# Demo Overview

These demos are intended to support the standard Azure EBC presentation deck.

## Scenarios and Features

This demo guide will cover the following technical scenarios listed below.

|  |  |
| --- | --- |
| Customer Scenario | Products |
| Driving customer engagement with intelligent bots | Bot Framework  Cognitive Services |

## Intended Audience

CxOs, Business Decision Makers

## Demo Prerequisites

For detailed set up instructions please see [Appendix 1](#_Appendix_1:_Configure_1).

# Driving customer engagement with intelligent bots

## Pre-Demo Steps

* Open Microsoft Edge in InPrivate browsing
* Open an InPrivate browser tab in Microsoft Edge for the Insurance website.
  + URL: [https://cisbot-prod.azurewebsites.net](https://cisbot-prod.azurewebsites.net/)
  + Username: Bot
  + Password: Azure
* Open an InPrivate browser tab for the CRM site.
  + URL: <https://litwareinsurancebotdemo1.crm.dynamics.com/>
  + Username: admin@litwareinsurancebotdemo1.onmicrosoft.com
  + Password: @uzKg#R4n!S5
  + Click the down arrow next to **Sales** in the header, then click **Opportunities**.

| **Speaker Script** | **Click Steps** |
| --- | --- |
| There have been several platform shifts in past few decades:   * The desktop PC in the 80’s * Which gave birth to the web and new internet services and search * Leading to smartphones and the age of mobile apps   And with each of these new platforms, things became easier; the world became a little smaller and closer. But they’ve also added a layer of complexity.  The next platform shift builds on the past but provides a new level of intelligent or AI experiences that fundamentally augments human ability that fits our behaviors versus us having to adapt to it. We call this Conversations as a Platform. It is where Natural Language becomes the user interface.  Conversations as a Platform has benefits for developers, individuals, and businesses. For developers, it provides a new canvas for human-computer interaction. For individuals, it provides a more personal way to discover, access, and interact. For businesses, it can transform customer engagement.  Productivity can be enhanced through task automation and automated workflows. Customers can be reached anywhere, on any platform or device. Customers engage in a natural way, conversationally and in context. Products and services can be exposed via messaging platforms where users are already highly engaged. This leads to improved customer experience and reduces the need for human assistance.  With Cortana Intelligence Suite, including the Bot Framework and Cognitive Services, Microsoft is enabling anyone to build a bot and infuse it with intelligence.  The Microsoft Bot Framework enables developer to build, connect, manage and publish intelligent bots across the most popular platforms. Think of bots as new applications that you converse with.  Microsoft Cognitive Services is a collection of 22 intelligence and knowledge APIs that enable developers to build smarter apps, such as vision, speech, language and search services.  Let’s look at an example of how an insurance company can use the Bot Framework and Cognitive Services to engage with a customer naturally, and bring higher value to the conversation. |  |
| **Get Started**  Yesterday, Alice bought a new car and needs to insure it with her existing insurance company.  Alice browses to the website looking to get a new automotive policy for her car. She could dig through the various pages of policy details, or she could call a representative, but Litware Insurance offers a chat capability for Alice to interact with a virtual agent.  **Introduction to the Bot**  Bots can support many different patterns of interactions with customers. They represent an opportunity for customers to interact with your business in personal, natural ways.  Here we can ask the bot simple questions and get immediate responses. It’s able to identify the intent of the question regardless of how it’s phrased by the user.  The interaction flow can be much more complex than simple questions and answers.  Here, the bot is going to maintain state as it leads Alice through a series of steps to achieve her goal of getting a new insurance policy.  **Engaging on the quote**  First, the bot works to understand what the customer needs. It uses the Language Understanding Intelligent Service (LUIS) to determine how to handle her inquiry. For example, if I had typed “I need auto insurance”, it wouldn’t ask what type of insurance I was wanting.  The bot then authenticates the customer using an experience comparable to a traditional call center.  **Infuse intelligence within business process**  Thanks to Dynamics CRM, the bot can connect business processes and retrieve customer information.  Using this information, the bot can suggest actions, such as adding her daughter to the policy. The capabilities of the Bot Service enable the company to infuse intelligence within business process.  **Services**  The bot now collects additional information for the car Alice just acquired.  Not only you can provide the information by typing but you can also see cards, designed with buttons for common answers help accelerate the process.  Here, Alice is asked to upload the picture of her car for the record. However, she uploads the wrong picture.  Uploading pictures is critical for Insurance companies, especially the case of an accident.  Thanks to the Computer Vision API, it is now possible to understand what is inside an image, and verify if the content is appropriate.  This solution could be extended to include deducing the make and model of the car from the image, rather than asking Alice for it.  **Smart Insights**  In the background, the bot is pulling together all the information Alice has provided and generates a quote.  This includes inputs from traditional risk assessment systems, as well as more modern sources like a churn model calculated with Azure Machine Learning.  At this point, if the customer likes the quote, we can take them to a payment processing screen or even use a payment method already on file.  But let’s see what happens though if we respond negatively to the bot.  The bot can detect the negative sentiment of the customer’s response thanks to Cognitive Services with the use of the Text Analytics API, or even leveraging an Azure ML churn model to measure if the threshold for continued interaction is too big.  In this scenario, the bot can go further by reaching out to a human agent to help close the sale.  Before we leave the front-end, it’s important to note that these capabilities are not just limited to the North American market.  Thanks to Translator APIs, the bot can detect the language being used by the customer and translate its responses to match.  **Behind the scenes**  In Dynamics CRM, we can see the opportunity the bot has built for the agent. It pulls in existing customer history and then appends information captured in the chat. It also leverages machine learning to identify customer churn risk and make smart suggestions regarding other products the customer may wish to purchase.  Jane can see Alice’s opportunity record in CRM. It shows her history with the company, as well as the engagement with the bot, so the agent is fully prepared to have a successful conversation.  At the top, we see information about the sales stage. As the bot gathered more information, it advanced the sales stage from qualify, to develop, and now to proposal.  On the left, we see information about:   * Client: her dependents & her license status * Car: make, model, year, and an approximate valuation pulled in from an external system * History: payment & credit performance with the company   The agent knows at a glance the key information about the person they are about to chat with.  In the middle, we see a history of this opportunity. As the bot took it from initial interest, through identifying the type of policy, to escalating it to an agent, entries have been added to the activity wall. It’s easy for the agent to understand how the escalation occurred and the bot continues to help by giving recommendations.  On the right, we see the agent’s view of the chat embedded right in CRM, so the agent has all the context they need to land the deal.  If we scroll down, we can also drill into the price that has been provided via the bot on the website. Here we can see the additional family coverage added at the bot’s suggestion. We can also see other suggestions that the agent might like to make to the customer.  The suggestions are powered by the Recommendations API. This uses machine learning to build a model based on the data already in the CRM system to make better predictions of other products that might be relevant to the customer. | 1. Switch to the Litware Insurance browser tab. 2. Click **Get Started**. 3. In the chat window, type **What can you do?** 4. Type **Where is your company based?** 5. Type **I need insurance**. 6. Click **Automotive**. 7. Click **Yes**. 8. Type **Alice Olson**. 9. Type **1234**. 10. Click **Yes**. 11. Click **Sedan**. 12. Type **Ford**. 13. Type **Fusion**. 14. Click **2015**. 15. Click **Yes**. 16. Click on the **picture icon** and upload **dog.jpg**. 17. Scroll down the chat window to see the response. 18. Click on the **picture icon** and upload **harry.jpg**. 19. Scroll down the chat window to see the response. 20. Click on the **picture icon** and upload **ford\_fusion.jpg**. 21. Type **No, that’s way too expensive!** 22. Type **Bonjour**. 23. Type **Hola**. 24. Switch to the **Dynamics CRM** tab 25. Refresh the page. 26. Click on the latest opportunity. 27. Indicate the **timeline** in the top pane. 28. Indicate the **summary** information on the left of the page. 29. Indicate the **posts** in the middle of the page. 30. Indicate the **chat window** on the right of the page. 31. Scroll down the page. 32. Indicate **product line items**. 33. Hover over the **Auto Insurance** product line item and click on the **Suggestions** link. |
| In this example, Litware Insurance has enabled a very rich, natural interaction with Alice using the Bot Framework and Cognitive Services. This gives Alice the service she wanted quickly, and enables Litware Insurance to provide other services of high value to Alice.  A real-world example of enabling new customer interaction is an initiative by Rockwell Automation. They provide industrial automation and information solutions to customers in more than 80 countries. Many major companies worldwide need better, faster, and cost effective ways to manage and analyze ever-larger amounts of data. Perhaps more importantly, their customer’s need to use data in faster, more innovative ways. With this objective, Rockwell Automation used Cortana Intelligence to build Shelby™, a bot to monitor production more efficiently and to know what is the status of operations in more natural ways.  "*Our customers need to move quickly to meet their goals. Shelby™ gives them an entirely new way to interact with their environment. The health and diagnostics of their production is critical to make the decisions that matter.*" - Paula Puess, Global Market Development Manager, Rockwell Automation  There are many opportunities for integrating Bots into customer interactions, and bringing intelligence to the business data underlying the transactions.  Conversation as a Platform is the next step in human-computer interaction, which can bring big benefits to your business through increased customer engagement.  The Microsoft Bot Framework and Microsoft Cognitive Services enable you to quickly adopt this new platform, thanks to the power of Microsoft Azure. |  |

# Appendix 1: Configure your Environment

These steps need to be performed only once per environment, and are required prior to performing the EBC demos.

## Driving customer engagement with intelligent bots

**Estimated Setup Time: 1 minute**

1. Download the **BotImages.zip** file from the Azure EBC Demo site.
2. Extract the zip file to a convenient location.