







Michael Dodd Solutions Architect





Agenda

- CSW Voice Call Flow
- Top 10/Voice Call Demo
- Azure Communication Services Integration

- Voice Workstream
- Copilot Studio IVR Bot

- Agent Experience
- Phone Number Porting Process/Go-Live
- Q&A







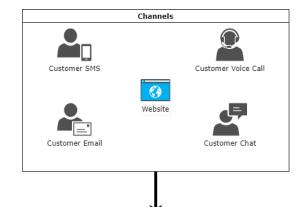


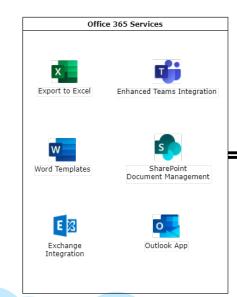
Part 1 - CSW Voice Call Flow

High-level Flow for Customer Service Workspace using Microsoft Voice

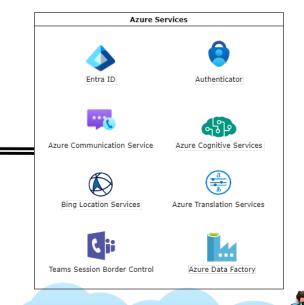
Services Included in CSW w/Voice







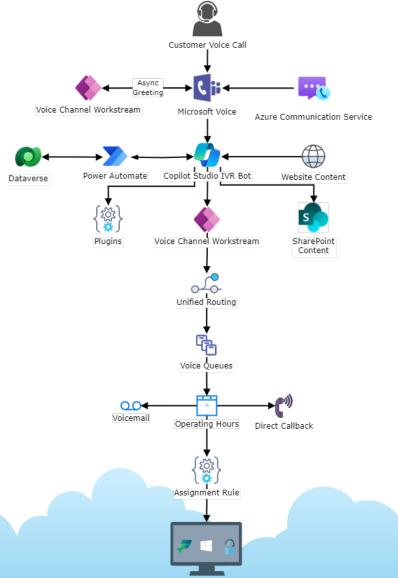






Voice Workstream Flow (Part 1)



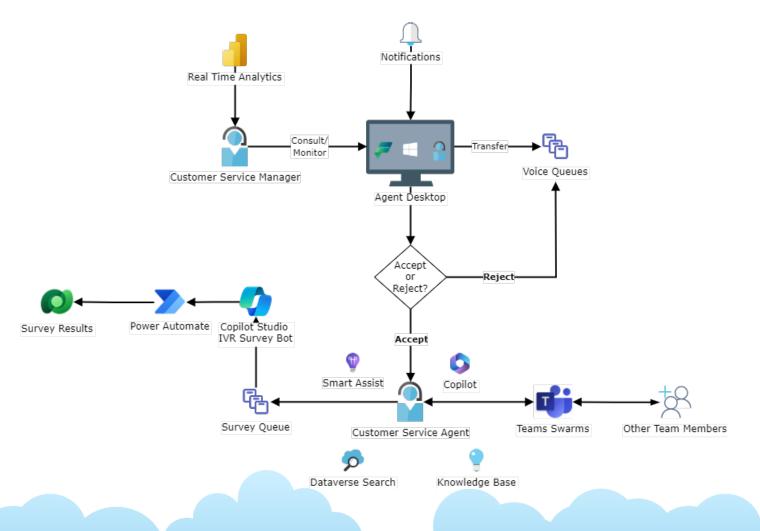






Voice Workstream Flow (Cont'd)











Part 2 - Demo

Demo to Show Microsoft Voice within Customer Service Workspace



Top Ten Reasons Why You Hated Your Call Center Experience















- 6. If they can't memorize that call script, they'll never make it to Broadway.
- 7. New Loyalty Bonus: If this is the 9th time you're calling about the same issue, 10th one is on the house!
- 8. Their website recommends that you call the support line. The support line recommends troubleshooting on their website. Make up your minds, people! I'm on my lunch break here!
- 9. You refer to your call center agent as "Casper" what with all the ghosting they do.
- 10. Call center agents are like pediatricians. They've got little patients.



Sources:







- 1. I'm sorry, that's not a valid option. To repeat this Top 10 List, press 7
- 2. Unlike Disney Land, when you get to the front of this queue, ain't no Pirates of the Caribbean!
- 3. You have to explain your problem over and over again.
- 3. You have to explain your problem over and over again.
- 4. 20 minutes into the call you realize your cat has a better handle on the terms of your warranty
- 5. You were transferred more times than the Greyhound bus to Wilkes Barre



Sources:





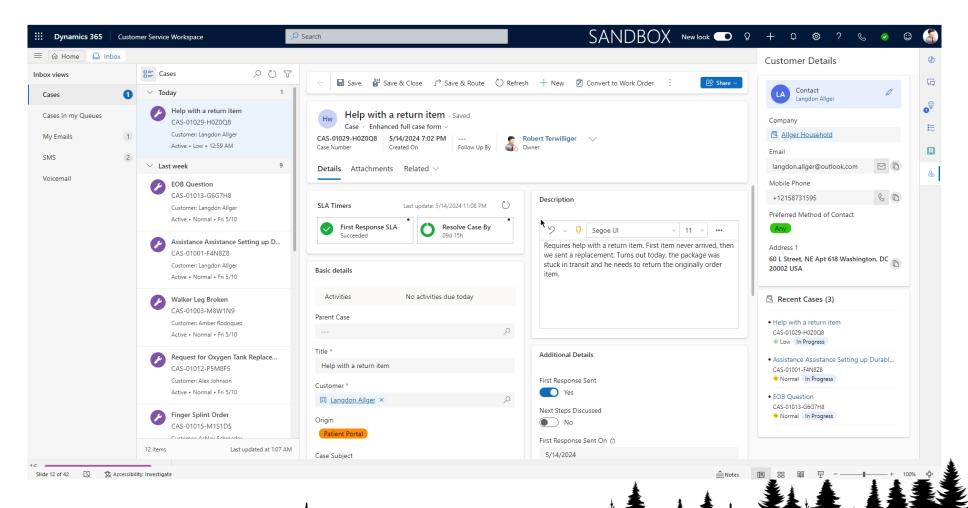


- 1. Unhelpful IVR menus/IVR loops
- 2. Call volume/long hold times
- 3. Providing redundant information
- 4. Lack of agent expertise
- 5. Too many transfers to get to the right agent
- 6. Lack of personalization/bad agent scripts
- 7. Multiple calls about the same issue
- 8. IVR directing customers to their website
- 9. No agent follow-up
- 10. Rude Agents





Brief Demo



Part 3 – Azure Communication Services

Configuring Azure Communication Services for Microsoft Voice Numbers for use with Customer Service Workspace

What is Azure Communication Services?



- Communication Platform with native integration to Customer Service Workspace
 - Azure Communication Services offers APIs for connecting voice, chat, SMS, call recordings, etc. to Customer Service Workspace
 - Used to purchase or port phone numbers that will sync with 1 or more CSW environments
- Provisions 1st Party channels
 - Voice
 - SMS
 - Chat
 - Emails
- Supports Teams and 3rd Party providers via direct routing/custom apps
- Routes ACS traffic to Customer Service Workspace via Events
 - Webhooks for events are generated by Customer Service Workspace
 - You can use the same web hooks for each environment

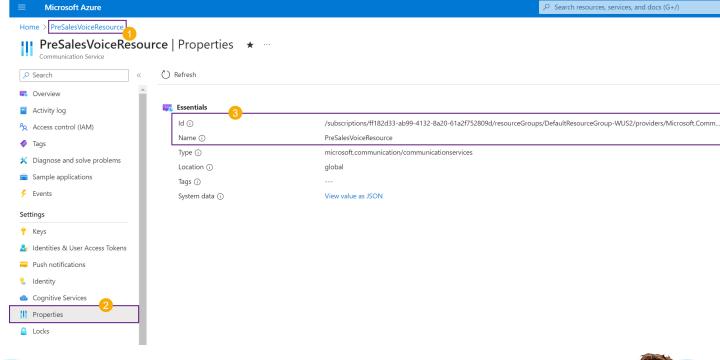


Configuring Azure Communication Services



Prerequisites:

- Subscription to ACS
- 1 or more Phone Numbers
- New or existing Azure Resource Group
- New or Existing ACS Resource
 - Copy/paste Resource Name (into Notepad)
 - Copy/paste Resource ID (into Notepad)







Configuring Azure Communication Services (Cont'd)



Prerequisites:

- ACS Resource Connection String
 - Go to Keys → Connection String
 - Copy/paste the Connection String value (into Notepad)

Microsoft Azure			∠ Search resources, services, and docs (G+/)			
Home > PreSalesVoiceResource PreSalesVoiceResource Communication Service	ource Keys \star …					
		e your API calls when you use the Communication Services SDKs. Store your access keys securely – fo our access keys regularly. You are provided two access keys so that you can maintain connects using				
Overview Activity log	Endpoint	https://presalesvoiceresource.unitedstates.communication.azure.com/	D			
Access control (IAM)	Primary key					
TagsDiagnose and solve problems	Regenerate primary ke	ey 👁 Show values				
Sample applicationsEvents	Key		Copy primary connection string to clip!			
Settings	Connection string					
↑ Keys	Secondary key					
Push notifications	Regenerate secondary	key 👁 Show values				
ldentity Cognitive Services	Key		0			
Properties	Connection string		<u></u>			
≜ Locks						









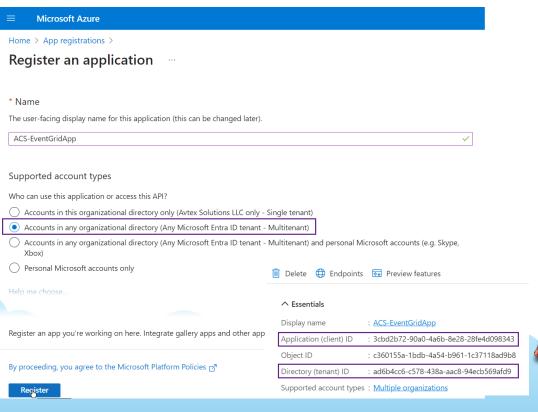
Prerequisites:

New or existing App Registration for the ACS Event Grid

Select the (Any Microsoft Entra ID tenant – Multitenant) option– No API

permissions needed

 Copy/paste the Application (client) ID (into Notepad)



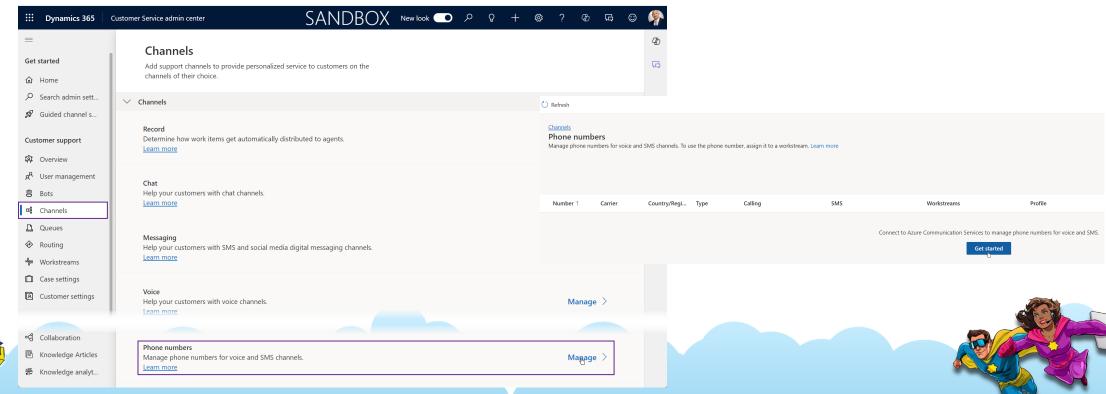


Configuring Azure Communication Services (Cont'd)



From the Dynamics 365 Customer Service Admin Center

- Navigate to Channels → Phone Numbers → Manage
- Click the Get Started button

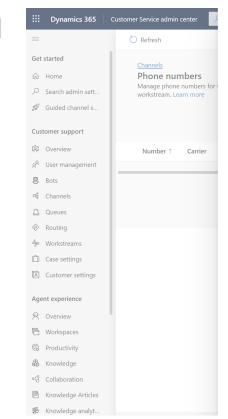








- Enter the 4 data points you gathered:
 - Resource Name
 - Resource ID
 - Connection String
 - ACS Event Grid App ID
 - Azure Tenant ID
- Click the Connect button

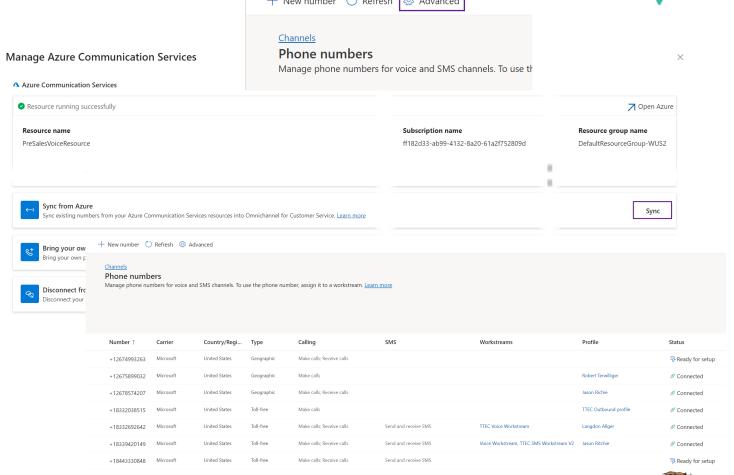


Connect to Azure Communication Services	×
Phone numbers are provided by Azure Communication Services. Create a new resource or connect an existing one to get started with voice and SMS Learn more	
Create new resource Use existing resource	
ACS Resource Name * ①	
PreSalesVoiceResource	
ACS Resource ID * ①	
/subscriptions/ff182d33-ab99-4132-8a20-6	
Connection string * ①	
endpoint=https://presalesvoiceresource.uni	
Event grid app id * ①	
3cbd2b72-90a0-4a6b-8e28-28fe4d098343	
Event grid app tenant id * ①	
ad6b4cc6-c578-438a-aac8-94ecb569afd9	
Connect	el



Configuring ACS Connection in CSW (Cont'd) + New number O Refresh Advanced

- In the Phone Number channel command bar, click the Advanced button
- In the Sync From Azure section, click the **Sync** button
- Close the pane
- Your ACS numbers will appear in the Phone Numbers grid view

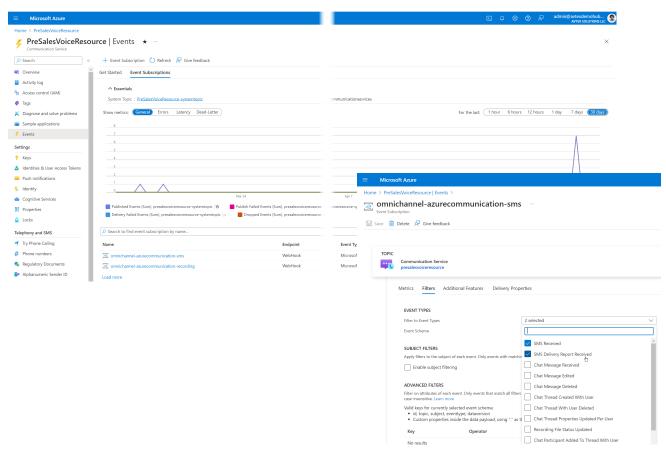




What is the ACS Event Grid?



- ACS Events allow you to subscribe to certain platform actions:
 - Incoming calls
 - SMS messages
 - Call recordings and Transcripts (including voicemail)
- The Event Grid monitors ACS platform events for CSW via REST endpoints to connect to Dynamics when those events are triggered.
- Endpoints for each event grid subscription can be found in the Customer Service Admin Center







Azure Communication Services Config Demo



■ Microsoft Azure					[Σ Q	©	® ₹	admin@	avtexdemohul avtex solution:	o @
Home > PreSalesVoiceResource											
PreSalesVoiceResor Communication Service	urce Events \star										×
∠ Search «	+ Event Subscription 💍 Refresh 👨 Give feedback										
Overview ^	Get Started Event Subscriptions										
Activity log Access control (IAM)	^ Essentials										
Tags	System Topic : <u>PreSalesVoiceResource-systemtopic</u>		ommunicationservices								
X Diagnose and solve problems	Show metrics: General Errors Latency Dead-Letter			Fo	or the last:	1 hour	6 hours	12 hours	1 day	7 days (30 d	ays
Sample applications	8										
Events	7									A	
Settings	5									Λ	
↑ Keys	4									Λ	
♣ Identities & User Access Tokens	3									A	
Push notifications	1				\wedge						
% Identity	0				/\				\triangle		
Cognitive Services		Mar 24	Apr 7				Apr 14			UTC-04:0	10
Properties	_	Publish Failed Events (Sum), presalesvoiceresource	oiceresource-systemtopic 15	Dead Lettered Events (Sum), presalesv	oiceresource-s	ystemtopi	c				
≜ Locks	Delivery Failed Events (Sum), presalesvoiceresource-systemtopic	■ Dropped Events (Sum), presalesvoiceresource									
Telephony and SMS											
₹ Try Phone Calling	Name	Endpoint	Event Types				Pr	ovisioning s	tate		
# Phone numbers	omnichannel-azurecommunication-sms	WebHook	Microsoft.Communication.SMS	SReceived, Microsoft. Communication.	.SMSDeliveryl	ReportRed	ceived Su	icceeded			
Regulatory Documents	omnichannel-azurecommunication-recording	WebHook	Microsoft.Communication.Reco	ordingFileStatusUpdated			Su	cceeded			
Alphanumeric Sender ID	Load more										





Part 4 – Copilot Studio IVR Bot

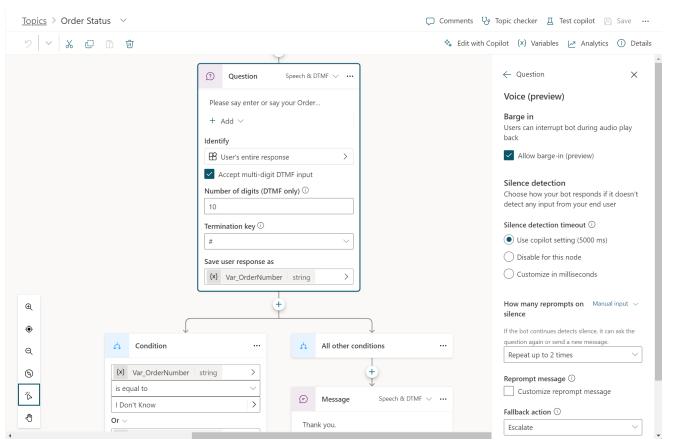
Anatomy of the IVR Bot





Copilot Studio IVR Bot Features

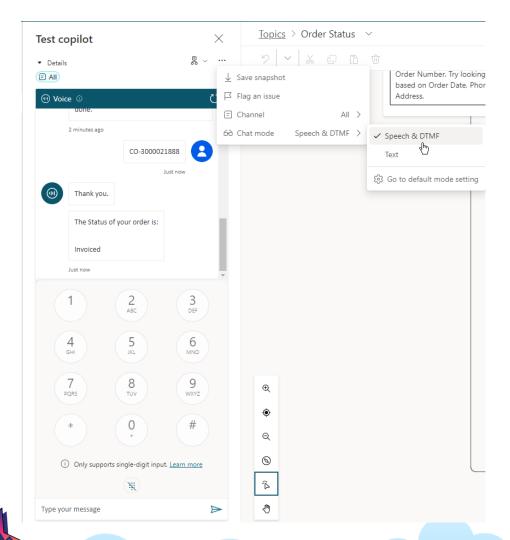
- Greets the customer
- Identifies the Customer (via Nuance)
- Collects information (using Variables)
- Identifies Intent (Using Topics)
- Triggers Power Automate (and other "plugins")
- Accepts DTMF as well as Voice
- Escalates/Transfers call to Customer Service Workspace
- Voice recognition options:
 - Bot Questions
 - Human responses

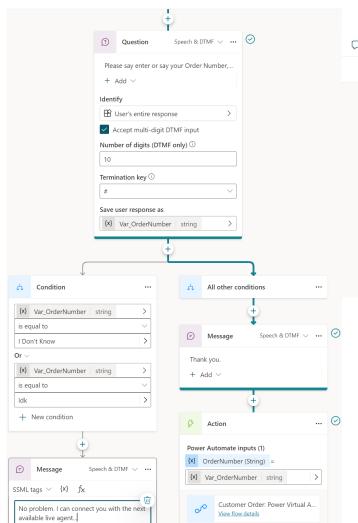


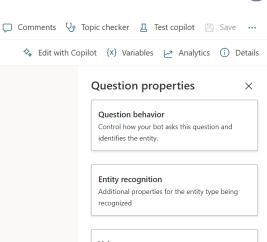


Copilot Studio IVR Bot Configuration Demo









Advanced features for voice.



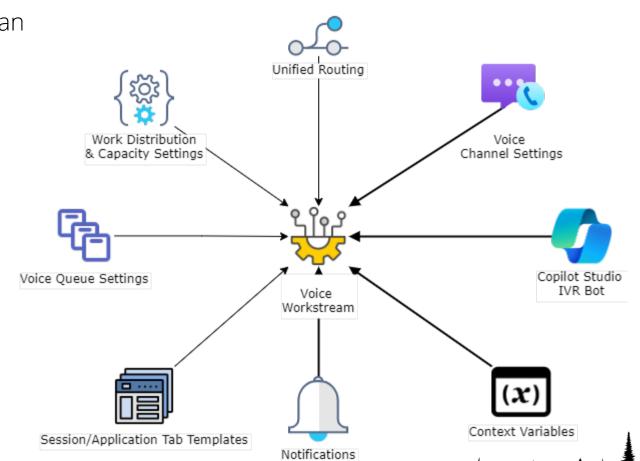
Part 5 - Voice Workstream

Anatomy of the Voice Workstream



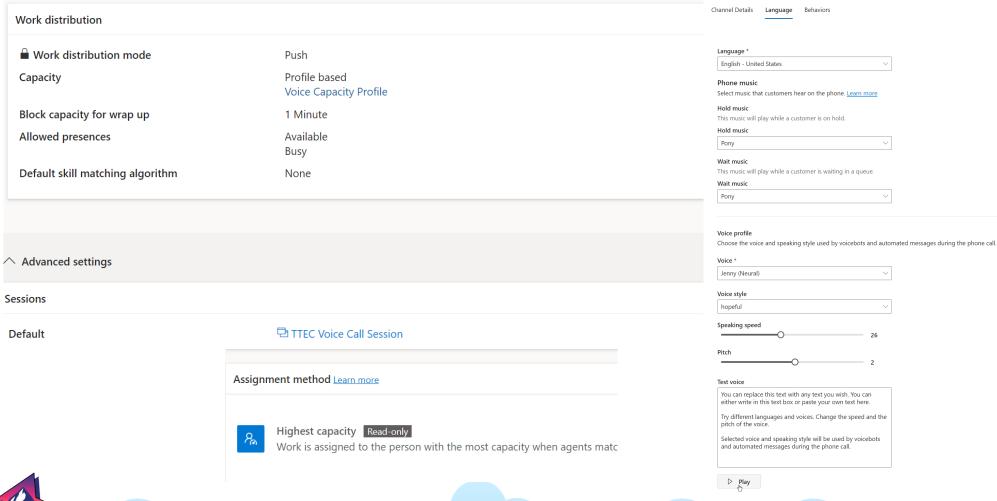
Voice Workstream in CSW

- Workstreams are the glue that holds an Omnichannel's components together
- Channel settings
 - Phone Number
 - Language
 - Bot's voice settings
 - Agent Options
- IVR Bot Connection
- Context Variables
- Routing Logic
- Work Distribution/Capacity Behavior
- Session/Application Tab Template
- Notification Templates



Voice Workstream Configuration Demo

Voice settings







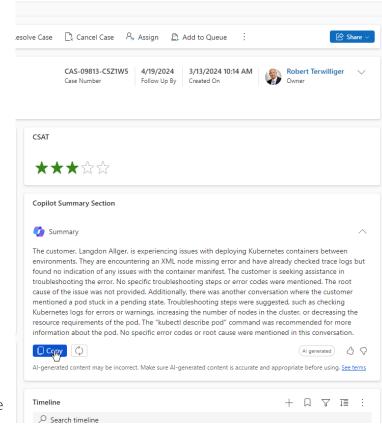


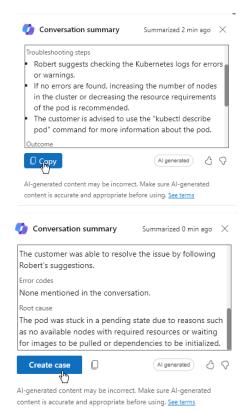
Configuring Copilot Assistant to Assist with Voice Calls

Copilot Assistant Features

()

- Help Pane (right-side) (on/off)
 - Ask a Question
 - Email Assistance
- Contextual Summaries
 - When the Agent/Supervisor joins a conversation
 - When a conversation ends
 - Create new Case from summary
 - Copy to clipboard (to update an existing Case)
 - On-demand
- Auto-summarization for conversations
 - When the Agent/Supervisor joins the conversation
 - When the conversation ends
 - When the Agent starts a linked chat in Teams
- Search on knowledge content
 - Knowledge Base Articles
 - Website(s)
- Sentiment Analysis
 - Determines positive and negative sentiment in real-time
 - Used to flag sessions for the Agent's awareness
 - Auto-escalates sessions to Supervisors





₽ ₽ ∨

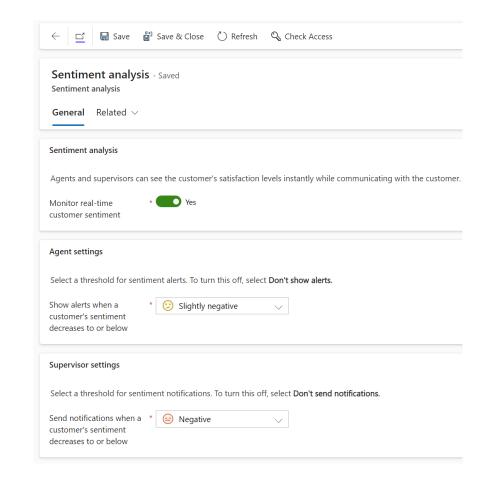




Copilot Assistant Configuration Demo



■ Save 🞳 Save and close 🖒 Refresh
The knowledge base is ready and 2 articles are being used. Agents will now get Al-powered responses with Copilot.
Insights > Copilot help pane Copilot help pane
Set up the Copilot help pane for agents. Agents can use this pane for help with writing emails, and to get Al-generated answers by asking a question or by using Al to identify customer questions during a live conversation. Learn more
① This feature is currently supported in a limited number of languages. See the <u>full list of supported languages</u> . Copilot responses in unsupported languages have not been tested for language accuracy. Make sure Al-generated content is accurate and appropriate before using it. <u>Read terms.</u>
Select features
Write an email - Help pane On By using Copilor features powered by Azure OpenAl, you agree that data may be stored and/or processed outside of your geographic region, compliance boundary, or national cloud instance. Learn more
For email: To write an email response Manage data
Ask a question On
By using Copilot features powered by Azure OpenAL, you agree that data may be stored and/or processed outside of your geographic region, compliance boundary, or national cloud instance. Learn more
Suggest a response (preview):
Get a suggested response during a customer chat. <u>See præview.terms</u>
Agent access
Agents added to out-of-the-box experience profiles can use Copilot. To change which agents can use Copilot, go to agent experience profiles.
Knowledge sources ○ On
Knowledge base ⊙
2 articles in use
Trusted webpages ○
Include trusted webpages as sources. Not available for Ask a question . <u>Learn more</u>
Web searches are powered by Bing (preview) See preview terms By adding a web address, you're allowing Copilot to use Bing. Your search data can be stored and processed outside of your tenant's geographic region or compilance boundary. Your use of Bing is governed by Microsoft Services Agreement and the Microsoft Privacy Statement.
https://learn.microsoft.com/en-us/dyna ×
https://axtexdemohubcs.powerappsport ×







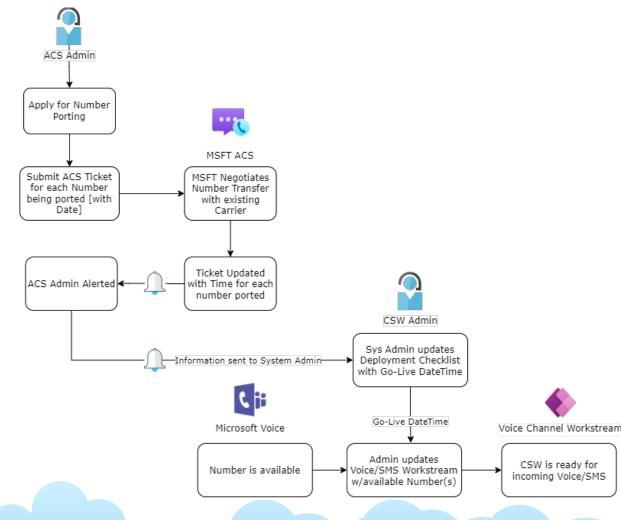


Part 7 – Phone Number Porting

Overview of the process for bringing your existing Customer Service Number(s) to Microsoft Voice in ACS and what to expect for your Go-Live

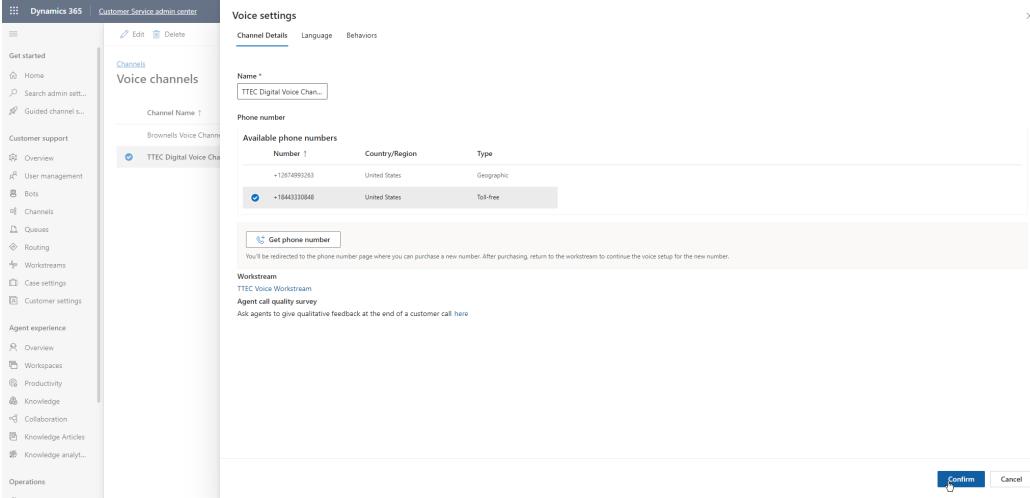
Port numbers via ACS

- Phone Number must be toll-free
- Process is currently manual
- Form can be filled out in ACS.
- Takes at least 2 weeks to process
- Once completed, ACS will contact the Azure Admin with a Go-Live date
 - This date cannot be changed
 - Typically happens on a Friday
 - Cannot be set to weekend or holiday





Setup Ported Phone Number Demo







Questions?