**DaVinci for Microsoft Dynamics CRM**

**E2E Scenario: Incoming phone call to available service agent**

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| Primary Persona: | Customer Service Agent (CSA) |
| Configuration Settings | Client: Web Client (Browsers: Chrome, Edge, IE, Firefox) |
| Problem / Opportunity Statement: | By providing the agent with the callers record before they answer the call it allows agents to see recent history/data from previous calls to give them insight into previous interactions before talking with the customer. By giving the agent the ability to handle the call within Dynamics you increasing the overall productivity of the call center. |
| Pain Points: | CSAs who handle telephony calls without an integrated experience are more prone to increasing the overall Average Handle Time of the Contact Center. By leaving the customer on the phone waiting longer than expected can lead drive a customer away from your business. |
| User Goals: | Become more efficient with processes.  Maintain focus. Have phone items delivered in one place.  Improve productivity.  Raise proficiency in handling and resovling customer issues. |
| Business Goals: | Make agents more productive.  Raise efficiency and quality by ensuring the call agent stays focused on the caller.  Raise customer satisfaction through timely and accurate response. |
| Triggers: | Agent receives a call by setting his presence to “available/ready.” |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | **Plans and evaluation**  **Narrative**  ***Agent Starts Day and Requests Work***  At the start of the day an agent logs into Microsoft Dynamics CRM and the AMC Contact Canvas Agent (CCA) – the DaVinci Toolbar. This begins the agent session. During the session the agent may be available for phone calls. Throught the agents day the calls are tracked and stored for reporting.  The agent sets his presence as “ready” to receive an incoming phone call. The call is presented to the agent within the DaVinci Toolbar.  ***Agent Recieves Call***  When the agents receives a phone call a screen pop with the callers information will be presented to the agent before they accept or answer the call. Upon Answer the agent will have detailed information on the customer to personalize the customer experience.  ***Break***  When taking a break, e.g., lunch, agents remain logged in, but uses DaVinci to set themselves “not ready” with reason. The reason identifies the break purpose for admins to see and report on.  ***End of Day***  At the end of the day, agents end their work session by logging out of Davinci this logs them out of the call queue.  ***Capturing Agent Session and Work Information***  Agent’s DaVinci session work states are tracked and captured to the telephony database. |
| Detailed Steps | * Agent logs in to dynamics * Agent will navigate to the Dynamics Sitemap and select AMC Technology -> Launcher; By selecting launcher the Toolbar will populate within Dynamcis. * Agent will use agent login and PW given to sign in to receive calls by selecting the Agent state control and selecting login. * Agent will select the “Ready” mode when ready to receive calls. |
| Success Metrics: | Improve Agent Productivity and proficiency:   * Number of calls handled * Average Handle Time by agent.   Customer Satisfaction metrix:   * Customer comments and compliments. * Customer retention. * Customer social media postings and ratings on Microsoft App Store. |