Contact Center Modernization with Microsoft Power Platform and Dynamics 365 (Duration 3 Days)

This comprehensive 3-day training program is designed to equip participants with the skills needed to modernize and enhance contact center operations using **Microsoft Power Platform and Dynamics 365 Contact Center**. Participants will learn to integrate **AI-driven automation, intelligent routing, voice and chat capabilities, and real-time analytics** to improve customer engagement and agent productivity. The course covers foundational setup, advanced AI-powered workflows, security best practices, and workforce management strategies to ensure seamless contact center operations.

By the end of this training, participants will be able to:

✔ Set up and configure a **modern cloud-based contact center** using **Dynamics 365 Contact Center**.

✔ Implement **AI-driven Copilot** for **agent assistance, customer insights, and automation**.

✔ Configure **voice, chat, and messaging channels** for seamless communication.

✔ Use **intelligent routing and automation tools** to optimize workflows.

✔ Enhance **agent productivity** and **supervisor monitoring** with real-time analytics.

✔ Ensure **security, compliance, and business continuity** in contact center operations.

✔ Strategically plan for **future trends** in AI-driven contact centers.

Table of contents

Module 1 - **Foundations of Modern Contact Centers**

- **Introduction to Dynamics 365 Contact Center**
    - o Overview of the Copilot-first, cloud-based contact center solution.
    - o Benefits of integrating AI into customer engagement channels.
    - o Understanding the flexibility to connect with various CRM systems.
- **Provisioning & Agent Experience Setup**
    - o Setting up agent workspaces with the new intuitive administration experience.
    - o Configuring agent routing and workflows.
    - o Introduction to enhanced outbound voice call options, including customer search in the outbound dialer.
- **Voice Channel & IVR Configuration**
    - o Setting up voice channels in Dynamics 365.
    - o Implementing Copilot-based Interactive Voice Response (IVR) for self-service.
    - o Integrating voice AI and call transcription.

Module 2 - **Advanced Messaging, Automation & AI Integration**

- **Messaging Channels & Chatbot Configuration**
    - Configuring chat and messaging channels (Live chat, SMS, WhatsApp, etc.).
    - Setting up AI-driven chatbots with Copilot assistance.
    - Utilizing Copilot Studio agents to gather customer feedback.
- **Unified Routing Setup & Extensibility**
    - Implementing intelligent skill-based routing.
    - Customizing rules and escalation logic.
    - Extending routing capabilities with Power Automate.
- **Copilot & AI Innovations**
    - Leveraging Copilot-generated notes to expedite case resolutions.
    - Automating intent determination with Customer Intent Agent for improved service.
    - Exploring multimodal support in Customer Intent Agent.

Module 3 - **Enhancing Agent & Supervisor Experiences**

- **Agent Productivity Tools**
    - Managing multiple interactions and session switching without losing context.
    - Utilizing productivity tools to enhance workflows.
    - Implementing Copilot-generated prompts within CRM solutions.
- **Supervisor & Admin Monitoring**
    - Real-time analytics and performance dashboards.
    - Monitoring agent assignments through Application Insights.
    - Configuring embedded experiences for various CRM solutions.

Module 4 - Security, Compliance & Business Continuity

- **Disaster Recovery Planning**
    - Establishing backup and recovery protocols.
    - Ensuring business continuity in contact center operations.
- **Security & Compliance**
    - Implementing contact center security best practices.
    - Adhering to data protection regulations (e.g., GDPR, HIPAA).
    - Utilizing tools to monitor and maintain compliance.

Module 5: Strategic Planning & Future Trends

- **Contact Center Strategy & Best Practices**
    - Optimizing agent productivity and efficiency.
    - Enhancing customer experience and engagement strategies.
    - Exploring future trends in AI-driven contact centres.
- **Workforce & Quality Management**
    - Implementing new workforce management capabilities.
    - Establishing quality management protocols to maintain high service standards.