6. Omnichannel (r)

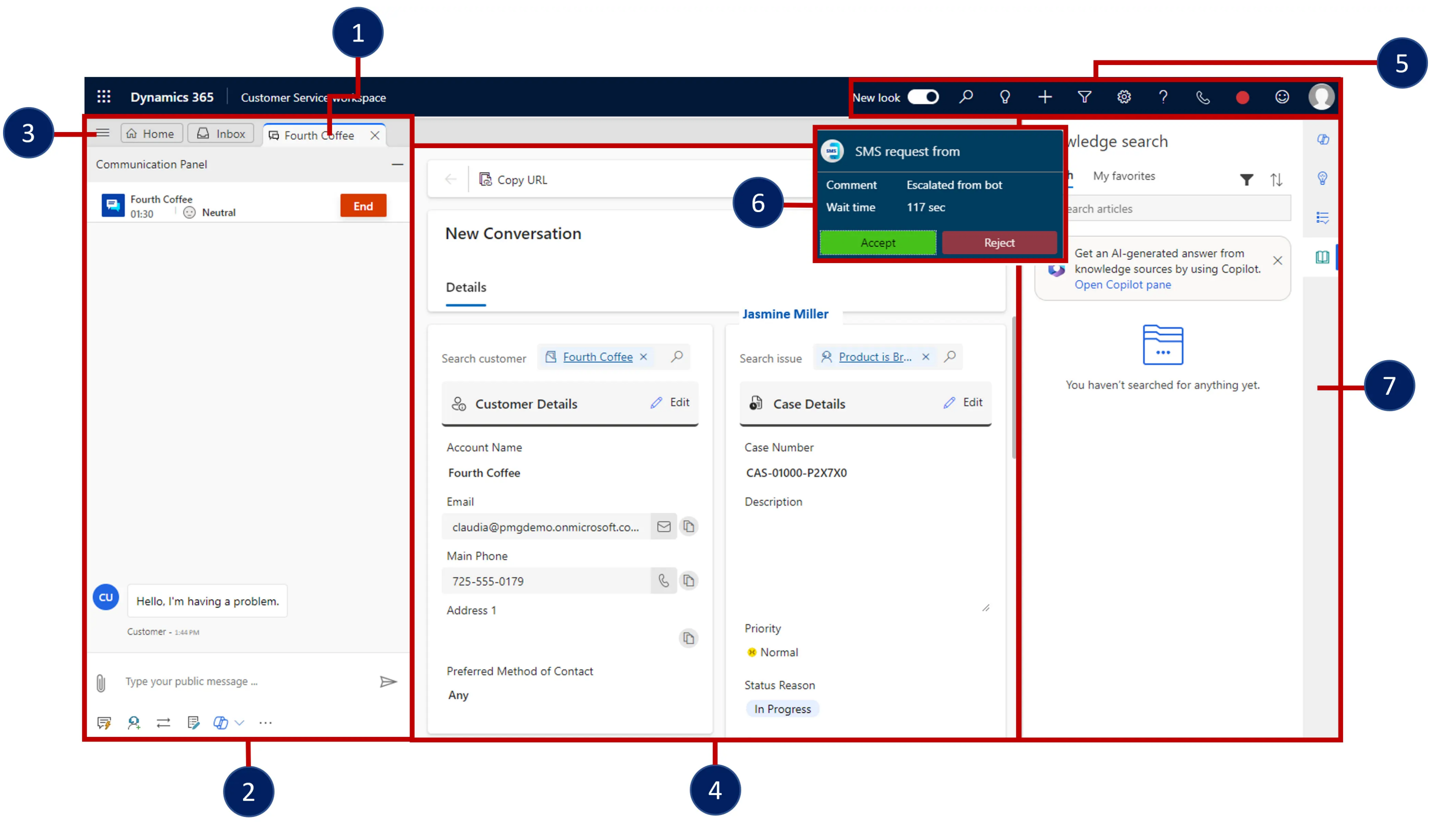
#D365_CS #D365

Get started with Omnichannel for Customer Service

(More)

Introduction

> With Dynamics 365 Omnichannel for Customer Service, organizations can offer omnichannel support to their customers. The solution extends the power of Dynamics 365 Customer Service. Once deployed, it enhances the capabilities that are available in Customer Service workspace to provide a modern, customizable, high-productivity application that allows agents to engage with customers across different channels.

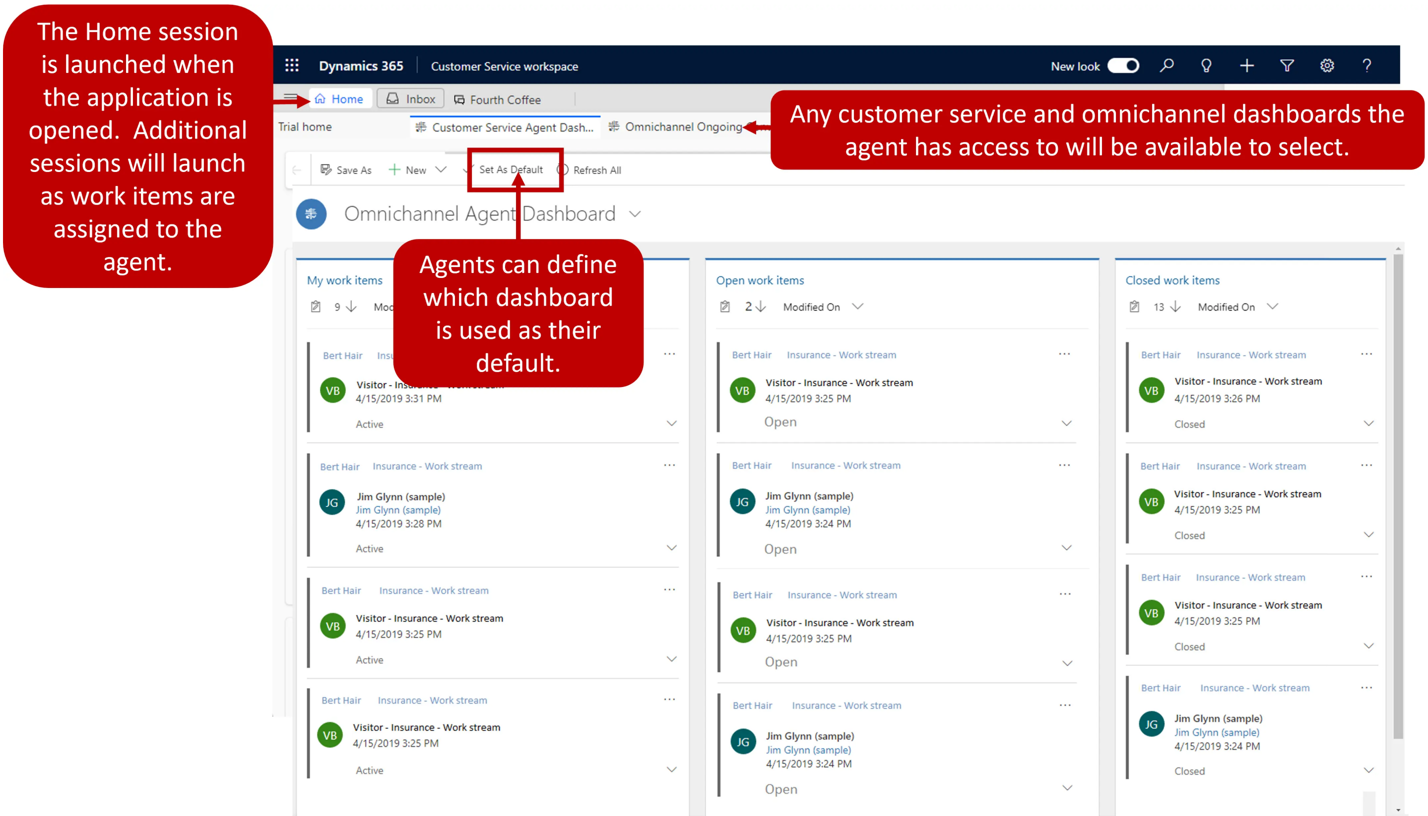


Omnichannel for Customer Service provides agents with the following features:

1. **Session management** - The session panel allows agents to work with multiple customer sessions simultaneously. Agents can switch between sessions without losing the context of the conversation or any customer details.
2. **Customer interaction** - The conversation panel allows agents to interact directly with customers from the communication panel. Agents can use the knowledge base, collaborate with colleagues, and more.

3. **Multiple applications** - The **Applications** tab bar allows agents access to relevant supporting applications in the context of the session. These applications remain open if the agent goes to another session.
4. **Customer summary** - The Unified Interface panel provides a single contextual view of the customer based on the current conversation. Agents can access customer details and related case information, and they can view activities from related records from one screen.
5. **Quick access to familiar Dynamics 365 tools** - By using existing Dynamics 365 functionality, agents can access record searching, quick record creation, and agent presence information.
6. **Real-time notification** - Agents receive real-time notification messages of incoming communication from customers.
7. **Productivity / Copilot Pane:** Provides access to agent tools such as Agent Scripts, Smart Assist, and Copilot.

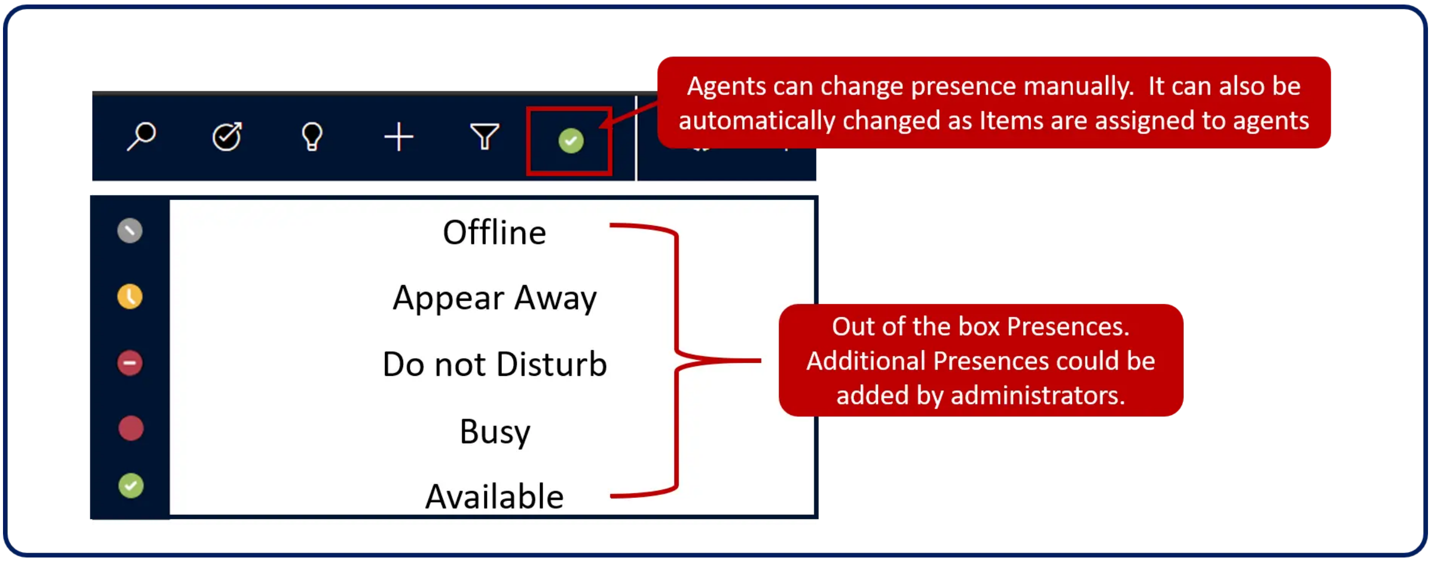
Use the agent interface



The Omnichannel Agent Dashboard contains the following streams:

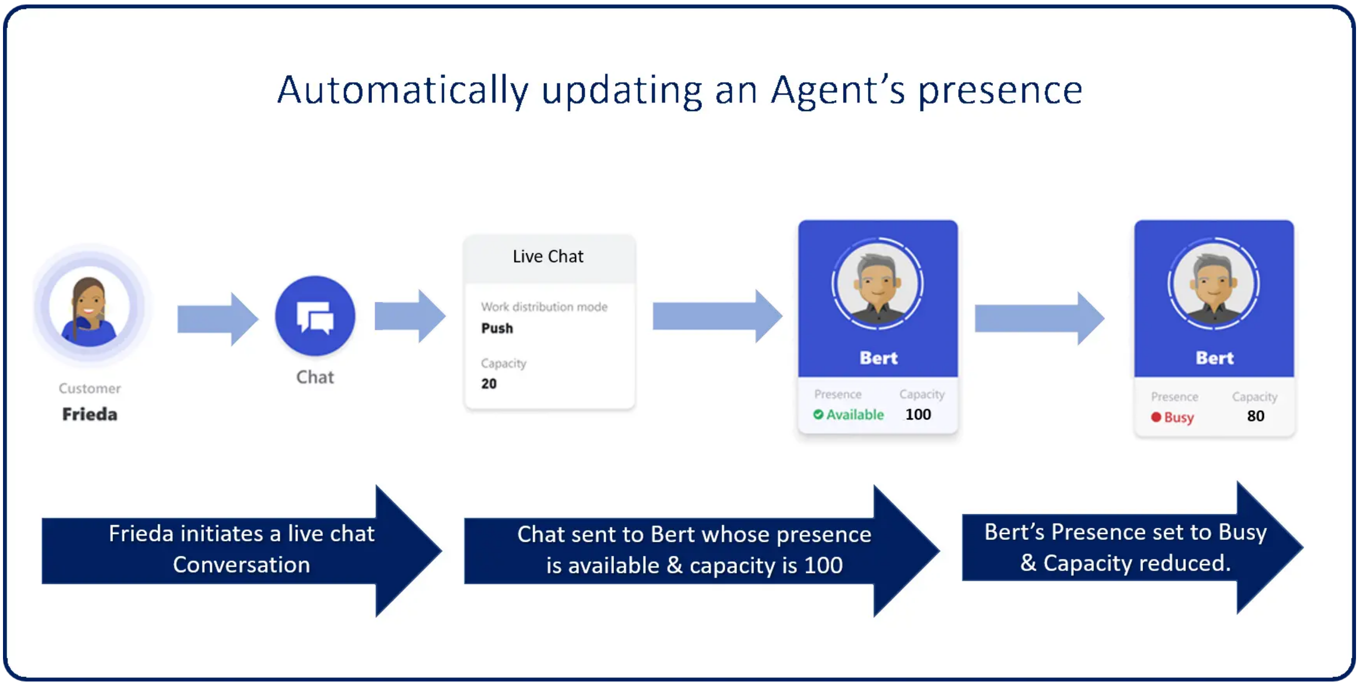
- **My work items** - Displays a list of conversations that the agent is actively working on. Agents are provided with an Open action, which allows them to open the work item to continue working on it.
- **Open work items** - Displays a list of conversations that are currently open and are from queues that the agent is a member of. An agent might be assigned as a member of multiple queues in the application based on their role, skills, or other factors. Agents are provided a Pick action to help them select items from the queue. When an agent picks an item, it's moved to that agent's **My work items** stream.
- **Closed work items** - Displays a list of conversations that the agent has closed in the past 24 hours. This stream enables agents to potentially reopen the item if they have more tasks to

complete.



The key points about agent capacity are:

- Each agent is assigned a capacity of 100 by default.
- Each communication channel has capacity assigned to it. This represents the amount of capacity that is consumed when an agent is assigned a work item from that channel.

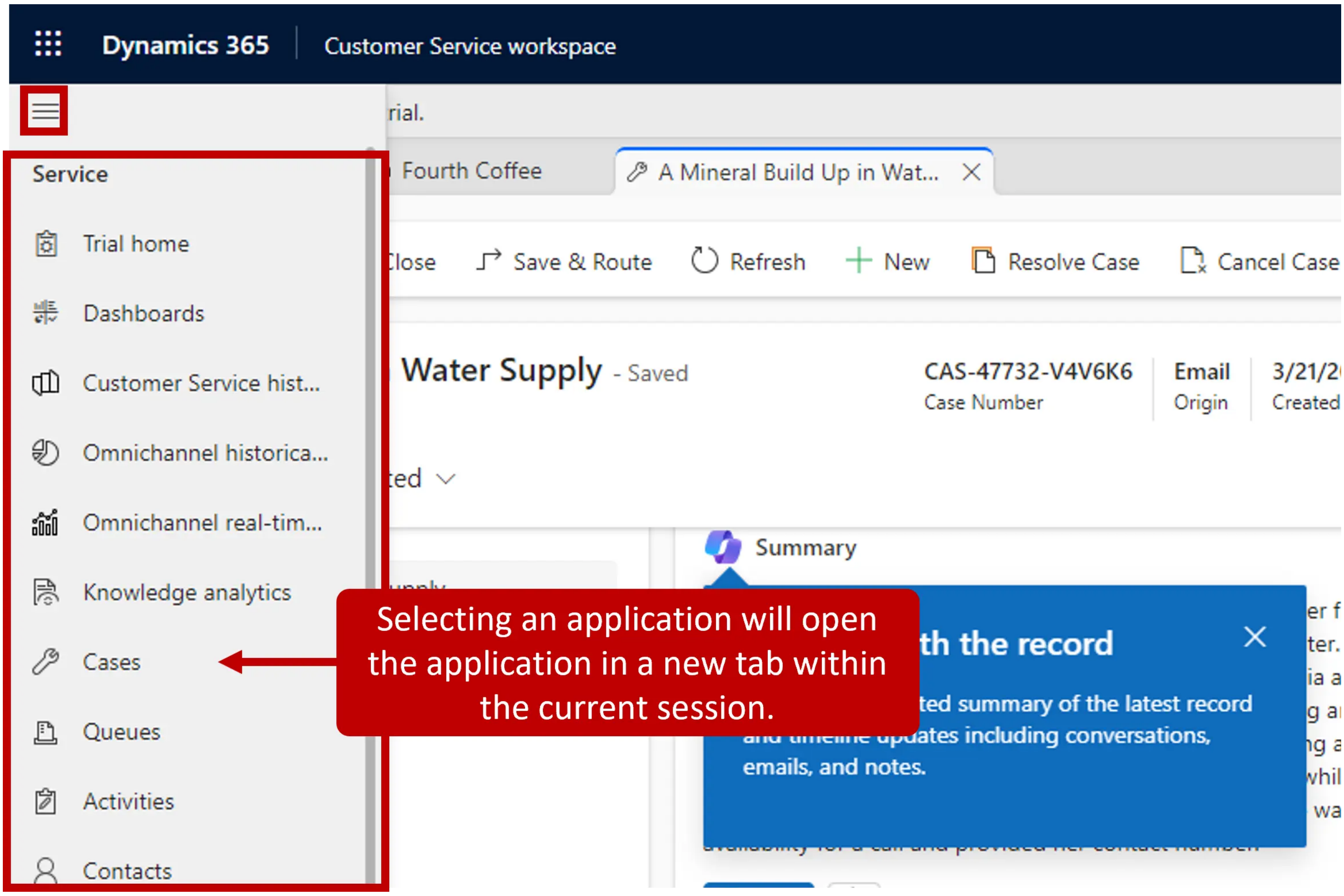


Notification alert dialog boxes are displayed when agents are assigned to a chat or SMS conversation request from a customer. The notification provides details about the customer they're interacting with.
After an agent accepts the notification, Omnichannel for Customer Service loads a new session in the application.

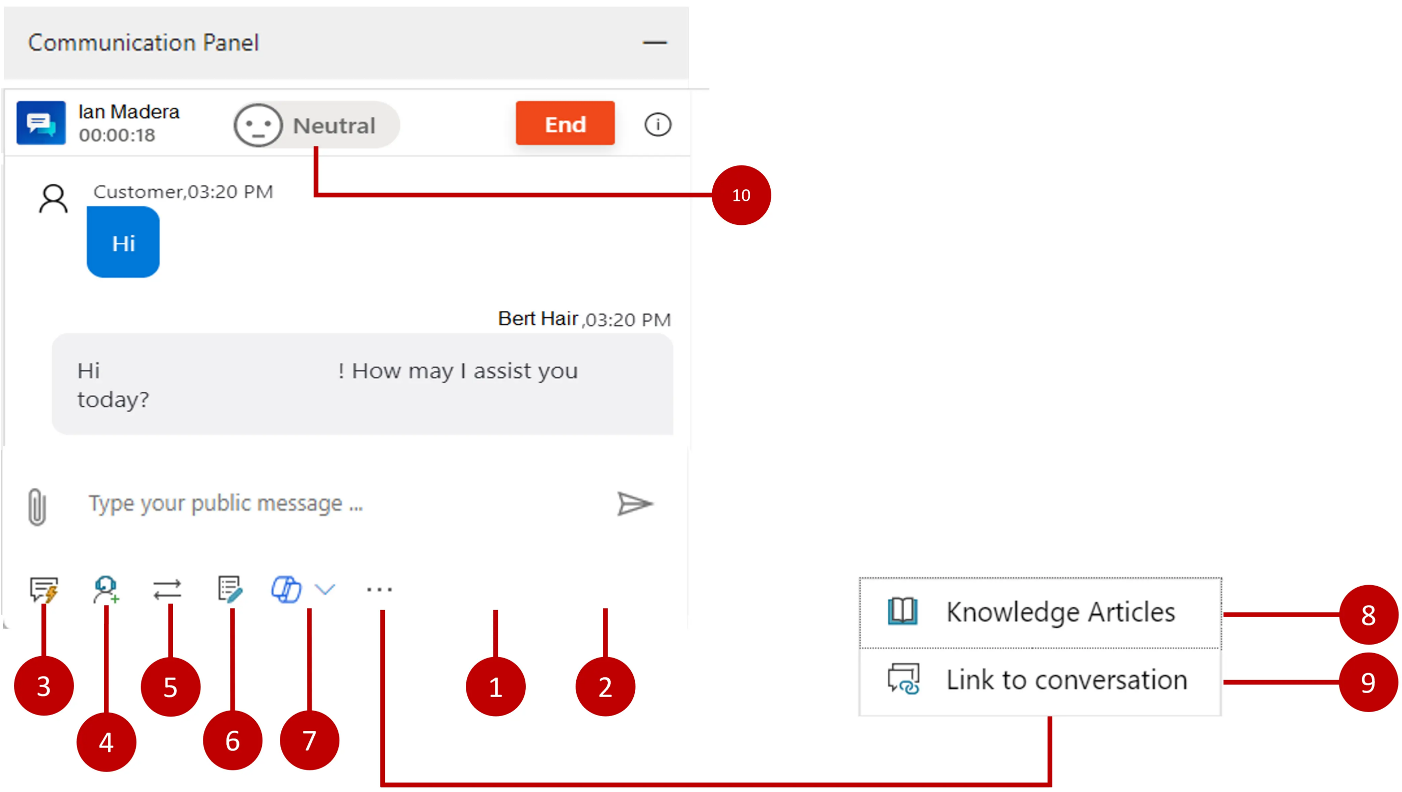
Manage sessions and work with applications

> Working with multiple sessions is one of the main features of the Omnichannel for Customer Service solution. Sessions keep related data and applications together in one area. As agents

switch between sessions, they don't have to worry about unsaved changes being lost. All information is still in the session when they return to it.



Work with conversations



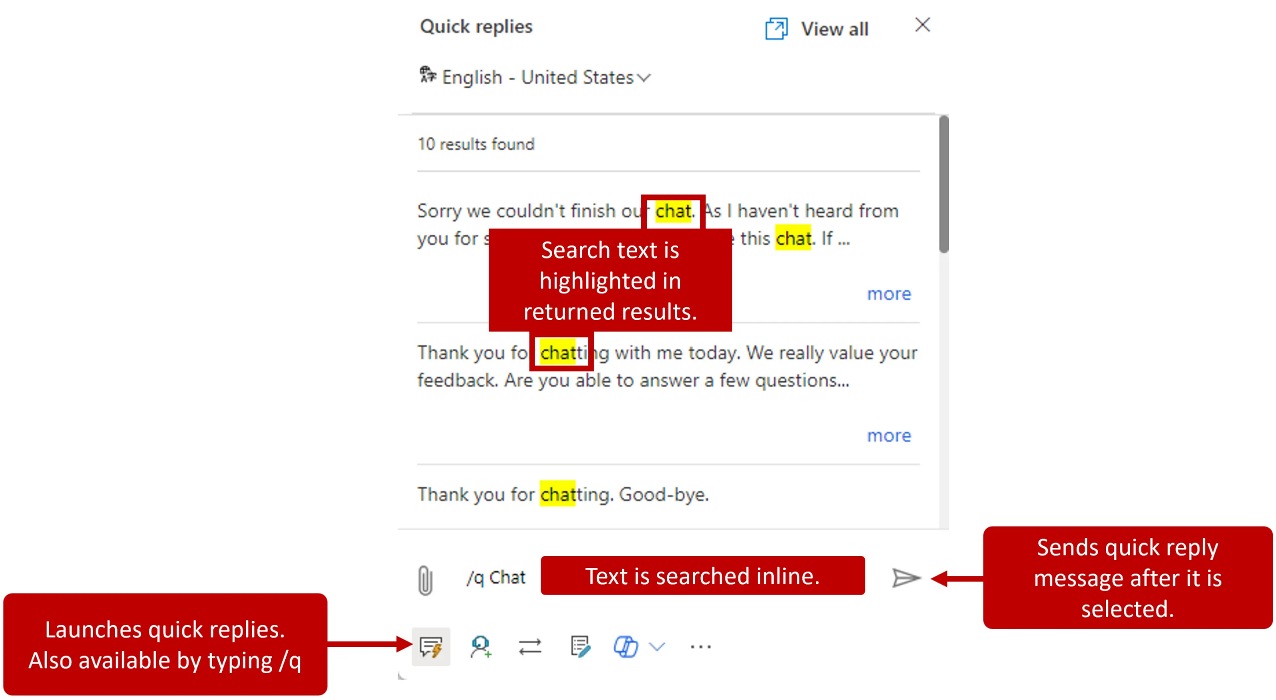
Agents can perform the following tasks from the Conversation panel:

- **Public** - Agents can engage with both internal agents or supervisors and the end customer.

- **Internal** - Only sends messages to Dynamics 365 users, such as other agents or supervisors.
- **Quick replies** - Templated messages built to speed up communication with customer.
- **Consult** - Agents can find and engage with other agents or supervisors.
- **Transfer** - Allows agents to transfer a conversation to another agent or supervisor.
- **Notes** - Provides a control that agents can use to take notes that are specific to the conversation.
- **Copilot** – Opens Copilot capabilities available to the agent such as creating summaries.
- **Knowledge articles** - Agents can search for knowledge articles and share them with customers.
- **Link to conversation** - Quickly associates a knowledge article to the conversation.
- **Customer sentiment** - Displays real-time customer satisfaction levels.

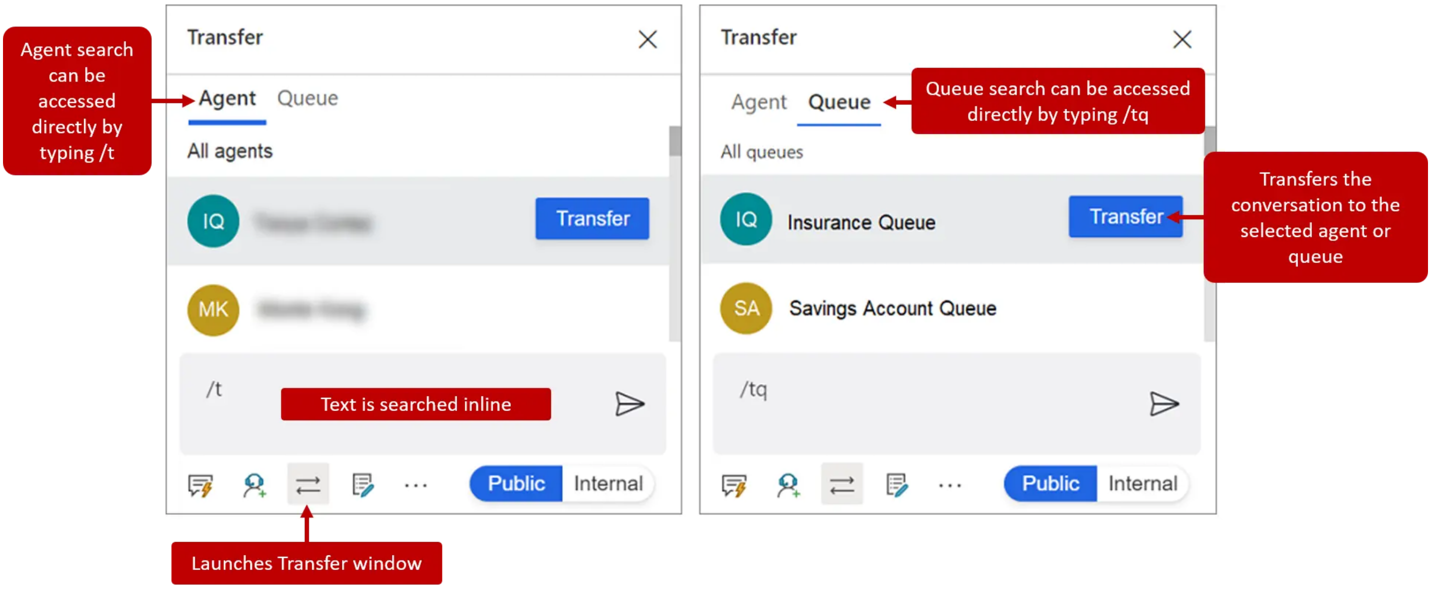
When a conversation is initiated, it's automatically in public mode. While the conversation is in public mode, other participants like internal agents and/or supervisors can be added to it. Any messages that are sent while conversations are in public mode goes to all added participants. Occasionally, an agent might want to send a message to internal participants only. They can complete this task by selecting the **Internal** option. In this situation, the agent still uses the same conversation window, but only the internal participants see the messages. When the conversation is switched back to public mode, both internal and external participants see the messages.

Quick replies can be sent to both external and internal participants. Organizations can create quick replies based on the needs of their agents. For agents that prefer shortcuts, they can also be opened by entering **/q**, which displays the **Quick replies** flyout menu. From the flyout menu, agents can continue to type key words that they're looking for. As possible matches are found, the results are displayed in the menu. Agents can use the arrow keys on their keyboard to cycle through the all the replies that were returned.

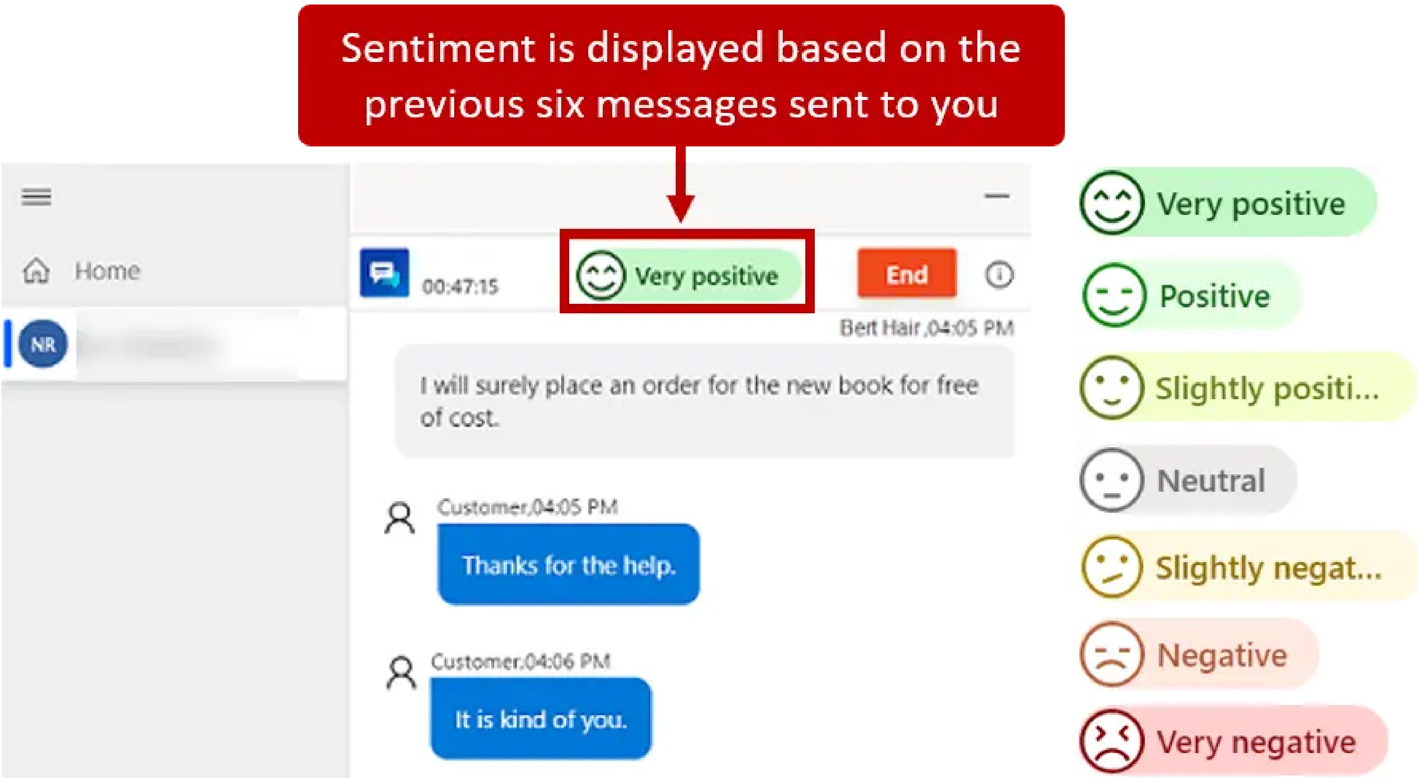


When an agent needs to talk with another team member, they can use the **Consult** button to invite other agents or supervisors. The **Consult** option can also be accessed by typing **/c**. With this option, the agent can search for the person they want, and the results are displayed in the panel.
If someone is more qualified to work on an item, the conversation can be transferred to another

agent or queue. Transferring can also be done by entering **/t** (Transfer to Agent) or **/tq** (Transfer to Queue). When transferring an item to someone else, agents can only transfer to agents that are in the same work stream and queue.

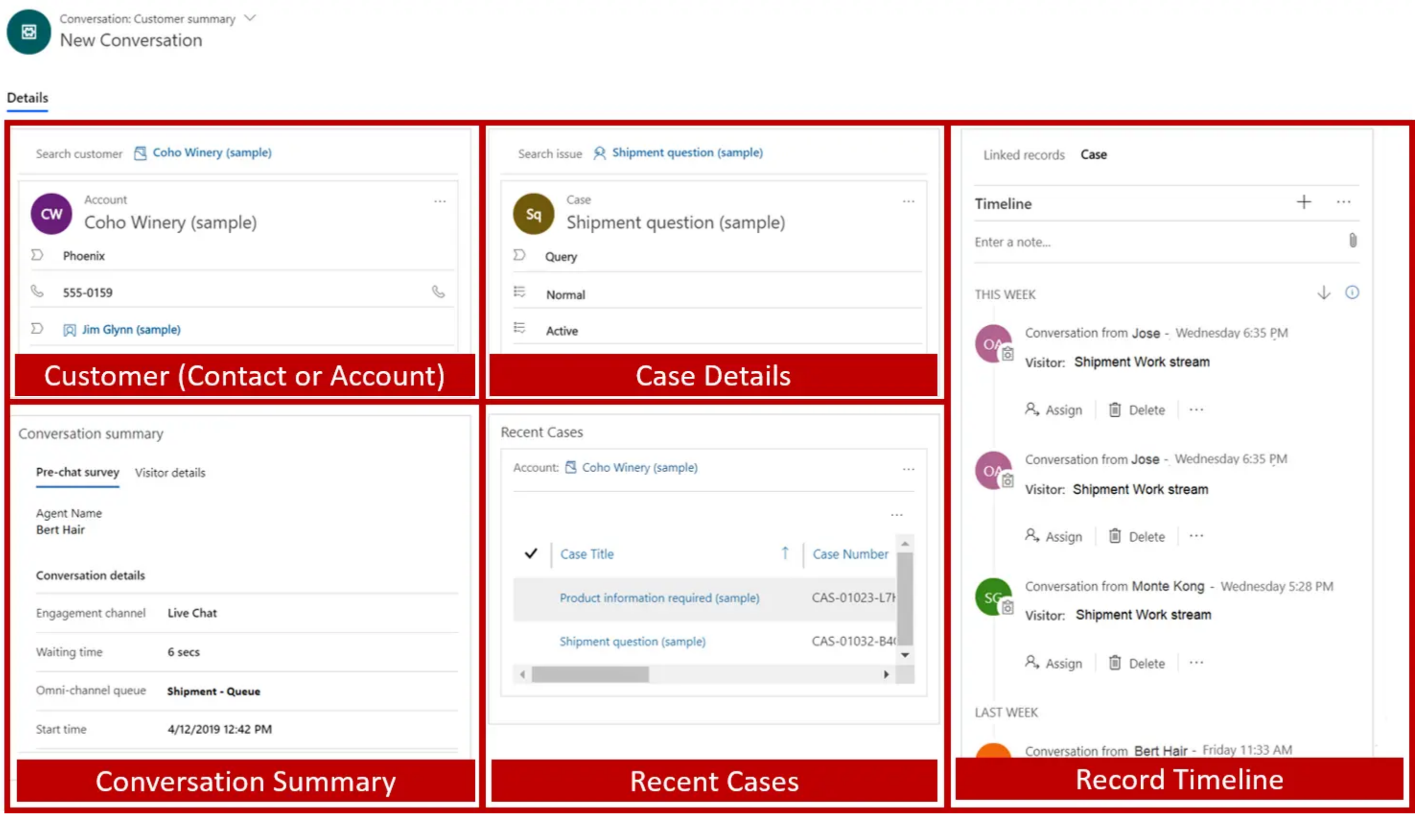


Agents need to be able to quickly locate the information that they need to resolve customer issues. They need quick access to the same knowledge content that is used to resolve cases. From the Conversation panel, agents can search for relevant knowledge articles as they're working in a session. Agents can also launch the knowledge base by entering **/kb**, which displays knowledge articles in a new application tab in the session. When the agent finds an article that solves the problem, they can share it with the customer from the Conversation panel by selecting the **Send link** button.



Work with customer information

When an agent accepts an incoming conversation request and a session is loaded, the session defaults to the **Customer Summary** page.



The customer summary view provides the following sections:

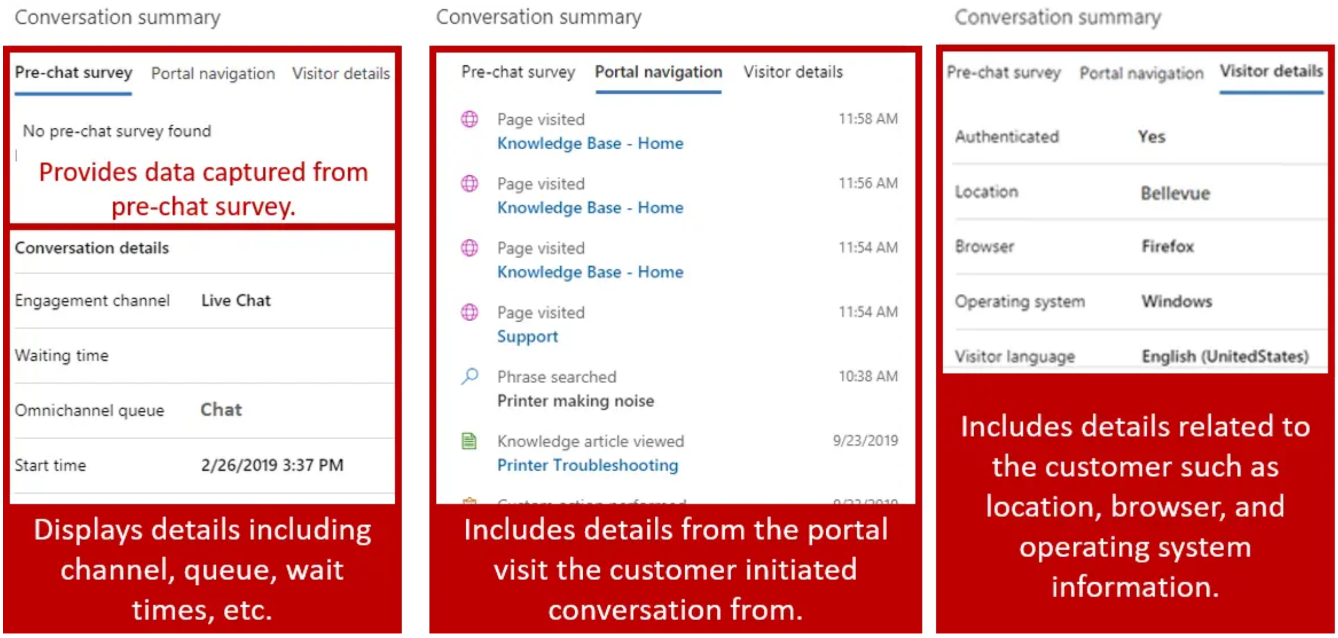
- **Customer** - Provides details about the customer that is being engaged with. A customer can be an account or contact. For conversations where the customer isn't known initially, the conversation can be associated with a customer record directly from the customer section.
- **Conversation summary** - Displays a series of tabs that provide more details that are related to the conversation.
- **Case** - Lets you link the conversation to a new or existing case in the application.
- **Recent cases** - Provides agents with historical data that is related to the most recent cases that are associated with the customer to help make accessing those records easy.
- **Timeline** - Provides direct access to the activity Timeline for the linked case and/or customer record to help make reviewing past activities easier.

The conversation history shows the following tabs:

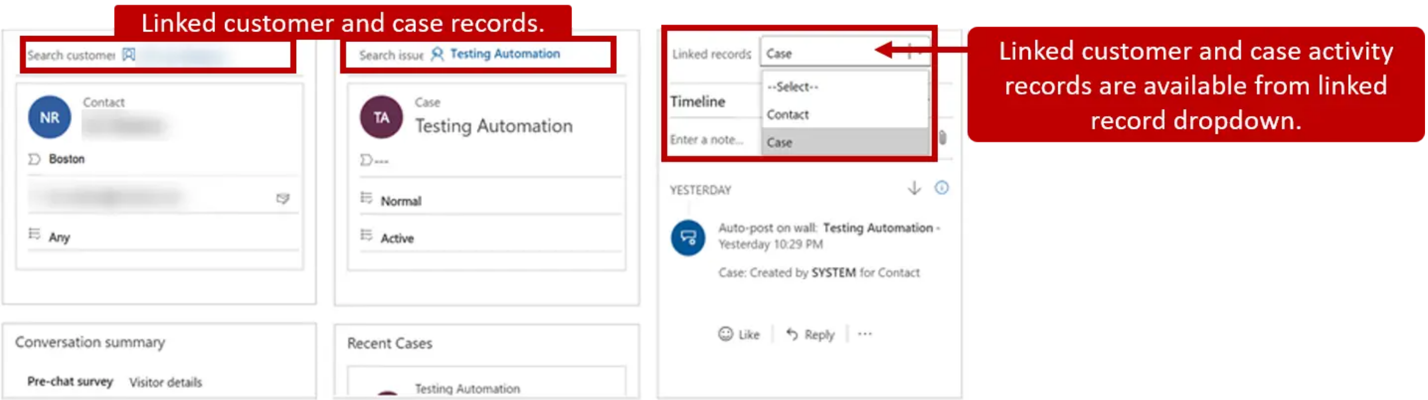
- **Pre-chat survey** - Appears when a pre-chat survey was available on the channel that the customer was engaging from. It shows the answers that were provided to the questions.
- **Portal navigation** - Displays information about what the customer did on a portal before they initiated the conversation. Items are categorized into the following types:
  - **Page visited** - Any portal page(s) visited with timestamp
  - **Phrase searched** - Any keywords or phrases that were searched for
  - **Knowledge article viewed** - Knowledge article that was viewed
- **Visitor details** - Provides information such as whether the customer is authenticated, browser information, operating system, location, and so on.
- **Additional details** - Provides any other context variables that were configured for the channel. This section only appears if more context variables have been made available.

Below these tabs, agents see the **Conversation details** section, which displays relevant information about the current interaction, such as:

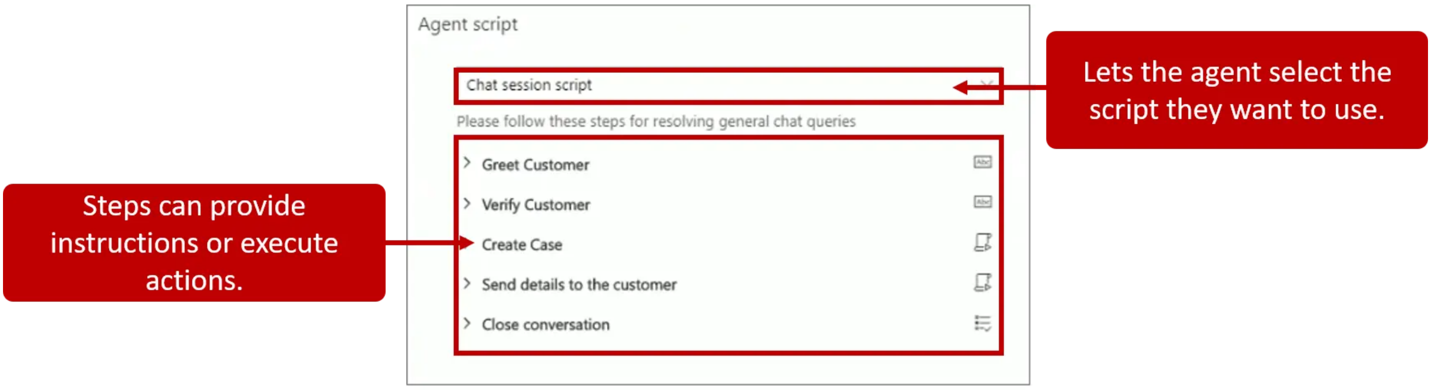
- **Engagement channel** - Channel that the customer has engaged on.
- **Waiting time** - How long the customer has been waiting since the last interaction.
- **Skills** - The skills that are associated with this item. (Used for Skills-Based Routing, which is currently in preview.)
- **Queue** - The Queue that the item came from.
- **Start time** - When the conversation was started.



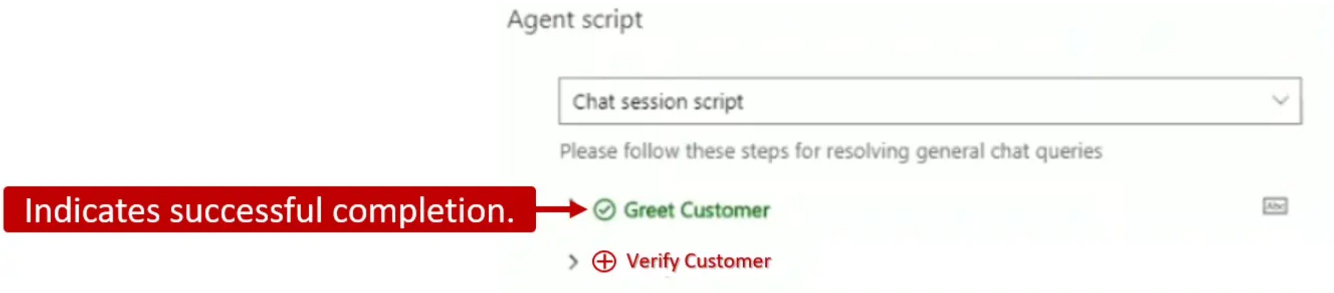
On the Customer Summary record, the Timeline displays case and customer-related activities in the form of a timeline. Agents can create quick notes based on the discussion with the customer. The Timeline control lets you switch what activities are displayed on the timeline based on the Case, Contact, or Account record that is linked to the conversation.



Reporting and analysis



Agent scripts consist of a series of steps. Each step is identified with an actionable icon that helps initiate that step. As agents expand a step, they're provided with a short description that defines what the step does and provides an icon that is used to perform the step's action.



The three types of steps that are available inside an agent script are:

- **Text instructions** - Provide guidance on actions to perform. For example, a text instruction might instruct the agent on how to greet the customer.
  After the agent performs the step based on the instructions, they can note that it's been completed.
- **Macro** - Instructions that inform the system how to complete a task. For example, a macro might be configured to generate a case record.
  In the script, the macro has a run icon next to it. When an agent selects the Run icon, the system performs the macro.
- **Agent script** - Loads another agent script from the current agent script. The newly loaded script replaces the current script on the **Agent script** menu.

Step	Title	Instruction	Icon	Action
Text Instruction	Greet Customer	Greet the customer with a welcome message from the quick reply repository	Mark as Done	After the agent has greeted the customer, they should select the icon to mark the step as done.
Text Instruction	Verify Customer uses any two of: customer Kenny Smith, Date of Birth, Email ID, Zip code, Mobile	Mark as Done	After the agent has verified the appropriate data, they should select the icon to mark the step as done.	

Step	Title	Instruction	Icon	Action
Macro	Create Case	Triggers create case form with customer context	Run	When you select the run macro icon, the system opens a case form in a new application tab panel.
Macro Send Details	Opens email to send details to the customer	Run	When you select the run macro icon, the system opens a draft email so you can send an email to the linked customer.	
Agent Script	Close Conversation	Follow these steps to close a conversation	View	When you select the view icon, the system loads another agent script from the current agent script. In this sample, another agent script is Close conversation script.

Smart assist is an intelligent assistant that provides real-time recommendations to agents to help them take actions while interacting with customers. It shows relevant recommendations such as knowledge articles, similar cases, and next-best steps. The smart assist bot interprets the conversation in the communication panel and provides real-time recommendations.

Work with AI features

> By default, sentiment analysis should be enabled, but, if necessary, you can enable the sentiment analysis feature in the **Customer Service admin center**. In the site map, select **Insights** in **Operations**. The **Insights** page appears. In the **Sentiment analysis** section, select **Manage**.

You can set the customer's sentiment to any of the following values:

- **Don't show alerts**: Doesn't display any alerts when customer sentiment changes.
- **Slightly negative**: Alerts when customer sentiment is Slightly negative or lower.
- **Negative**: Alerts when customer sentiment is Negative or lower.
- **Very negative**: Alerts when customer sentiment is Very Negative.

Unlike agents, who are concerned with the sentiment of the individual cases they're managing, supervisors are typically looking at the bigger picture. Supervisors can view customer sentiment in real-time using the **Omnichannel Ongoing Conversations** dashboard. Like agents, notifications can be displayed to supervisors when a customer's sentiment decreases to a particular value or below it. The primary difference is that the supervisor must be assigned to the queue to receive sentiment notifications

Case summaries help agents understand the context of a case, enabling them to resolve customer issues efficiently. They're provided with a concise summary of the case with the:

- Case title
- Customer
- Case subject
- Product
- Priority
- Case type
- Case description

Helping an agent's productivity

The overview dashboard is divided into two sections:

- **Omnichannel Insights dashboard**: Provides important KPI details such as Average wait time, Abandon Rates, Average Handle Time, Transfer rate, Average Customer Sentiment Pulse and more.
- **Omnichannel Sentiment Analysis dashboard**: Provides an overview of Important KPIs and trends relative to the sentiment analysis of conversation offered.

The Omnichannel Insights reports allow your administrators and supervisors to know how overall support is performing across channels. The reporting structure consists of the following sections:

- **Conversations and channels**: Provides historical visibility into the overall support operations across various conversations and channels.
- **Queue and agents**: Provide historical visibility about how queues and agents are performing across different channels so supervisors can take appropriate steps to improve the support experience for the customer.
- **Bot insights**: Provides historical visibility into how bots are performing to help resolve customer support issues.

The conversations and channels report provides important KPIs for conversations and channels. For conversations, these KPIs are applicable to scenarios in which bots escalate to agents or agents directly handle customer calls. Some of the key KPIs available are:

- **Incoming conversations**: The number of conversations initiated by the customers that can be presented to agents.
- **Conversations engaged**: Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.
- **Abandon rate**: The percentage of conversations that aren't engaged by agents.
- **Transfer rate**: The percentage of conversations that are transferred to another agent or queue.
- **Conversation handle time**: Cumulative session active time for a conversation.

- **Average Conversation time**: Average time from the conversation start to conversation end.
- **Average Customer Effort time**: Average time from the conversation start to the conversation wrap-up start time.
- **Customer wait time**: The average time customers have waited before connecting to agents.
- **Average Customer sentiment pulse (CSP)**: The predicted customer sentiment in a given timeframe for a set queue or agent, which indicates the degree of positive sentiment expressed by customers at the end of their interactions.

The queue and agent sections contain KPIs that help break down conversation information by queues and agents. Some of the key KPIs provided in this section include:

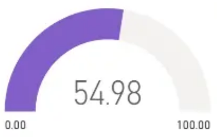
- **Consult sessions**: The number of sessions accepted by a user in mode = consult.
- **Total consult time**: The time spent on the consult from when the agent joined to when they left the session participant.
- **Average consult time**: The total consult time divided by the total consult sessions.
- **Sessions engaged**: the number of sessions presented to an agent and accepted by an agent.
- **Session rejection rate**: The number of sessions presented to an agent that aren't accepted by an agent.
- **Transfer rate**: The number of sessions transferred by an agent.
- **Consult sessions**: The number of sessions where the agent has participated in consult mode.
- **Monitor sessions**: The number of sessions where the agent has participated in monitor mode.
- **Average consult time**: The average time the agent spent on a session in consulting mode.
- **Session active time**: The time an agent actively spent on a session.

More support organizations are using bots to help enhance their customers support experience. The KPIs available for bots include:

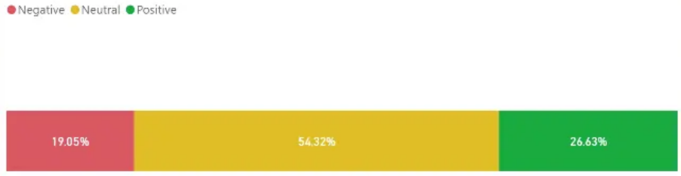
- **Bot conversations**: The number of conversations initiated by the customer and handled by a bot.
- **Bot resolution rate**: The percentage of conversations that were closed by interacting with a bot out of all conversations handled by a bot.
- **Bot resolution time (mins)**: The length of time, in minutes, a customer interacted with a bot before the conversation was closed.
- **Bot escalation rate**: The percentage of conversations that a bot escalates to a human agent.
- **Bot escalation time (mins)**: The length of time, in minutes, a customer interacted with a bot before the conversation was escalated to a human agent.

Omnichannel Sentiment Analysis (OCSA) for Dynamics 365

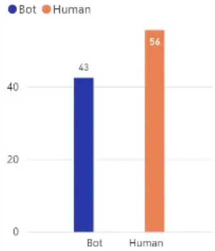
Avg. sentiment pulse



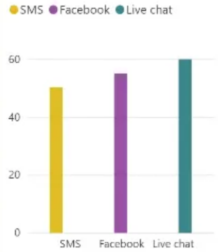
Sentiment zones



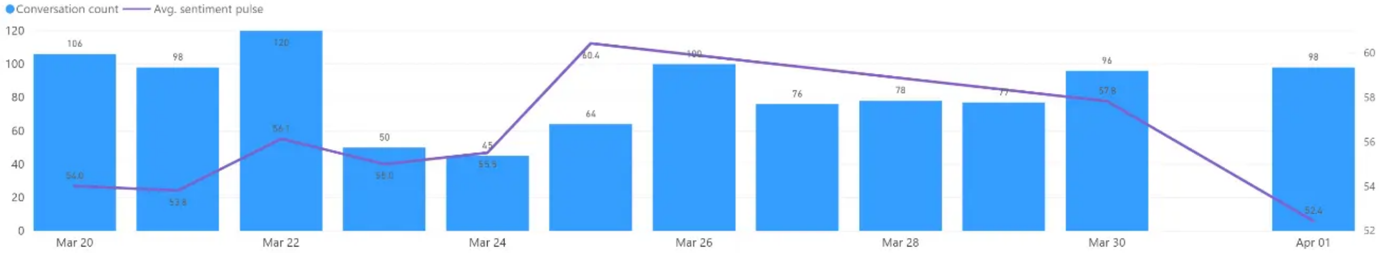
Sentiment pulse by agent ty...



Sentiment pulse by channels



Conversations with sentiment by date



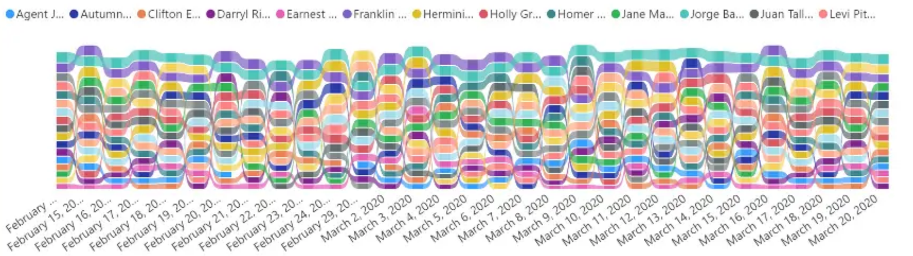
Agents with lowest custome...

Agent name	Sentiment pulse
Earnest Luciano	39.71
Agent Jarvis	44.08
Clifton Earnest	45.30
Darryl Rivero	47.59

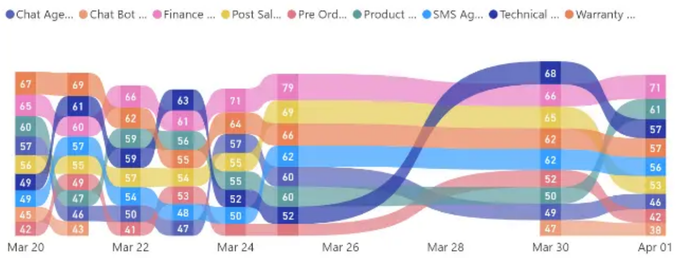
Agents with highest custom...

Agent name	Sentiment pulse
Jorge Barba	75.21
Franklin Rhoden	72.50
Herminia Hart	59.30
Holly Gregory	58.61
Noah Overby	57.40
Rita Sherman	56.67
Sharon Bentley	56.38
Trudy Lindsay	56.15
Homer Carswell	55.95

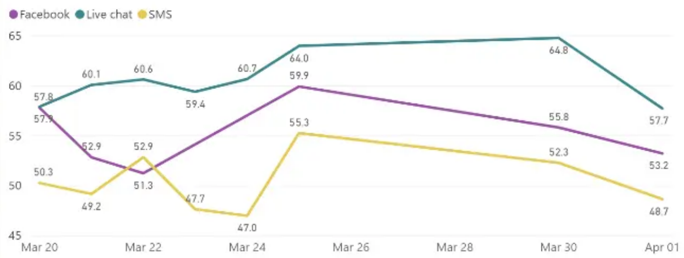
Rank orders of average sentiment pulse by agents



Queue sentiment pulse by date



Channel sentiment pulse by date



Daily topic trends

Impact	Topic	Avg. sentiment	Conversation occurrence
-0.01	game game pass try	61.09	0.40%
0.18	subscription charge	67.22	0.40%
-0.16	account suspend	53.00	1.90%
0.25	code gift card redeem	70.00	7.40%
0.07	account email change change try	56.00	8.00%
-0.27	connection wifi	29.30	15.30%
-0.46	gamepass renew	35.00	25.80%

Topic keywords

Weekly topic trends