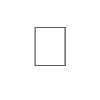
**Transcript**

September 15, 2025, 3:32PM

 **Faiza Jawed Khan** started transcription

 **Robert MacNeal** 0:03  
Have tomorrow with them and then also just being able to see what it is, um, their use cases are and what we can put together.

 **Muhammad Nazim** 0:11  
OK, so first of all, Robert, you can recall what the team have already configured within the general demo environment when we were, you know, establishing the scenario for a contact center, so you know what is already.  
There that we can potentially show, right?

 **Robert MacNeal** 0:31  
Yeah, yeah, I can definitely. I can definitely look into that. I will review that this afternoon and see, um.  
I could have.

 **Muhammad Nazim** 0:40  
OK. And and as you're saying, there's a, there's some calls set up tomorrow in which you will know that exactly what do we need to show for Friday, right?

 **Robert MacNeal** 0:51  
Correct.

 **Muhammad Nazim** 0:52  
OK.

 **Robert MacNeal** 0:54  
So I will, I will say that. Um.  
And it's really just going to depend on what it is. So this client, let me give you some background on the client. The client is a company that sells plumbing and mechanical parts and so it's a it's a manufacturing client and they are we were brought in by HIG the company.  
A private company that acquired Quizitive, one of their sister companies is helping them, is helping the plumbing company called M Supply look for a customer service solution, right. So they're talking about doing ServiceNow, there's talk of doing ServiceNow, there's talk of doing Zendesk and.  
Somebody from their team asked Lane on our team if we would be able to do something for them and so that's where this came from. So we are going to put together some type of demo for them. The thought is really to be able to just simply.  
Do a demonstration for them of customer service. So the first scenario is just going to be a phone call. Come in, create a case, show the features off, whether it be copilot and all the all the features of of omnichannel basic stuff.  
We want to be able to then show the same thing being done through a portal. So those are the two things we need to be able to just show basic ticket triage, CRM functionality. And then the second scenario is the one that we're going to find out tomorrow. So as as you guys know, I haven't talked to Syed Bahad and everything was it.  
Agents and all of that, we want to include some type of agent in our demonstration. So whatever that may be, if it's going to be a custom agent, if it's going to be a an out-of-the-box agent based on what there is, you know, we've had that conversation as well and we know what what kind of we're doing there, it can be a.  
Chat bot it can be mocked, but we want to be able to show what it is that they need to do. So those are the two things that I have in mind. I will check the the recording and see what it is. I assume that both of those things are able. I know that in the past.  
With with phone calls, we've had a, you know, we've had some limits that we've had to kind of make sure that we we don't hit because things are on trial and we've we've kind of adjusted that. I also do know that my phone has had issues in the past with calling in for some of those things, so.

 **Muhammad Nazim** 3:30  
Right.

 **Robert MacNeal** 3:31  
I can use, I have, I have access to other phones, so that's something that we can, we can work or we can manage. I'm not worried about that part, but as far as just what we're able to do, I said I don't know anything right now based on what it is, but I do know that we want to be able to show that basic flow at the minimal, so if that.  
So that's what the team could look into between today and tomorrow that that would be that would be perfect again because it's really just it's we're just trying to show the customer service solution and then from there we can kind of go in and say yeah we can do this or we can do that with with the agent piece but that's the details for tomorrow but I do know that we're.  
We're gonna need to show that. So we do need an environment with the omnichannel desk and we can talk about routing and things if routing is set up already, which I don't think it is. I think again, I don't, but we can kind of to see what the features are, just have the team configure the basic features.  
If they're not already knowing again that we would like to do a chat option as well as a phone call and I think that'll be the start. And then from there we can, we'll have a conversation tomorrow for the rest of the items.

 **Muhammad Nazim** 4:43  
Yeah, my assumption is that the basic stuff is indeed configured for omnichannel. I think Robert, you can refer to that the demo that we give and the existing configuration. I believe the basic configuration for contact centers that's already there.

 **Robert MacNeal** 4:54  
Yeah.  
Perfect. Yeah. So if they could just confirm that, I think that would be key.

 **Muhammad Nazim** 5:01  
Right. And and that but you can double check, but you can definitely double check that right? And once we have the requirement clear, we will see from there like how much existing.  
How much map there is like what additional things we need to perform right and and regarding the agents like I'm I'm a little bit concerned like it's still with the IT and seeing back the the when I connected with the team for for particularly the copilot seemed like.  
We cannot configure our own agent here as well, so some there's some setting that IT needs to enable so that the agents will be available. So I think until that is not resolved, I don't think we can even continue. I'm not talking about the out-of-the-box.  
Copilots, but also the the custom Uh copilot scenarios.

 **Robert MacNeal** 6:02  
So we can't. We can't even show out. We can't even show out-of-the-box copilot. Not even. I'm not talking agents. Do we do we have basic copilot set up like just summary summarize this record type of stuff?

 **Faiza Jawed Khan** 6:15  
That is there. That is there. I think what Nazim is talking about the out-of-the-box copilot agents, the customer service, yeah, yeah, copilot, anything related to copilot studio stuff, that is something they're not able to do that. But that row summary agent and everything that we do, Robert, if you see that environment, it's there.

 **Robert MacNeal** 6:17  
OK.  
It's copilot studio stuff, OK.

 **Muhammad Nazim** 6:29  
Yes.

 **Robert MacNeal** 6:35  
OK, OK. All right. If you could follow up with, I know IT is still working on it and see what it is. I copy. I think Syed Fahad's copied on it. Copy Syed Fahad on it as well and see and see who if we can escalate this knowing that and say that we have a client.

 **Faiza Jawed Khan** 6:35  
It's already there.

 **Muhammad Nazim** 6:37  
Yes.

 **Robert MacNeal** 6:54  
Demo coming up and we'd really like to be able to show this functionality and see what they can do. If they can ask ask for an escalation with inquisitive IT, I know that they're waiting for. I know that they're said they're waiting for Microsoft responses, but we should be able to at least get some type of response to see what all.  
We can do, and if not, it's at least we tried. But see what you can do in terms of escalating. Include Sayed Fahad, include whoever we need to and we'll go from there.

 **Muhammad Nazim** 7:22  
I retort, yeah.  
Yeah, let me, uh, uh, chase ID on this, Robert. Let me send an e-mail today.

 **Robert MacNeal** 7:31  
Perfect. Yeah. So Matt, have the team check on that and then we'll have this sync again tomorrow because I know that again it's it goes with the rest of the CE stuff that we're trying to figure out. So I thought we'd at least you know somewhat ahead of this and then from there we should be able to.  
We should be able to have a path, but yeah this is really the the goal is for this and I guess for to to kind of give some more insight on how this came through. This came down from from lane from the top from our leadership team. So even if it is something that you know we just we want to be able to put our our best and cleanest foot forward we want to be able to.  
Show a really clean demo because knowing that again with ServiceNow and Zendesk, those if you want a customer service solution, those two are kind of hard to beat, but we're gonna try to chat, we're gonna try to change the narrative on it and say yes, we have a customer service solution, it can do.  
What those can do, you can get your agentic stuff, you can get this and you can get that. So we're trying to expand that story and that's right now that's the goal for our for demonstration and then from there we want to be able to.  
See what happens. So I I think, I think we're in a good spot. I said I we don't, I don't know what time, what if the demo is going to be Friday or Monday, but if we could just make sure that we check those items and we'll go from there, I think we should be good to go.

 **Muhammad Nazim** 9:03  
OK.

 **Robert MacNeal** 9:06  
Any questions on y'all's end?

 **Faiza Jawed Khan** 9:11  
No, the action item I think here is that actually requesting IT to follow up so that we can start configuring that. Apart from that, Nazem has confirmed that the omnichannel configuration the team did before still exist.

 **Muhammad Nazim** 9:12  
No, I'm good.

 **Robert MacNeal** 9:29  
Yeah.

 **Faiza Jawed Khan** 9:29  
So if there is anything in the use case, Robert, you can just let us know so that we can see what else can be done. But I think that was purely out-of-the-box configuration they did. What else do you want us to see?  
Before tomorrow.

 **Robert MacNeal** 9:46  
That's it. There's really being able to know that we can answer a phone call, create a ticket. That environment has, you know, a contact record that's set up that we can do it and we can drive that. Just make sure that there's data in there. Another thing that I'm going to want to do is create some type of omnichannel Power BI report. I I don't know.  
I don't know if they're available already based on productivity. Again, they don't have to be directly driven from our environment, but if you could find something out there or have the team put something together to be able to just mock one and say, hey, look, this is, you know, this is what a productivity report looks like and we can share that.  
I think that's something that would go over really well, especially with all the insights that are available, you know that the systems talk about and whatnot. If we could show something along those lines, again, doesn't have to be relevant to our our demo scenario, just being able to show.  
Something in that sense is is key. I think that would be another step that I I wouldn't mind taking if we can.

 **Faiza Jawed Khan** 10:48  
So there are certain out-of-the-box omnichannel dashboards. I think that that was there as well. Last time I think Fez or Samuela showed around some historical highlights or within that won't that work or do you want something else as well on top of it?  
Because I remember there were two BI dashboards, not if you can come for the two BI reports which they showed.

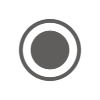
 **Robert MacNeal** 11:15  
Yeah, if we have, if we have them already, that's great. Please confirm them that and I think that's fine as well. But if if not.  
It's not I think let me sink on it based on the Power BI on the dashboards part just cause that's it was one of their specific requirements that they shared with us in in their list of things. So I think if we're able to do something and share something that would or do something a little bit kind of deeper than just out-of-the-box stuff, I think we would probably.  
Wanna go ahead and do that? Um, but let me know what's there and we can, uh, we can reassess.

 **Faiza Jawed Khan** 12:01  
Again.

 **Robert MacNeal** 12:04  
Awesome. I think that's all. I appreciate the time team. Let me know and come up with Nazm. Please let me know or copy me on the e-mail and if there is anything that we can do, I wouldn't be surprised if IT just says, you know, we're just waiting on Microsoft, but let's see if we can escalate based on this and we can bring in who we need to at the time.  
But otherwise, thank you very much for the for the effort and confirmations and I will sync with y'all tomorrow. The call, we have the call tomorrow at 11:30, this call at the same time. The call with the client isn't until 2:00 PM. So let's have this call and we can get up.  
Updates based on the action items today. If there aren't any updates and they can and you just want to send to via e-mail, you can cancel the call for tomorrow and then I'll send a note after the client call tomorrow afternoon and we can meet Wednesday morning.  
And see what it is that we need to do or what we can accomplish.

 **Faiza Jawed Khan** 13:04  
OK.

 **Muhammad Nazim** 13:04  
Right, OK.

 **Faiza Jawed Khan** stopped transcription