

Total Economic Impact

# The Total Economic Impact™ Of CX Cloud

## Cost Savings And Business Benefits Enabled By Genesys And Salesforce

A FORRESTER TOTAL ECONOMIC IMPACT STUDY COMMISSIONED BY GENESYS AND SALESFORCE, DECEMBER 2025

The Forrester logo is displayed in white, serif, all-caps font within a black rectangular box. The box is positioned on the left side of a large, abstract graphic that features flowing, organic shapes in various shades of green and teal, set against a solid black background.

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## Executive Summary

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**Every customer interaction represents an opportunity for enterprises to drive measurable outcomes, improve the customer experience, and create lasting business value. By unifying formerly disparate platforms and leveraging AI capabilities, CX Cloud from Genesys and Salesforce optimizes those customer interactions by reducing agents' administrative work and allowing customer service representatives to focus on higher-value conversations that drive loyalty, efficiency, and growth.**

CX Cloud from Genesys and Salesforce (CX Cloud) is a joint product offering that combines two key platforms together into one integrated solution — an enterprise-level contact center platform in Genesys Cloud together with Salesforce. CX Cloud helps enterprise organizations modernize their contact center operations with time-saving artificial intelligence (AI) features and visibility into a unified customer dataset. For example, customer service representatives can easily view account health and customer interaction data from Salesforce's Data 360 (formerly Data Cloud), which can better inform their customer approach and provide valuable context for any upsell or cross-sell opportunities. These features help companies create efficiencies within the customer experience (CX) organization and provide significant cost savings.

Genesys and Salesforce commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying CX Cloud.<sup>1</sup> The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of CX Cloud on their organizations.

**266%**

**Return on investment (ROI)**

**\$10.8M**

**Net present value (NPV)**

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed five decision-makers with experience using CX Cloud from Genesys and Salesforce. For the purposes of this study, Forrester aggregated the experiences of the interviewees and combined the results into a single composite organization: a global supply company headquartered in the US, with \$2.5 billion in annual revenue and an average of 80,000 customer interactions each week.

Interviewees said that prior to using CX Cloud, their organizations used legacy on-premises technology that was siloed and costly to maintain. These previous systems often lacked integration with other CX platforms. With the disconnected nature of their customer experience technology stack, interviewees noted that agents had to toggle between different systems and often had to create manual, error-prone workarounds to accomplish daily tasks. As a result, interviewees were stuck with a costly system that was frustrating to use, was not customer-centric, and did not allow their organizations the opportunity to scale for future growth.

After investing in CX Cloud, the interviewees were able to generate significant cost savings by retiring legacy systems for the customer experience team. Their organizations were also able to improve agent productivity by decreasing mean time to resolution (MTTR), augmenting self-service capabilities for customers, and leveraging agent assist tools so that customers could get personalized, quality service with an efficient level of involvement from live agents.

### Key Findings

**Quantified benefits.** Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Retired legacy systems and moving to a cloud solution helps to save the composite organization nearly \$2 million over the three-year period.** The composite is able to sunset its legacy telephony, workforce management, call recording, and transcription platforms in favor of the unified CX Cloud offering. In addition to saving costs for the platforms themselves, the composite organization is also able to save on IT developer and management costs that it otherwise would have spent to maintain its legacy systems.
- **Increased customer interactions in the self-service channel by 10%, which saves money and improves CX team productivity.** The composite organization is able to increase the sophistication of its self-service channels — such as chatbots and automated SMS messaging — and complete more customer interactions within this channel. This frees up live agents to dive into higher-

level work, such as train-the-trainer sessions and onboarding new customer service representatives. This productivity lift also eases the burden of backfilling for inevitable attrition, and it speeds up employee onboarding for seasonal peaks where the composite is looking to maximize resources within its live agent team. The composite is able to save \$4.9 million over the three-year financial period.

- **Reduced MTTR by 2 minutes per live agent-customer interaction and created efficiencies for the CX team.** By leveraging the tools within the CX Cloud solution, the composite organization is able to improve live agent performance and shorten the time it takes to resolve customer issues. Improved training, better live coaching, and increased access to relevant customer information helps agents to alleviate customer concerns more quickly. These improvements save the composite organization more than \$2.6 million in each of the first three years that CX Cloud is implemented.
- **Enabled new incremental sales using agent assist technologies, with an estimated impact of 1.5% to revenue and margin.** Customer service agents at the composite organization can better capitalize on upselling and cross-selling opportunities by having the right information at their fingertips when interacting with a customer. The composite sees a revenue and margin boost of 1.5% over the three-year financial period, which is valued at \$1.4 million to the composite organization over the three-year period.

**Unquantified benefits.** Benefits that provide value for the composite organization but are not quantified for this study include:

- **Improved customer satisfaction.** The composite organization sees its customer satisfaction (CSAT) scores increase across its various channels after implementing CX Cloud. The solution helps to train agents more thoroughly, so they can address customer needs in a more comprehensive way. The improvement and increased personalization of the self-service channel is also something that customers appreciate because it's a fast, low-lift way to get their questions answered, allowing them to move on with their day.
- **Enhanced agent performance.** With CX Cloud, customer service agents at the composite organization have a tool that gives them access to a broad set of customer insights and data, all of which is much more comprehensive than what they had with their legacy platform. With deeper insights and streamlined processes for information gathering, agents can focus more of their attention on customer interactions, leading to improved performance, increased job satisfaction among customer service representatives, and decreased agent turnover.
- **Streamlined data entry to decrease errors and improve compliance.** Automated data entry processes and having a streamlined customer service solution reduces agent errors at the composite organization. This consistent data entry accuracy helps to improve operational insights and avoid excess compliance and audit costs. The composite organization's auditors do not need to spend as much time evaluating the CX organization, cutting back on administrative paperwork by 20%.

**Costs.** Three-year, risk-adjusted PV costs for the composite organization include:

- **CX Cloud solution costs.** The composite organization pays for CX Cloud solution costs, which includes the Genesys Cloud licenses, the Salesforce Voice licenses, and the Genesys Salesforce connector licenses. The annual cost of the solution licenses totals \$882,000.
- **Implementation and deployment costs.** The composite organization assigns a resource team to work on implementation prior to the start of the three-year financial modeling period. Implementation takes 10 weeks and totals \$1.3 million.
- **Ongoing resources and management costs.** Five individuals at the composite organization are responsible for ongoing CX Cloud management during the three-year financial period. These resources spend 30% of their time managing CX Cloud, with a total cost to the composite organization of \$555,000 over three years.

The financial analysis based on customer interviews found that a composite organization experiences benefits of \$14.8 million over three years versus costs of \$4.1 million, adding up to a net present value (NPV) of \$10.8 million and an ROI of 266%.

*"The biggest thing that we saw [before CX Cloud] was agents that always had to flag down a supervisor. And now we don't need to do that. In most cases, you have a level of AI coaching and AI assist that will handle most levels of problems."*

**Global director of IT, industrial supplies**

Key Statistics

266%

Return on investment (ROI)

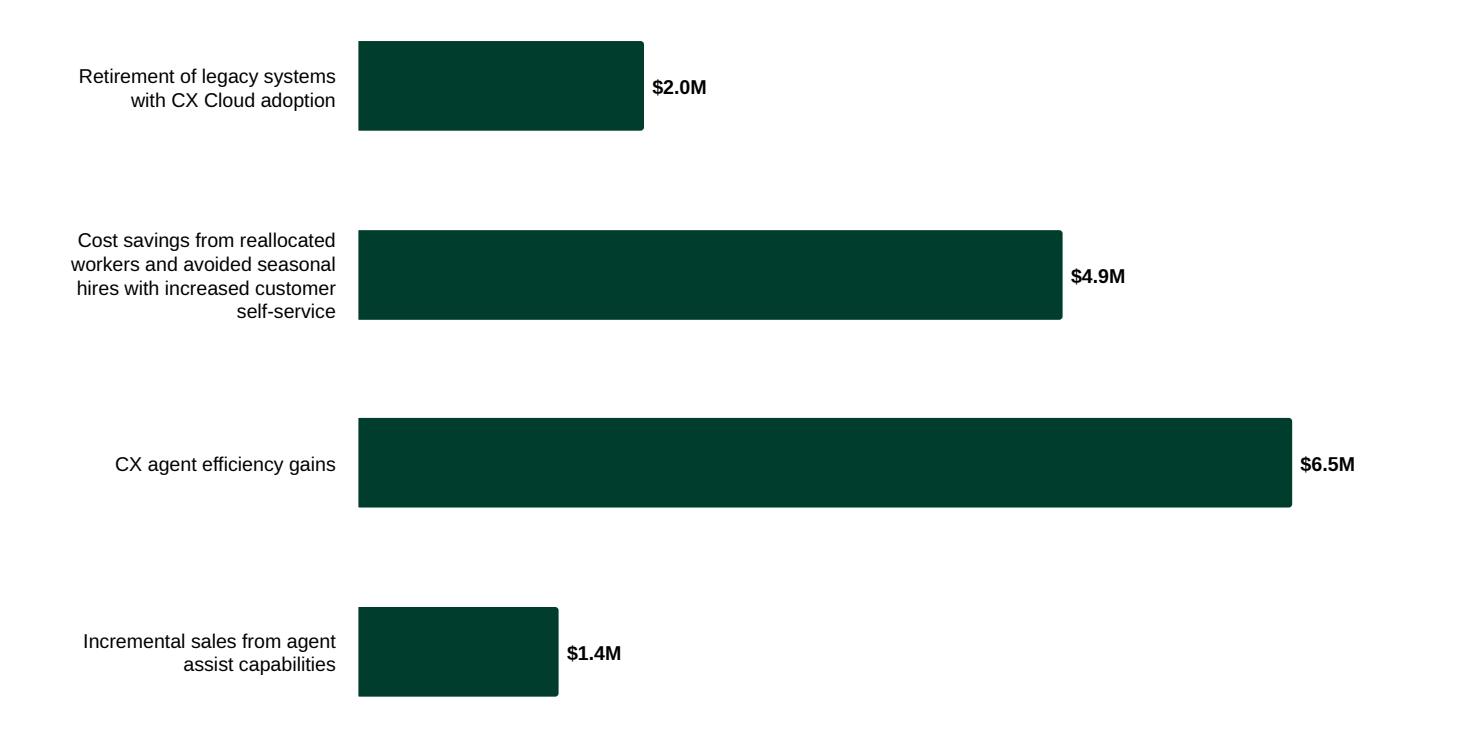
\$14.8M

Benefits PV

\$10.8M

Net present value (NPV)

Benefits (Three-Year)



# The CX Cloud Experience

Drivers leading to the CX Cloud investment

Interviews			
Role	Industry	Annual Revenue	Employees
CTO	Insurance	\$1.1 billion	Total: 700 CX: 50
Senior director of customer experience	Manufacturing	\$3.7 billion	Total: 18,000 CX: 340
Head of revenue intelligence	Technology	\$73 million	Total: 700 CX: 65
Global director of IT	Industrial supplies	\$1.3 billion	Total: 1,845 CX: 650
Customer experience manager	Healthcare	\$100 billion	Total: 66,000 CX: 4,000

## Key Challenges

Interviewees had numerous challenges with their legacy systems. Without integrated, cloud-based solutions in place, interviewees had to adopt costly and time-consuming approaches within their contact center operations. These inefficiencies could trickle down to the customer. For example, slow issue resolution could result in higher customer abandonment rates and fewer purchases.

Interviewees noted how their organizations struggled with common challenges, including:

- **Legacy on-premises systems were expensive, inefficient, and hard to scale.** Costly and siloed systems made it difficult to train new agents and identify areas for performance improvement. Interviewees found that it was challenging to maintain visibility into customer data and scale to meet changing customer demands. The customer experience manager from the healthcare organization described the difficulties and the expense of having a siloed set of systems in place: “For us, it was millions of dollars every year that we were spending on all those old technologies and tools. There was a lot of cost to maintain these technologies, keep them compliant, and add to them without massively overhauling the functionality.”
- **Agents and operations teams used manual and error-prone processes.** Manual data entry and clunky audit and internal reporting processes created inefficiencies, produced excess costs, and introduced errors. The CTO from the insurance company summarized these issues: “There were clear opportunities to massively improve the experience that we delivered to customers with a more integrated solution that could really streamline our internal processes. That way, our internal team could just focus on the customer, rather than having to copy, paste, search, and do all of the manual steps they had to do when managing a call in our in our previous setup.”
- **Customer experience suffered from inconsistent service quality.** With legacy technology in place, interviewees noted that call drop and abandonment rates were high. Many customers weren’t getting their questions answered and issues resolved in their first outreach attempt. Since agents couldn’t access a unified customer dataset, they often lacked the resources to effectively assist customers themselves or route calls to the appropriate agents, which made the customer experience suboptimal.

*“[Our legacy system] was costing us way too much for a really poor experience for the customer — to the tune of hundreds of thousands of dollars.”*

Senior director of customer experience, manufacturing

*“Our previous system was more or less an old switchboard that the agents were using. When we did reporting, we had to do CSV exports and try to piece information together. It was horrible.”*

Head of revenue intelligence, technology

## Composite Organization

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the interviewees' organizations, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

- **Description of composite.** The composite is a global supplier with \$2.5 billion in annual revenue. While the organization is headquartered in the US, it operates globally, serving a large customer base with 600 customer service agents. The composite's average weekly interaction volume (including both agent and self-service) totals 80,000, with each interaction lasting 12 minutes, on average.
- **Deployment characteristics.** The composite organization begins using the solution in Year 1, following a brief 10-week implementation period. The company uses 400 concurrent licenses of the CX Cloud solution to cover its 600 agents who operate across different time zones and different contact center shifts. The implementation covers all geographies in which the composite organization operates.

### KEY ASSUMPTIONS

- \$2.5 billion revenue
- 10,000 employees
- 600 contact center agents
- 80,000 weekly interaction volume

## Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Retirement of legacy systems with CX Cloud adoption	\$646,000	\$883,500	\$883,500	\$2,413,000	\$1,981,225
Btr	Cost savings from reallocated workers and avoided seasonal hires with increased customer self-service	\$1,980,160	\$1,980,160	\$1,980,160	\$5,940,480	\$4,924,365
Ctr	CX agent efficiency gains	\$2,620,800	\$2,620,800	\$2,620,800	\$7,862,400	\$6,517,542
Dtr	Incremental sales from agent assist capabilities	\$570,000	\$570,000	\$570,000	\$1,710,000	\$1,417,506
	Total benefits (risk-adjusted)	\$5,816,960	\$6,054,460	\$6,054,460	\$17,925,880	\$14,840,638

### Retirement Of Legacy Systems With CX Cloud Adoption

**Evidence and data.** Interviewees discussed their companies' legacy systems that were costly to maintain and operate. With CX Cloud in place, organizations were able to generate significant cost savings due to the lower overall cost compared to their previous contact center technology stack.

- The customer experience manager of the healthcare company explained some of their early reasoning in choosing CX Cloud and how that came to benefit their organization from a cost savings standpoint: "We came to the conclusion that going down [the Genesys and Salesforce] path was faster and better for us. We wouldn't have to go through the effort of maintaining the customized connector between our old systems, and this solution will be functional for us out of the box. We've even created a consortium of Salesforce and Genesys product team members to discuss additional features that we're looking to add to CX Cloud."
- The CTO of the insurance company described how their management and run costs are lower now that they have CX Cloud. They said, "We now have about a 30% lower annual run cost for licenses and operating activity on the SaaS environment than we had on our on-premises environment."

**Modeling and assumptions.** Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization is able to finish sunsetting its legacy telephony platform in the middle of Year 1, so it only realizes half of the retirement savings that it experiences in Years 2 and 3.
- The reduced developer effort is based on more than 2,400 hours of development work at the composite at a fully burdened hourly rate of \$94.
- The reduced management effort is based on more than 1,500 hours of management work at the composite at a fully burdened hourly rate of \$65.

**Risks.** The following risks could impact the legacy systems retirement benefit:

- Legacy platform costs can vary, depending on contract and pricing specifics of previous provider.
- Developer and management cost savings depend upon resource experience level and hours required.
- If a third party performs developer and management tasks, modeled cost savings could vary.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 5%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$2.0 million.

\$2.0 million

Cost savings over a three-year period from retiring legacy systems

*“If you look at our situation from an annualized cost savings perspective — what we would have been spending to manage our old system in comparison to what we’re spending on our new system — we’re saving over \$100,000. So you’re getting savings and you’re getting a better experience out of it for the customer.”*

Senior director of customer experience, manufacturing

Retirement Of Legacy Systems With CX Cloud Adoption					
Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	Cost savings from retirement of legacy telephony platform	Composite	\$250,000	\$500,000	\$500,000
A2	Cost savings from retirement of legacy applications (workforce management, call recording, call transcription, and others)	Composite	\$100,000	\$100,000	\$100,000
A3	Reduced development effort required for integration of legacy systems with CRM	Composite	\$230,000	\$230,000	\$230,000
A4	Reduced legacy platform management effort	Composite	\$100,000	\$100,000	\$100,000
At	Retirement of legacy systems with CX Cloud adoption	A1+A2+A3+A4	\$680,000	\$930,000	\$930,000
	Risk adjustment	15%			
Atr	Retirement of legacy systems with CX Cloud adoption (risk-adjusted)		\$646,000	\$883,500	\$883,500
Three-year total: \$2,413,000			Three-year present value: \$1,981,225		

Cost Savings From Reallocated Workers And Avoided Seasonal Hires With Increased Customer Self-Service

**Evidence and data.** The interviewees’ organizations were able to achieve significant cost savings by increasing their customers’ ability to self-service.

- CX Cloud helped the interviewees’ organizations to increase customer issue resolution through automated channels, giving them the ability to reallocate live agents or avoid hiring additional agents during seasonal peaks.
- The head of revenue intelligence for the technology company said: “[Our company experienced] quite a heavy deflection rate [with the help of CX Cloud], I think up toward 60%. We got similar types of questions from customers, and we were able to fetch data and present it straightaway to the customer inside the IVR [interactive voice response].”
- The global director of IT for the industrial supplies company discussed how the improved self-service capabilities have benefitted their organization: “Previously, you would have a customer engage with a dumb chatbot, and then maybe it helps them, but maybe it doesn’t. ... Now, you have an intelligent chatbot, and you have an automated SMS response within 10 minutes. That says to the customer that they matter. And customers are more likely now to use the self-service model than speak to a live agent, because they know that they’re getting an intelligent response. We’ve seen the self-service model increase by 30% just since we deployed the solution.”
- The CTO of the insurance company detailed how their organization utilizes the cost savings from increased customer self-service: “There has been some agent deferral and attrition-based reduction without replacement. So while this type of benefit has some marginal savings, we’re largely just using that to reinvest in the customer experience.”



**Modeling and assumptions.** Based on the interviews, Forrester assumes the following about the composite organization:

- Full-time agents at the composite organization are assumed to work a 40-hour week.
- The fully burdened hourly rate for a customer service representative is \$28.

**Risks.** The following risks could impact the cost savings from the reallocated workers and avoided seasonal hires benefit:

- Salary figures for customer service representatives could vary based on agent experience.
- Customer service interaction volume could vary at different points throughout the year based on business seasonality.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$4.9 million.

10%

Improvement in self-service completion rate with CX Cloud

Cost Savings From Reallocated Workers And Avoided Seasonal Hires With Increased Customer Self-Service					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	Average total interactions (agent and self-service) per week before CX Cloud	Composite	80,000	80,000	80,000
B2	Self-service completion rate before CX Cloud	Composite	15%	15%	15%
B3	Average self-service interactions resolved per week before CX Cloud	B1*B2	12,000	12,000	12,000
B4	Self-service completion rate with CX Cloud	Interviews	25%	25%	25%
B5	Average self-service interactions resolved per week with CX Cloud	B1*B4	20,000	20,000	20,000
B6	Average increase in self-service interactions resolved per week with CX Cloud	B5-B3	8,000	8,000	8,000
B7	Time saved from increased self-service completion (FTEs)	(B6*52* (B2/60))/2,080	40	40	40
B8	Fully burdened annual salary for a customer experience representative	Composite	\$58,240	\$58,240	\$58,240
Bt	Cost savings from reallocated workers and avoided seasonal hires with increased customer self-service	B7*B8	\$2,329,600	\$2,329,600	\$2,329,600
	Risk adjustment	15%			
Btr	Cost savings from reallocated workers and avoided seasonal hires with increased customer self-service (risk-adjusted)		\$1,980,160	\$1,980,160	\$1,980,160
Three-year total: \$5,940,480			Three-year present value: \$4,924,365		

CX Agent Efficiency Gains

**Evidence and data.** This benefit outlines the cost savings based on customer service agents being able to improve MTTR in their live interactions with customers.

- Interviewees reported that after implementing CX Cloud, their agents were able to increase their readiness for customer inquiries. Live call interactions were much improved due to the agents having access to a unified dashboard containing relevant and actionable customer information.
- The CTO of the insurance company discussed their agents’ experience in reducing average handle time: “We’ve seen our average handle time reduced from 10 minutes and 22 seconds down to 8 minutes and 1 second across the new environment. That’s over a 20% reduction in average handle time.”
- The customer experience manager for the healthcare company explained how they’re trying to encourage agents to be efficient, but not at the expense of the customers’ experience: “We believe [agents’ time savings on customer interactions] will

be higher, but we’re being very conservative and only crediting a few seconds of time savings right now. We are also coaching our agents to not shortcut on AHT [average handle time].”

**Modeling and assumptions.** Based on the interviews, Forrester assumes the following about the composite organization:

- The 60,000 interactions that occur with a live agent are assumed to be the first contact by the customer and not a customer inquiry that begins in the self-service channel.
- The composite is able to subtract 2 minutes from its MTTR, which is a 16.7% improvement in call handle time. The composite organization would still have experienced 2 minutes of time savings, even if its previous average handle time (before CX Cloud) was shorter to begin with. For example, if the composite organization averaged 9-minute interactions before CX Cloud, they would have seen a 2-minute reduction thanks to CX Cloud, not a 1.5 minute reduction (which equates to 16.7%).

**Risks.** The following risks could impact the agent efficiency gains:

- The customer service representative’s salary could vary based on the agent’s level of education and experience.
- The composite organization’s ability to decrease MTTR could be partially attributed to other factors over time — such as improved agent training or better product manuals.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$6.5 million.

## 2 minutes

### Reduction in MTTR for live agent interactions

*“We previously didn’t have any insight into the customer — no 360-degree view. Everything took longer than it had to take because agents had to go into a lot of different tools to find information. And after all that navigating, all of a sudden you’re working in Salesforce. ... All of that reduced the total time to resolution.”*

**Head of revenue intelligence, technology**

CX Agent Efficiency Gains					
Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	Average CX interactions per week that involve an agent	B1-B5	60,000	60,000	60,000
C2	MTTR before CX Cloud (minutes)	Composite	12	12	12
C3	MTTR with CX Cloud (minutes)	Composite	10	10	10
C4	Time saved per interaction (minutes)	C2-C3	2	2	2
C5	Time saved per year (hours)	C1*(C4/60)*52	104,000	104,000	104,000
C6	Fully burdened hourly rate for a customer experience representative	Composite	\$28	\$28	\$28
Ct	CX agent efficiency gains	C5*C6	\$2,912,000	\$2,912,000	\$2,912,000
	Risk adjustment	↓10%			
Ctr	CX agent efficiency gains (risk-adjusted)		\$2,620,800	\$2,620,800	\$2,620,800
Three-year total: \$7,862,400			Three-year present value: \$6,517,542		

## Incremental Sales From Agent Assist Tools

**Evidence and data.** Interviewees described how the integrated Genesys and Salesforce agent assist capabilities within CX Cloud streamline how agents identify and deliver cross-sell and upsell opportunities.

- Interviewees agreed that agent assist tools within the solution helped their agents to get more thoroughly trained and better prepare them for conversations about new sales opportunities.
- The CX manager for the healthcare company said, “[Sales trends were] pointing in the [upward] direction,” and that their organization had already seen a small lift of 0.3%.
- The global director of IT for the industrial supplies company explained how their organization saw a revenue increase when their organization established predictive upsell: “If a customer is communicating with customer service with SMS or chat, they’ll now get different product recommendations based on what their actual request is. So if you’re saying, ‘Okay, I’m having a problem with [X],’ then we’ll recommend a particular product bundle that will work best. ... We’ve now seen 12% growth, and I’m honestly surprised it’s not higher than that.”

**Modeling and assumptions.** Based on the interviews, Forrester assumes the following about the composite organization:

- Twenty percent of the composite organization’s revenue is impacted by CX Cloud.
- As a global supply company, the composite organization’s gross margin is assumed to be 8%.

**Risks.** The following risks could impact the incremental sales from agent assist capabilities:

- The amount of revenue impacted by CX Cloud could vary, depending on the level of deployment across the organization.
- Gross margin could vary based on the composite organization’s pricing and cost structure.

**Results.** To account for these risks, Forrester adjusted this benefit downward by 5%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.4 million.

## 1.5%

**Percentage of new revenue as a result of CX Cloud’s agent assist tools**

*“With the agent assist capabilities, a lot of questions can be answered automatically for the agent. It also detects if the agent is hesitant for some reason. For example, if the agent doesn’t say something for 10 seconds, the AI agent actually comes in and says, ‘Hey, do you need help with this?’ That assistance cuts down on support calls immensely.”*

**Global director of IT, industrial supplies**

Incremental Sales From Agent Assist Tools					
Ref.	Metric	Source	Year 1	Year 2	Year 3
D1	Annual revenue impacted by CX Cloud	Composite	\$500,000,000	\$500,000,000	\$500,000,000
D2	Percentage of new revenue as a result of CX Cloud	Interviews	1.5%	1.5%	1.5%
D3	Gross margin	Composite	8.0%	8.0%	8.0%
Dt	Incremental sales from agent assist tools	D1*D2*D3	\$600,000	\$600,000	\$600,000
	Risk adjustment	1.5%			
Dtr	Incremental sales from agent assist tools (risk-adjusted)		\$570,000	\$570,000	\$570,000
Three-year total: \$1,710,000			Three-year present value: \$1,417,506		

## Unquantified Benefits

Interviewees mentioned the following additional benefits that their organizations experienced but were not able to quantify in the financial model:

- **Improved customer satisfaction.** Interviewees who conducted CSAT surveys after implementing CX Cloud noted that their scores increased by as much as 40% in their self-service channel. With the combined solution in place, agents were less bogged down with administrative work, and could instead focus more of their energy on customers and their needs. The senior director of customer experience for the manufacturing company said: “Anybody who calls in [to our customer service line] has the opportunity to answer a survey. ... As far as quality and consistency go, those scores have improved significantly.”
- **Enhanced agent performance.** With better transcription, call analytics, and data entry, agents were able to receive better coaching and training on the job. These improvements in agent coaching also helped to speed up their onboarding processes, improve performance, and in some cases, even reduce turnover and improve job satisfaction. The global director of IT for industrial supplies said: “I’d say you have a 30% improvement in agent satisfaction because now, [with better coordination, these agents] are able to get more shifts, and therefore make more money. We’re happy because those shifts are covered. And they’re happy because the tools that they have at their disposal are more effective than what they had before.”
- **Streamlined data entry, increasing accuracy and improving compliance.** CX Cloud helped to reduce the number of errors made in manual data entry — including post-call entry, user inputs inside of the IVR, and pulling the right contact information. This error reduction helped to improve agent compliance overall, and interviewees noted that their organizations are spending less time on internal audits. The global director of IT for the industrial supplies company discussed how their organization has benefited from compliance improvement. They said, “I think we’re 20% down on the amount of work that our auditors have to do for any type of compliance paperwork for GDPR or PCI.”

## Flexibility

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement CX Cloud and later realize additional uses and business opportunities, including:

- **Scalability and growth potential.** Interviewees were often limited by their previous CX solutions. However, having CX Cloud in place has allowed these organizations to grow, scale, and improve their customer experience activities, and interviewees expected this growth to continue into the future. Without needing to make costly investments in legacy technology, organizations were able to utilize those same financial resources in a more dynamic way that directly impacted the customer experience.
- **Ability to fully leverage AI features.** Interviewees still wanted to explore more AI features and capabilities within the CX Cloud solution as they moved toward the future and continued to improve their CX organization. Performing sentiment analysis, leveraging AI features within the organization’s knowledge base, and using AI for email response automation are all areas where interviewees would like to expand their usage of CX Cloud.

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Total Economic Impact Approach](#)).

*“CX Cloud provides me with really, really good data as it integrates into our CRM. It’s information I can dig into and understand the different components of. It lets me look and see where our future focus needs to be, so we can go ahead and get better from a customer experience standpoint.”*

**Senior director of customer experience, manufacturing**

## Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Etr	CX Cloud solution costs	\$0	\$882,000	\$882,000	\$882,000	\$2,646,000	\$2,193,403
Ftr	Implementation costs	\$1,304,600	\$0	\$0	\$0	\$1,309,000	\$1,309,000
Gtr	Ongoing management costs	\$0	\$223,080	\$223,080	\$223,080	\$669,240	\$554,767
	Total costs (risk-adjusted)	\$1,304,600	\$1,105,080	\$1,105,080	\$1,105,080	\$4,624,240	\$4,057,170

### CX Cloud Solution Costs

**Evidence and data.** Interviewees described the annual software license costs that their organizations paid for CX Cloud from Genesys and Salesforce. This included all costs paid to Genesys and Salesforce for the combined solution but did not include internal resources used to implement and operate CX Cloud on an ongoing basis.

- The licensing costs for CX Cloud depended on how many users needed access to the solution.
- License costs for the CX Cloud solution were broken out into three areas — the Genesys Cloud licenses, the Salesforce Voice licenses, and the Genesys Salesforce connector licenses.
- Pricing and applicable discounts may vary. Contact Genesys and Salesforce for additional details.

**Modeling and assumptions.** For the financial analysis, Forrester assumes the following about the composite organization:

- The composite organization utilizes the Genesys CX Cloud 2 platform, which costs \$170 per user per month for concurrent licenses for 400 agents. This accounts for unique shifts and time zones covered by the CX agents, meaning that not all 600 of the composite organization's CX agents need to utilize the solution simultaneously.
- The cost of the Salesforce Voice licenses and the Genesys Salesforce connector licenses are \$25 per user per month for the 400 concurrent users.
- A 20% discount is applied for the composite organization's contractual commitment to CX Cloud.

**Risks.** The following risks could impact the CX Cloud solution costs:

- Licensing cost variation can occur based on an organization's usage of named licenses versus concurrent licenses.
- Differences in contact center hours can account for variation in license costs.
- Discounting can vary based on commitments made during the contracting process.

**Results.** To account for these risks, Forrester adjusted this cost upward by 5%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$2.2 million.

*"We now have a 30% lower annual run cost for licenses and operating activity on the SaaS environment than we had on our on-premises environment."*

CTO, insurance

CX Cloud Solution Costs						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
E1	Genesys Cloud licenses	Genesys		\$650,000	\$650,000	\$650,000
E2	Salesforce Voice licenses	Salesforce		\$95,000	\$95,000	\$95,000
E3	CX Cloud connector license	Genesys and Salesforce		\$95,000	\$95,000	\$95,000
Et	CX Cloud solution costs	E1+E2+E3	\$0	\$840,000	\$840,000	\$840,000
	Risk adjustment	15%				
Etr	CX Cloud solution costs (risk-adjusted)		\$0	\$882,000	\$882,000	\$882,000
Three-year total: \$2,646,000			Three-year present value: \$2,193,403			

## Implementation Costs

**Evidence and data.** Interviewees discussed the resources required for their organizations to initially deploy the CX Cloud solution prior to the start of the three-year financial modeling period.

- Interviewees cited that their implementation periods varied between four weeks and four months.
- During implementation, interviewees' organizations often needed to perform custom coding work, which is embedded in these cost figures.
- Pricing may vary, dependent on customer needs. Contact Genesys and Salesforce for additional details around professional services costs.

**Modeling and assumptions.** For the financial analysis, Forrester assumes the following about the composite organization:

- The composite organization requires 20 people for implementation to account for the custom coding work completed to optimize its instance of CX Cloud.
- The average hourly rate of implementation resources combines developer, IT, and managerial roles.

**Risks.** The following risks could impact the implementation costs.

- The organization's size and complexity .
- The organization's contact center technology and CRM software prior to implementation, which can affect the duration of implementation.

**Results.** To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.3 million.

*"The teams were able to make that connector work within two weeks' time frame in the development environment and then migrate it into production. So for us, it was no more than four weeks' worth of implementation work to get the [solution] stood up."*

**Customer experience manager, healthcare**

Implementation Costs						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
F1	FTEs involved in implementation	Composite	20			
F2	Implementation weeks	Composite	10			
F3	Average fully burdened hourly rate for implementation resources	Composite	\$80			
F4	Total implementation resource costs	$F1 \times F2 \times F3 \times 40$	\$640,000			
F5	Additional professional services implementation fees	Composite	\$550,000			
Ft	Implementation costs	$F4 + F5$	\$1,190,000	\$0	\$0	\$0
	Risk adjustment	↑10%				
Ftr	Implementation costs (risk-adjusted)		\$1,309,000	\$0	\$0	\$0
Three-year total: \$1,309,000			Three-year present value: \$1,309,000			

## Ongoing Management Costs

**Evidence and data.** The interviewees outlined the resources required for ongoing management of CX Cloud.

- Compared to the more intensive nature of the implementation process, interviewees stated that their organizations did not need as many experienced resources to manage CX Cloud on an ongoing basis.
- Interviewees spoke of the ease with which they could manage the solution. The implementation and change management components were a more significant resource investment than the resources required for ongoing management.

**Modeling and assumptions.** Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization uses a lower hourly rate for ongoing management of the CX Cloud solution than it does for implementation. Lower-cost, less experienced job roles can handle the ongoing management responsibilities of the solution.
- The five individuals responsible for ongoing management dedicate 30% of their time to these activities.

**Risks.** The following risks could impact the ongoing management costs for the composite organization:

- The hourly rate per person could vary, based on that individual's particular level of job experience and education.
- Management time per week could vary from 30% if there are business seasonality considerations that increase or decrease customer interactions in a given week.

**Results.** To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$555,000.

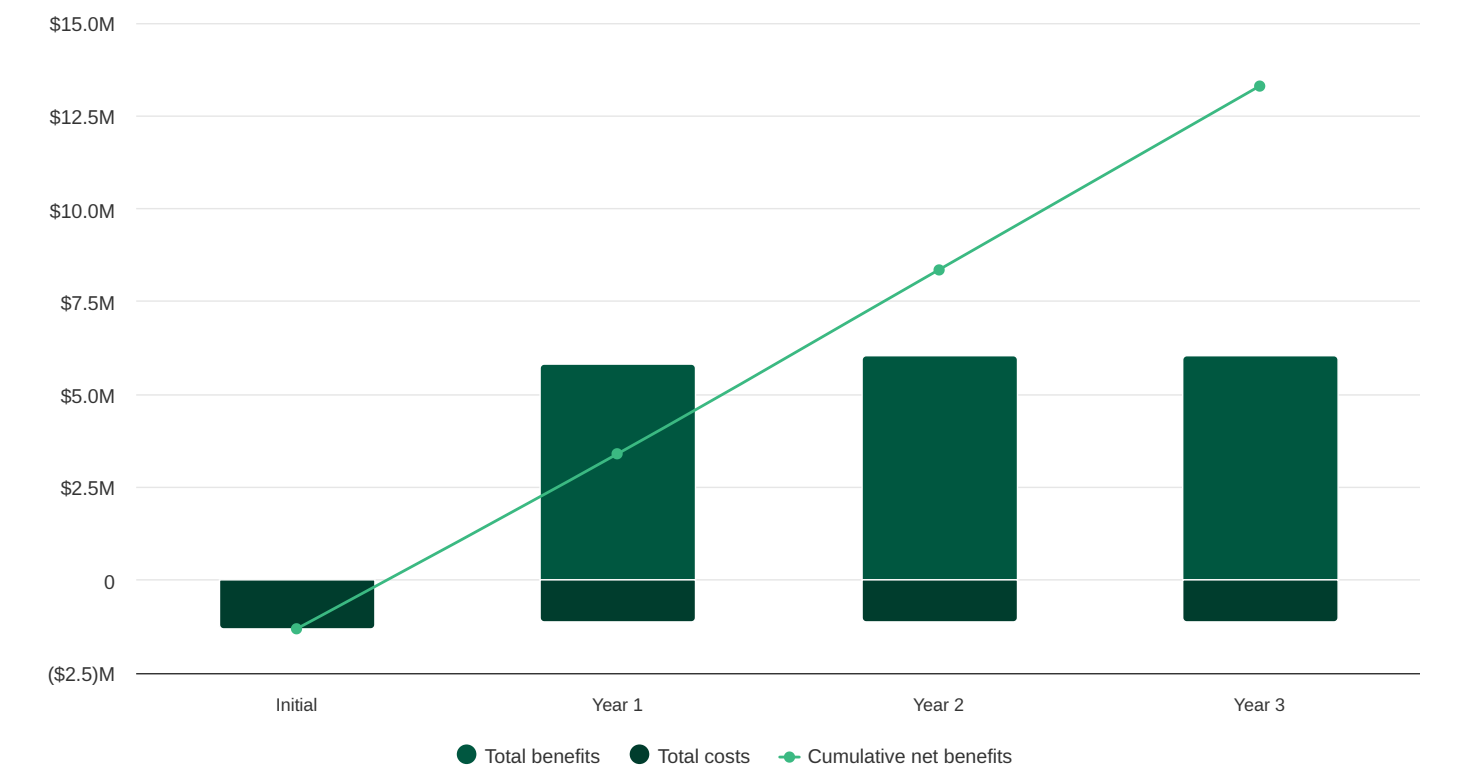


Ongoing Management Costs						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
G1	Total people managing the CX Cloud solution			5	5	5
G2	Hourly rate per person managing CX Cloud			\$65	\$65	\$65
G3	Weekly time per person managing CX Cloud (hours)			12	12	12
Gt	Ongoing management costs	$G1 \times G2 \times G3 \times 52$	\$0	\$202,800	\$202,800	\$202,800
	Risk adjustment	↑10%				
Gtr	Ongoing management costs (risk-adjusted)		\$0	\$223,080	\$223,080	\$223,080
Three-year total: \$669,240			Three-year present value: \$554,767			

# Financial Summary

Consolidated Three-Year, Risk-Adjusted Metrics

Cash Flow Chart (Risk-Adjusted)



Cash Flow Analysis (Risk-Adjusted)						
	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$1,309,000)	(\$1,105,080)	(\$1,105,080)	(\$1,105,080)	(\$4,624,240)	(\$4,057,170)
Total benefits	\$0	\$5,816,960	\$6,054,460	\$6,054,460	\$17,925,880	\$14,840,638
Net benefits	(\$1,309,000)	\$4,711,880	\$4,949,380	\$4,949,380	\$13,301,640	\$10,783,468
ROI						266%

## Please Note

The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

## TEI Framework And Methodology

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From the information provided in the interviews, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in CX Cloud.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that CX Cloud can have on an organization.

### Due Diligence

Interviewed five stakeholders and Forrester analysts to gather data relative to CX Cloud.

### Interviews

Interviewed four decision-makers at organizations using CX Cloud to obtain data about costs, benefits, and risks.

### Composite Organization

Designed a composite organization based on characteristics of the interviewees' organizations.

### Financial Model Framework

Constructed a financial model representative of the interviews using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees.

### Case Study

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see [Appendix A](#) for additional information on the TEI methodology.

## Glossary

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### Total Economic Impact Approach

#### Benefits

Benefits represent the value the solution delivers to the business. The TEI methodology places equal weight on the measure of benefits and costs, allowing for a full examination of the solution's effect on the entire organization.

#### Costs

Costs comprise all expenses necessary to deliver the proposed value, or benefits, of the solution. The methodology captures implementation and ongoing costs associated with the solution.

#### Flexibility

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. The ability to capture that benefit has a PV that can be estimated.

#### Risks

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

### Financial Terminology

#### Present value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feeds into the total NPV of cash flows.

#### Net present value (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

#### Return on investment (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

#### Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

#### Payback

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

## Appendixes

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### APPENDIX A

#### Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

### APPENDIX B

#### Endnotes

<sup>1</sup> Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

## Disclosures

Readers should be aware of the following:

This study is commissioned by Genesys and Salesforce and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in CX Cloud. For any interactive functionality, the intent is for the questions to solicit inputs specific to a prospect's business. Forrester believes that this analysis is representative of what companies may achieve with CX Cloud based on the inputs provided and any assumptions made. Forrester does not endorse Genesys, Salesforce, or their offerings. Although great care has been taken to ensure the accuracy and completeness of this model, Genesys, Salesforce, and Forrester Research are unable to accept any legal responsibility for any actions taken on the basis of the information contained herein. The interactive tool is provided 'AS IS,' and Forrester, Genesys, and Salesforce make no warranties of any kind.

Genesys and Salesforce reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Genesys and Salesforce provided the customer names for the interviews but did not participate in the interviews.

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**PUBLISHED**

**December 2025**