Improving global customer and employee engagement using advanced routing

How PayPal relies on a single customer experience platform from Genesys to differentiate customer service and manage explosive growth

A global financial and technology company operating in more than 200 markets worldwide, PayPal is an online payments system offering electronic alternatives to traditional paper methods like checks and money orders. The company enables global commerce, allowing customers to pay and get paid in more than 100 currencies, withdraw funds to their bank accounts in 57 currencies, and hold balances in their PayPal accounts in 26 currencies. In 2015, PayPal supported more than $80 billion in payments per quarter, including nearly 5 billion transactions, 28% of which were completed via mobile. And these numbers continue to grow.

The PayPal motto is “we put people at the center of everything we do.” When issues arise, they know they need to be available to help in whatever channel the customer chooses. To make good on this promise, more than 11,700 PayPal agents, called “teammates,” use the Genesys Customer Experience platform to service more than 188 million consumers and 13 million merchants around the globe. Genesys provides the flexibility and stability PayPal needs to drive innovation at scale, while creating a frictionless experience to quickly resolve problems.

In the face of double-digit growth, the proprietary PayPal routing platform had significant scale limitations. Tied to the specific region where the PBX was located, the platform couldn’t support global demand and increasing interaction volumes. In addition, in-house development and maintenance were expensive.

Without advanced skills-based routing, customers could not be efficiently matched to the right teammate and multiple transfers and long hold times frustrated both customers and teammates. PayPal also lacked customer case visibility between front- and back-office activities, as well as key data insights for performance.
monitoring, reporting, and forecasting which made it hard to service customers effectively and efficiently.

PayPal needed a flexible, scalable platform that would support their business growth, improve business process efficiencies and enable differentiated customer experiences around the world.

Two new service centers in three months

In a very short timeframe, PayPal evolved from a start-up focused on peer-to-peer payments to an online retail payments player. When eBay bought PayPal in 2002, the business exploded, with double-digit growth, year after year. The growth was so great that in 2014 PayPal decided to separate from eBay. They were given only nine months to divide the company, three to four months of which were dedicated to executing the plan for the new service centers.

By leveraging the software-based architecture of Genesys, PayPal was able to seamlessly transition the business and easily pivot, building-out two Genesys Data Center installations —from scratch—in only three months (allowing enablement of 44 customer engagement centers). Within 30 days of the integration request, Genesys capabilities were fully enabled to support voice and case contacts. The Genesys Customer Experience platform enabled PayPal to fully integrate five legacy systems and consolidate all customer interactions in a single view. Using the Genesys softphone control, PayPal easily merged the new platform with their desktop application, simplifying rollout and adoption, and improving functionality of existing solutions without the need for team re-training.

Single customer experience platform as foundation

Genesys provides PayPal with a fully blended, global customer experience platform that manages all customer interactions and works items easily and flawlessly anywhere around the globe and consolidates all customer interactions in a single view for team members. The single agnostic platform increases visibility and provides team members important customer context by linking front- and back-office activities, and incorporating case management and fraud oversight controls across multiple communication channels, including voice, email, and internal chat. By consolidating all customer interactions in a single view, teammates now have full transparency into a customer’s transaction history.

Through advanced, skills-based global routing, Genesys automatically prioritizes and distributes cases to the appropriately skilled resources, getting customers to the right teammate the first time, which ensures issues are resolved as quickly as possible. By blending all channels into a single platform, PayPal can now easily match the highest value customers to the most suitable employees, regardless of location, and deliver the highest level of customer satisfaction.

“The scalability and flexibility of the Genesys customer experience platform and blended routing has been absolutely critical to our success,” said Brad Strock, PayPal’s CIO. “Now we can service customers when they need us, in the channel that they need us, at the time that they need us—in 200 markets around the globe and in 24 different languages, efficiently and effectively.”

PayPal also relies on Genesys Chat as an internal tool to escalate issues to teammates and supervisors, as well as SMS and voice outreach for proactive customer care and customer notifications.

When PayPal began the Genesys partnership in 2010, they were handling approximately 80,000 voice contacts and 100,000 email cases per day. Today, Genesys helps PayPal effectively and proficiently route 150,000 voice contacts, 50,000 emails, and about 50,000 back-office cases per day.

Managing the business with global visibility across channels

“Prior to working with Genesys, half of our business was largely invisible to us. We weren’t able to forecast and manage the business effectively,” said Dar Andrews, Senior Director of Service Delivery and Engineering at PayPal. “Genesys gave us the ability to better manage and understand all of our channels and teams globally.”

In addition to using Genesys intelligent Workload Distribution (iWD) to route interactions and work through front-office channels, PayPal has also taken advantage of the robust suite of APIs to improve back office case management. Previously, teammates would cherry pick tasks to work on. Now PayPal can easily prioritize and assign tasks to the back office teammate best suited to handle the work. Integrating existing systems has optimized workflow and improved understanding of customer history and needs, leading to faster resolution and new levels of efficiency.

“Having visibility into all of our work types, and all of the resources available to work those tasks, is a significant improvement over our past operations,” says Strock.

“Having one point of truth for average handle time, contact volumes, and SLA scoring, and customer supports that need, well.”

Dar Andrews
Senior Director of Service Delivery and Engineering
“The Genesys customer experience platform with its scalability, flexibility and blended routing is absolutely critical to our success. Now we can service customers when they need us, in the channel that they need us, at the time that they need us—in 200 markets around the globe and in 24 different languages efficiently while delivering world-class customer service.”

**Brad Strock**, CIO

PayPal also has more visibility into what teammates are working on and can manage the business by leveraging true multi-channel reporting from Genesys Info Mart, which also helps them improve scheduling for global coverage. Thanks to Genesys, PayPal has consolidated 10 sources of reporting into one view. As a result, they are able to integrate mergers and acquisitions more efficiently, and accurately measure and forecast the business in ways that weren’t possible before.

“Across the board, Genesys provided the platform that we needed to really see PayPal move to the next level,” said Andrews. “It was a huge game changer.”

“Having one point of truth for average handle time, contact volumes, and SLA has been a major benefit to PayPal operations. The ease with which Genesys allows us to extract data into our data warehouse—merging contacts, NPS scoring, and customer activity metadata—was equally critical to us. PayPal is a data-driven company that requires accurate and timely management. Genesys supports that need, well.” said Andrews.

**RESULTS**

**30 points**
Consistent improvement in NPS scores—with an increase of 30 points in some markets

Reduced handle time and transfers with advanced skills-based global routing

Enabled more insight for accurate forecasting and workload distribution

**33%**
Helped reduce teammate attrition by roughly 33%

**24/7**
disaster recovery

**Customer engagement vision now a reality**

The new level of advanced skills-based global routing has reduced handle time and transfers, dramatically reducing customer frustration. Net Promoter Scores (NPS) are showing consistent improvement, with an increase of 30 points in some markets.

“Genesys is really powerful,” said Andrews. “It’s more efficient, more cost-effective and supports the delivery of better service which has resulted in better customer satisfaction.”

Genesys has also contributed to creating an environment that’s more fulfilling for teammates, who are now getting interactions and work items they’re best fit to resolve. In fact, retention has improved consistently over the last six years, reducing hiring and training costs. PayPal teammate attrition rates are roughly 1/3rd better than they were pre-Genesys (in the 2009/2010 timeframe).

Compared to the previous, regionally based system, the global platform supports disaster recovery with 24/7 availability. PayPal can easily redirect customers to other parts of the globe to effectively handle contacts in the case of a snowstorm, tropical storm, or other weather-driven events.

“Genesys provides excellent flexibility and is very easy to work with,” said Andrews. “Administratively, from a sales perspective, and from a support perspective, Genesys is a role model company.”

Strock concluded, “Technology is not only driving innovation. It is driving business strategy. The technology platform choices that we make are strategic and critical, and we’re looking to Genesys as a provider of a key strategic platform to help us continue to innovate with new services and capabilities for our consumers and merchants.”

**ABOUT GENESYS**

Genesys® powers more than 25 billion of the world’s best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes. Genesys on-premise and cloud solutions are built to be fluid, instinctive and profoundly empowering. Combining the best of technology and human ingenuity, we work the way you think.

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