloud configuration & available objects.
- Fine tuning as needed with CX as Code.
- Troubleshooting initial run / result if needed with CX as Code.

Pre-Requisites

- Conceptual understanding of Genesys Cloud configuration.
- Ready to deploy CX as Code with available resources.
- Knowledge of basic DevOps practices.
- Proficiency with a code repository of choice (e.g. GitHub, Bitbucket).

Assumptions:

1. The customer will provide resources that are knowledgeable with the business, technical, and DevOps practices.
2. The customer is responsible for all internal and external cost incurred for all third-party systems relating to this project.
3. The customer is responsible for all work effort related to third party systems that are needed for integration with the Genesys Cloud system and associated tools.

4. Changes to Customer's systems or integration with any third-party software are not included unless specifically mentioned within this SOW.
5. Customer is responsible to provide SME on chosen CI/CD pipeline solution and establish CI/CD Pipeline (Jenkins, GitHub, Azure, AWS)
6. Customer is responsible for developing and managing any/all scripts needed to execute Genesys Automation tools.

8. Value Realization Program

The Value Realization Program is a strategic approach designed to ensure a successful transition to Genesys Cloud and accelerate measurable business outcomes. This integrated program is a critical workstream within the overall migration effort and is structured to support the initial Go-Live business group in the Customer's organization.

The program brings together four essential workstreams:

- Vision & Value Alignment
- Transformation Strategy
- Adoption Readiness
- Impact Measurement

Together, these workstreams drive executive alignment, define future state needs, prepare the organization for adoption, and measure the success of operational KPIs and customer experience improvements.

As part of this effort Genesys will provide the following documentation:

- Best Practices Recommendations
- Benchmark Data
- CX Innovation Recommendations
- Strategies and solutions for maximizing Customer's Genesys Cloud investment

As part of the Value Realization Program, Genesys will execute the following strategic and consultative activities:

- Lead program kick-off sessions to align stakeholders on goals, scope, and success criteria
- Gather business insights through surveys, workshops, and operational data analysis
- Facilitate stakeholder alignment sessions to define vision, KPIs, enablers, and success metrics
- Evaluate current-state operations and designing future-state business requirements in alignment with industry best practices
- Provide thought leadership and sharing insights from industry benchmarks, case studies, and innovative solutions to inform decision-making
- Assess organizational readiness for change and designing adoption strategies tailored to specific stakeholder groups and personas
- Develop a targeted communication plan to foster awareness, engagement, and leadership buy-in
- Establish KPI baselines and performing ongoing measurement of operational and customer experience improvements post-Go-Live
- Deliver recommendations for AI and automation opportunities to enhance performance and customer self-service capabilities

- Present executive-level readouts and strategic recommendations at key milestones to guide leadership decisions

8.1. Value Realization Deliverables::

- Vision & Value Alignment Readout (PowerPoint)
- Genesys Cloud Transformation Blueprint (Word)
- Stakeholder Mapping and Impact Assessment (PowerPoint)
- Change Readiness & Adoption Recommendations (PowerPoint)
- Project Awareness Communications Campaign (PowerPoint)
- KPI Baseline Report and follow-on Progress and Realization Reports (PowerPoint)
- Operational Optimization and AI Opportunity Reports (PowerPoint)
- Executive Summary Readouts (PowerPoint)

9. Project Closure

9.1. Customer Ownership and Transition to Support

Upon completion of the System Go Live described in Section 6 of this SOW, Customer will assume full ownership of the Genesys Cloud system. Genesys Customer Care will begin to provide break-fix assistance beyond the structured project support period.

9.2. Change Request Process

Any material enhancements, modifications, or additional requirements beyond the agreed scope will be subject to a formal Project Change Request ("PCR") process.

Customer Responsibilities

Genesys and Customer will provide project personnel to facilitate the performance of the tasks described in this SOW.

Genesys recommends that Customer provide resources for the following key roles:

- Business Sponsor (Co-Product Owner)
 - Articulate business vision
 - Identify and provide needed people and funding.
 - Oversee the successful deployment and adoption of Genesys Cloud
- Project Manager
 - Create the internal project scope and timeline.
 - Align and oversee participation of all needed people.
 - Collaborate with Genesys or Partner implementation project manager.
- Contact Center Admin (Designated Support Contact)
 - Setup and manage users, groups, call flows, queues, scripts.
 - Perform moves, adds, changes, and deletes.
 - Perform all troubleshooting and support for the internal team.
- IT & Network Admin (Designated Support Contact)
 - Ensure a robust network & environment free of any latency or jitters for Genesys Cloud connectivity and audio performance.
 - Understand and manage all system interdependencies.
 - Serve as the main Point of Contact for any LAN/WAN/telecom related issues.
- Contact Center Supervisor.
 - Manage and monitor call center personnel (agents)
 - Manage all scheduling, training, reporting, forecasting, KPIs.
- Contact Center Agent
 - Use the solution on a day-to-day basis.
- Developer (if integrating via APIs)
 - Web Developer familiar with JavaScript and REST based APIs
 - Integrate Platform API, Co-browse, Webhooks, Web Service Data Dip, etc.

Customer responsibilities will include, but not be limited to, the following activities during the project:

- Assign a Project Manager to serve as a single point of contact for Genesys.
- Provide support and assist Genesys in:
 - Having Customer stakeholders participate of the meetings organized by Genesys to gather functional and technical requirements.
 - Organizing meetings with any third-party vendors which are part of the overall solution.
 - Provide all integration requirements and details of Customer's systems.

- Provide soft copy of all necessary documentation, as requested by Genesys.
- Participate in “Transfer of Implementation Information” sessions.
- Provide testers that will be responsible for performing User Acceptance Testing of Genesys’ deliverables.
- Perform any development required on Customer’s back-end systems in support of the integration to Genesys Cloud.

Project General Assumptions

Genesys has used the following assumptions and dependencies in preparing this SOW. These assumptions are inextricably related to the pricing Genesys has made for these Services.

1. Genesys will work with Customer to accommodate schedule and project objectives. Work will be scheduled according to an agreed-upon start date. Genesys may require two (2) to six (6) weeks’ notice to staff this engagement after this SOW is signed and delivered to Genesys along with a supporting Purchase Order.
2. Customer will recognize the Genesys Project Manager as the main Genesys point of contact for this project. All issues or concerns must be communicated to the Genesys Project Manager who will address all issues and then forward to the appropriate resource for resolution.
3. Customer will appoint a single point of contact responsible for all communications and project management among all Customer parties (staff, vendors, consultants) and for the escalation and resolution of any issues for Customer.
4. It is expected that Customer meets responsibilities and provide resources as outlined in this SOW. Failure to meet these in a timely manner will need to be addressed through the Change Management section described in this SOW.
5. Custom voice recordings/prompts and/or translation services are not included.
6. Customer systems must meet minimum Genesys equipment requirements and recommendations as posted on <https://help.mypurecloud.com/articles/purecloud-requirements>.
7. It is assumed that all 3rd party systems to which Genesys Cloud will be integrating with will possess a RESTful interface and its documentation is available and up to date.
8. Customer’s back end systems should have a web service that meets Genesys Cloud’s data action requirements as described in the following link:
<https://help.mypurecloud.com/articles/requirements-for-the-data-actions-integration/>.
9. All Services, materials and communications are assumed to be delivered in English, unless otherwise specifically noted.
10. All services are to be delivered remotely, unless otherwise specifically specified.
11. Changes to Customer’s legacy systems or integration with any third-party software are not included unless specifically mentioned within this SOW.
12. Genesys cannot be held responsible for issues which arise from third-party applications or Customer network configurations.
13. Genesys solutions allows customers (Controllers) and Partners (Processors) to achieve compliance with global data privacy regulations such as GDPR, CCPA etc. It is Customer responsibility to assure compliance with all the laws. Any compliance specific requirements must be clearly communicated, scoped & documented within this SOW.

Change Management

Any of the following items will be considered out of scope and require a Change Order (Project Change Request or “PCR”):

1. Changes to scheduled dates after joint creation of the Release Plan.
2. Requests for additional work not defined within this SOW.
3. Changes to terms and conditions and/or scope language defined in this SOW.
4. Work outside of standard working hours for your region, up to eight (8) hours per day, forty (40) hours per week, weekend work, and/or holiday work, unless otherwise noted or agreed to.

Genesys, in collaboration with Customer will estimate the time and cost needed to implement the change and the impact it may have on the delivery of this SOW. Genesys will perform the requested work once the Change Order has been completed, approved and signed by Customer representative.

Project Milestone Acceptance

1. Customer will accept work items delivered by Genesys based on the acceptance criteria and the Definition of Done which are mutually agreed at the beginning of this engagement. The Definition of Done and each acceptance of work must be approved and signed off on in writing by the Vice President of Customer with ownership of this project.
 - a. For the avoidance of doubt the following shall be used as the definition of DoD:
 - i. A formal, agreed-upon set of criteria specifying exactly what constitutes a complete, acceptable deliverable, ensuring clarity, quality, and preventing disputes by defining measurable standards like testing, documentation, and designated customer stakeholder approval before work is considered finished and ready for release. It's a quality benchmark, acting as a checklist to confirm all necessary steps (e.g., code review, deployment, testing, documentation update) have been met for a feature or task to be truly "done," not just "in progress".
2. Customer shall have ten (10) business days, (the "Acceptance Period"), after the completion of each Epic or Sprint to evaluate all Services and Deliverables that were performed or produced during such Epic or Sprint. Customer shall, by the end of the Acceptance Period or earlier, send to Genesys either a written notice of acceptance or a written notice of rejections that includes a detailed description of any problems with the Services or Deliverables.
3. Upon receipt of the written notices of acceptance of Services and Deliverables that correspond to a Billing Milestone, Genesys will issue Customer an invoice for that Milestone.
4. If Customer fails to accept or reject a Deliverable during the Acceptance Period, such deliverables shall immediately be escalated to Customer management for decisioning. Notwithstanding the foregoing sentence, a deliverable shall be treated as accepted by customer if customer starts using the deliverable in a live production environment (other than as part of agreed review and acceptance testing procedure, such as UAT). For the avoidance of doubt, this includes UAT for multiple LOBs during a phased deployment.
5. If Customer rejects a Service or Deliverable for non-compliance of the mutually agreed upon technical and functional specifications ("Specifications") or the mutually agreed acceptance criteria and Definition of Done ("Acceptance Criteria"), Genesys shall have ten (10) business days, (the "Remediation Period"), to correct the problems and deliver the correction to Customer. The Acceptance Period shall then begin anew.
6. In the case the sign-off is not received within ten (10) business days, the instance will be escalated to the Customer System Director and Vendor Management team. Any delay in deliverables signoff, except when the deliverables do not meet the Specifications or Acceptance Criteria, may also have an impact on the cost and schedules of the project. Customer and Genesys will discuss the impact and follow the Change Request per the Agreement, if needed. If Customer, in its sole reasonable discretion, does not sign-off on acceptance of any Deliverable after a reasonable number of repeated attempts at delivery by Genesys, then Customer may terminate this SOW without penalty or further obligation (including without limitation without obligation to pay any additional or remaining fees).

Recruitment

During the term of this Agreement and for a period of one (1) year thereafter, each party shall not solicit the employment of any employee of the other party with whom the party has had contact in connection with the relationship arising under this Engagement. The preceding will not prohibit either party from engaging in general solicitation efforts, such as publishing newspaper or online advertisements and job postings, and/or contacting individual employees of the other party through "headhunters" (but not at the specific direction of the hiring party) or in response to resumes or job inquiries posted or instigated first by such employees.

Pricing

The Services described in this SOW are structured in a fixed price model and as such all fees and expenses for the services (not including travel and expenses) will be discussed and agreed with Customer, and only thereafter billed on a milestone-completion basis as determined by achieving the milestones set forth in the Payment Terms schedule below. Any expenses if agreed by Customer will confirm to the Expense and Entertainment policy guidelines defined in the Agreement.

Project Price	Investment
GC Migration and Transformation, includes:	\$1,045,000.00 USD
• Project Initiation • Discovery & Design • Genesys Cloud System Configuration • System Testing • Genesys Cloud Development System • System Go Live • Genesys Cloud DevOps Services • Project Closure	
Expected Expenses	\$0.00 USD
Subtotal	\$1,045,000.00 USD
Special Partnership Incentive	(\$170,000.00 USD)
Total	\$875,000.00 USD

Payment Terms

Milestone	Amount to be Billed
SOW Fully Executed (20%)	\$175,000.00 USD
Discovery & Design Complete, Project Plan Delivered (10%)	\$87,500.00 USD
System Configuration Complete - 6 BU's Ready for UAT (40%)	\$350,000.00 USD
UAT Support Complete (15%)	\$131,250.00 USD
Go-Live Support Complete (15%)	\$131,250.00 USD
Total	\$875,000.00 USD

1. Genesys will issue invoices in the amount indicated upon completion of the respective milestones mentioned above.
2. This document is valid for thirty (30) calendar days.
3. Travel and Expenses are NOT included and after Customer approval, are billed monthly, separately as incurred. Price does not include applicable VAT, sales or use taxes. All payments are to be made in the currency used by the Pricing section of this document.

Proposal Acceptance

I authorize Genesys Cloud Services, Inc. to deliver consulting Services and to invoice Customer for those Services as established in this Statement of Work. I have the authority to authorize these Services and payment thereof.

Genesys Cloud Services, Inc.: Signature: <u>Jordan Lee</u> Name Printed: <u>Jordan Lee</u> Title: <u>VP Customer Success</u> Date: <u>2/25/2026</u> SOW#: <u>982714</u>		Acme Retail Group: Signature: <u>Alex Morgan</u> Name Printed: <u>Alex Morgan</u> Title: <u>CIO</u> Phone: _____ Email: <u>alex.morgan@acmeretail.example</u> Date: <u>2/25/2026</u>	
☐ Yes ☐ No		PO Reference: _____ PO Amount: _____ PO Expiration Date (if applicable): _____	
SHIPPING ADDRESS _____ _____ _____ _____ Shipping Contact: _____ Shipping Phone: _____ Shipping Email: _____		BILLING ADDRESS _____ _____ _____ _____ Billing Contact: _____ Billing Phone: _____ Billing Email: _____	
Payment Terms:		VAT / GST STATUS If tax-exempt please attach tax certificate and include tax number: _____	

Appendix A: Genesys Cloud™ Terminology

The following table includes the most used terms for Genesys Cloud™ deployments and its corresponding definition for Genesys Cloud.

Term	Definition
Acceptance Criteria	A list of requirements that would need to be completed to justify business value.
ACD	Automated Contact Distribution (ACD) is a standard contact center term used to reference the system, device, or entity that automatically assigns waiting interactions to available agents using routing rules.
ACD Agent	These individuals are single contributors within an ACD Queue, responsible for servicing both the internal and external customers within the various business practices.
ACD Supervisor	These leaders are responsible for the ACD Agents productivity, enforcement of business practices, customer escalations and goal achievement, using monitoring and reporting tools.
ACW	After Call Work (ACW) is the work that an agent performs immediately following an interaction. Work may involve keying activity codes, updating customer databases, filling out forms, or initiating outbound contact. As a metric, it indicates the total time an agent takes to finish working on a call. If an agent must complete work before the agent can handle the next contact, then ACW is factored into the average handle time.
ANI	Auto Number Identification (ANI) is a service that allows you to see who is calling you when the phone rings. Genesys Cloud uses this information in several ways. In the contact center, Genesys Cloud uses ANI to match a caller with their Genesys Cloud contact record and display that record to the agent who receives the customer's call. ANI also allows Genesys Cloud to distinguish between the billing number and the telephone number of the caller. Finally, ANI identifies the origin of calls to emergency services.
Architect	Architect is an application that executes flows for the various media types that are supported by Genesys Cloud.
Auto-Answer	For SIP phones that support RFC 5373, the auto-answer feature enables incoming calls to be connected to the agent automatically.
ASR	Automatic Speech Recognition (ASR) is the translation of spoken words into text. ASR is also known as computer speech recognition or speech to text (STT).
Bullseye routing	Bullseye routing is a strategy in which the number of agents included in consideration for an interaction is expanded incrementally over a period of time. This strategy draws its name from the visualization of a bullseye target in which an interaction is queued for the most desired agents — or the center — but the pool of agents expands.
BPO	Business Process Outsourcer.
BYOC Cloud Trunk	A Genesys Cloud BYOC Cloud trunk is a customer-defined SIP Trunk between Genesys Cloud AWS-based Edge & Media Tier and a third-party system over the public Internet.
BYOC Premises Trunk	A BYOC Premises trunk is a SIP trunk that you configure between your premises-based Edge devices and a third-party system, either on your own network or over the public Internet.

Term	Definition
Call Data Action	A Call Data Action selects and sets up attributes for a custom data action configured previously by an administrator in Genesys Cloud. For example, use this action to retrieve specific attributes about a contact from a CRM database, such as name, address, contact numbers, account number, or account status. This action is available in the Data category of the task editor's Toolbox. When the flow runs, the data action sends input to a web service and retrieves data back from the web service. The flow then evaluates the data and continues as designed, based on the result of the evaluation.
Call Flow	A call flow is the organizational process, typically audio files and menu options, of the caller's experience prior to agent assignment. A call flow can be the inbound auto-attendant, an inbound or outbound IVR, or the call's in-queue handling.
CDM	CDM is an acronym for Cloud Deployment Model and indicates a Genesys Cloud environment where the Edge devices are hosted in the cloud. All Genesys Cloud Voice environments are CDM.
Demo	A meeting in which the features, functionality, and work items completed during the iteration/sprint are presented to the customer for feedback and/or acceptance.
Dialer	Software that utilizes customer provided call lists to instigate outbound calls to end-customers for the purposes of conducting business. The subsequent calls are then routed to ACD Queues and treated according to business practices defined by each ACD Queue.
DID	Direct Inward Dialing (DID) is a series of digits passed by the telecommunications service provider with an incoming call.
Division	A division is a separate unit that allows you to group and separate configurable objects but keep them inside the same organization. Divisions can be organized by business unit, office location, country, brand, or any other classification you define. In Genesys Cloud, administrators can move objects into divisions and then grant users access to specific objects based on access control. Configurable objects include users, queues, flows, outbound campaigns, contact lists, Do Not Call lists, and management units.
DNIS	Dialed Number Identification Service (DNIS) is the number dialed by the calling party.
Edge	The Genesys Cloud Edge is responsible for handling telephony events and media at the "edge" of the cloud network. The Edge provides media processing, SIP, and telephony services for the Genesys Cloud platform.
Epic	A high-level idea that usually requires one or multiple sprints to complete. Epics are usually broad in scope and short on details.
Evaluation Form	Evaluation forms are score cards that supervisors use to evaluate agent performance.
Feature	The high-level individual components that need to be completed for an Epic.
Go Live	Go Live is the moment in which the Genesys Cloud instance (Org) becomes operational and begins to route interactions to contact center agents and/or Genesys Cloud users.
Groups	Genesys Cloud Groups are communities within your organization based on common skills, relationships, locations, or other data contained in Genesys Cloud Collaborate profiles.
Idle	Idle is a routing status that represents agents who are On Queue and available to take interactions but are not working with interactions.
Iteration / Sprint	A time boxed interval, in which work is pulled into from the backlog with the agreement of the entire development team.

Term	Definition
IVR	Interactive Voice Response (IVR) is a telephony industry term that references the collective feature set of customer experience options pertaining to call flows, DTMF and speech entry, menus, and audio prompting. In Genesys Cloud, IVRs are built in Architect. IVR is also referred to as routing in Genesys Cloud.
Kanban Facilitator / Scrum Master	The facilitator for a delivery team. The Kanban Facilitator/Scrum Master manages the delivery model for how information is exchanged. This includes ensuring the team adopts the Scrum/Kanban framework, reporting on KPIs, and removing roadblocks for the development team to increase their velocity.
KPI	Key Performance Indicator.
LDM	LDM is an acronym for Local Deployment Model and indicates a Genesys Cloud environment where the Edge devices are physically located on the customer premises.
Line of Business ("LOB")	A Line of Business (or "LOB") is an organizational structure such as a department or team that produces and is responsible for costs.
Location	A location is a physical address where Genesys Cloud users are working from and is defined by an address. Location is also the address that emergency services use as the ANI for a call if this location is associated with a telephony site (Communicate and Engage – including Genesys Cloud Voice – customers only).
MVP	Minimal Viable Product- A tactic to seeing what people actually do with respect to the software- this is much more reliable than asking people what they would do or for a list of requirements without end users having accessed the system.
MPP	Minimal Marketable Product- this is the product with the least number of features that you consider has market value and can go to production.
One-party consent state	State that requires consent of only one party to be recorded. https://en.wikipedia.org/wiki/Telephone_call_recording_laws
PBX	A Private Branch eXchange (PBX) is a private telephone network used within an enterprise. It allows for the sharing of outside phone lines when placing external calls. A PBX saves money, as external lines are not connected to every phone.
Policies	Policies help you save time by automating repetitive quality management tasks, such as defining voice recording and agent desktop screen recording, assigning evaluations, or starting a calibration. Each policy defines a type of interaction and an action to take. For example, you can create a policy to assign an evaluation automatically for all interactions longer than 5 minutes.
POTS	Plain Old Telephone Service (POTS) is the basic supplying service for standard single-line telephones, telephone lines, and access to the public switched network. This service receives and places calls.
Product Backlog	A list of product backlog items (PBIs). PBIs are user stories that get added to the backlog, along with a rough estimate from the Team and an ordered priority from the product owner.
Product Owner	The Product Owner is the one person ultimately responsible for the return on investment (ROI) of the product development effort. The Product Owner influences the development effort by conveying his/her vision to the team and prioritizing the Product Backlog. The Product Owner must have the authority to make real business decisions, vision about what the product could be, and availability to the team.
Queue	A queue is a "waiting line" of interactions.

Term	Definition
Script	A script is the written words and logic an agent follows while processing a call. A script can contain multiple pages of narrative mixed with fields for updating data collected or updated by the agent. Scripts can be created for inbound or outbound interactions. In Genesys Cloud, scripts display editable records and directions to each agent that handles a particular type of interaction. Scripts present agents with details about the caller or contact, often with fields for collecting or updating information. Properly designed scripts ensure consistent handling of interactions.
SIP Trunk	A SIP trunk is a physical telecommunications circuit from a SIP carrier to an Edge device. The circuit is typically either Ethernet or fiber and is used to carry SIP call control and voice traffic to and from the carrier and customer. SIP trunks are usually designated in terms of overall bandwidth in MB, versus the total number of channels of capacity. Overall capacity of a SIP trunk depends upon the voice coder selection.
Site	A site is a list of rules for routing calls. Objects such as phones associated with a site share the same rules. When a user makes a call from a phone, the system looks up the site and the call type to route the call to the best outbound phone line, or endpoint. Phones that are associated with a site are usually located in the same general area and have the same general purpose.
Skill	A skill is a task, expertise, or knowledge that an agent must have to handle an interaction. For example, skills might be Linux, Windows, billing, or sales. Agents with assigned skills can have proficiency ratings for those skills. Proficiency ratings indicate the agent's level of expertise or knowledge of that skill. Genesys Cloud ACD considers proficiency ratings when matching agents and interactions.
Sprint	A time boxed interval, in which work is pulled into from the backlog with the agreement of the entire development team.
Sprint Review	A meeting in which the features, functionality, and work items completed during the sprint are presented to the customer for feedback and acceptance.
Subject Matter Expert ("SME")	Person who is an authority on a particular topic.
Task	Tasks (or task actions) are used to build complex IVR options. A task action groups related steps of a process together to create a flow routine. A process is made up of the tasks involved, the sequence of those tasks, and the actions that exist between them. Place tasks under states (in email and message flows) and menus (in call flows). In call flows, menu choices contain common settings such as DTMF and speech recognition. You can reuse tasks within the same flow.
Trunk	A trunk is a link to a communication provider. A trunk can be a gateway, a long-distance line, a SIP carrier, or any other type of entity that brokers contact between the Edge and the outside world. A trunk must be physically connected to an Edge.
TTS	Text-To-Speech (TTS) uses speech synthesis to convert written words to a voice (audio) output.
TUI	The Telephone User Interface (TUI) allows you to check voicemail and set options directly on your phone.
Two-party consent state	States that require that all parties consent to the recording. https://en.wikipedia.org/wiki/Telephone_call_recording_laws
User Story	The user requirements that outline the objective that needs to be complete to satisfy the end users need. It typically includes acceptance criteria and tasks that need to be completed to complete the user story.

Term	Definition
WebRTC	WebRTC (Web Real-Time Communications) is a set of technologies that allow web browsers and mobile phones to send voice and video to each other with no additional software installations. Several Genesys Cloud features, such as the Genesys Cloud WebRTC phone use this technology.

For a complete list of terms and definitions, please refer to the following Genesys Resource Center articles:

- <https://help.mypurecloud.com/glossary/>
- <https://help.mypurecloud.com/articles-table-of-contents/>

Appendix B: Governance Structure & Meeting Cadence

Genesys has a governance model that ensures accountability and transparency while providing the guardrails to navigate complex deployments, ensuring issues are proactively managed.

Key elements of our framework include:

- **Executive Governance:** Quarterly Executive Forums and Steering Committee meetings provide high-level strategic guidance and decision-making.
- **Operational Governance:** Monthly Design Authority & Change Boards manage technical and architectural decisions. Regular SCRUMs ensure agile delivery, and daily stand-ups keep the teams aligned on progress.
- **Communication Channels:** Dedicated forums for design reviews, release management, and quality assurance foster transparency. Real-time updates and structured retrospectives enable continuous improvement.
- **Risk and Dependency Management:** Structured approach to identify, track, and mitigate risks, with clear escalation paths to maintain momentum.

