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MAY 2024
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Configuring Customer Service Workspace with Microsoft Voice + Copilot

Presented by:

Michael Dodd
Solutions Architect

ttec DIGITAL

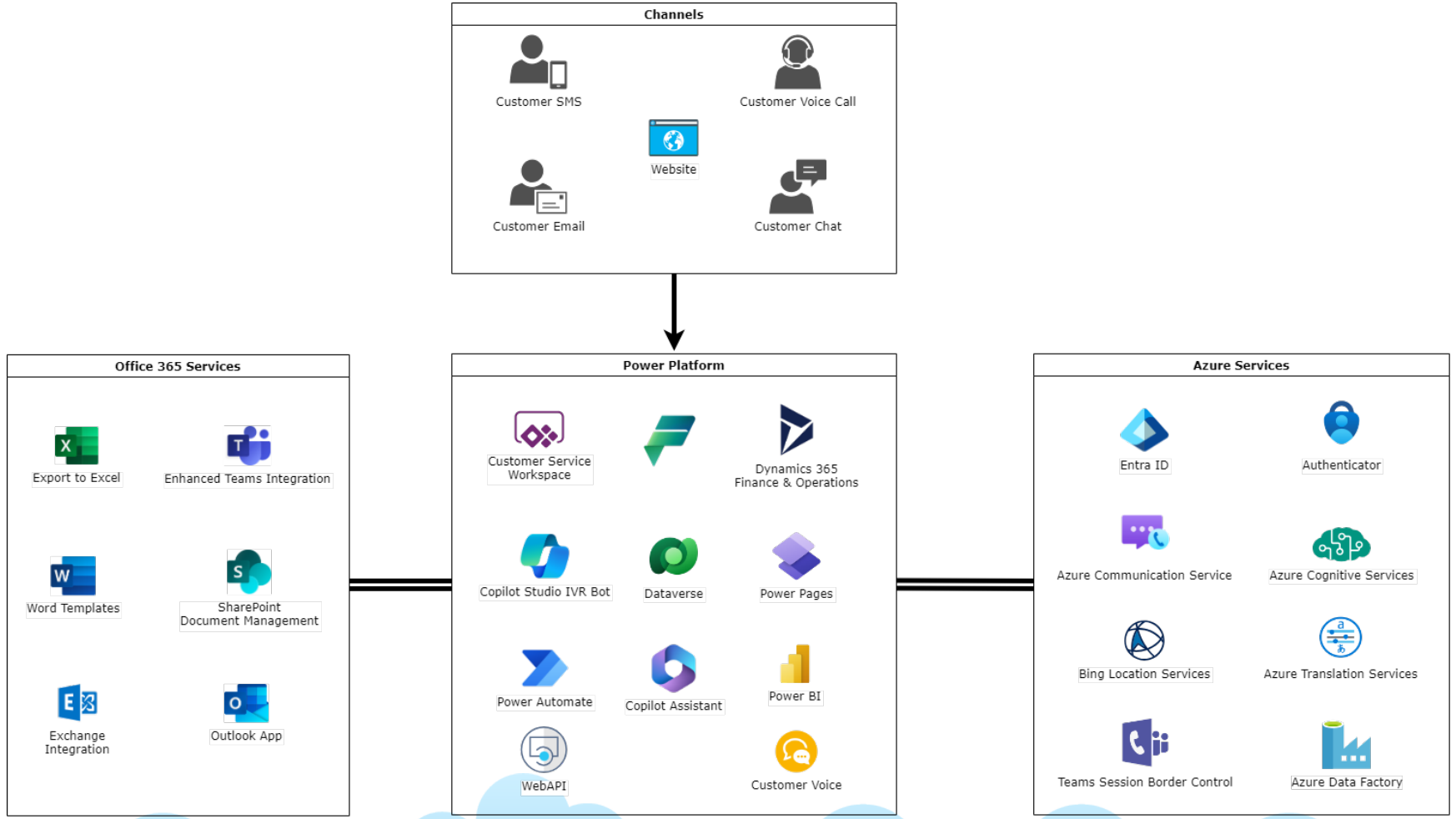
Agenda

- 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

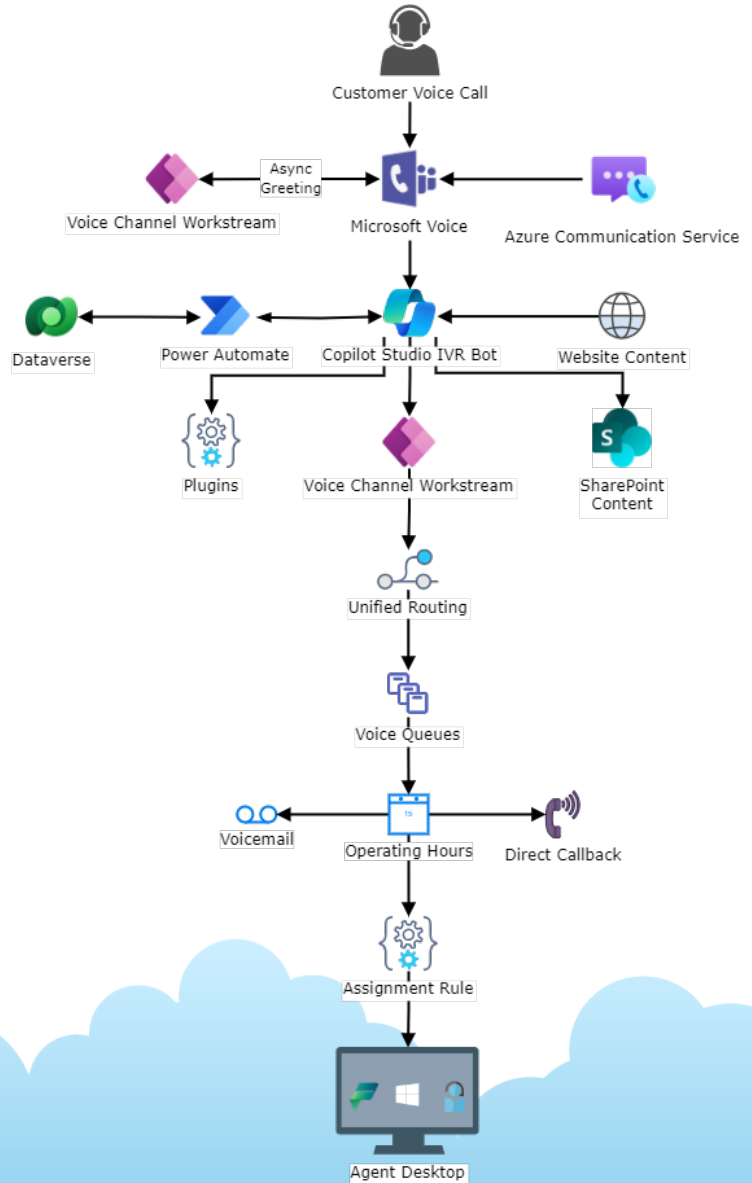
Part 1 – CSW Voice Call Flow

High-level Flow for Customer Service Workspace using Microsoft Voice

Services Included in CSW w/Voice



Voice Workstream Flow (Part 1)



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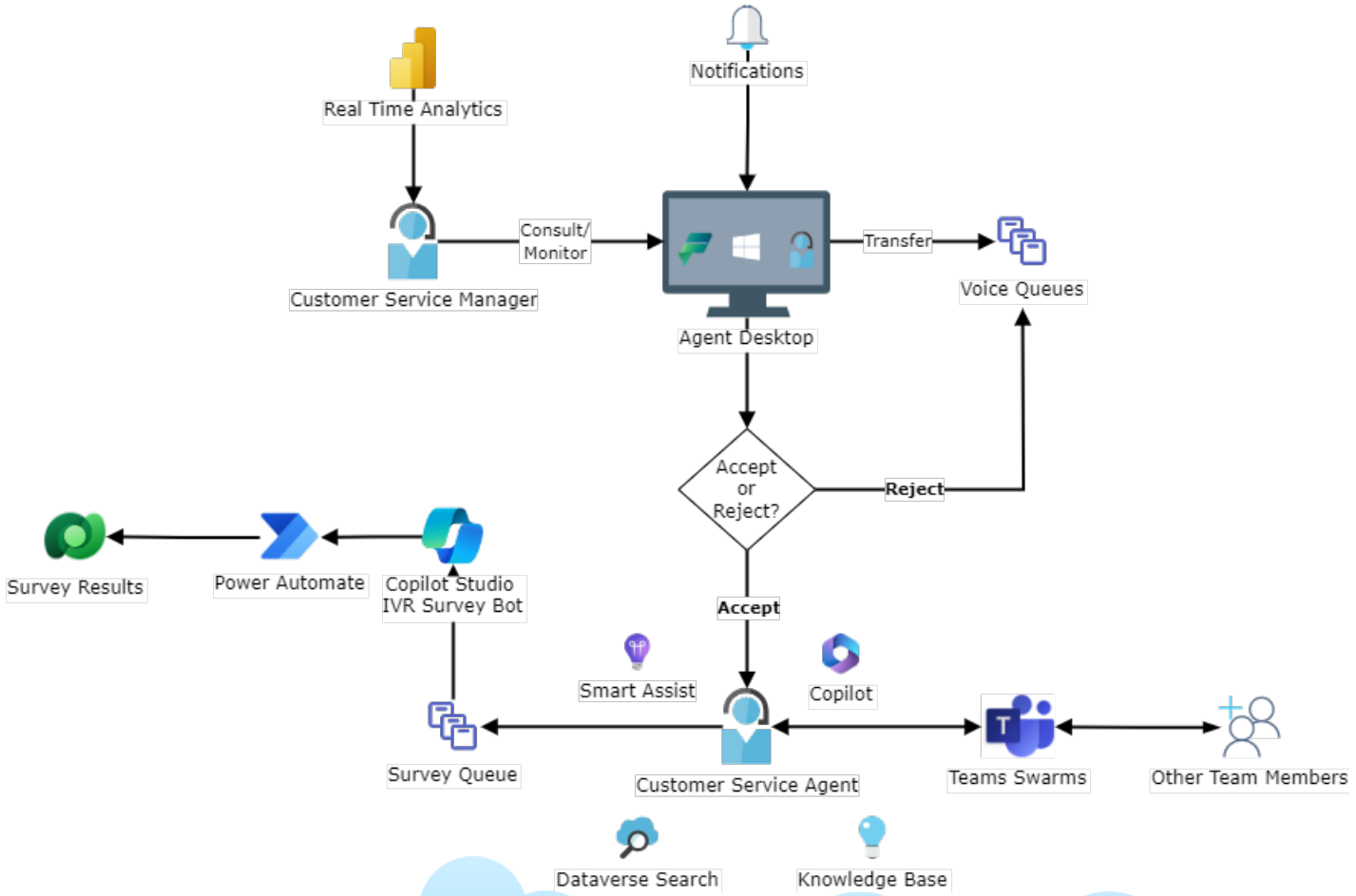
Voice Workstream Flow (Cont'd)



Part 2 - Demo

Demo to Show Microsoft Voice within Customer Service Workspace

Top Ten Reasons Why You Hated Your Call Center Experience

Sources:
https://www.calltrackingmetrics.com/blog/sales-service/lead-management/are-you-guilty-5-common-call-center-mistakes-to-avoid/
https://www.cdcsoftware.com/call-center-challenges/
https://getvoip.com/blog/call-center-problems/

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:
https://www.calltrackingmetrics.com/blog/sales-service/lead-management/are-you-guilty-5-common-call-center-mistakes-to-avoid/
https://www.cdcsoftware.com/call-center-challenges/
https://getvoip.com/blog/call-center-problems/

Top Ten Reasons Why You Hated Your Call Center Experience

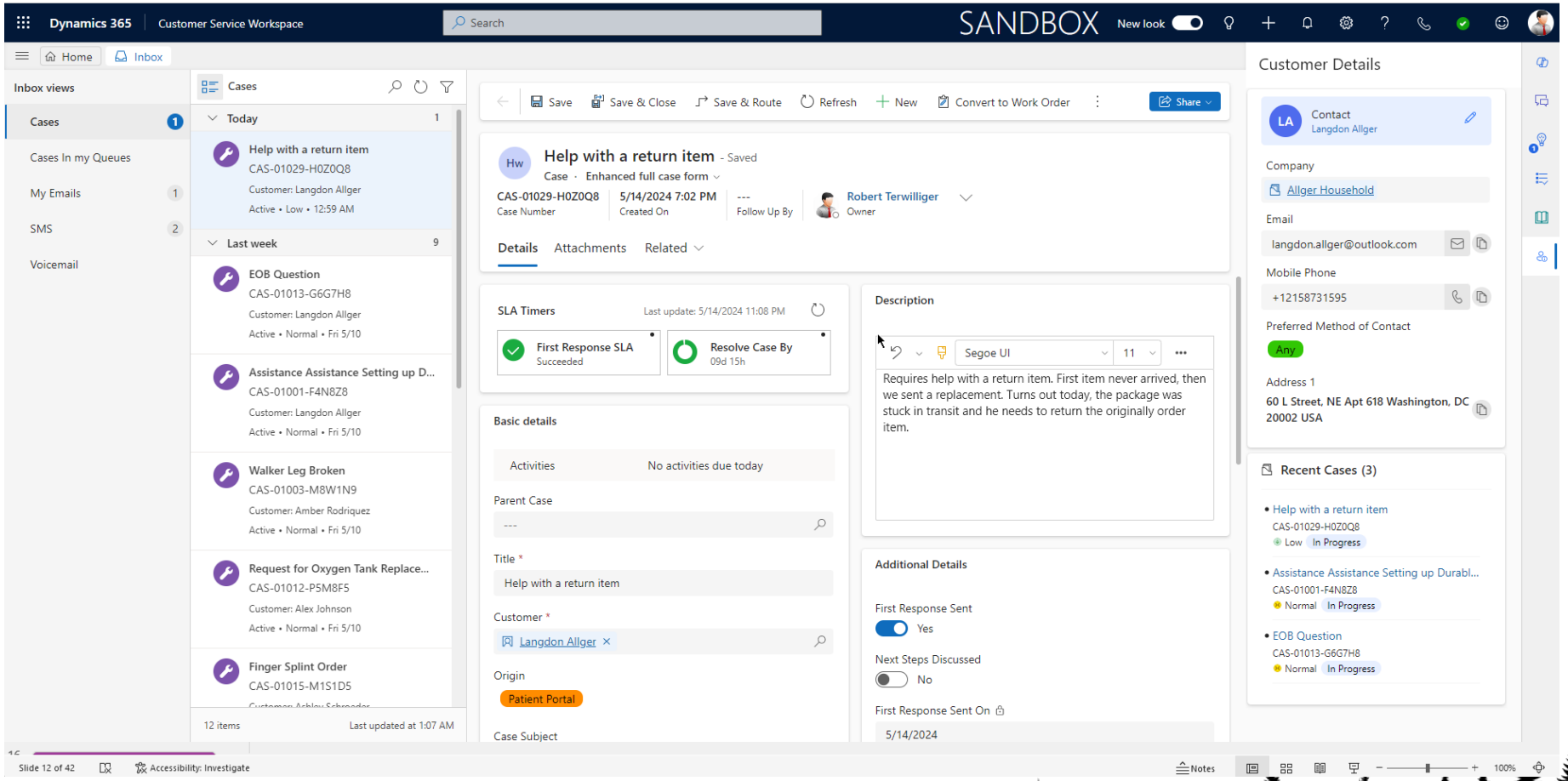
1. I'm sorry, that's not a valid option. To repeat this Top 10 List, press 7
2. Unlike Disney Land, when you get to the front of this queue, ain't no Pirates of the Caribbean!
3. You have to explain your problem over and over again.
3. You have to explain your problem over and over again.
4. 20 minutes 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:
https://www.calltrackingmetrics.com/blog/sales-service/lead-management/are-you-guilty-5-common-call-center-mistakes-to-avoid/
https://www.cdcsoftware.com/call-center-challenges/
https://getvoip.com/blog/call-center-problems/

Top Ten (real) Reasons Why You Hated Your Call Center Experience

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



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Part 3 – Azure Communication Services

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

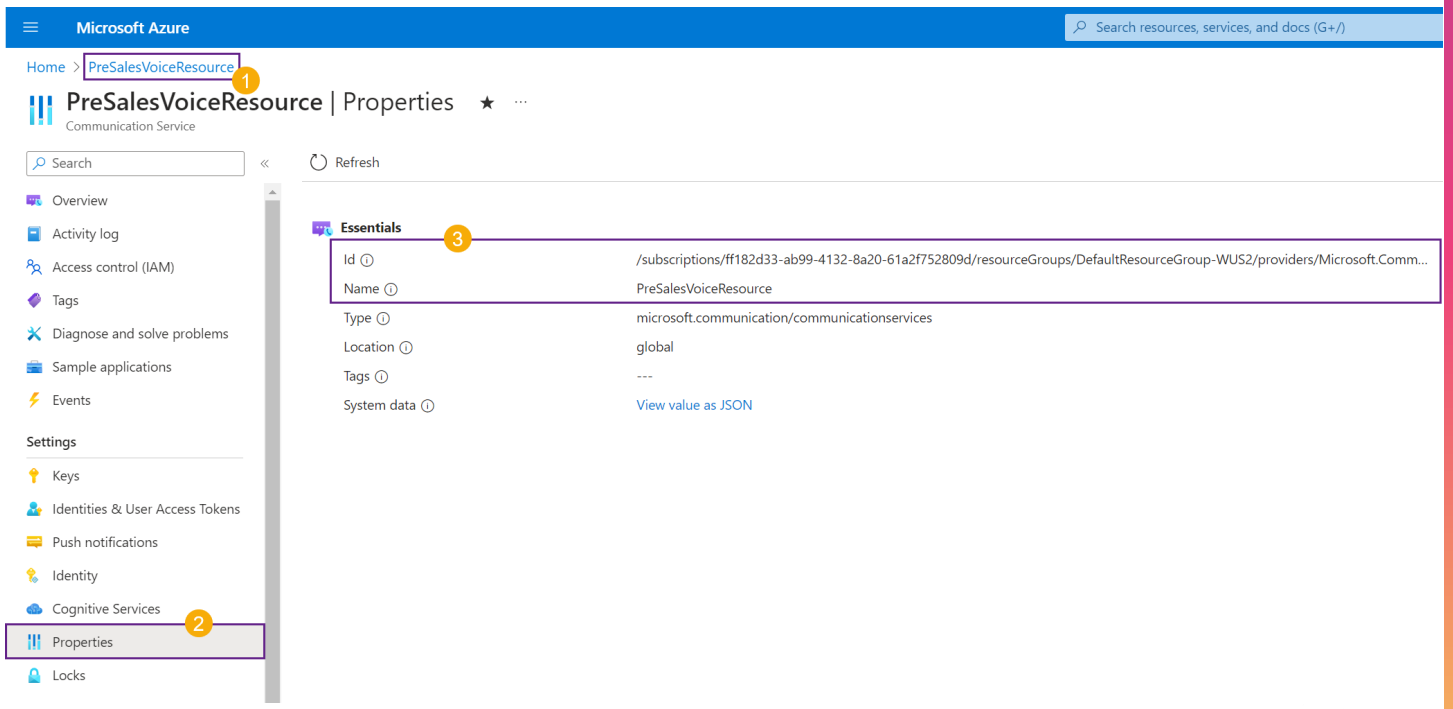
What is Azure Communication Services?

- 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:

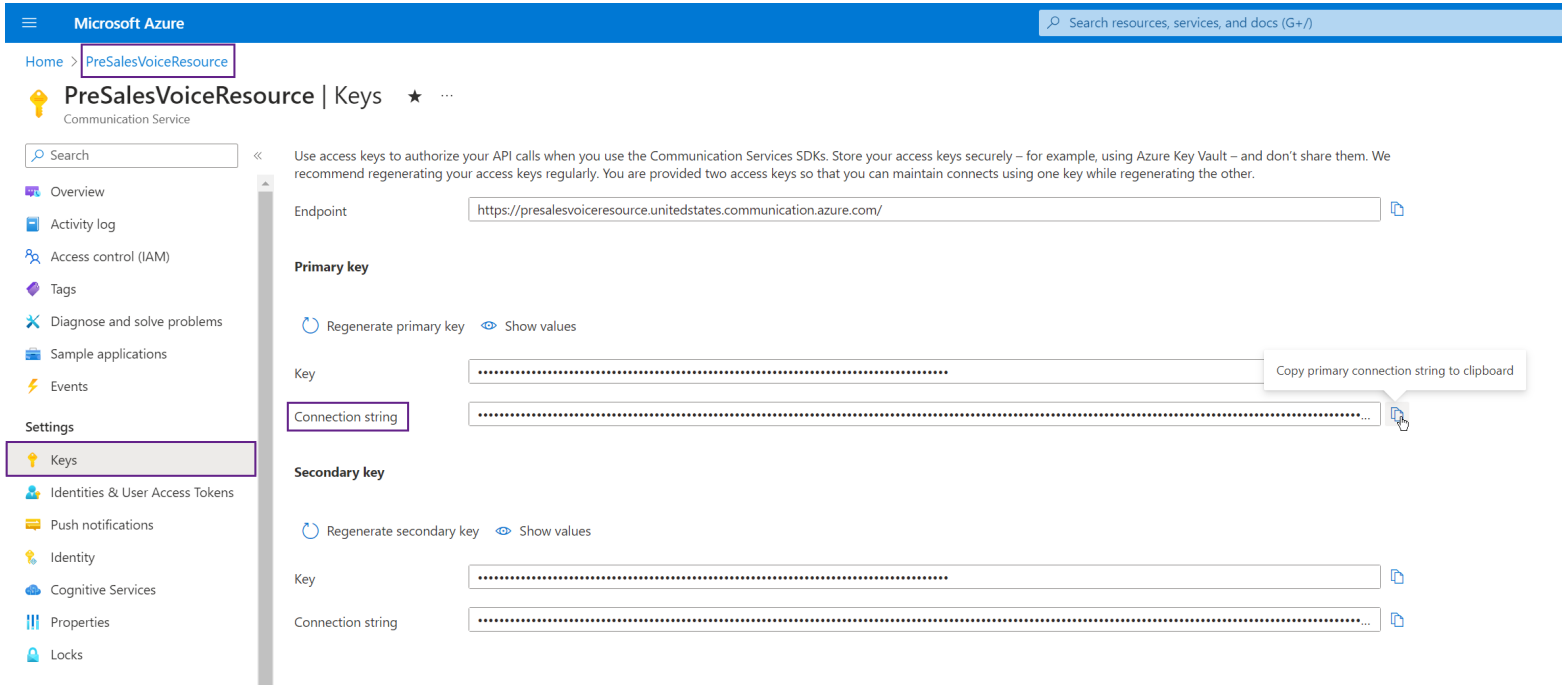
- Subscription to ACS
- 1 or more Phone Numbers
- New or existing Azure Resource Group
- New or Existing ACS Resource
  - Copy/paste Resource Name (into Notepad)
  - Copy/paste Resource ID (into Notepad)



Configuring Azure Communication Services (Cont'd)

Prerequisites:

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

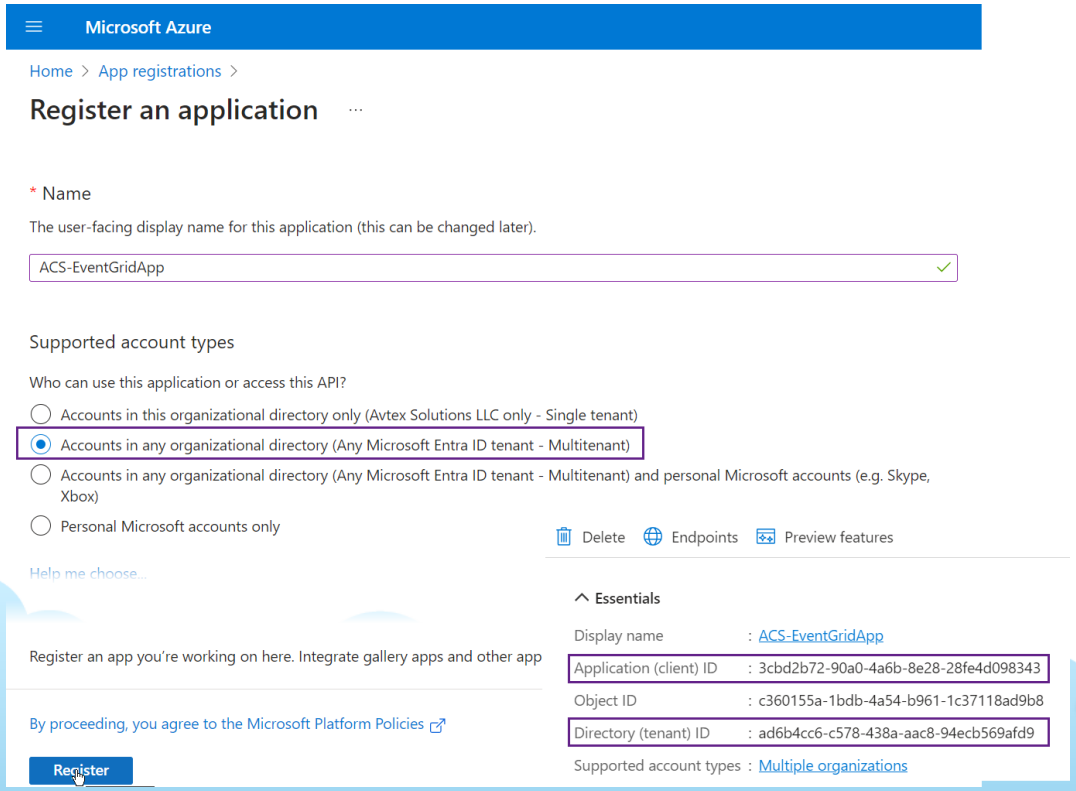


Configuring Azure Communication Services (Cont'd)

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

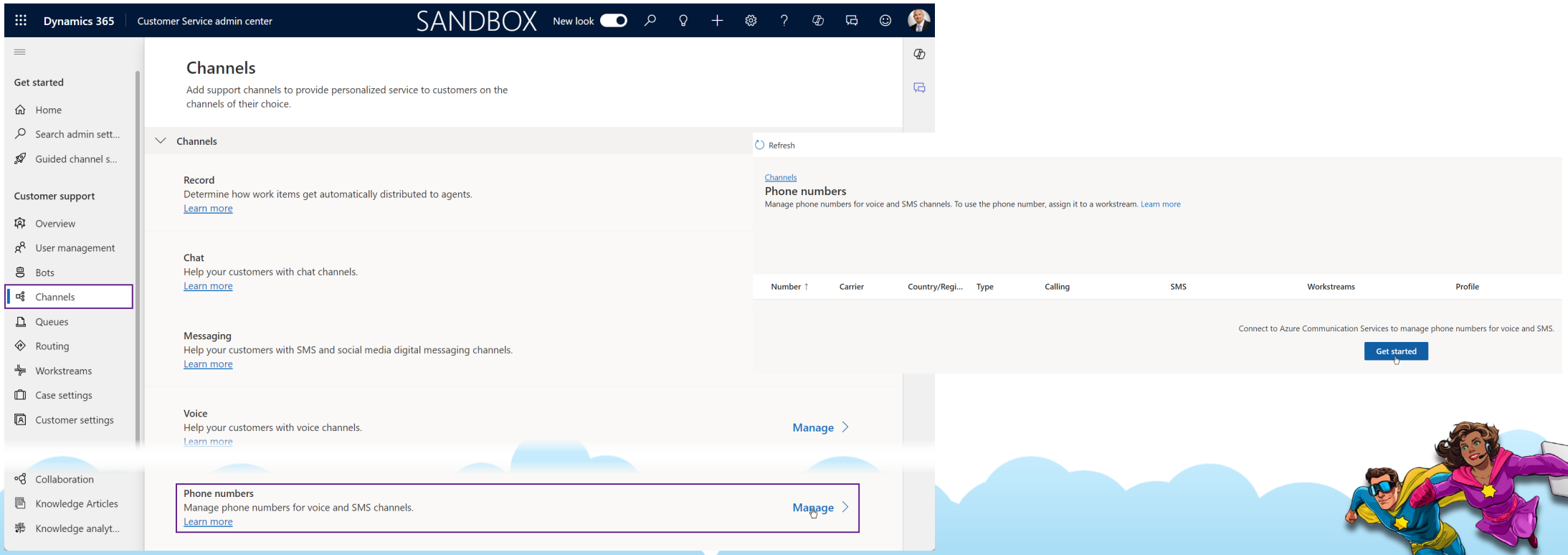
    (client) ID (into Notepad)



Configuring Azure Communication Services (Cont'd)

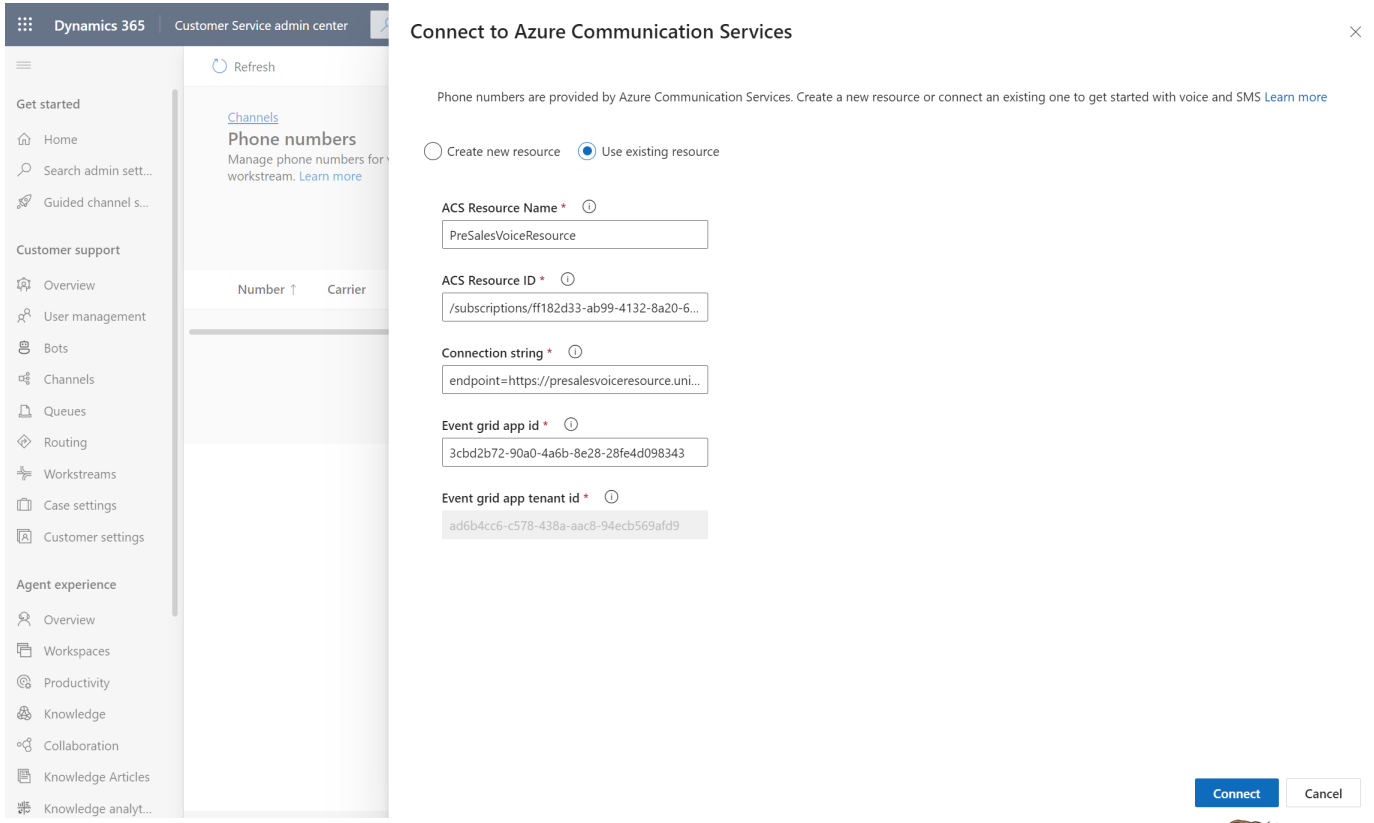
From the Dynamics 365 *Customer Service Admin Center*

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



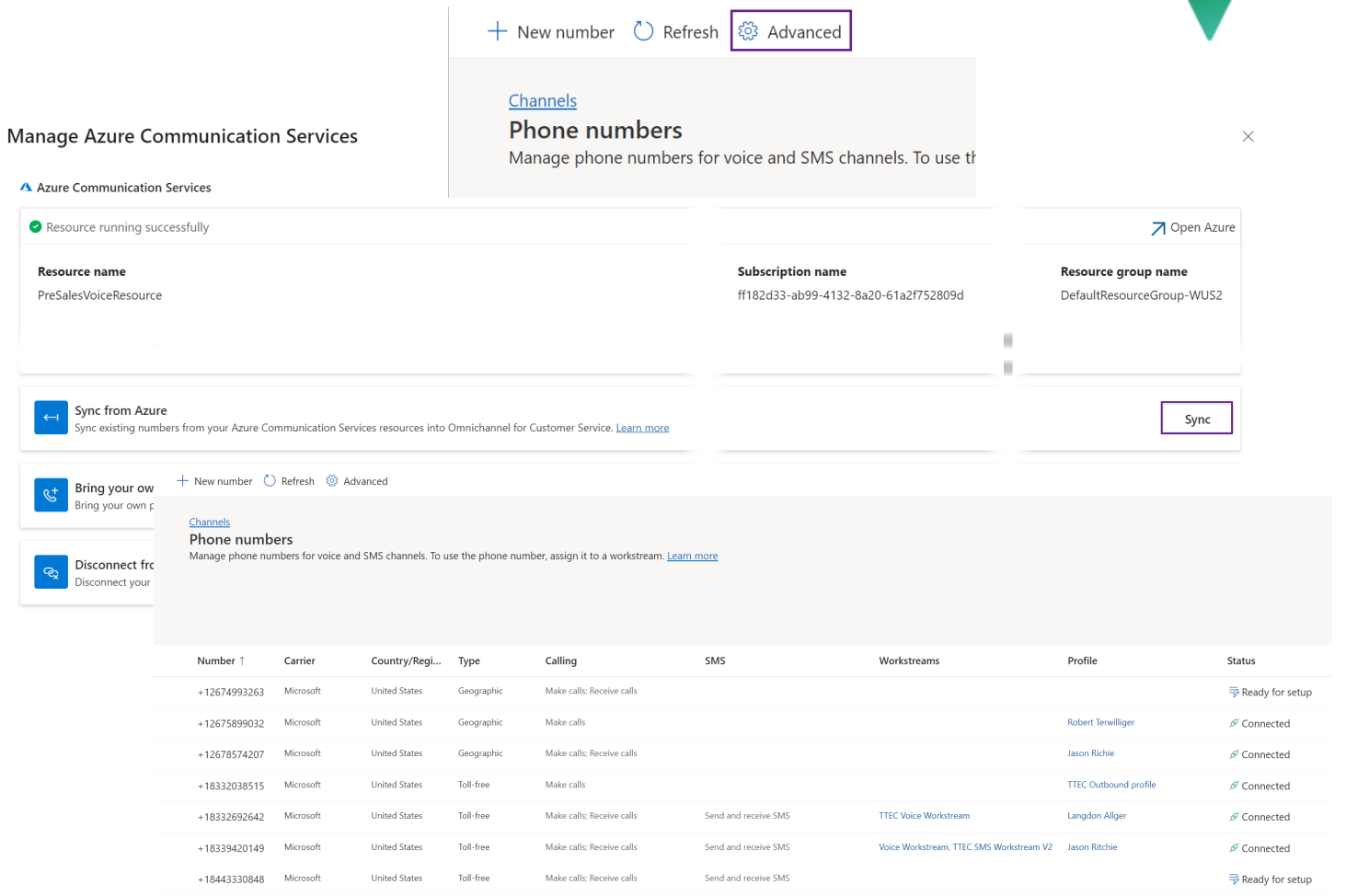
Configuring ACS Connection in Customer Service Workspace

- 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



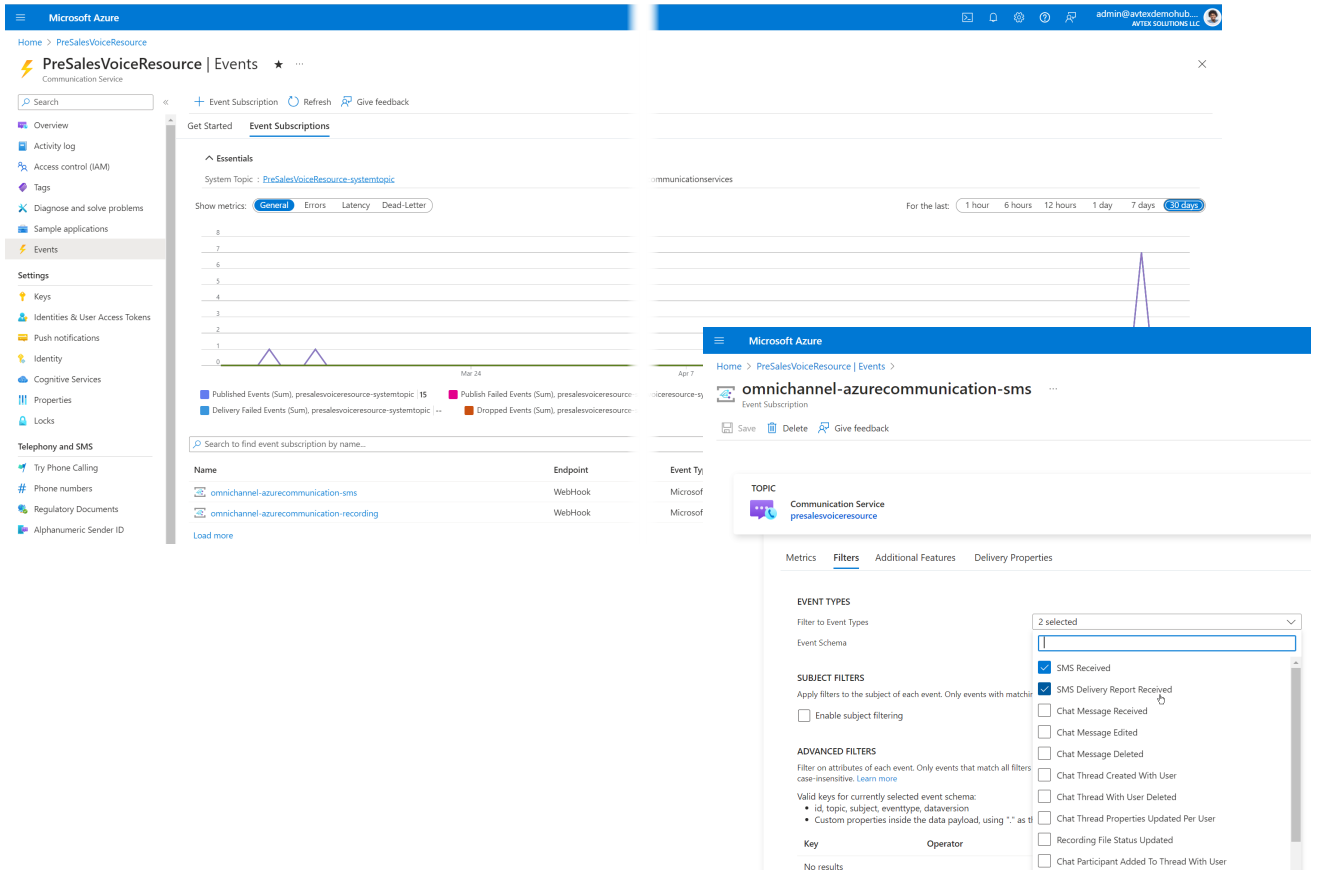
Configuring ACS Connection in CSW (Cont'd)

- 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

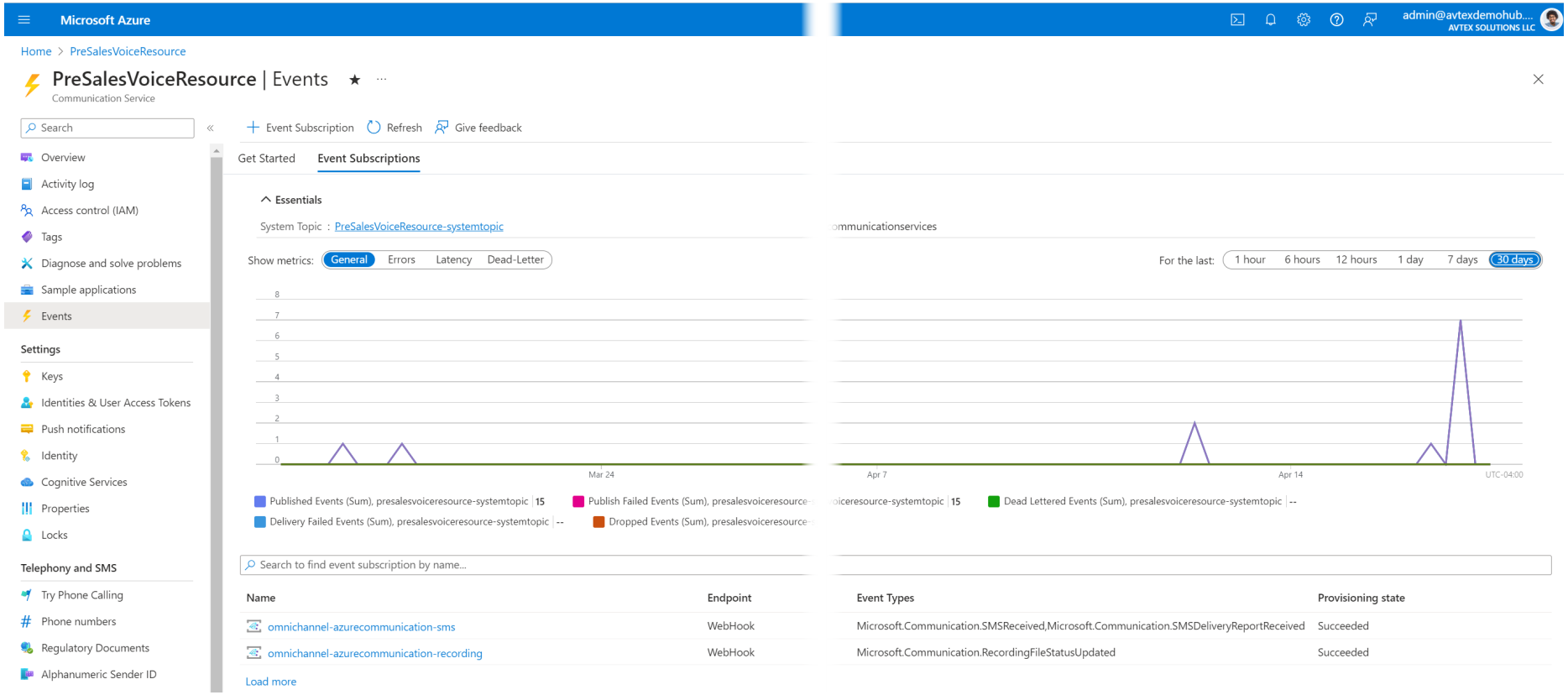


What is the ACS Event Grid?

- 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



Part 4 – Copilot Studio IVR Bot

Anatomy of the IVR Bot

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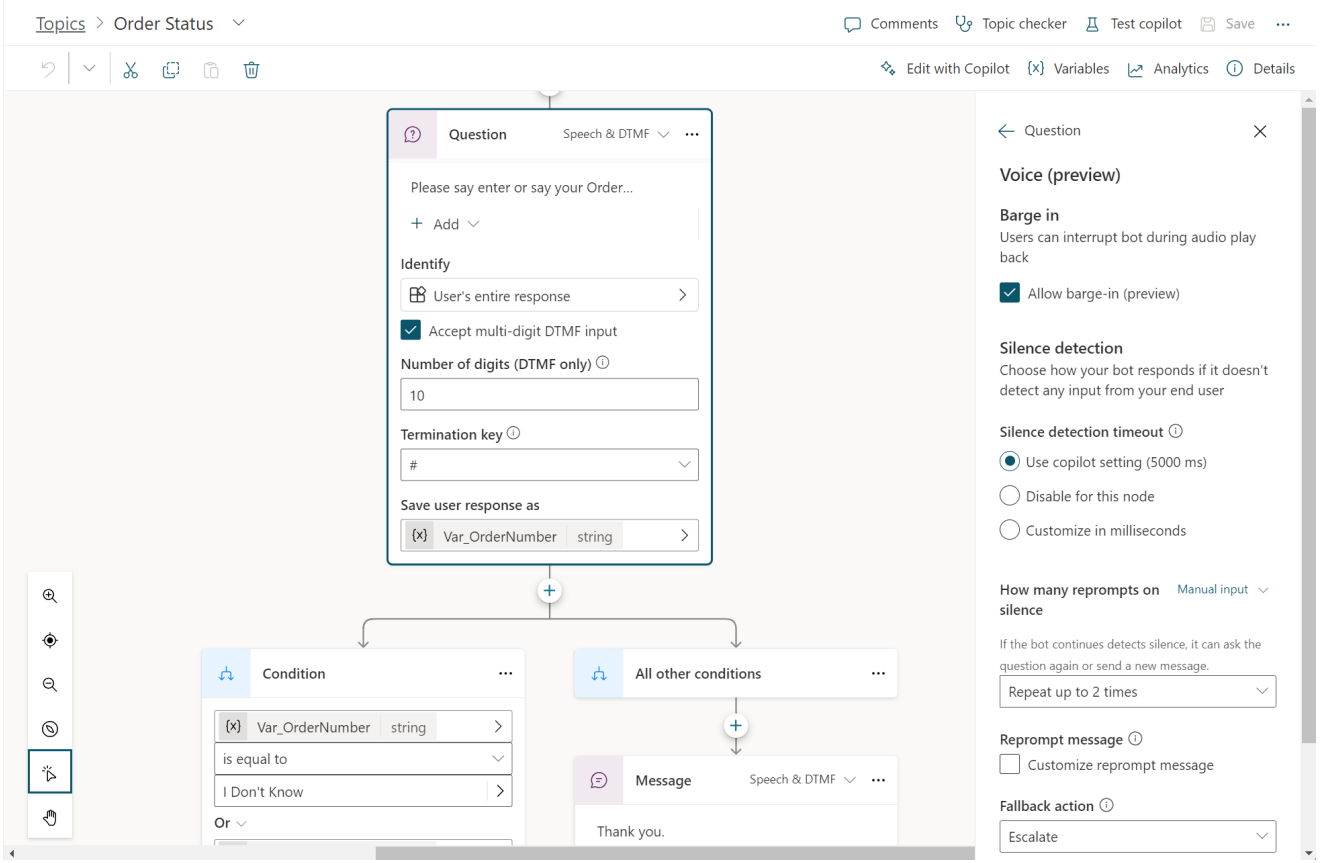
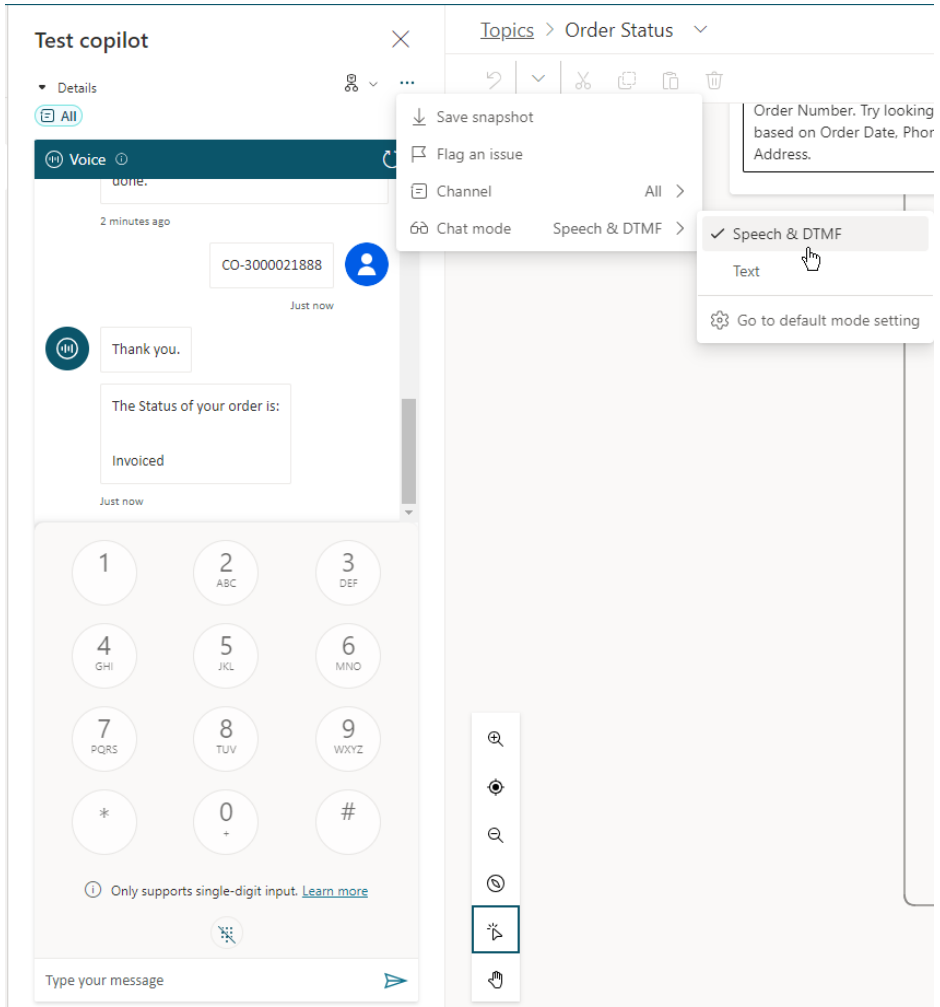
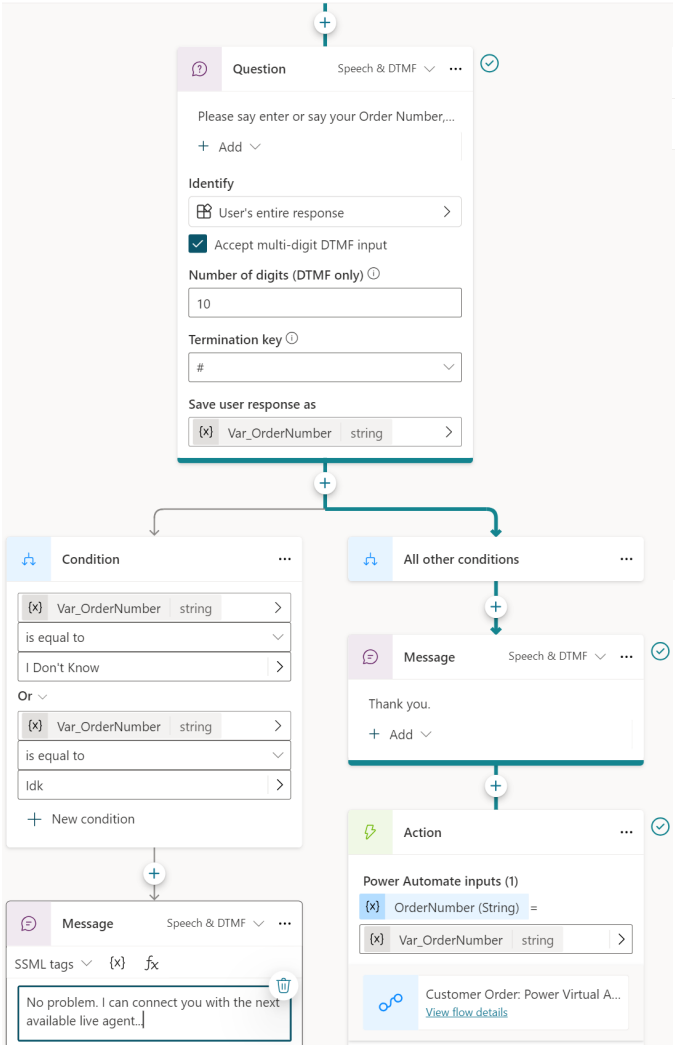
Copilot Studio IVR Bot Features

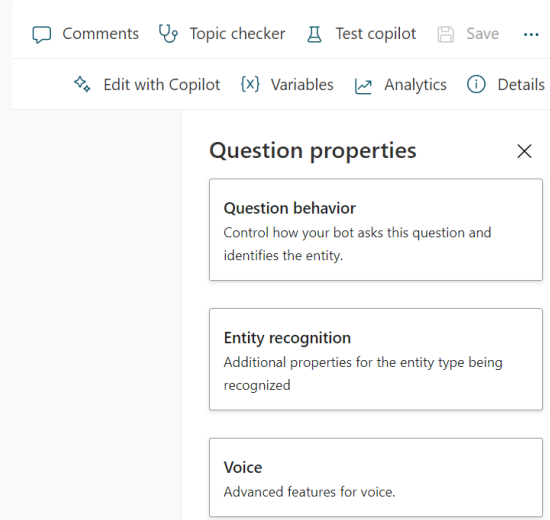
- Greets the customer
- Identifies the Customer (via Nuance)
- Collects information (using Variables)
- Identifies Intent (Using Topics)
- Triggers Power Automate (and other “plugins”)
- Accepts DTMF as well as Voice
- Escalates/Transfers call to Customer Service Workspace
- Voice recognition options: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



Copilot Studio IVR Bot Configuration Demo

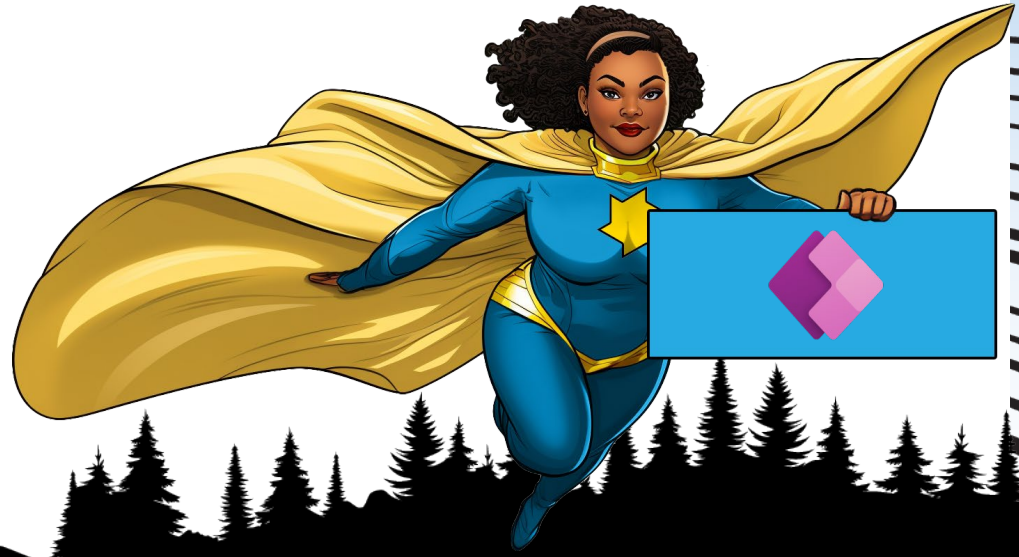






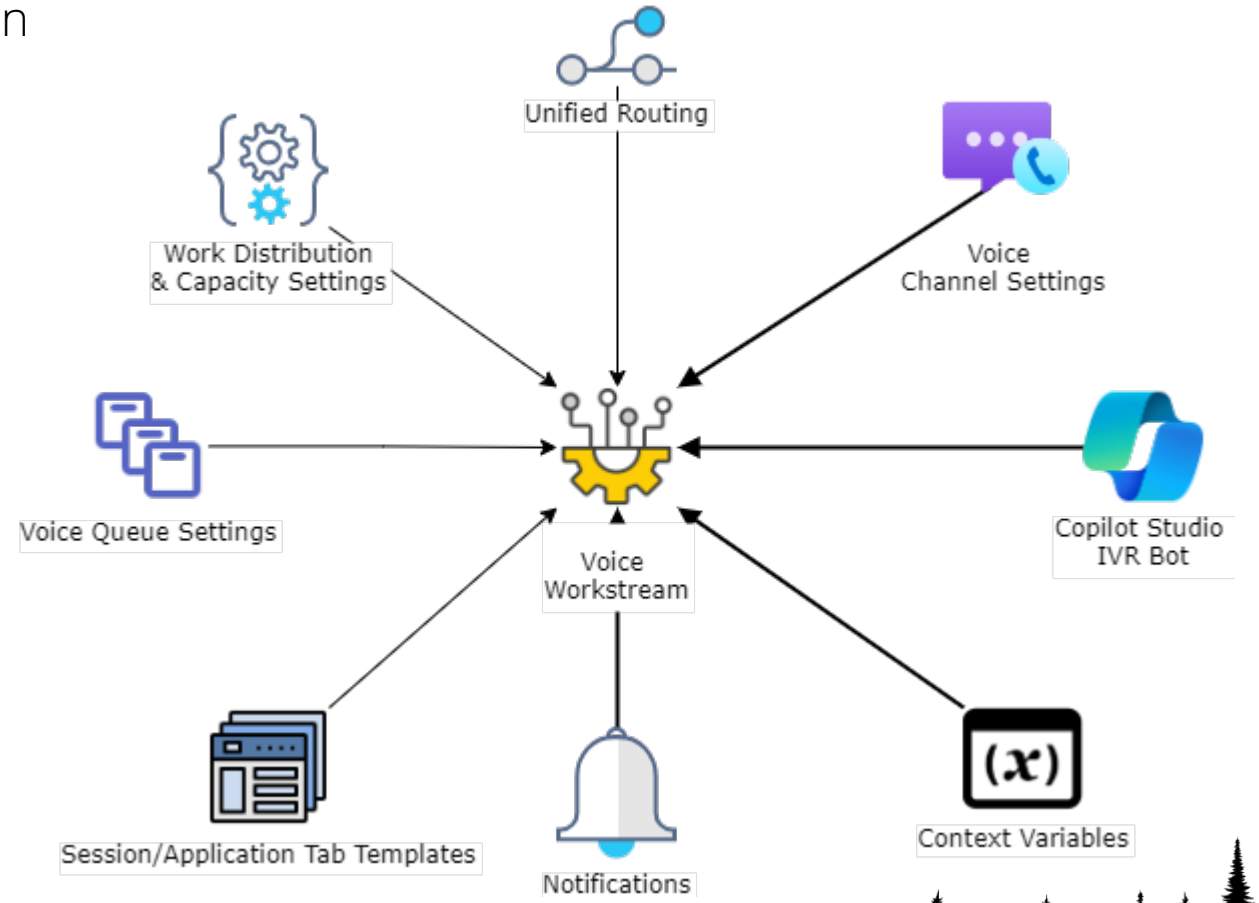
Part 5 – Voice Workstream

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

Work distribution

Work distribution mode	Push
Capacity	Profile based Voice Capacity Profile
Block capacity for wrap up	1 Minute
Allowed presences	Available Busy
Default skill matching algorithm	None

Advanced settings

Sessions

Default — TTEC Voice Call Session

Assignment method Learn more

Highest capacity **Read-only**

Work is assigned to the person with the most capacity when agents matc

Voice settings

Channel Details | Language | Behaviors

Language *
English - United States

Phone music
Select music that customers hear on the phone. Learn more

Hold music
This music will play while a customer is on hold.

Hold music
Pony

Wait music
This music will play while a customer is waiting in a queue.

Wait music
Pony

Voice profile
Choose the voice and speaking style used by voicebots and automated messages during the phone call.

Voice *
Jenny (Neural)

Voice style
hopeful

Speaking speed — 26

Pitch — 2

Test voice

You can replace this text with any text you wish. You can either write in this text box or paste your own text here.

Try different languages and voices. Change the speed and the pitch of the voice.

Selected voice and speaking style will be used by voicebots and automated messages during the phone call.

Play

Part 6 – Agent Experience: Copilot Assistant

Configuring Copilot Assistant to Assist with Voice Calls

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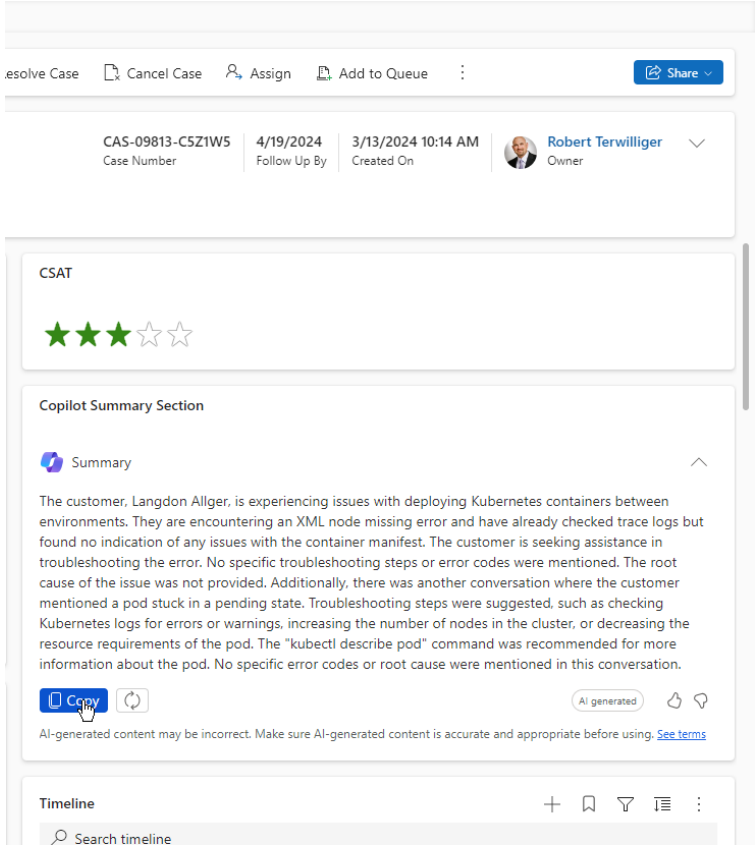
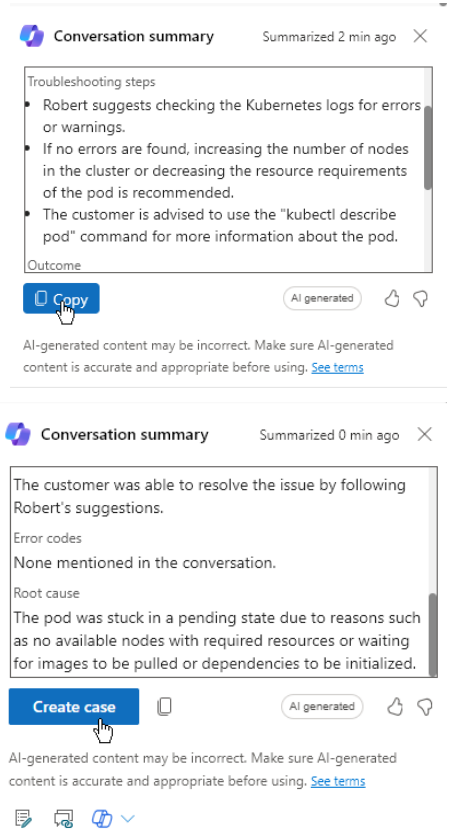
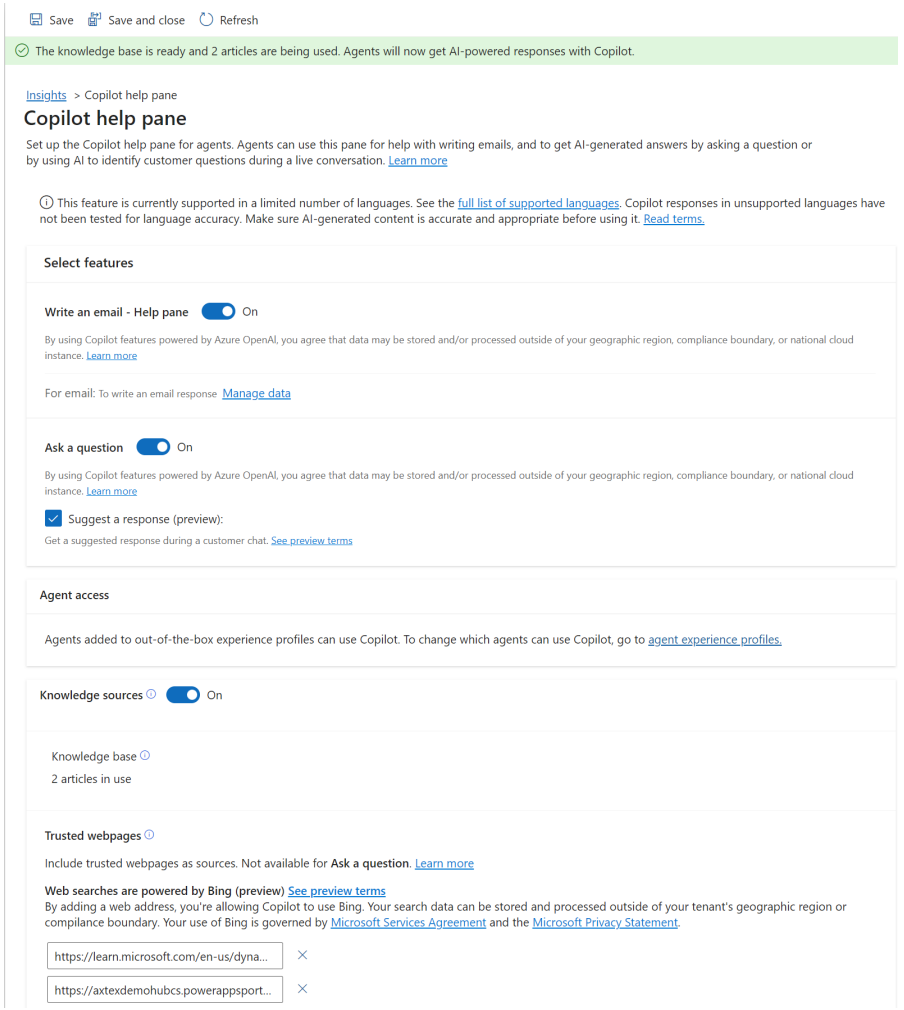
Copilot Assistant Features

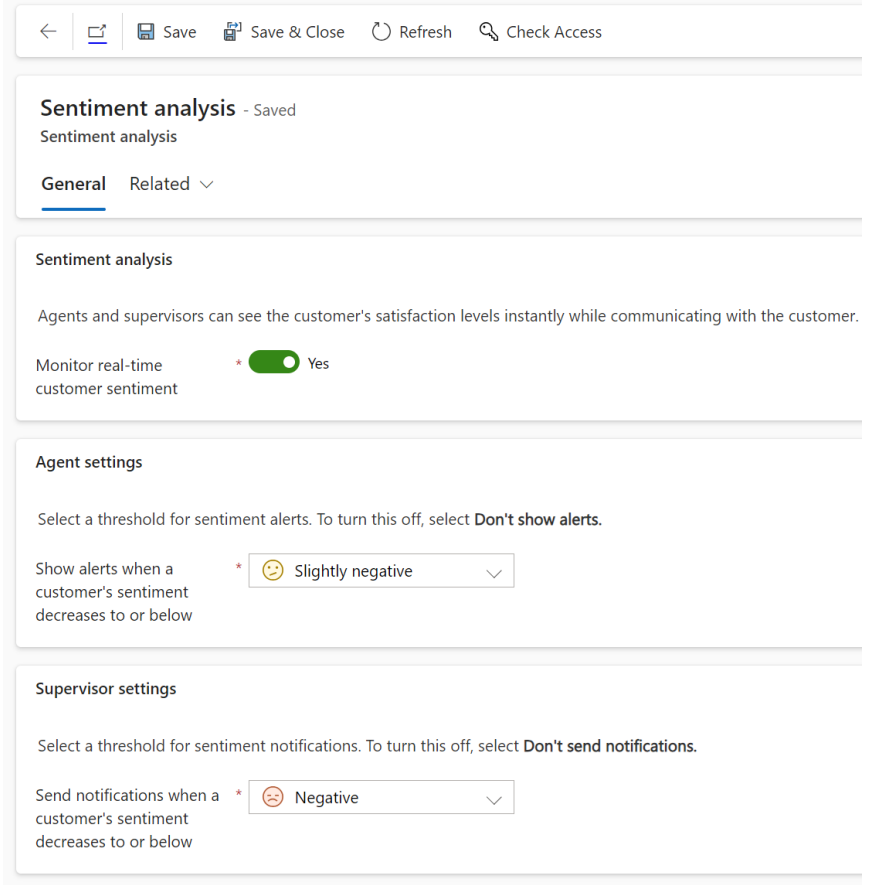
- Help Pane (right-side) (on/off)
  - Ask a Question
  - Email Assistance
- Contextual Summaries
  - When the Agent/Supervisor joins a conversation
  - When a conversation ends
    - Create new Case from summary
    - Copy to clipboard (to update an existing Case)
    - On-demand
- Auto-summarization 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

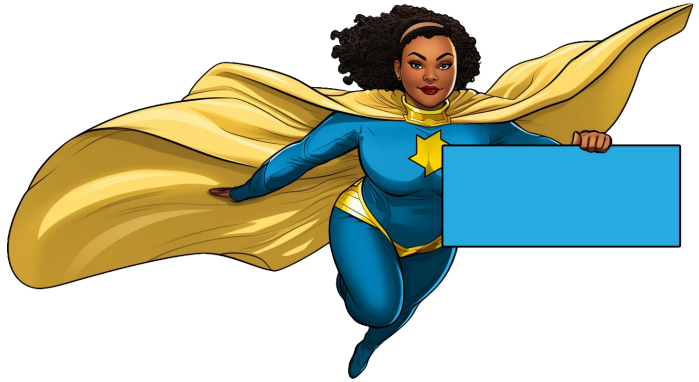




Copilot Assistant Configuration Demo





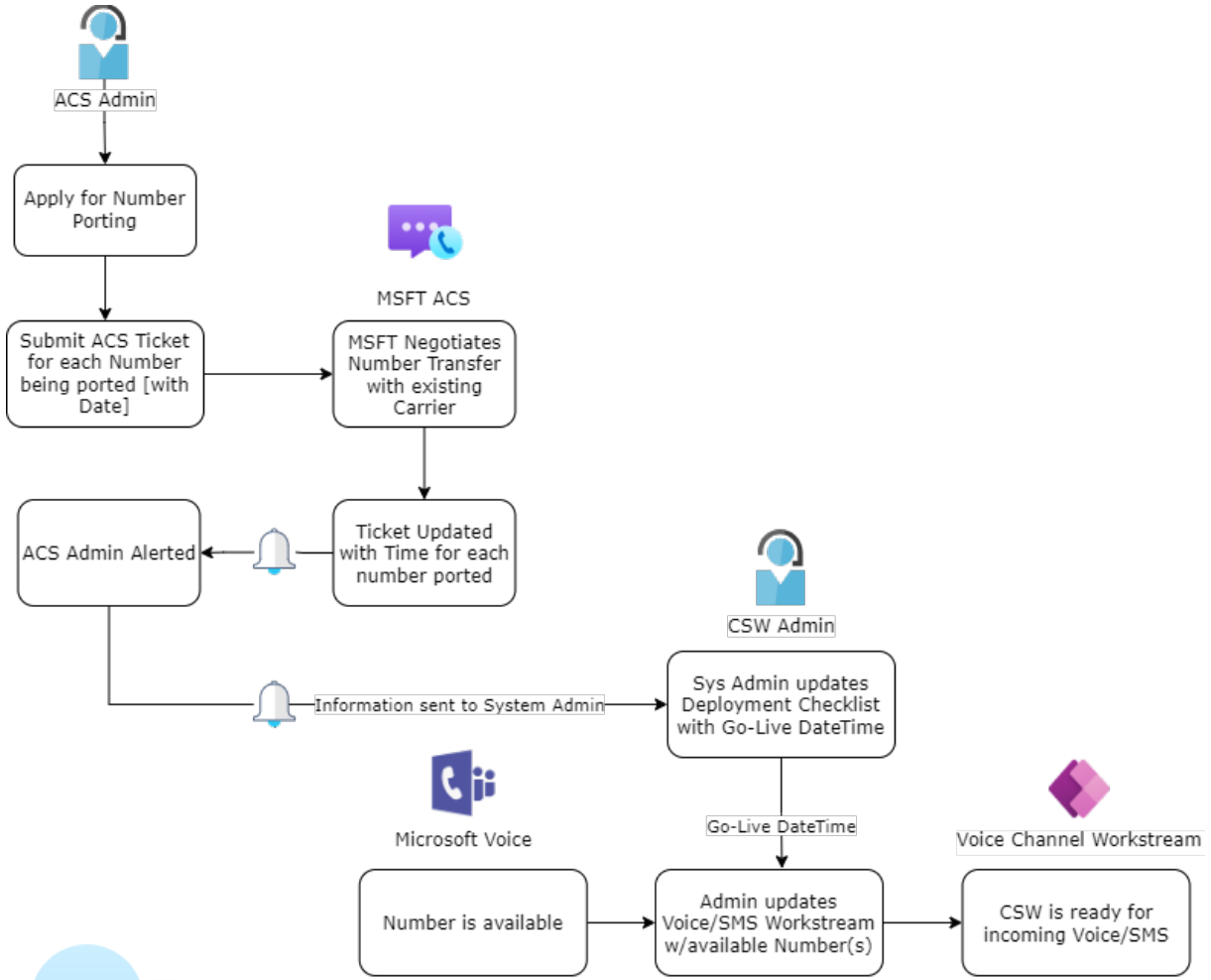


Part 7 – Phone Number Porting

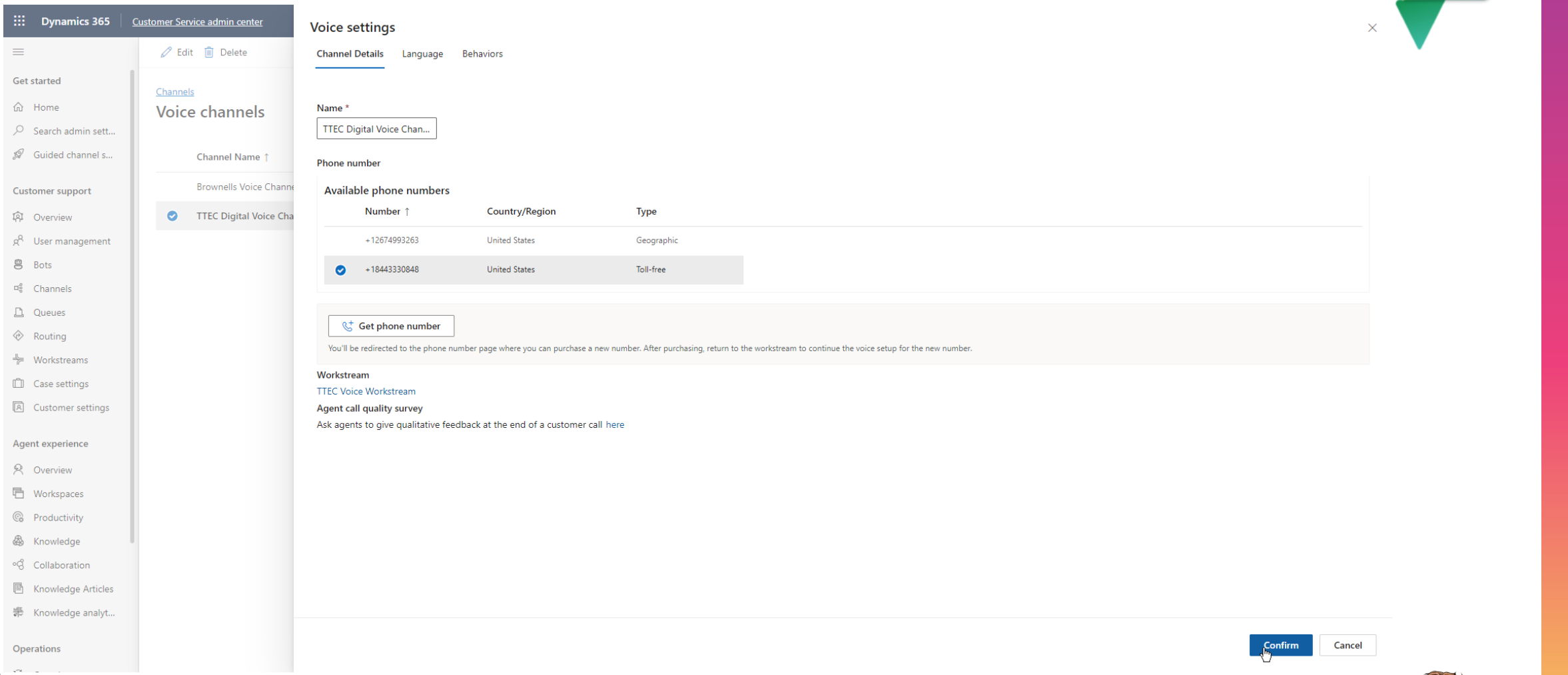
Overview of the process for bringing your existing Customer Service Number(s) to Microsoft Voice in ACS and what to expect for your Go-Live

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?