

Government Dynamics 365 Contact Center

RSM Overview



Agenda

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17	Journey #3 - Supervisor
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Presenters



Pat Petersen

Director, Modern Work

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Pat focuses on deployment of solutions and integration with telecom solutions.



Jeff Lovett

Director, Contact Center

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Jeff is responsible for the user journey of a Contact Center solution. Focused on Workforce Management, leading practices and industry experience.



John Greve

Managing Director, D365

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John is focused on RSM's go to market strategy with Microsoft Business Applications for State and Local Government.

Founded in
1926



81

Cities in North America



5th

Largest global accounting firm



Audit and
accounting



Tax



Consulting



\$3.7B

in Revenue



Only 1

of the Big Five focused on the
middle market



16,000+

Professionals in North America



27,000

Clients in US alone

Globally



More than
120
countries



More than
64,000
professionals



820
offices



\$9B
in combined fees

| RSM's Partnership with Microsoft



Microsoft Cloud

1300+

Microsoft Certified Consultants



Recent Microsoft Awards

- ✓ **Partner Of the Year US Finalist Government**
- ✓ **Partner Of the Year WW Finalist Government**
- ✓ Partner Of the Year Winner D365 Finance
- ✓ Partner Of the Year Winner Defense & Intelligence
- ✓ Partner Of the Year Finalists D365 Business Central
- ✓ Partner Of the Year US Finalists Community Response
- ✓ Partner Of the Year WW Finalists Healthcare & Life Sciences
- ✓ Partner Of the Year WW Finalists Business Intelligence

Top 1% of Dynamics Partners for the past 20 Years



Security

Specialist

Cloud Security
Identity and Access
Management
Information Protection and
Governance
Threat Protection



Modern Work

Specialist

Adoption and Change
Management
Calling for Microsoft Teams
Teamwork Deployment
Modernize Endpoints



Business Applications

Specialist

Small and Midsize Business
Management
Supply Chain
Finance



Data & AI
Azure

Specialist

Analytics
AI and Machine Learning
Infra and Database Migration
Migrate Enterprise Applications
to Microsoft Azure



Digital & App Innovation
Azure

Specialist

AI and Machine Learning
Low Code Application
Development
Migrate Enterprise Applications
to Microsoft Azure



Infrastructure
Azure

Specialist

Infra and Database Migration
Azure Virtual Desktop

| RSM's Contact Center Highlights



Over 20 Years of Contact Center and Telecom Deployments



Power Platform integrations ensure that solutions are built within the ecosystem



Proven Contact Center Deployment Approach aligns with leading practices of deployments



Human-Centered Design aligns processes, products and services with the behaviors of real users



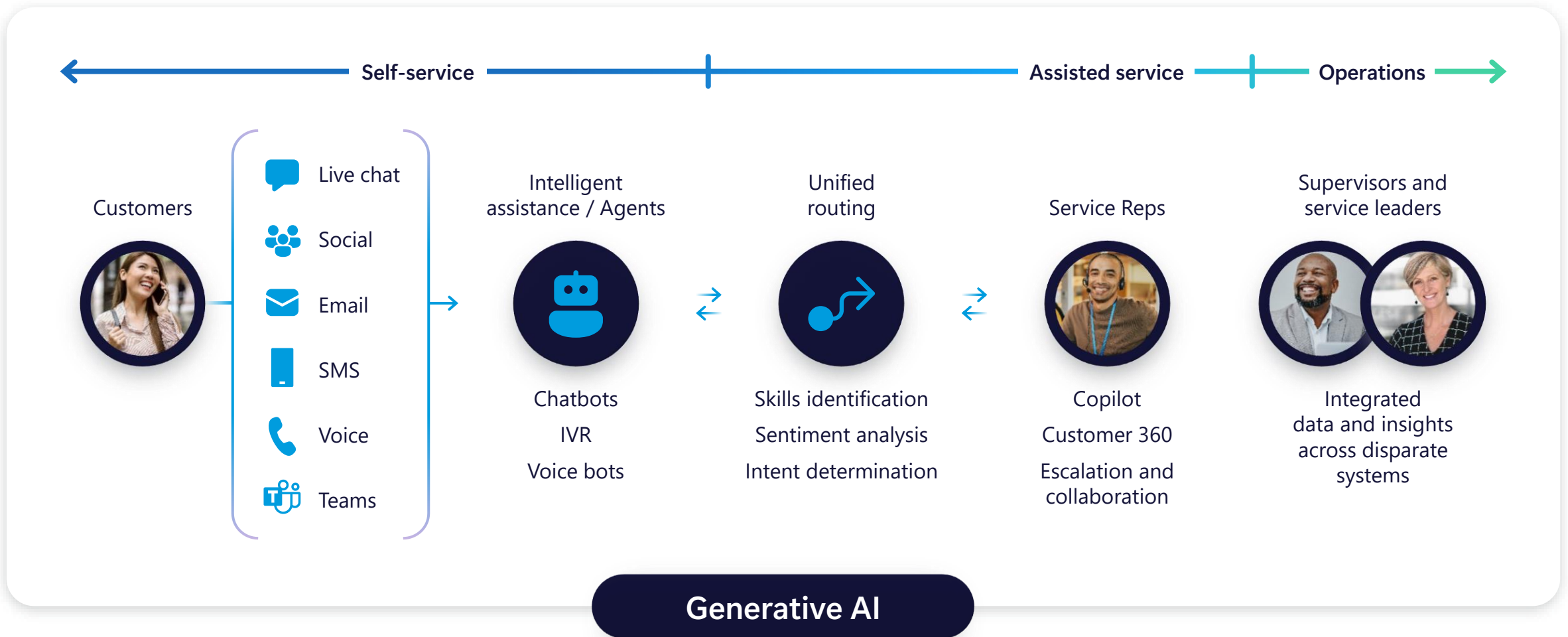
Integrated Delivery Model bringing Business Applications, Human-Centered Design, & Modern Work teams to ensure successful delivery



RSM's OneMicrosoft Integration ensures a unified deployment across service lines

Architecture Overview

| Modernize service with a complete solution



| The Microsoft Experience



AZURE CLOUD

Built on Microsoft Cloud for scalable, secure, and reliable contact center workloads, including voice, digital, and routing.



DATAVERSE

Provides Copilot with data for full customer views; customer journey and agent profiles



POWER PLATFORM

Allows Power Apps to be built, Power Automate allows tasks to be automated, Power BI delivers reporting and analytics.



COPILOT

Offers AI routing, sentiment analysis, intent detection, and resource optimization. Provides summarization, knowledge base insights, and draft creation.



COPILOT STUDIO

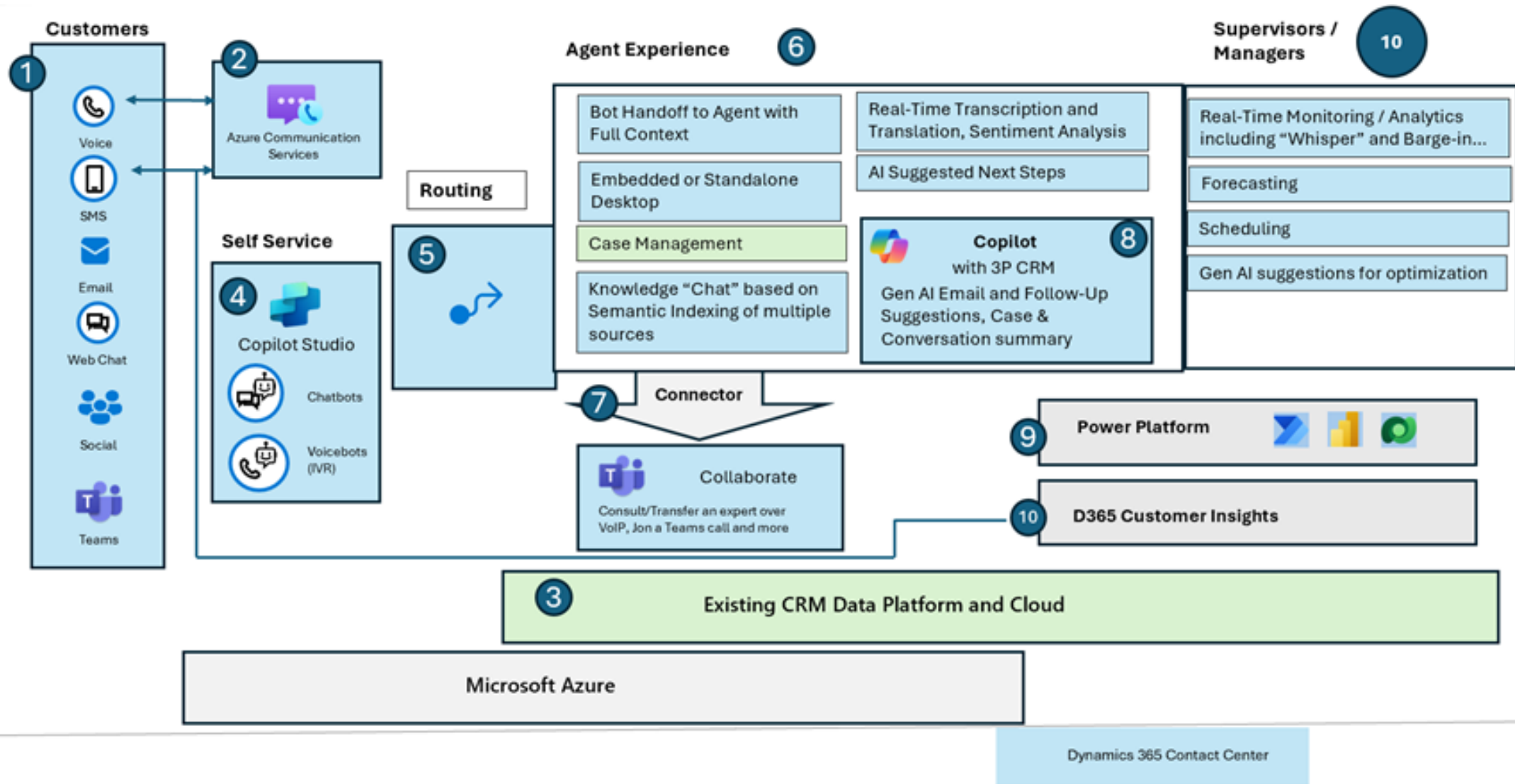
Intelligent Conversational bot authoring drawing on conversations, knowledge, history and data.



CHANNELS

Voice, Web Chat, Live Chat, IVRs, Voicebots, Chatbots, SMS, Email, Social Media, Microsoft Teams.

Microsoft AI-Driven Contact Center



Customer Journey and Demo

| Dynamics 365 Contact Center Offerings

Unique, in-market deployment flexibility.

Embedded into your CRM

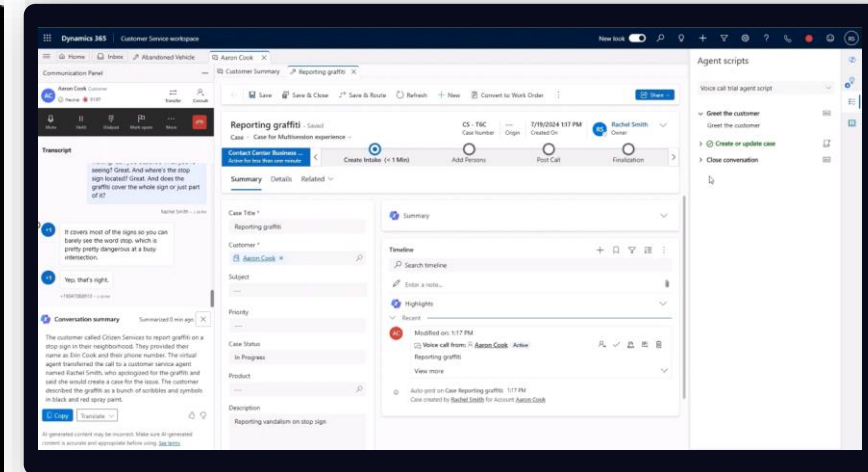
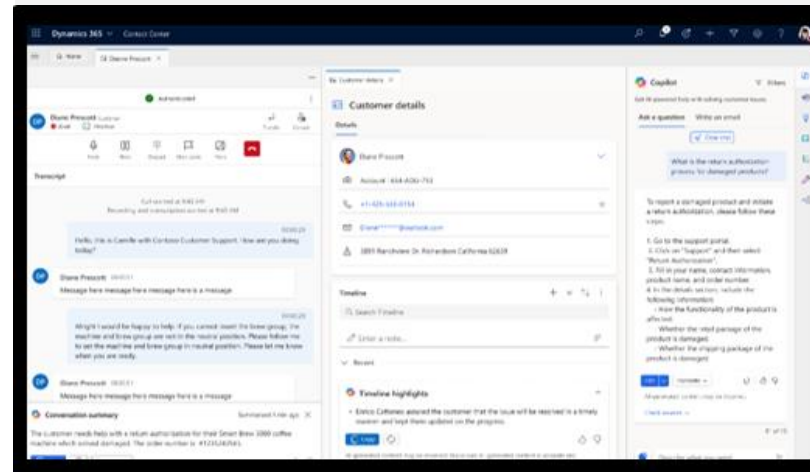
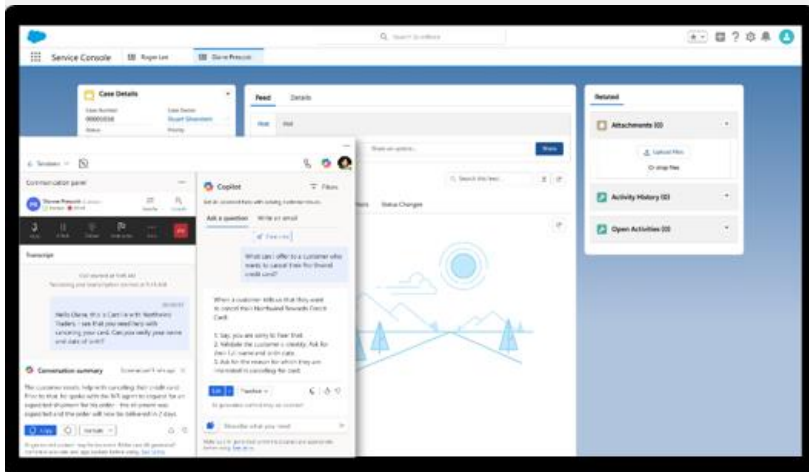
Engage with customers across channels while working seamlessly within your existing CRM system.¹

Standalone experience

Work directly from Dynamics 365 Contact Center for a full-screen view of conversations, customer details, and Copilot

Dynamics 365 CRM + Contact Center

Dynamics 365 Customer Service + Contact Center delivered as a single, unified cloud experience to maximize case management productivity & effectiveness across all engagement channels



| Enhancing the Agent Experience *with* D365 Contact Center and Copilot



Deliver **Efficient and Consistent** Service

Copilot automates routine tasks, allowing agents to focus on providing personalized assistance while ensuring that agents follow standardized procedures.



Provide **Accurate** Feedback

Providing real-time data and suggestions, Copilot helps agents deliver accurate and up-to-date information to citizens.



Surface **Intelligent** Recommendations

Copilot can suggest additional services or information that might be relevant to the citizen, enhancing the overall customer experience.

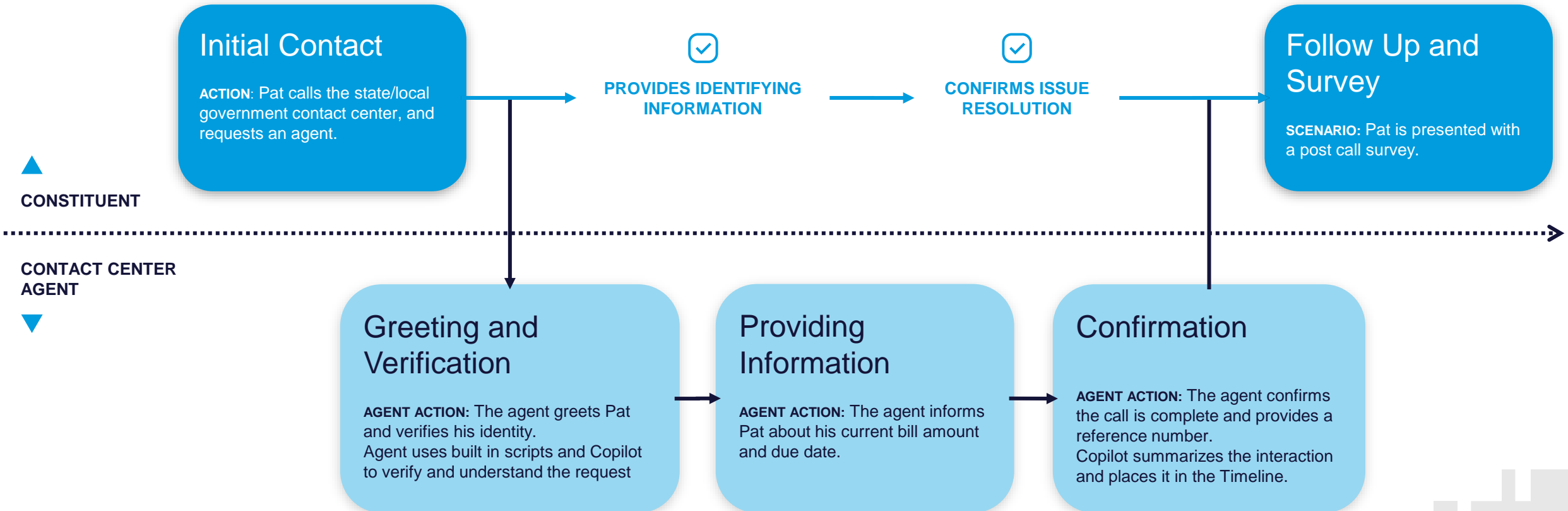
Navigation Overview

| Sample Journey 01 - Voice Interaction

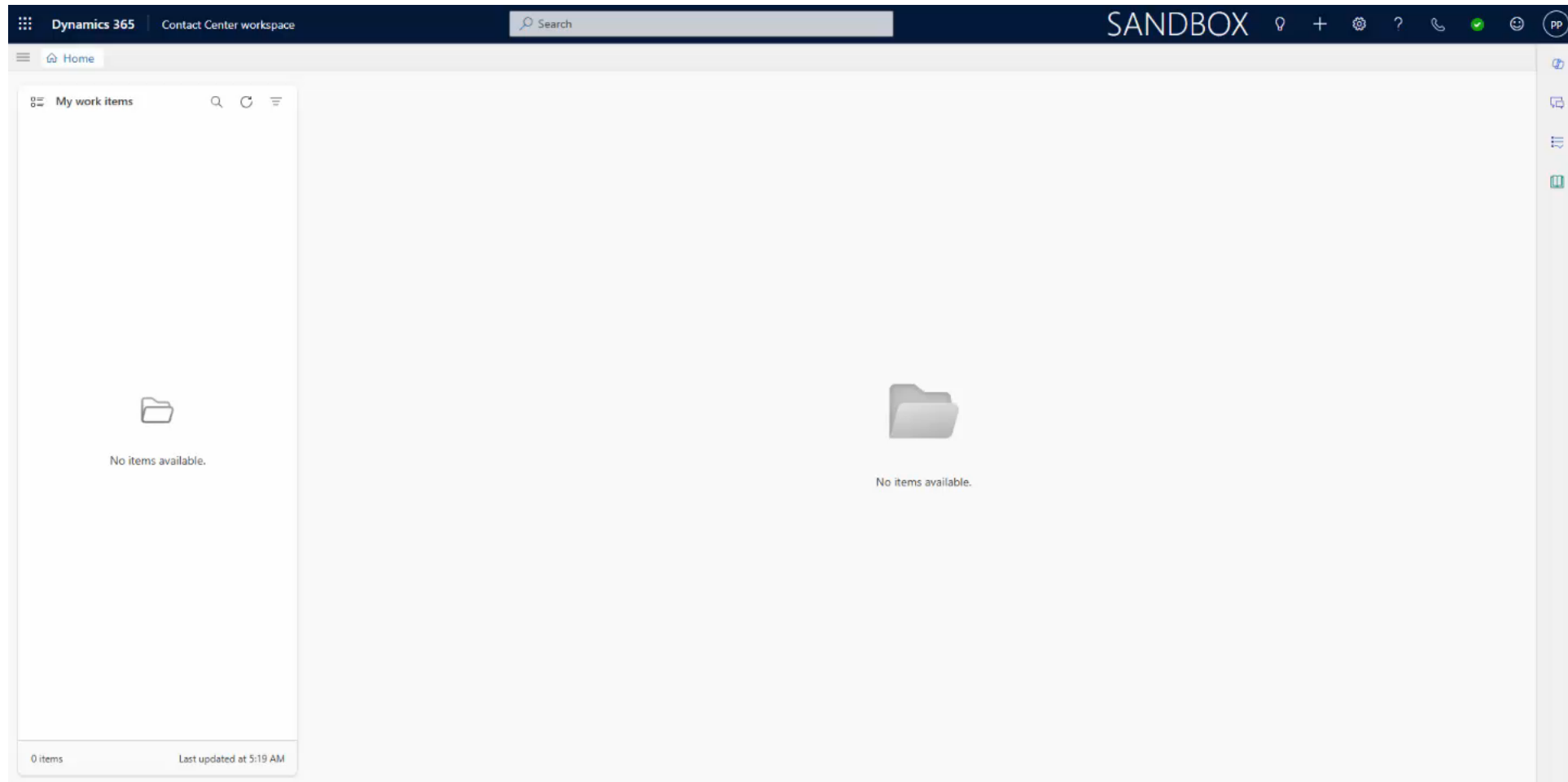
Paying a Bill

SCENARIO

A citizen, Pat, needs to pay his utility bill.



Sample Journey 01 - Voice Interaction



| Sample Journey 01 - Summary

Paying a Bill

SCENARIO

A citizen, Pat, needs to pay his utility bill.

INITIAL CONTACT

Pat is greeted by automated message allowing basic interaction with Voicebot. Pat is routed to Contact Center after requesting to speak to an Agent

FOLLOW UP AND SURVEY

On Conversation close, Pat is presented with a survey for feedback.



CONSTITUENT

CONTACT CENTER
AGENT



GREETING AND VERIFICATION

Agent greets Pat and verifies his identity. The agent can see interactions with Voice as well as review summary and scripts.

PROVIDING INFORMATION

Agent can utilize Smart Assist for Knowledge base articles.

CONFIRMATION

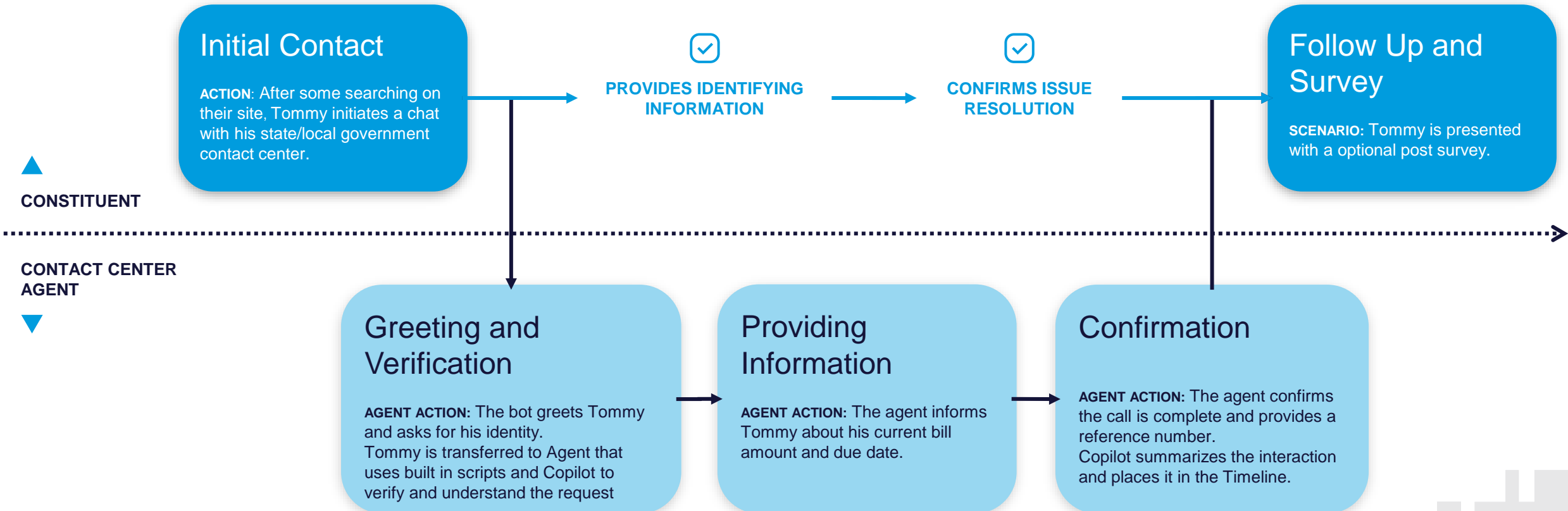
Agent is able to review timeline of existing calls, provide feedback based on the widgets on the screen

| Sample Journey 02 - Web Chat Interaction

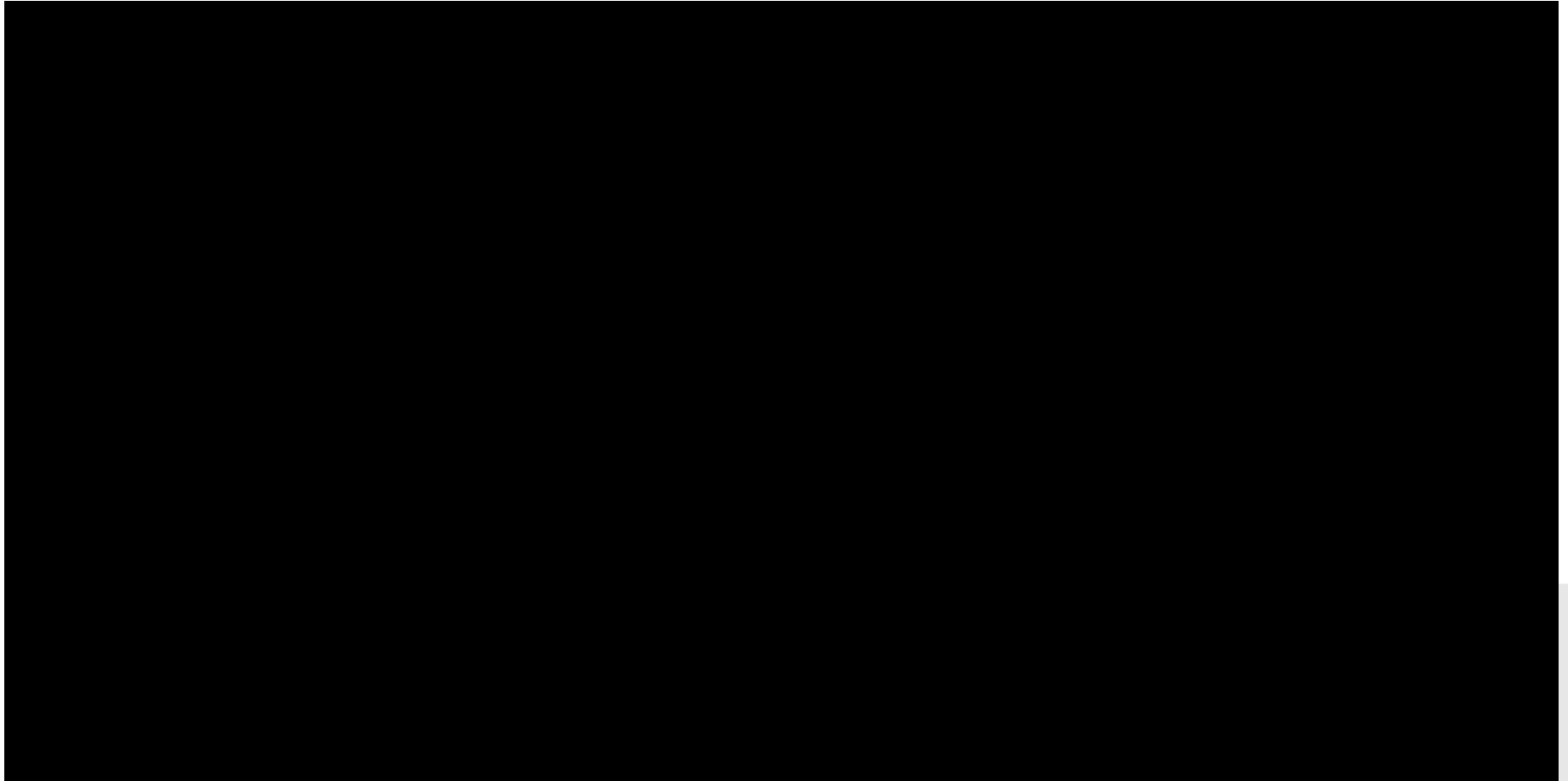
Inquiring about Utility Bill

SCENARIO

A citizen, Tommy, needs to pay a utility bill for his property.



Sample Journey 02 – Web Chat Interaction



| Sample Journey 02 – Web Chat Interaction Summary

Paying a Bill

SCENARIO

A citizen, Tommy, needs to pay his utility bill.

INITIAL CONTACT

Tommy is greeted by automated message allowing basic interaction with the Chat Bot.
Tommy is routed to Contact Center after requesting to speak to an Agent

FOLLOW UP AND SURVEY

On Conversation close, Tommy is presented with a survey for feedback.

▲
CONSTITUENT

▼
CONTACT CENTER AGENT

GREETING AND VERIFICATION

Agent greets Tommy and verifies his identity. The agent can see interactions with Voice as well as review summary and scripts.

PROVIDING INFORMATION

Agent can utilize Copilot for Knowledge base articles.

CONFIRMATION

Agent is able to review timeline of existing calls, provide feedback based on the widgets on the screen

| Sample Journey 03 – Dashboards & Reporting

Supervisor Reporting and Dashboard

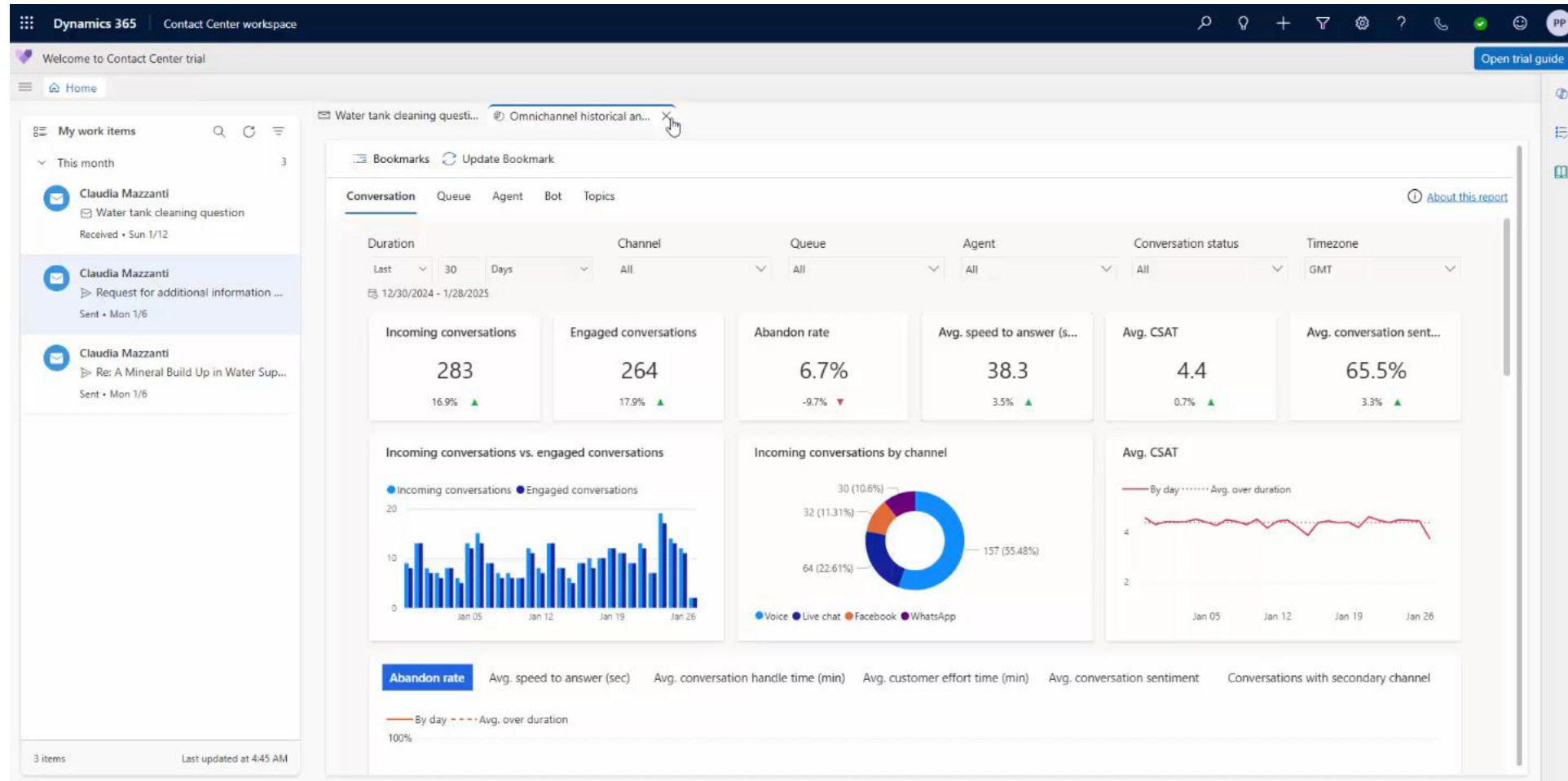
SCENARIO

Contact Center Administrators need to continually evaluate their systems and staff for level of constituent service.

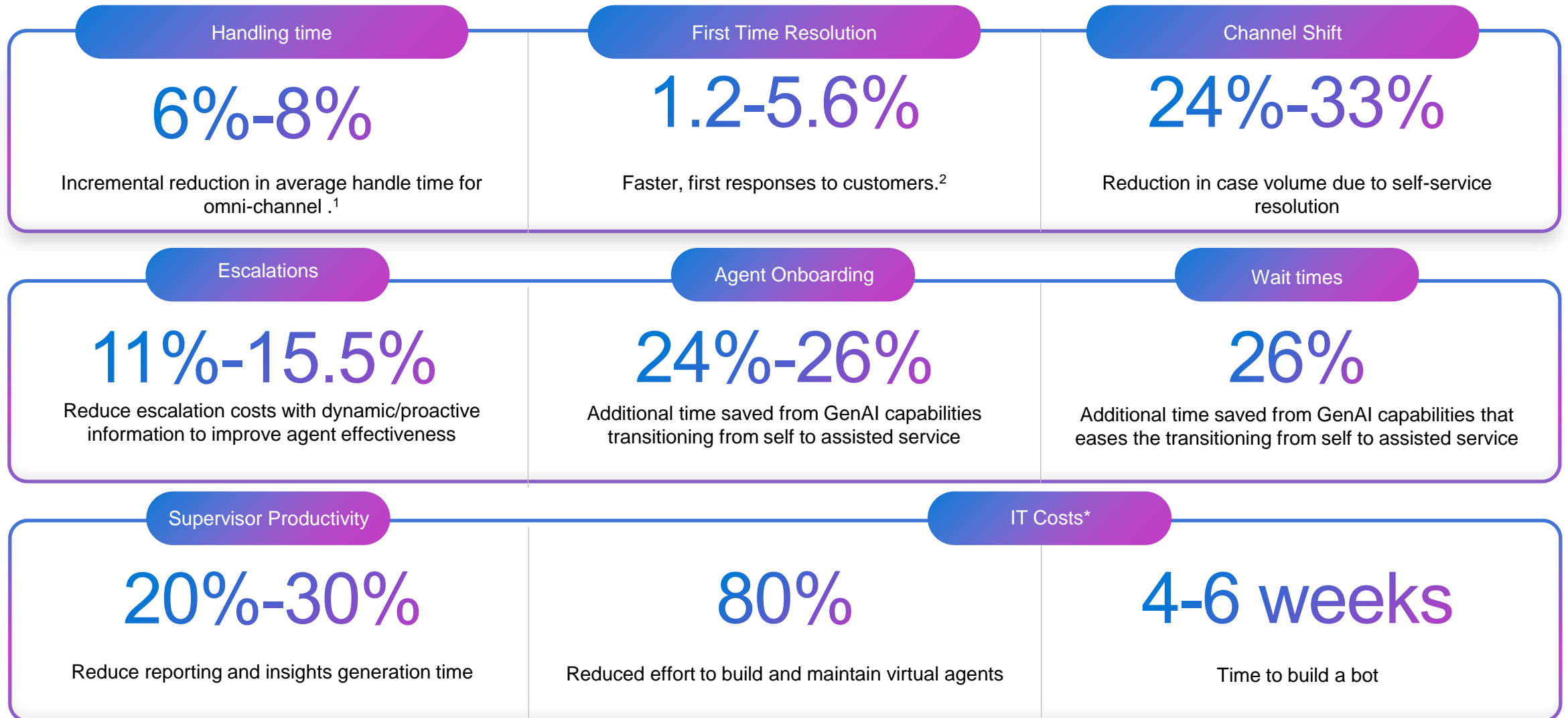
CONTACT CENTER
SUPERVISOR



Sample Journey 03 – Dashboards and Reporting



| Incremental CCaaS Value



Sources:

1. [Klarna AI assistant handles two-thirds of customer service chats in its first month](#)" Klarna deployment of AI assistant powered by OpenAI
2. Microsoft, Microsoft empowers support engineers to shine brighter with Dynamics 365 Customer Service, Sep 2023
3. * Additional budget impact from Vendor Consolidation, Reduction of Risk of Data Breach and Development Costs

Overview of Our Approach

	Overview of Our Approach		
	Planning & Design	Development & Testing	Deployment & Post-Implementation
Goal	Identify and outline business requirements and solution design of the contact center solution	Configure and setup the contact center and ensure that it meets all identified business needs	Smooth transition of current business operations to the newly configured contact center solution
Tasks	<ul style="list-style-type: none"> <u>Planning and requirements gathering</u> <ul style="list-style-type: none"> Engage stakeholders to capture business goals and requirements Analyze current contact center infrastructure and processes <u>Design and solution architecture</u> <ul style="list-style-type: none"> Develop a detailed design and architecture of the contact center solution Identify necessary features, integrations, and customizations Ensure compliance with regulatory and security standards Create a project roadmap with clear milestones and deliverables 	<ul style="list-style-type: none"> <u>Development and configuration</u> <ul style="list-style-type: none"> Set up and configure the contact center software and hardware Integrate with existing CRM, ERP, and other systems Develop and implement custom features as required Conduct unit and integration testing to ensure business functionality is met <u>User acceptance testing (UAT)</u> <ul style="list-style-type: none"> Conduct comprehensive testing to validate system performance, functionality, and security Engage end-users in testing to ensure the solution meets business requirements and user expectations Iterate and refine the system based on feedback <u>Training and change management</u> <ul style="list-style-type: none"> Develop and deliver training programs tailored to different user groups Implement change management strategies to ensure smooth adoption 	<ul style="list-style-type: none"> <u>Deployment</u> <ul style="list-style-type: none"> Conduct a pilot launch to test the solution with a limited user group Gather feedback from the pilot phase and make necessary adjustments Execute a full rollout of the contact center solution across the organization <u>Post-Implementation Support and Optimization</u> <ul style="list-style-type: none"> Provide ongoing support and monitoring to ensure system stability and performance Troubleshoot and resolve any post-deployment issues Continuously collect feedback and implement improvements Measure performance against defined KPIs and objectives to ensure ongoing optimization
Outcomes	<ul style="list-style-type: none"> Comprehensive architecture documentation Detailed feature specifications, integrations, and customizations Compliance Plan to ensure compliance with regulatory and security standards 	<ul style="list-style-type: none"> Fully configured contact center hardware and software with the necessary features and customizations Detailed UAT plan and checklist Change management strategy to ensure smooth adoption 	<ul style="list-style-type: none"> Comprehensive plan for full deployment Fully operational contact center solution in use by the organization Feedback collection mechanisms setup and improvement plans

| Contact Center RaMP UP

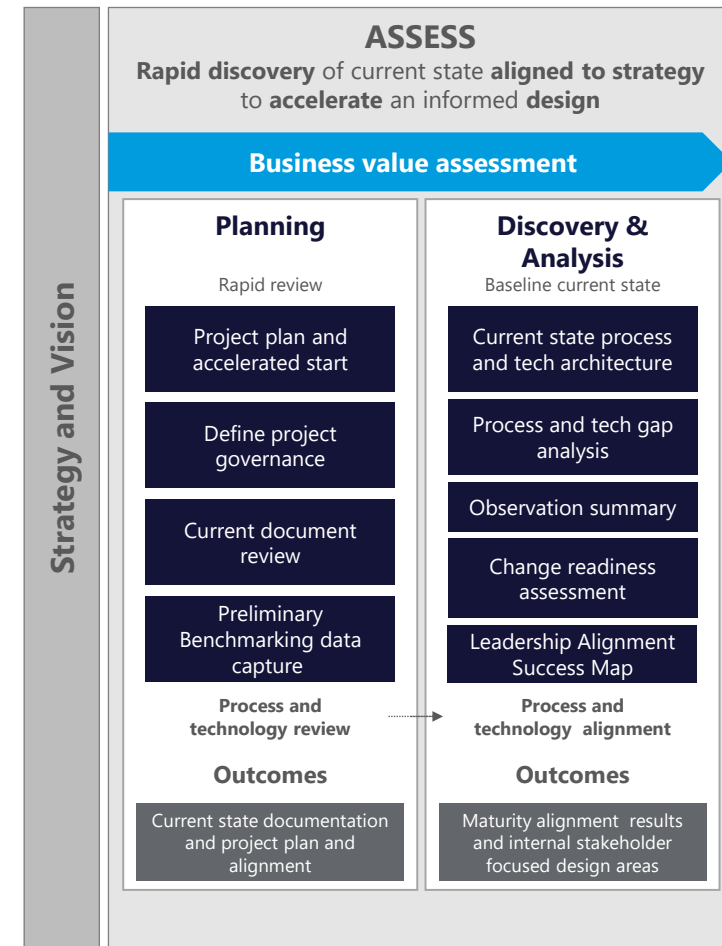
Rapid Modernization Planning *and* Unlocking Potential

VISION & VALUE

At RSM, our assessment methodology is designed to **empower organizations** with the clarity and confidence needed to accelerate their journey toward a modern, scalable, and **citizen-focused contact center**. By combining deep industry expertise, innovative tools, and a structured approach, we deliver **actionable insights** and **tailored roadmaps** that align with your unique business goals.

Our vision is to guide organizations in **uncovering opportunities**, **addressing challenges**, and setting a **clear path to success** while leveraging the latest technologies, including Microsoft's robust ecosystem. We believe that the right assessment unlocks transformative value by **aligning technology, people, and processes** for sustainable outcomes.

Through RSM's partnership with Microsoft, there are **potential funding opportunities** available to support this assessment. These investment dollars can help offset costs, making it easier to focus on building a **strategic roadmap** and **delivering measurable results**.



Thank You



[Schedule a follow up Conversation](#)



THE POWER OF BEING UNDERSTOOD

ASSURANCE | TAX | CONSULTING

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Introducing Agents

December 2024
Public Preview

Customer Intent Agent

Autonomously mine intents from past and current customer conversations across channels to power dynamic, evergreen self-service and assisted service

December 2024
Public Preview

Customer Knowledge Management Agent

Extract knowledge from human-assisted cases and draft new/update existing knowledge articles to solve future cases via self-service & assisted service

February 2025
Public Preview

Case Management Agent

Automate tasks throughout the case lifecycle -- creation, updates, collab, resolution, follow up, & closure -- to reduce handle time and burden on service reps



D365 Contact Center



D365 Customer Service

Why Microsoft for your contact center?



Comprehensive vision for service

Single vendor across CCaaS, CRM, gen AI, and more. We meet you where you are and offer a path to consolidation and growth



Infused with Copilot from end to end

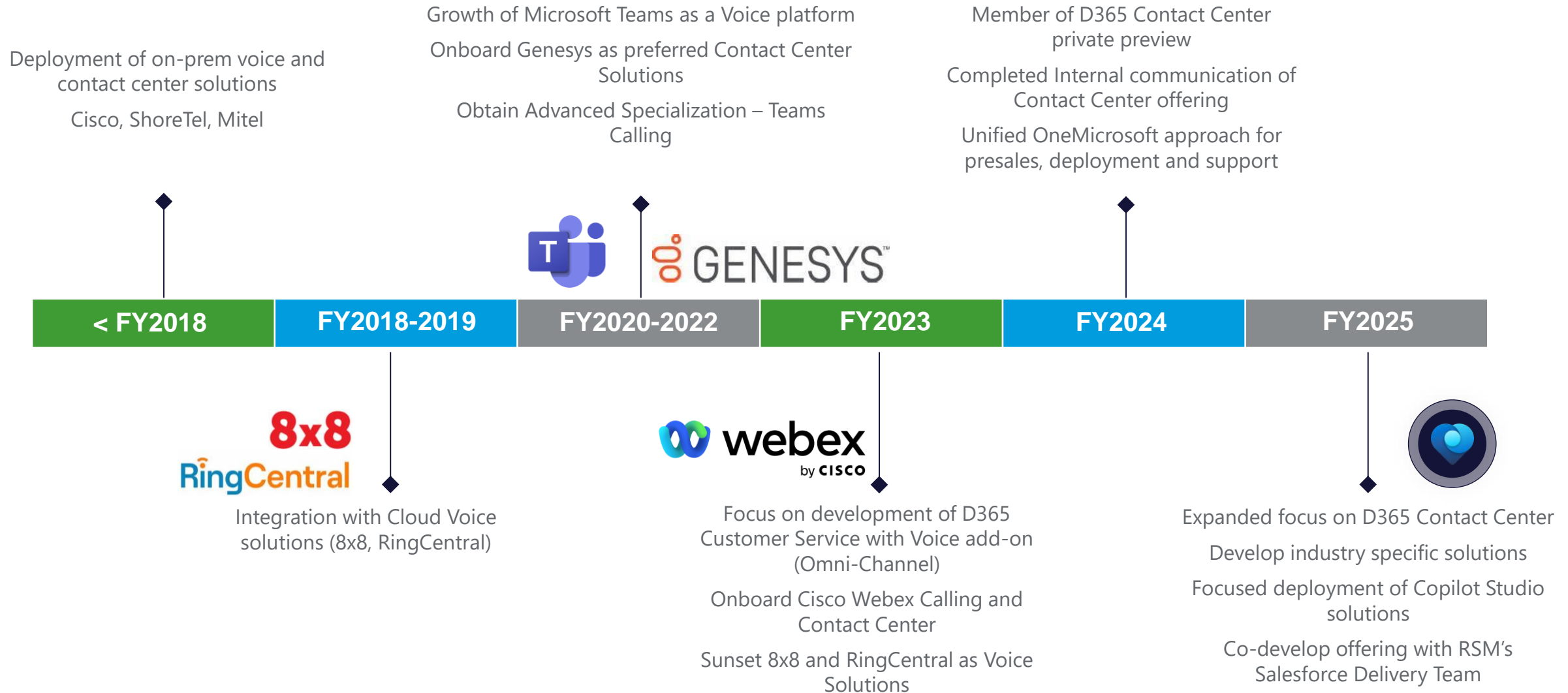
From self-service to routing, agent-assisted service, post-call wrap-up, and analytics—all connected to the data you rely on



Built for scalability and reliability

Modern cloud infrastructure, for critical contact center workloads. As your needs evolve, you can count on Microsoft Cloud

Voice & Contact Center | Timeline



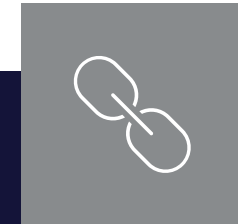
Scalability



Dedicated Lab Environment
Focused Presales team
integrated with Project Delivery
Team
Consultants focused on Copilot
Studio and automation



17 Certified engineers
30 Contact Center
implementation experience
Dedicated delivery team of
Business Applications and
Modern Work resources



OneMicrosoft Integration
Monthly check-ins with D365
and Modern Work resources
Integration with Microsoft team
as part of preview program
Existing Contact Center
experience

Human-Centered Design Team

Experience Strategy & Design

- Mapping customer journeys and defining experience frameworks
- Persona development to align contact center solutions with end-user needs
- Blueprinting workflows to ensure seamless omnichannel experiences


Contact Center Assessment & Innovation

- Evaluating existing platforms to identify gaps and quick wins
- Innovation workshops to co-create user-centric solutions with clients
- Competitive benchmarking to ensure industry-best standards

Usability Testing & Continuous Improvement

- Prototyping contact center workflows to validate experience designs
- Gathering feedback from agents and customers to drive improvements
- Using analytics to optimize agent performance and customer satisfaction

Implementation Support

- Collaborating with technical and business teams to ensure seamless solution rollouts
 - Training and adoption programs designed to fit diverse user groups
 - Post-launch experience reviews and future-state recommendations
- 

Contact Center Implementation Approach

Planning and Design		
Phase I	Planning and Requirements Gathering	Design and Solution Architecture
Activities	<ul style="list-style-type: none">• Define project objectives and scope• Engage stakeholders to capture business goals and requirements• Analyze current contact center infrastructure and processes• Establish project timelines, budget, and resource allocation	<ul style="list-style-type: none">• Develop a detailed design and architecture of the contact center solution• Identify necessary features, integrations, and customizations• Ensure compliance with regulatory and security standards• Create a project roadmap with clear milestones and deliverables
Outcomes	<ul style="list-style-type: none">• Defined Objectives and Scope: Understanding of project goals, scope, and deliverables• Stakeholder Engagement: Documented requirements and expectations• Current State Analysis: Assessment report of existing infrastructure and processes• Project Plan: Detailed project timeline, budget, and resource allocation plan	<ul style="list-style-type: none">• Detailed Design: Comprehensive design and architecture documentation• Feature Specification: List of required features, integrations, and customizations• Compliance Plan: Documentation ensuring compliance with regulatory and security standards• Project Roadmap: Clear milestones, deliverables, and project phases outlined

Contact Center Implementation Approach

Development and Testing			
Phase II	Development and Configuration	User Acceptance Testing (UAT)	Training and Change Management
Activities	<ul style="list-style-type: none">Set up and configure the contact center software and hardwareIntegrate with existing CRM, ERP, and other systemsDevelop and implement custom features as requiredConduct unit and integration testing to ensure functionality	<ul style="list-style-type: none">Conduct comprehensive testing to validate system performance, functionality, and securityEngage end-users in testing to ensure the solution meets business requirements and user expectationsIterate and refine the system based on feedback from UAT	<ul style="list-style-type: none">Develop and deliver training programs tailored to different user groupsCreate user manuals, guides, and support documentationImplement change management strategies to ensure smooth adoption
Outcomes	<ul style="list-style-type: none">Setup and Configuration: Fully configured contact center software and hardwareSystem Integration: Integrated contact center solution with CRM, ERP, and other systemsCustom Features: Developed and implemented custom features as requiredTesting Reports: Unit and integration testing reports ensuring system functionality	<ul style="list-style-type: none">Testing Plans: Detailed UAT plans and checklistsUAT Reports: Comprehensive reports on system performance, functionality, and securityEnd-User Feedback: Documented feedback from end-usersRefinement Plans: List of system refinements and iterations based on UAT feedback	<ul style="list-style-type: none">Training Programs: Developed and delivered training materials tailored to different user groupsUser Documentation: User manuals, guides, and support documentationChange Management Strategy: Implemented strategies to ensure smooth user adoption and transition

Contact Center Implementation Approach

Deployment and Post-Implementation		
Phase III	Deployment	Post-Implementation Support and Optimization
Activities	<ul style="list-style-type: none">• Conduct a pilot launch to test the solution with a limited user group• Gather feedback from the pilot phase and make necessary adjustments• Execute a full rollout of the contact center solution across the organization	<ul style="list-style-type: none">• Provide ongoing support and monitoring to ensure system stability and performance• Troubleshoot and resolve any post-deployment issues• Continuously collect feedback and implement improvements• Measure performance against defined KPIs and objectives to ensure ongoing optimization
Outcomes	<ul style="list-style-type: none">• Pilot Launch: Pilot phase report detailing test outcomes and adjustments• Full Rollout Plan: Comprehensive plan for full deployment• Deployment Reports: Feedback and issues reported during deployment phase• Operational System: Fully operational contact center solution in use by the organization	<ul style="list-style-type: none">• Support Plans: Ongoing support and monitoring plans• Issue Resolution: Documentation of troubleshooting and issue resolution processes• Continuous Improvement: Feedback collection mechanisms and improvement plans• Performance Metrics: Regular reports measuring performance against defined KPIs and objectives