Success Planning for Dynamics 365 Contact Center

Architecture Services

Duration: 3 Days [Remote | Onsite]
Difficulty Level: 200 - Intermediate

Description

The success planning for Dynamics 365 Contact Center is designed to help users achieve their business goals with Dynamics 365 Contact Center. This deliverable includes a comprehensive plan that maps user goals with business challenges, develops initial use cases, and defines performance KPIs for various user roles and channels. The goal is to understand both business and technical challenges and map key metrics to monitor throughout the contact center as a service project.

Objectives

- Identify and understand the specific goals and current challenges.
- Create initial use cases based on the success plan to address the identified goals and challenges.
- Establish Key Performance Indicators (KPIs) for various user roles and channels.
- Map the technical current state and the migration strategy, aligned with business outcomes, to Dynamics 365 Contact Center.

Outcomes

- The success plan includes defining performance KPIs for various user roles and channels, leading to measurable improvements in performance.
- A clear understanding of the business and technical current state to support the implementation.
- Clarify the scope and goal of the Dynamics 365 Contact Center as a service project with an emphasis on business metrics for Dynamic 365 Contact Center.
- High-level description of technical solution and Dynamics 365 Contact Center stack, high-level recommendation on migration steps.

Methodology

Review and analysis

An in-person or virtual dynamic workshop focused on user strategy and priorities, designed to develop a plan to measure and define strategic and tactical outcomes for the contact center solution.

Scope

This offering is scoped for a single instance of Dynamics 365 Contact Center.

Agenda

Day 1

- Welcome and Introduction.
- Understand business challenges, goals and priorities for contact center operation.
- Understand key metrics by person on the contact center operation.

Day 2

- Understand the current state of the contact center solution and its current technology stack, including integration with third-party solutions.

Day 3

- Define a success plan for business challenges and metrics.
- Define a high-level migration plan from current technology stack to Microsoft stack.
- Next steps and wrap-up.

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Delivery outline

Participants

- Project Manager, Business Analyst, Technical Consultant, IT Managers, Contact Center Managers, End-Users, Performance Analyst, and Training Specialist.

Skill Requirements

- Knowledge of the contact center operations, business challenges and technical current state.

Time Commitment

- Three full-day engagements with relevant roles.

Delivery Requirements

- Access to any relevant architecture design and documentation.

Success Planning Agenda	
Day 1	
Business Engagement	• Welcome and Introduction. • Understand business challenges, goals and priorities for contact center operation. • Understand key metrics by person on the contact center operation.
Day 2	
Technical Engagement	• Understand the current state of the contact center solution and its current technology stack, including integration with third-party solutions.
Day 3	
Success Plan	• Define a success plan for business challenges and metrics. • Define a high-level migration plan from current technology stack to Microsoft stack. • Next steps and wrap-up.

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

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