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Genesys Training

2 days (14 hours)

Overview

Genesys is a customer experience and contact center platform designed to unify channels, streamline routing, and improve customer relationships. With its queues, omnichannel journeys, APIs, and automation capabilities, Genesys enables more efficient and consistent interactions.

Our Genesys training will equip you with the essential fundamentals to understand the ecosystem, the logic behind interaction distribution, and the role of key configuration objects.

You'll learn to identify the key components of a Genesys solution, work with concepts such as queues, channels, routing, and interaction tracking, while gaining a clear understanding of business use cases.

By the end of the training, you'll be able to better configure the fundamentals, monitor the handling of customer requests, and communicate more effectively with technical and operational teams.

This training also covers best practices for configuration, omnichannel logic, performance metrics, and key considerations for deploying Genesys in a production environment.

Like all our training courses, this one will introduce you to **the latest stable version** of the technology and its new features.

Objectives

- Understand Genesys' role in a customer relationship environment.

- Identify the main components of an omnichannel platform.
- Master the concepts of routing, queues, and interaction handling.
- Learn the basics of configuration and functional administration.
- Monitor customer interactions using monitoring and reporting mechanisms.
- Apply best practices for reliable use in an operational context.

Target Audience

- CRM Administrator
- Customer Relationship Project Manager
- Contact Center Manager
- Application Support
- Business Analyst

Prerequisites

- General knowledge of customer relationship and contact center challenges.
- Basic understanding of CRM and the organization of processing workflows.
- Basic understanding of voice, email, and chat channels.
- Initial experience with an application administration or monitoring tool.

Technical Prerequisites

- A recent computer with an up-to-date web browser to access the training environment.
- A stable Internet connection, preferably via Ethernet or a reliable Wi-Fi network.
- A headset with a microphone for any discussions in the virtual classroom.
- A demo environment or login credentials provided in advance by the instructor.

Genesys Training Program

[Day 1 - Morning]

Introduction to Genesys and its ecosystem

- Understand Genesys' role in customer relationship management.
- Identify the main functional components of a contact center platform.
- Distinguish between the main supported communication channels.
- Identify basic objects, such as agents, queues, and interactions.
- Understand the general logic behind request routing.
- Hands-on workshop: guided tour of a Genesys interface and identification of key components.

[Day 1 - Afternoon]

Managing interactions and queues

- Understand how a queue works and its relationship to agents.
- Learn the rules for distributing interactions based on agent availability.
- Exploring the concept of priority and handling incoming requests.
- Introduce the differences between voice and digital channels.
- See how to track the status of an interaction from start to finish.
- Hands-on workshop: basic queue configuration and simulation of interaction routing.

[Day 2 - Morning]

Configure the functional basics

- Discover the basic settings of a Genesys organization.
- Understand the role of profiles, skills, and groups.
- Understand the principles of skill-based routing.
- Identify useful settings to tailor the service to business needs.
- Understand how a configuration impacts the agent and customer experience.
- Hands-on workshop: Creating a simple routing scenario with business criteria.

[Day 2 - Afternoon]

Monitoring and operating the solution

- Understand activity and performance metrics.
- Learn the basics of reporting and monitoring.
- Identify control points to ensure reliable day-to-day operations.
- Adopt best practices for communication between business and technical teams.
- Review the key elements for preparing to deploy the solution in a production environment.
- Hands-on workshop: analysis of a complete use case, from routing to performance monitoring.

Target Audience

This training is intended for both individuals and companies—large or small—that wish to train their teams in new, advanced IT technologies or to acquire specific business knowledge or modern methods.

Prerequisites for the training

The assessment conducted upon enrollment complies with Qualiopi quality standards. Upon final registration, the learner receives a self-assessment questionnaire that allows us to evaluate their estimated proficiency with various types of technology, as well as their expectations and personal goals for the upcoming training, within the limits imposed by the selected format. This questionnaire also allows us to anticipate certain connection or internal security issues within the company (intra-company or virtual classroom) that could pose challenges for monitoring and ensuring the smooth operation of the training session.

Teaching Methods

Hands-On Training: 60% Practical, 40% Theoretical. Training materials distributed in digital format to all participants.

Organization

The course alternates between theoretical input from the instructor—supported by examples and reflection sessions—and group work.

Assessment

At the end of the session, a multiple-choice quiz is administered to verify that participants have successfully acquired the skills.

Certification

A certificate will be issued to each trainee who has completed the entire training program.