

Success Assessment for Dynamics 365 Contact Center



Assessment Program

Duration: 3 Days [Remote | Onsite]

Difficulty Level: 200 - Intermediate

Description

Success Assessment for Dynamics 365 Contact Center performs an in-depth evaluation to generate the first set of results and business outcomes. This workshop brings together business sponsors, technical sponsors along with operational leaders and representation from the voice of the customer. The objective is to analyze results and align against the Success Plan. Post review, the workshop aims to develop a plan to help remediate any missing metrics.

Objectives

- Align D365 Contact Center deployment to the Success Plan.
- Post Go-Live Review & Solution Health Check.
- Deliver Business Outcomes.

Outcomes

- A read-out, health check, or analysis of the Contact Center business challenges addressed with their measurable outcomes.
- An initial or updated plan on how to continue to measure both tactical and strategic goals towards a successful Contact Center solution.

Methodology

Assessment

Perform an in-depth evaluation with a Microsoft engineer and generate your first set of results.

Review and analysis

Analyze your results and examine the issues identified and how to remediate them.

Develop a plan

Develop a plan to help you remediate issues and improve your environment.

Scope

- Define Customer Contact Center Strategy and Priorities
- Incorporate known leading Industry Challenges & Solutions in the Contact Center space
- Use domain expertise to make recommendations on how to achieve success in the Contact Center space from both strategic and tactical perspective
- Tie customer goals to KPIs to measure success

Agenda

Days 1-3

Discovery Phase

- High-level plan and progress to date (if any) with focus on People, Process, Technology, Functionality, Governance, Data
- Resources (availability/depth expertise) and constraints
- Known Risks/Obstacles
- Key milestones (i.e.: Fiscal cycles; decommissioned systems)
- Sequencing and prioritization of activities

Synthesis Phase

- Validation of assumptions
- Mapping of Recommendations for Improvement
- Creation of Readout

Final Report

- Presentation to participant Business & IT stakeholders
- High-level summary/observations of customer project -to ensure mutual understanding.
- High-level recommendations for Improvement

Delivery outline

Requirements

Participants

- CMO
- Exec Sponsor
- Domain Owner(s): Business Strategy, Business Operations functions, Information Technology, CX delivery leader
- Operational leaders
- Voice of Customer/NPS owner
- CCR (agent) leaders

Skill Requirements

- Not Applicable

Time Commitment

- Three full-day engagement with relevant roles
- 2-4 hour Interview with relevant roles

Delivery Requirements

- Supported version of Windows
- Modern browser, such as Microsoft Edge (or equivalent)
- Internet access
- Microsoft Teams for remote deliveries

Assessment and Knowledge Transfer

Define and agree on the scoping	<ul style="list-style-type: none">• Scope the engagement, review the prerequisites, and define roles and responsibilities
Discovery Phase	<ul style="list-style-type: none">• Key KPIs or operational measures for Contact Center.• High-level plan and progress to date (if any) with focus on People, Process, Technology, Functionality, Governance, Data.• Resources (availability/depth expertise) and constraints.• Known Risks/Obstacles.• Key milestones (i.e.: Fiscal cycles; decommissioned systems).• Sequencing and prioritization of activities.
Synthesis Phase	<ul style="list-style-type: none">• Validation of assumptions• Mapping of Recommendations for Improvement• Creation of Readout
Perform Evaluation	<ul style="list-style-type: none">• Generate first set of KPIs measured against the Success Plan.
Analysis	<ul style="list-style-type: none">• Examine any highlighted issues, and recommendations for improvement.
Presentation	<ul style="list-style-type: none">• Participating Business & IT stakeholders and facilitated by the MSFT team to define• High-level summary/observations of customer project -to ensure mutual understanding.• High-level recommendations for Improvement.

If you are interested in this engagement for your organization, contact your Microsoft Account Representative.