LAB Configure Quality Evaluation agent

Configure Quality Evaluation Agent in Dynamics 365 Customer Service or Contact center to meet your quality specific business needs.

Lab Details

Prerequisites

- You need to have access to Microsoft Copilot Studio using https://copilotstudio.microsoft.com/.
- Available Copilot credits.
- A computer with internet access.
- Sample data should be installed in the environment

Documentation and additional training links

- Manage Quality Evaluation Agent | Dynamics 365 Contact Center

Use Case: The Quality Evaluation Agent helps insurance organizations review and improve the quality of customer interactions using AI. Supervisors define the evaluation framework, which includes the evaluation criteria, evaluation plan, and scoring model. Using this framework, the agent automatically evaluates customer conversation or cases such as policy inquiries, surrender or other service requests—to ensure accuracy, compliance, and consistent service delivery.

Task 1 – Prerequisites

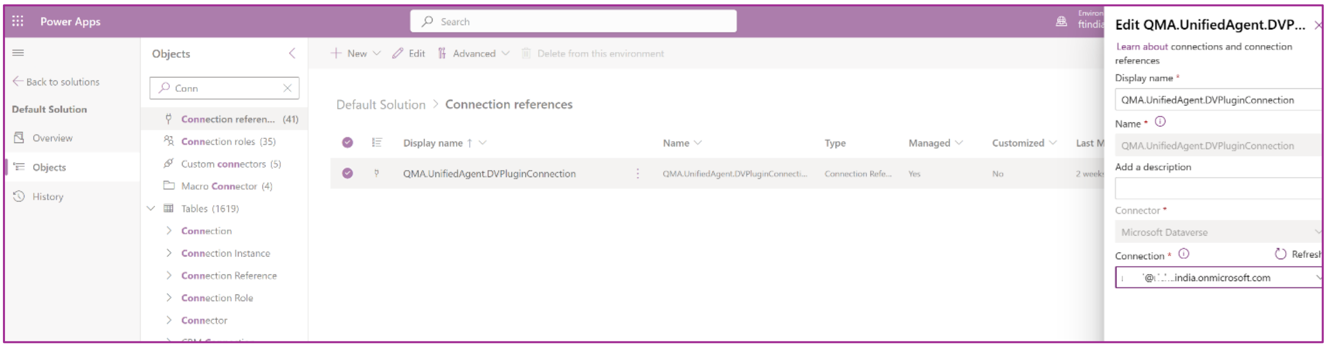
Step 1 Assign the **Quality Manager**, **Quality Evaluator**, and **Quality Administrator** roles to the users responsible for configuring the Quality Evaluation Agent (QEA).

Persona	**Role**	**Privileges**
Administrator	Quality Administrator	- Configure Quality Evaluation Agent. - Create evaluation criteria and evaluation plan. - Complete or assign an evaluation.
Supervisor	Quality Manager	- Create evaluation criteria and evaluation plan. - Complete or assign an evaluation.
Supervisor	Quality Evaluator	Complete or assign an evaluation.

Step 2 Configure the connection references required for the Quality Evaluation Agent flow.

For detailed steps refer to link [Set connection references for AI agent flow]

Below example screenshot for setting up Connection Reference for “**QMA.UnifiedAgent.DVPluginConnection**”



Below is the screenshot for setting up Connection Reference for “**Microsoft Copilot Studio Connection Reference for QEA**”

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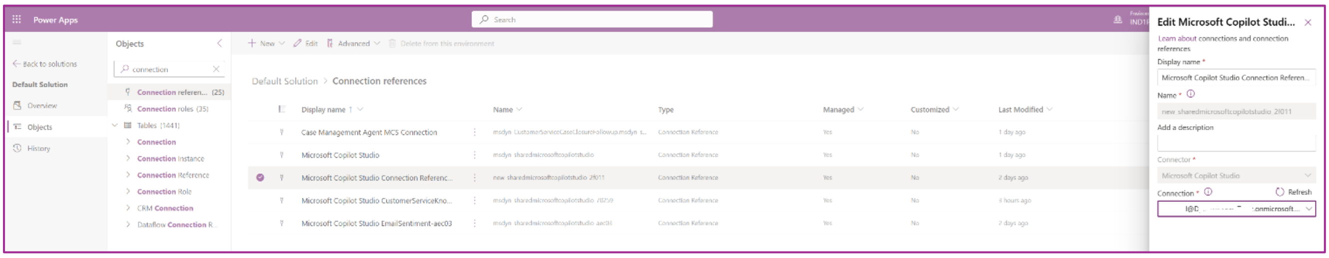


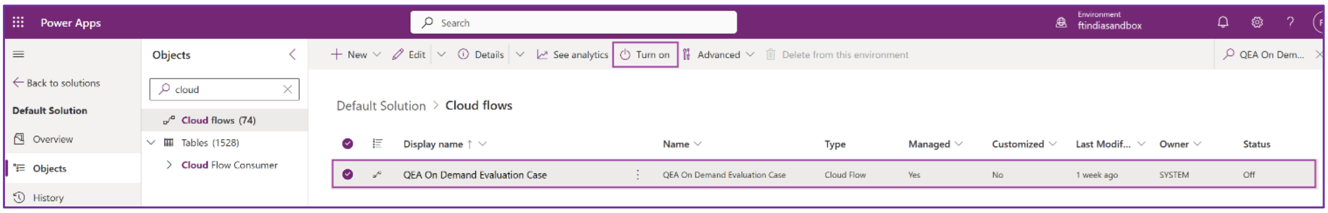
Do the similar steps to associate connection to all the below Connection references –

- Microsoft Copilot Studio Connection Reference for QEA
- Microsoft Dataverse Connection Reference for QEA
- QMA.Incident.DVPluginConnection
- QMA.UnifiedAgent.DVPluginConnection

Step 3 Turn on the Power Automate flow

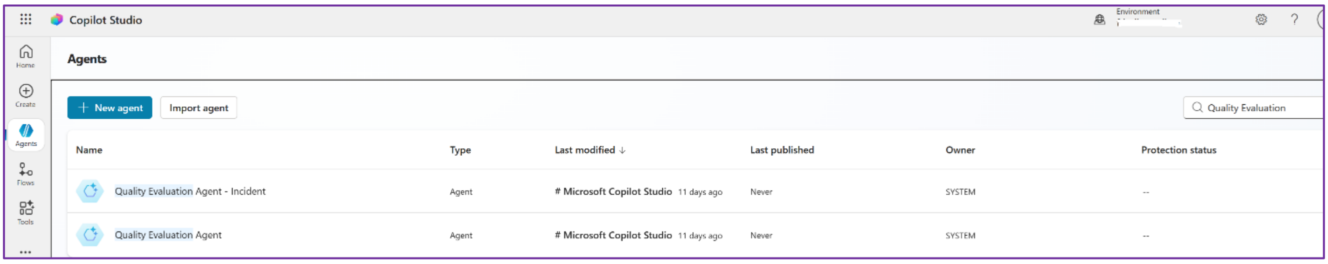
For detailed steps refer to link [Turn on the Power Automate Flows]

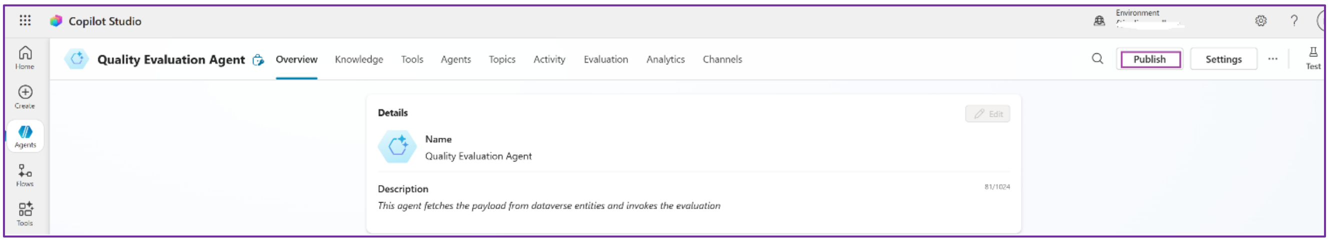
Below example screenshot for turning on Power Automate “**QEA On Demand Evaluation Case**”



Step 4 Publish the Microsoft Copilot Studio Agent

In [Microsoft Copilot Studio], select your environment, and then search for the agent, for example, **Quality Evaluation Agent** agent.
[Publish the agent].



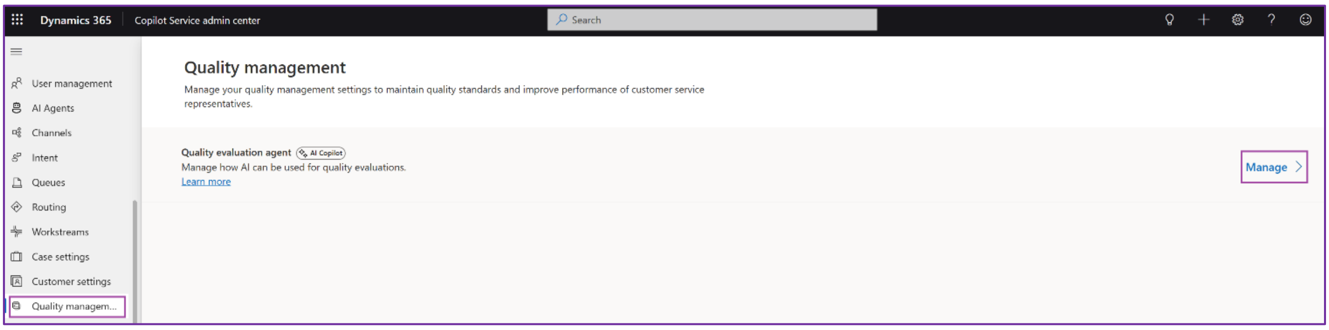


Task 2 – Enable Quality Evaluation Agent

For step-by-step details refer link [Enable Quality Evaluation Agent] to enable QEA.

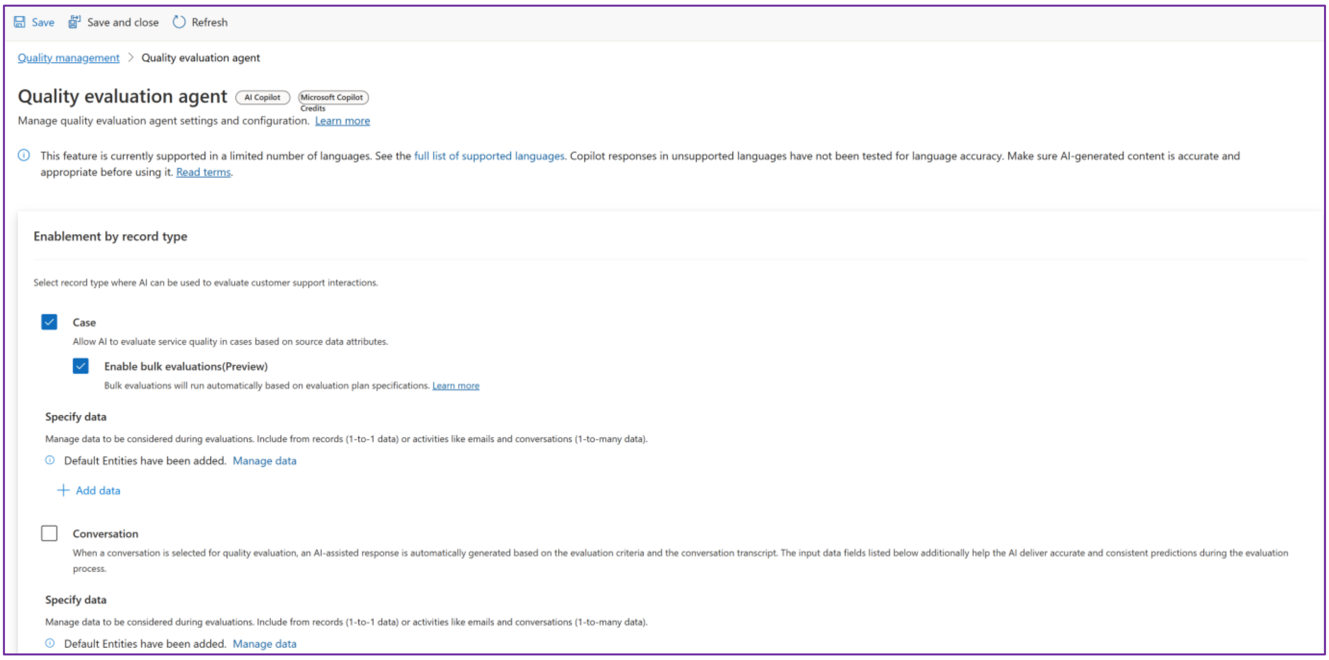
Step 1

- Open Environment.
- Open Copilot Service admin center app.
- Navigate to Quality Management -> Click on Manage



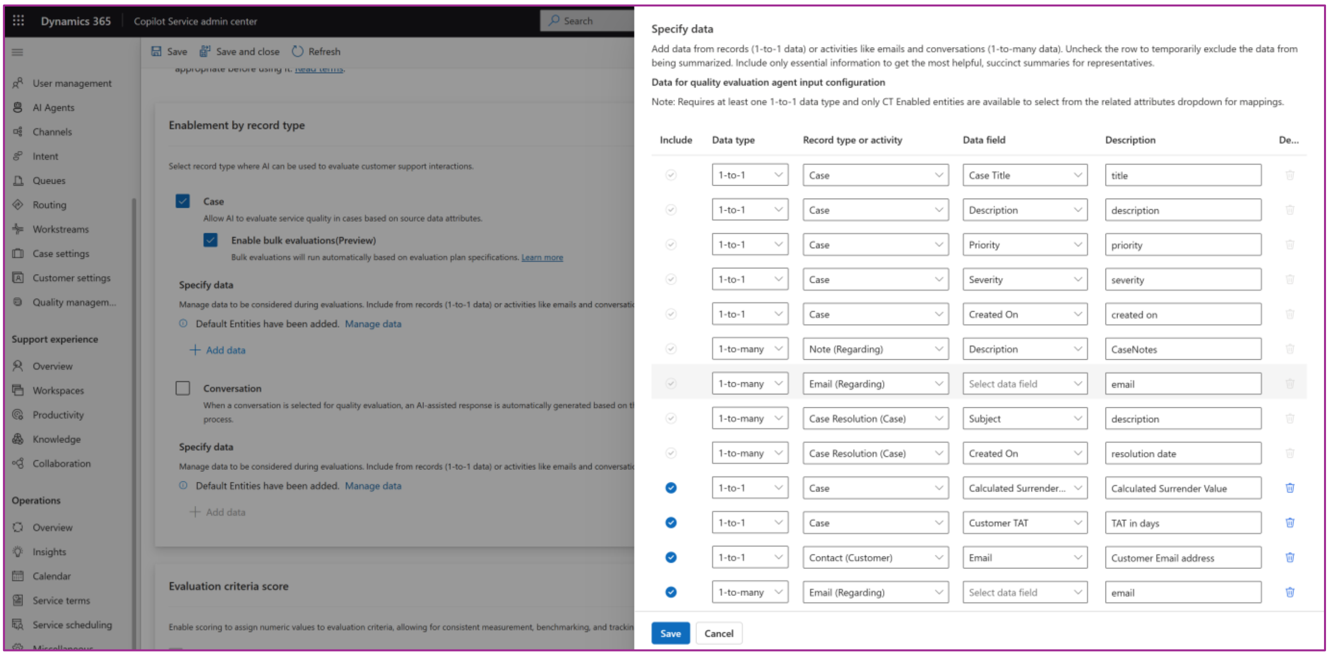
Step 2

- Enable Record Type (Cases Conversations or both)



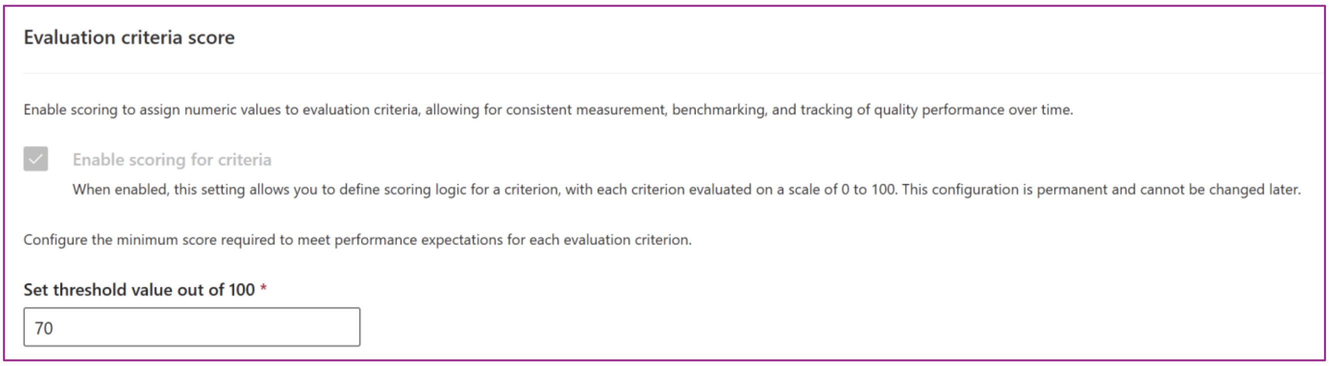
Step 3

- Manage data to be considered during evaluation



Step 4

- Enable Evaluation Criteria Scoring

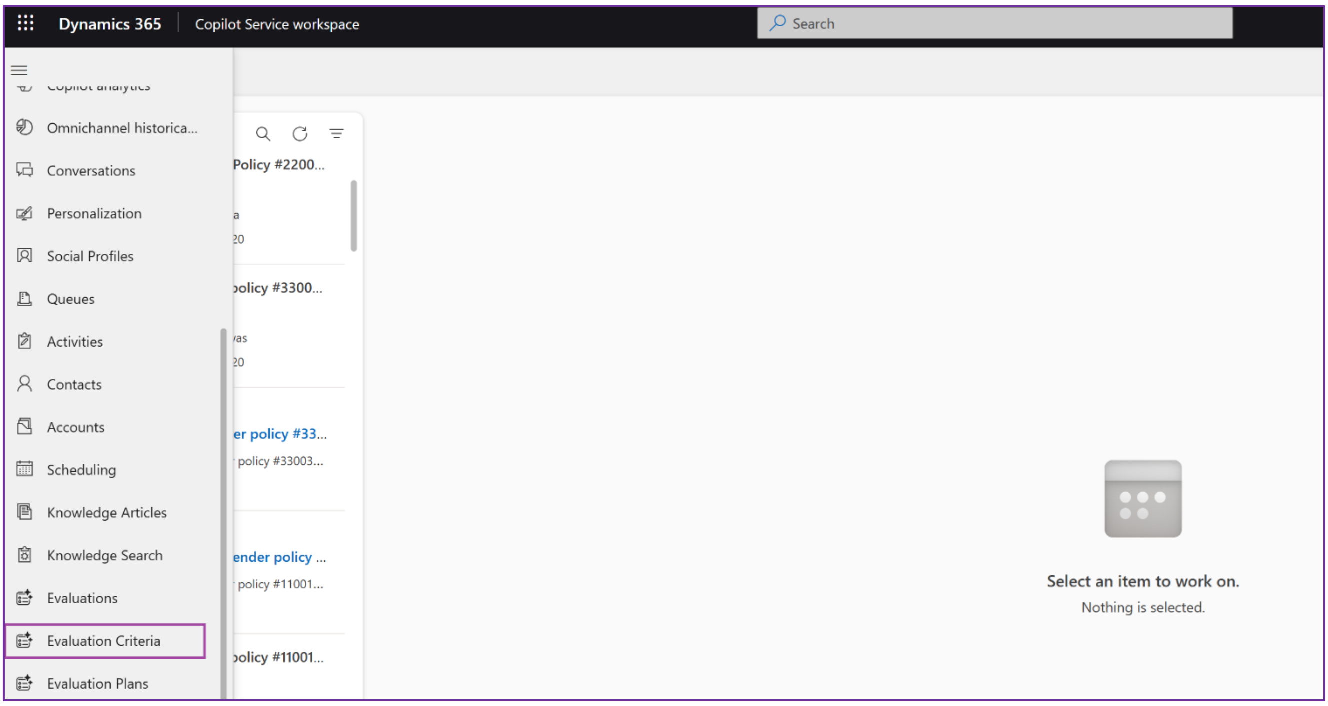


Task 3 – Use Evaluation Criteria

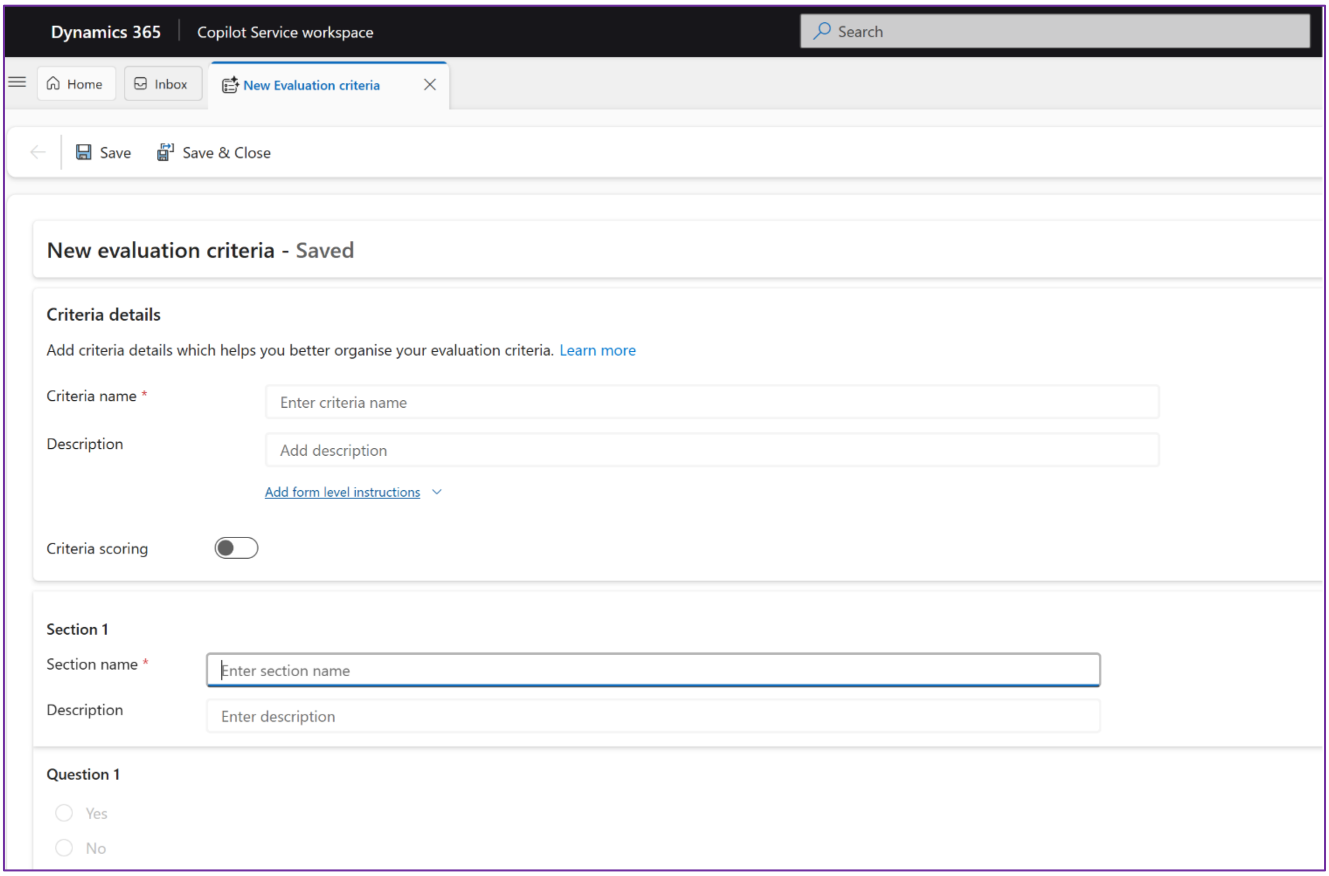
For step-by step details to create and manage Evaluation Criteria refer link [Create Evaluation Criteria]

Step 1

- Open Copilot Service workspace. Ensure the user has the required security roles assigned in [Task 1]
- Click on left Navigation Pane -> click Evaluation Criteria.



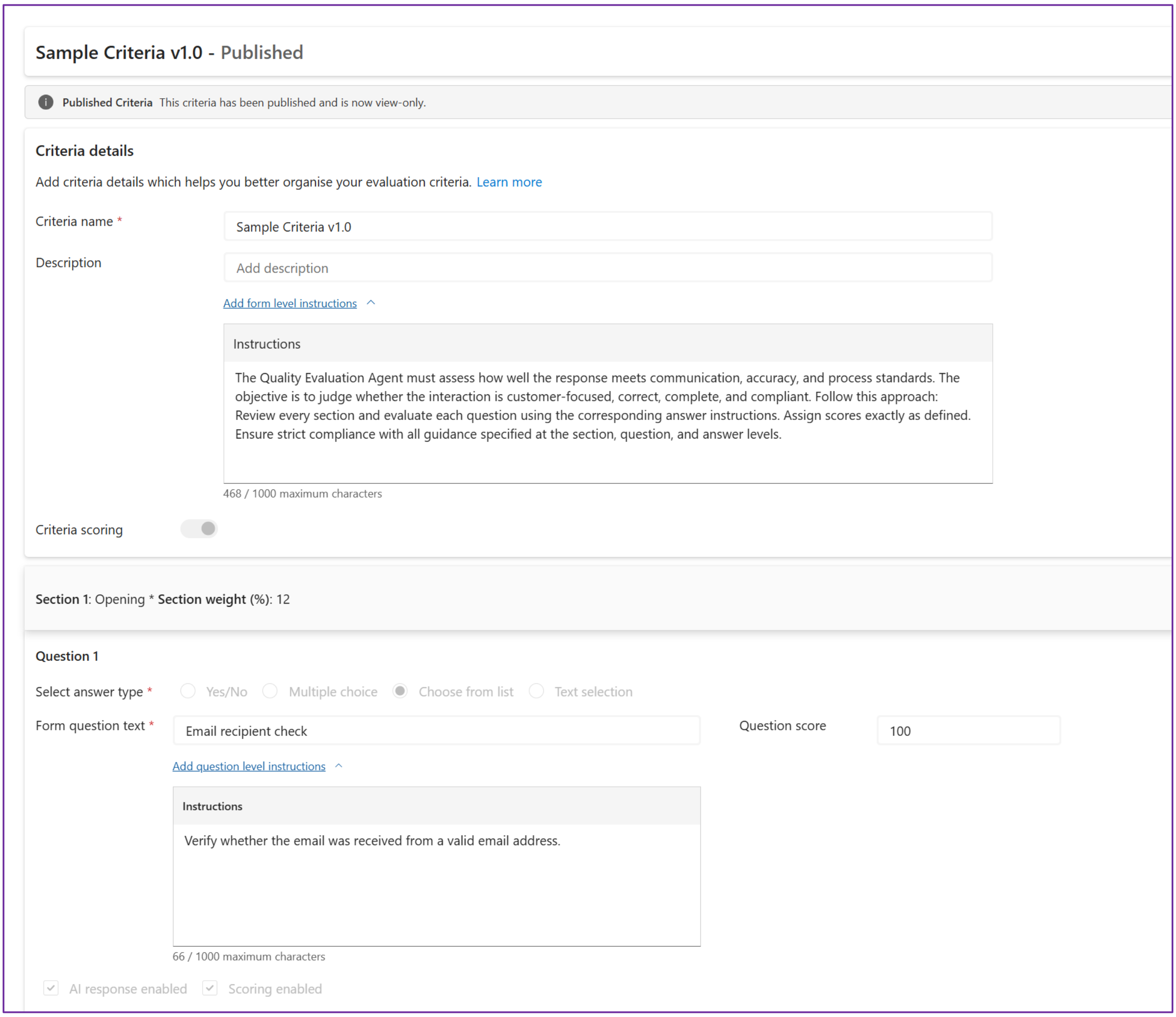
Step 2 Click on New (+) button to start the process of creating Evaluation criteria.



Step 3 Define instructions that apply to the evaluation criteria.

Refer link for the best practices to create evaluation criteria.

Below sample screenshot of evaluation criteria

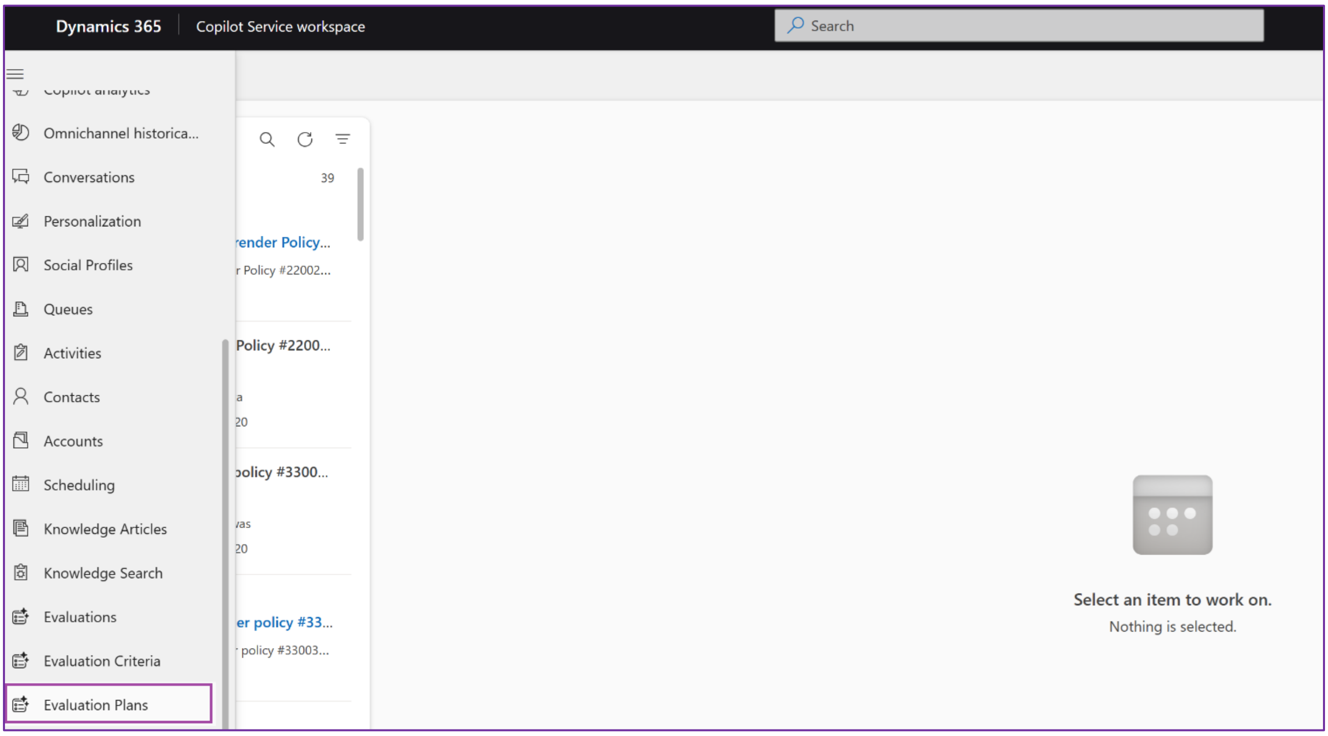


Task 4 – Use Evaluation Plan

This section describes how to create, activate, and manage evaluation plans, and enable bulk evaluations to streamline your review process.

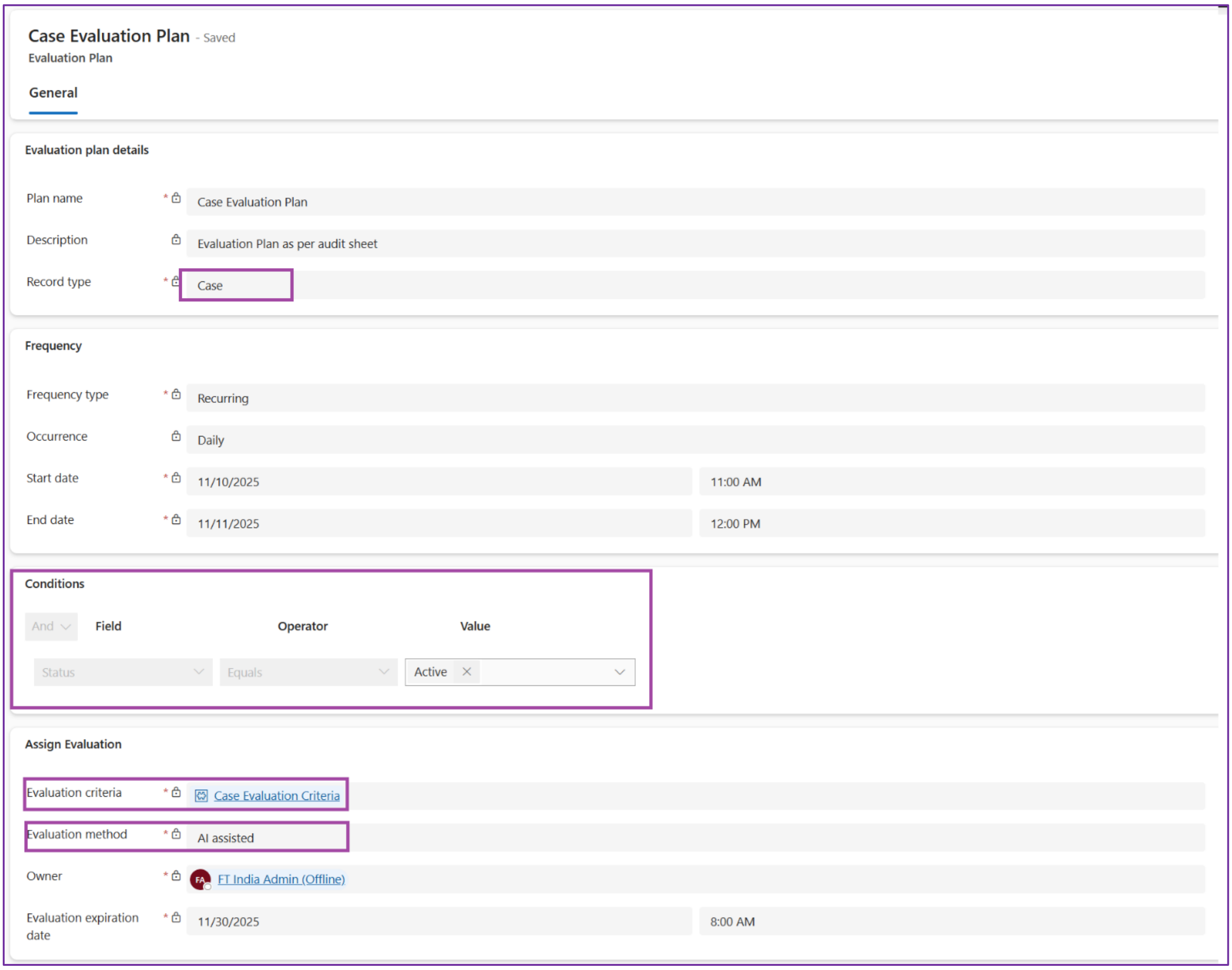
Refer link for more details [Create and Activate evaluation-plan-for-cases-and-closed-conversations]

Step 1 Open Copilot Service workspace -> Click on Evaluation Plans



Step 2 Create an evaluation plan

Below is an example screenshot showing what an evaluation plan looks like.



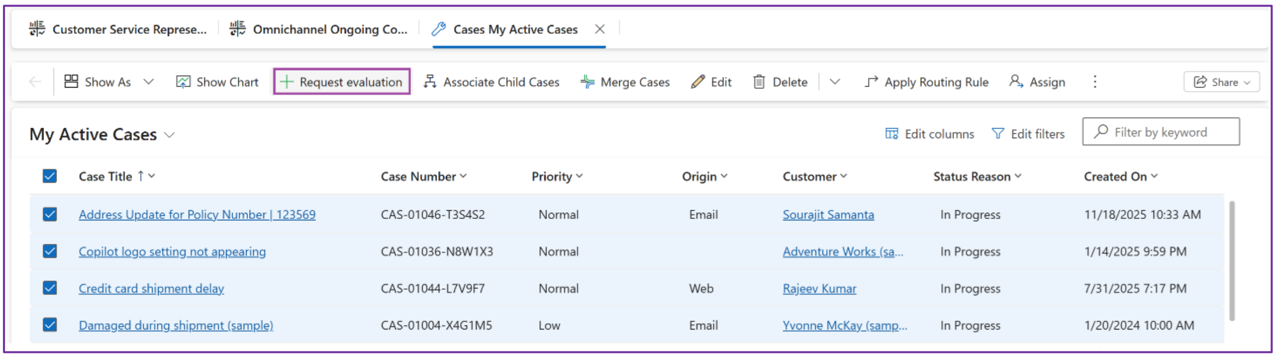
Task 5 – Use on-demand evaluation

Use on-demand evaluation to check cases and conversations. Request evaluations with AI-assisted, manual, or AI agent methods for flexible quality management.

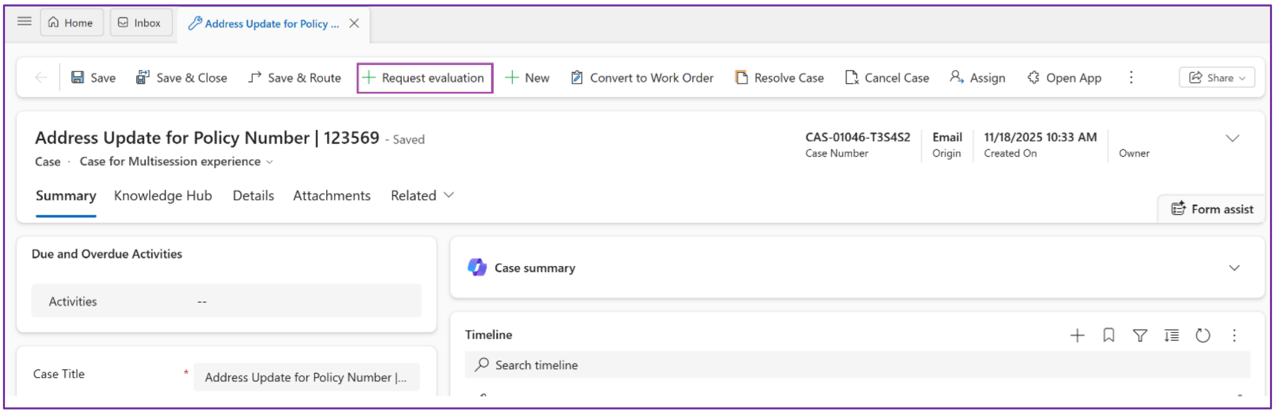
Refer link On-demand-evaluation-for-cases , On-demand-evaluation-for-conversations for detailed steps.

Step 1

- Evaluation from Case sub grid (20 records max)



- Evaluation for a single record

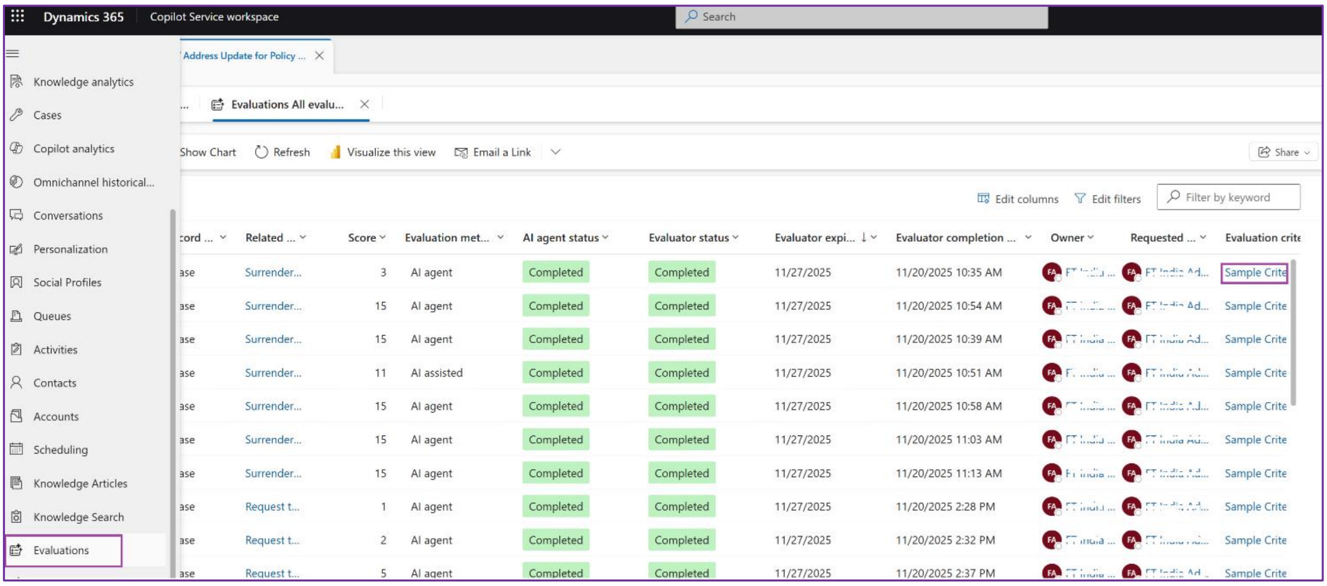


Task 6 – Use Evaluations

Use evaluations to assess and improve the quality of cases and conversations. This article explains how to access evaluation results, understand scoring and compliance details, and interpret evaluation states.

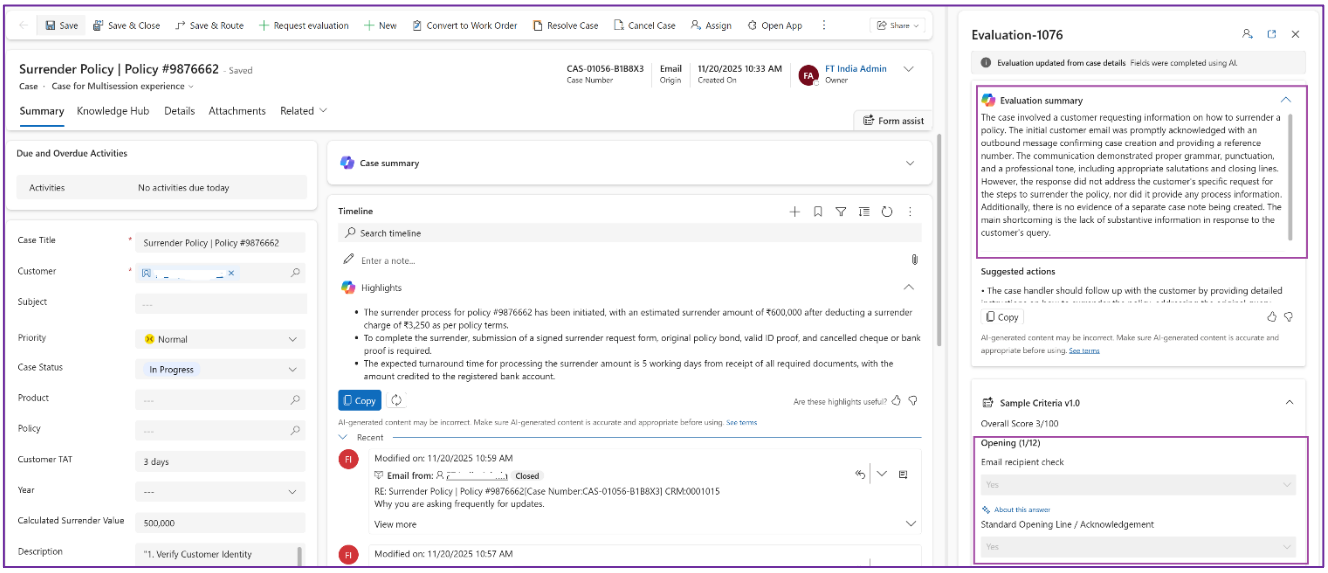
Refer link Use-evaluations for detailed steps

Step 1 Open Copilot Service workspace -> Click Evaluations



Step 2 Click the record name to open the evaluation

Below is a screenshot showing a sample evaluation



Glossary

Speak the language, bridge the world—unlock hearts, opportunities, and the true essence of every land.

Customer Representatives: A human representative helping resolve customer issues

Agent: A digital assistant powered by AI, capable of understanding and responding to user inputs. In Copilot Studio, agents can be customized to for conversational experiences and/or can act autonomously based on pre-configured triggers and instructions.

Testing Scenario (Appendix) -

Step 1 - Customer sends an email to surrender a case

Sub – Request to surrender policy #101010
Dear Customer Care Team,

I would like to surrender my policy #33003300. Please share the surrender value, applicable charges (if any), and the process/required documents to complete this request.
Kindly confirm the expected TAT for processing.

Regards,
Customer Name

Step 2 - A case gets created. Perform a on-demand evaluation by clicking on “Request evaluate” on the specific case by choosing the evaluation criteria which you have created. Notice the evaluation score and recommendation for each of the questions present in the evaluation criteria.

Step 3 – Lets add a note which you as a customer service representative acted on the case.

“Note Title - Activities done for Surrender of Policy
1. Verified Customer Identity
Confirmed policyholder details using KYC checks (Policy No., DOB/PAN, OTP verification).
2. Checked Eligibility for Surrender
Verified if the policy has acquired surrender value.
Confirmed lock-in completion (e.g., 5 years for ULIPs).
Informed customer if surrender is not permissible.
3. Shared Estimated Surrender Value
Retrieved/computed surrender value (GSV/SSV/Fund Value).
Communicated deductions and impact clearly.
4. Explained Implications
Informed customer of:
Loss of benefits and bonuses
Charges/penalties
Tax or coverage impact
5. Collected Required Documents
Surrendered request form (signed)
Original policy bond
ID proof
Bank proof (cancelled cheque/statement)
Any additional documents as per guidelines
6. Registered the Request
Logged a surrender service request in the system.
Uploaded documents and initiate the workflow.
7. Processed Surrender
Triggerered surrender computation in the system.
Validated charges, approvals, and system checks.
8. Confirmed TAT to Customer
Informed customer of the processing time (typically 4–10 days).
Shared the payout value and bank account details where the amount will be credited.
9. Complete Payout
Forwarded the case to finance for NEFT payout.
Updated policy status to "Surrendered" once payment is released.
10. Close the Request
Notify the customer of successful completion.
Close the service ticket with all supporting details.”

Step 4 – Perform the on-demand evaluation and notice the score and the recommendations. Observe that the score is improving as more criteria are being met.