COVID-19 RESPONSE STRATEGY

Business as UN usual

Improving Customer and Employee Insights Utilzing Voice Data

Microsoft®

We are all about **VOICE** data.

Our mission is to unlock every business conversation & add Voice into the Enterprise data mix.

Table of Contents

Microsoft®

About this eBook

As we globally navigate the health crisis there are customers, sectors and geographies that all are moving and navigating at a different pace and who are in different phases.

In this eBook, you'll find resources and recommended practices for the different phases.

We are categorizing the phases as:

1. Crisis
2. Restart
3. Reshape/Re-Tool

Microsoft®

Executive Overview

15 years ago Clive Humby from Tesco said;

"data is the new oil. It's valuable, but if unrefined it cannot really be used."

Whilst oil is a valuable resource, the real untapped resource is

UNSTRUCTURED DATA .

Harnessing, cultivating and curating data insights has long been the key to improving organization performance. However, swiftly navigating the RIGHT DATA in a tornedo has become the norm and absolute necessity due to the current worldwide Coronavirus (COVID-19) outbreak.

Whilst we navigate the challenge upon us and ahead of us, what is crucial in understanding the health and engagement of your employees and customers.

The key data source here typically is conversation interaction data that gives you a real time pulse check on your customers and employees.

This eBook seeks to help you navigate the different stages of our global challenge but highlighting technology enablers from Microsoft that will supercharge your voice data.

What is common in all these phases and modes is needing crucial and timely insights into performance data – particularly Customer and Employee Insights and particularly around conversations being had between the Employee and Customer.

Microsoft

3 Phases

"In April 2020 in one single day users logged more than
4 billion meeting minutes in TEAMS!"
Jared Spataro CVP Microsoft 365

1. Crisis

Our world has certainly been turned upside down with the global health crisis. Organizations are in many different positions – some are in survival mode; some are significantly having to reshape their organization others are having to cope with significant growth/demand.

Inefficient and incomplete data insights are leading to uninformed decisions. The world has drastically changed for both employees and customers and organizations are struggling for the right data.

In the crisis phase organizations are looking to

- Manage the immediate fall out
- Ensure employee safety
- Ensure customer experience, connectivity and messaging
- Re Position workforce
- Re Engineer cost base/operating costs
- Prioritize and focus on key activities
- Remediate supply chain and contact channels
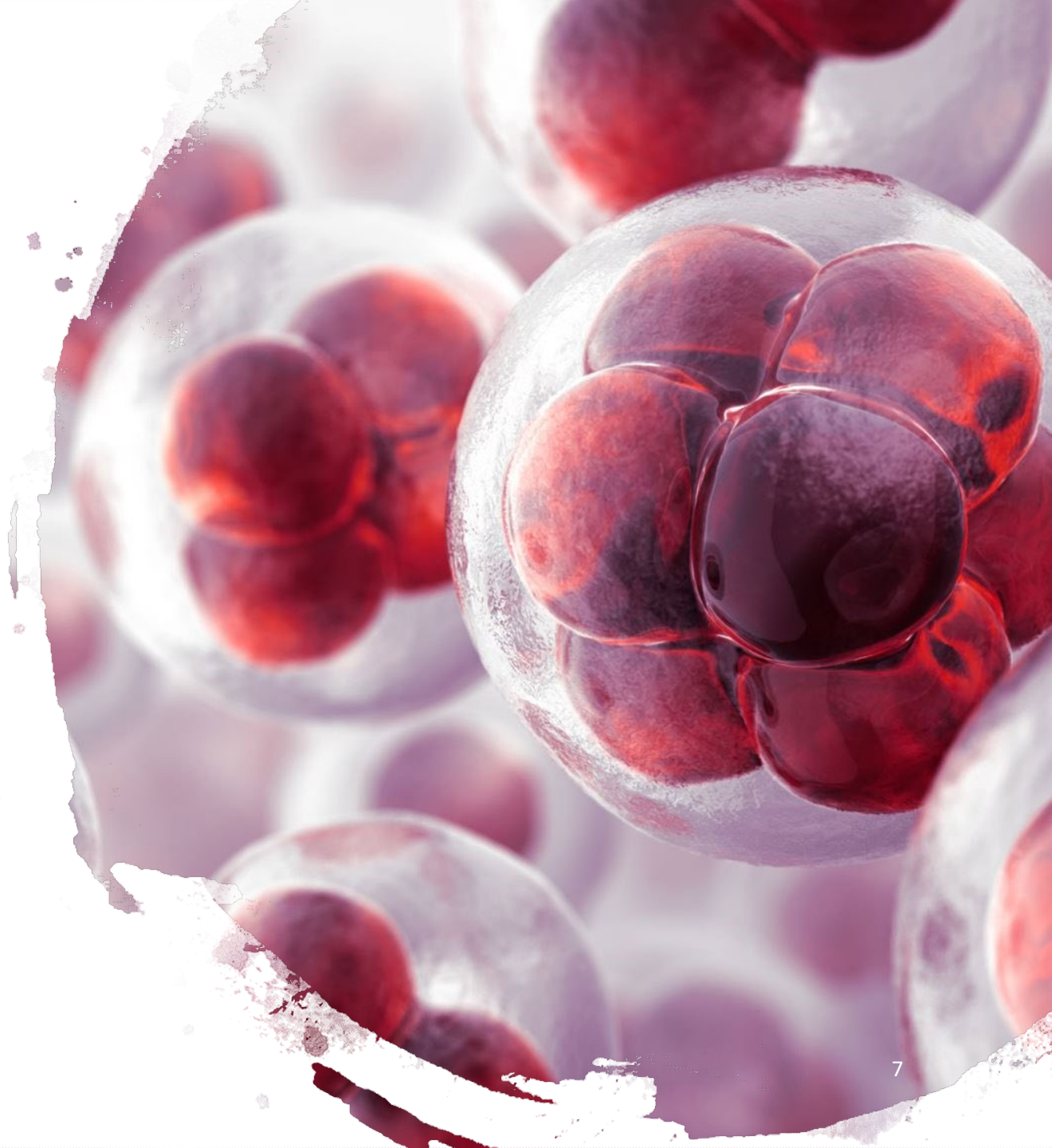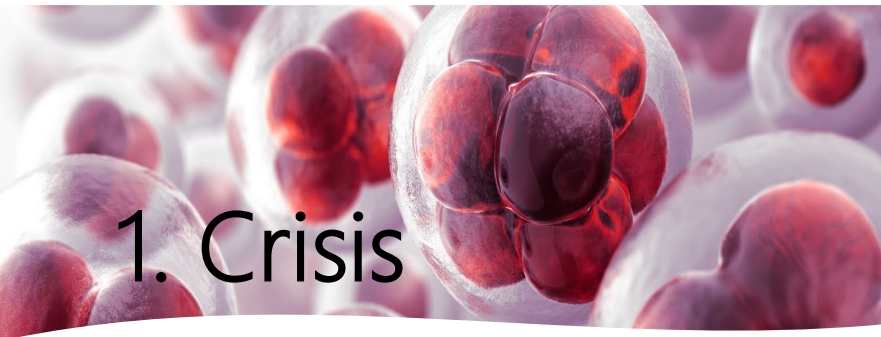
Microsoft®

1. Crisis

## Use conversational data to gain significantly enhanced insights :

Employees interacting with customers

- Acoustic, linguistic and sentiment analytics to ascertain;
  - employee engagement levels
  - customer empathy
  - effectiveness
  - active listening
- Acoustic, linguistic and sentiment analytics to ascertain;
  - culture and conduct
  - what customers are receptive to
  - alignment to customer contact methodology
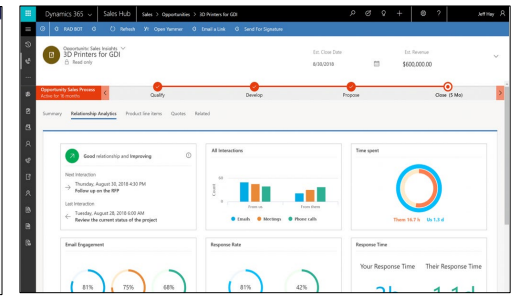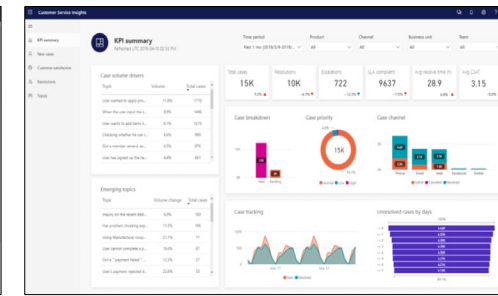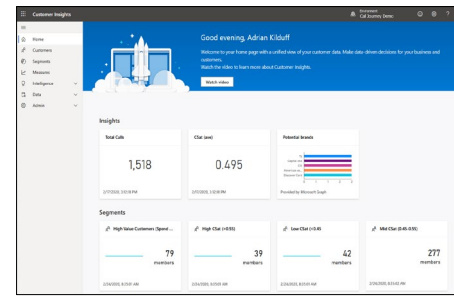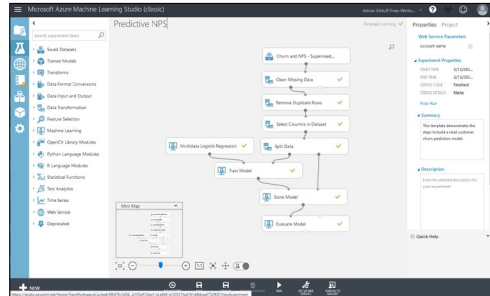 - opportunity management

This phase is further heightened when customer contact professionals have shifted to a work from home ,distributed workforce model

Customers interacting with employees

- Acoustic, linguistic and sentiment analytics to ascertain;
  - customer engagement levels
  - duress/stress measures
  - key topics discussed and context (i.e. Covid-19, domestic violence)
  - common issues and context (i.e. needing to reduce/hold payments)
- Acoustic, linguistic and sentiment analytics to ascertain;
  - triggers and events
  - customer agenda (i.e churn/lapse)
  - next customer action
  - next best offer
  - customer journey validation
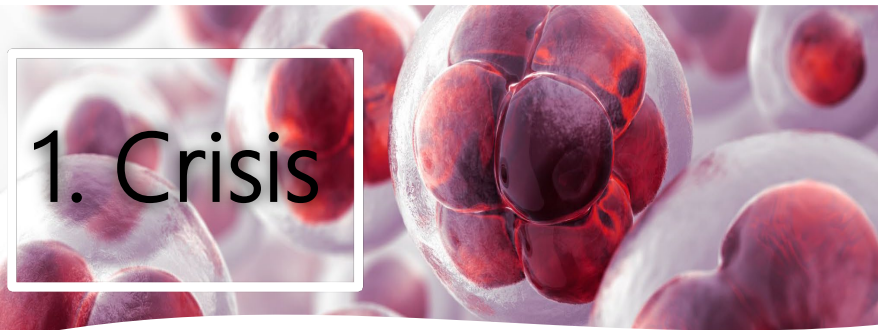
Microsoft

1. Crisis

Utilize The Microsoft Ecosystem to significantly enhance customer and employee insights.

AZURE DATA LAKE
Push conversation data into Azure Database.

MACHINE LEARNING STUDIO
Enhance data analytics and modelling with Voice Data being added.

CUSTOMER INSIGHTS
Add voice data to the data consolidation environment.

CUSTOMER SERVICE INSIGHTS
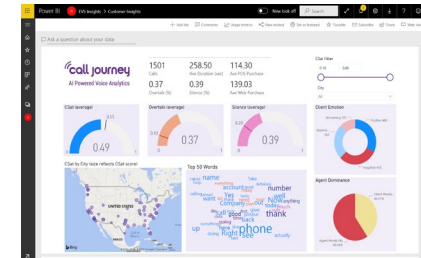Consume voice data and view trends around CX.

SALES INSIGHTS
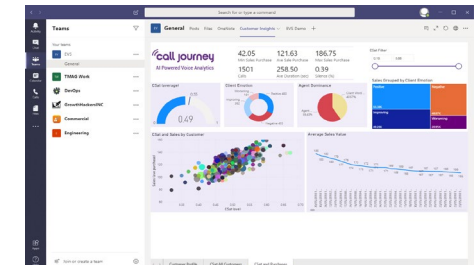Consume voice data and view trends around revenue.
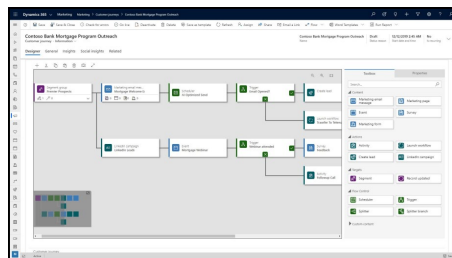
D365 MARKETING
Consume voice data and view trends around customer journeys and intent.
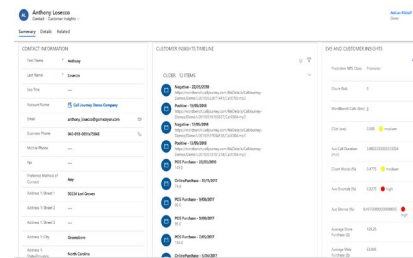
D365 CRM
Push conversation data into CRM to achieve a single view of the customer & customer interactions.

PowerBI
Visualize and track voice driven trends for further Insights.

TEAMS
Share voice data enhanced insights in Teams.

2. Restart

As restrictions ease and the economy looks to restart, organizations may be cautious and will take the transition slowly others will look to accelerate the shift towards the new norm or business as Unusual. We expect there will be an acceleration to re-connect with customers and employees quickly and dynamically and to focus on strategic growth initiatives.

In this phase organizations may look to

- **Assess the best mode of employee work structure**
  - we expect a higher level of comfort and new norm of work from home/work from alternate geographies to be in place
  - What's the "health and well-being" of my employees – how do I know?
  - Did any employee trends emerge?

- **Assess "health" of the customer base**
  - Have the engagement and buying modes changed?
  - Have customer journey's altered?
  - Have new products/cohorts emerged?
  - Have new trends been discussed?
  - What have the customers been saying that will help us to strategize how to support them on their own personalized journey

Everything is new – new environments. In this phase, organizations will reassess how employees and customers have been coping. They will look to new sources of information to help make better, more informed decisions. Conversations are key...

Microsoft

Use conversational data to gain significantly enhanced insights :

Employees interacting with customers

- Acoustic, linguistic and sentiment analytics to ascertain;
  - employee engagement level trends, insights and opportunities. How are they managing in their current environment
    - employee engagement positivity per interaction – are there employees who's resilience levels support remote working more than others?
    - customer empathy
    - effectiveness
    - active listening
- Acoustic, linguistic and sentiment analytics to ascertain;
  - culture and conduct trends, issues and opportunities
  - what customers trends are in terms of employee engagement
  - alignment to customer contact methodology – what's changed?

This phase will still be heightened where customer contact professionals are in a work from home distributed workforce model
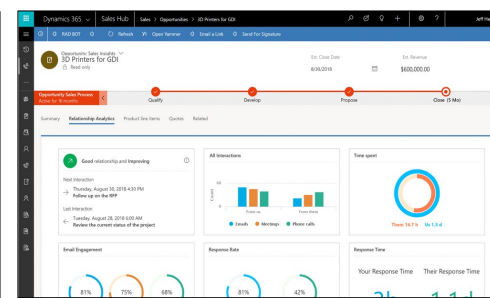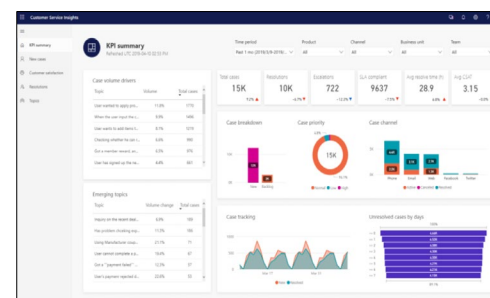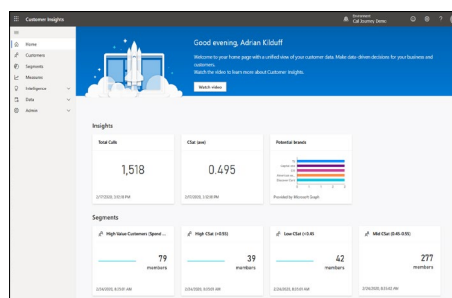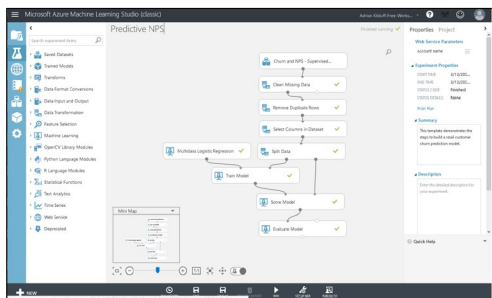
Customers interacting with employees

- Acoustic, linguistic and sentiment analytics to ascertain;
  - customer engagement level trends – what has occurred?
  - duress/stress measures – retention and loss measure assesment
  - key topics discussed and context (i.e. Covid-19, domestic violence) – how do we manage moving forward?
  - common issues and context (i.e. needing to reduce/hold payments). Are there new insights/trends emerging?
- Acoustic, linguistic and sentiment analytics to ascertain;
  - triggers and events
  - customer agenda (i.e churn/lapse) – how do we manage any new drivers/trends?
  - next customer action – have new journey's emerged?
  - next best offer – what's changed?
  - customer journey validation

Microsoft

2. Restart

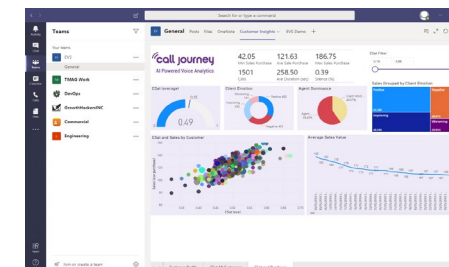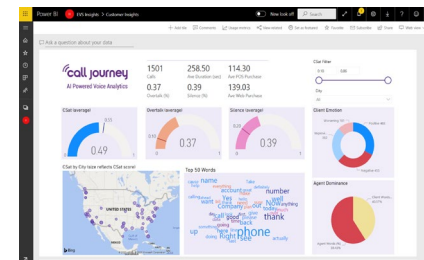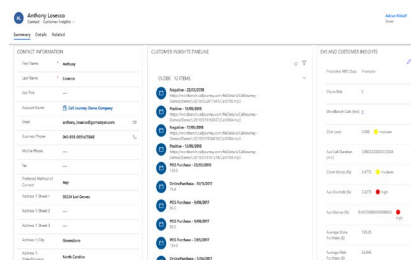Utilize The Microsoft Ecosystem to significantly enhance customer and employee insights.

AZURE DATA LAKE
Push conversation data into Azure Database.

MACHINE LEARNING STUDIO
Enhance data analytics and modelling with Voice Data being added.

CUSTOMER INSIGHTS
Add voice data to the data consolidation environment.

CUSTOMER SERVICE INSIGHTS
Consume data and view trends around CX.

SALES INSIGHTS
Consume data and view trends around revenue.

D365 MARKETING
Consume data and view trends around customer journeys and intent.

D365 CRM
Push conversation data into CRM to achieve a single view of the customer & customer interactions.

PowerBI
Visualize and track trends for further Insights.

TEAMS
Share voice data enhanced insights in Teams.

3. Reshape/Re Tool

Now in the new norm or Business as UNusual phase, organizations will look to make more informed data driven decision about workforce structure, supply chain, strategic imperatives, cost frameworks, customer structures and needs and look for ways to get a jump start on their competitors. They may look to;

- streamline and automate processes to manage efficiency

- significantly enhance customer and employee connections

- accelerate strategic initiatives

- refine and improve cost to serve

- review customer journey insights for supply chain efficiencies

- add more data to the decision-making tree

Microsoft®

3. Reshape/re-tool

Use AI/NLP driven conversational data to gain significantly enhanced insights :

Employees interacting with customers

- Acoustic, linguistic and sentiment analytics to ascertain;
  - employee engagement level trends, insights and opportunities.
  - employee performance – more granular relevant KPI measurements
  - culture and conduct trends, issues and opportunities
  - conversation flow – utilized to inform bot strategy and implementation
  - improved interaction experience measures and insights
  - will utilize enhanced single customer view platforms with voice interaction insights added to drive greater CX
  - customer engagement reactions to conversation workflows
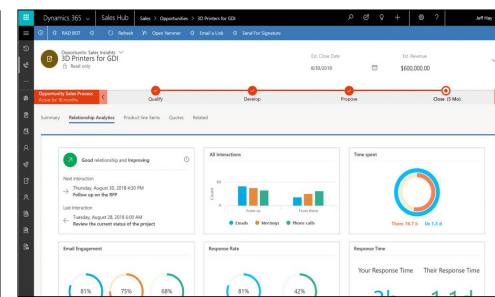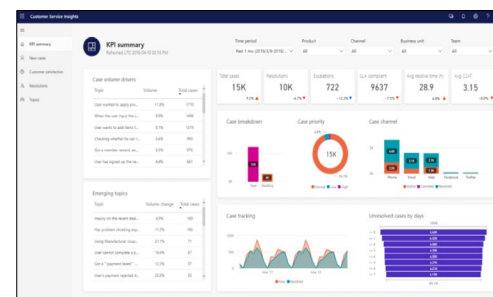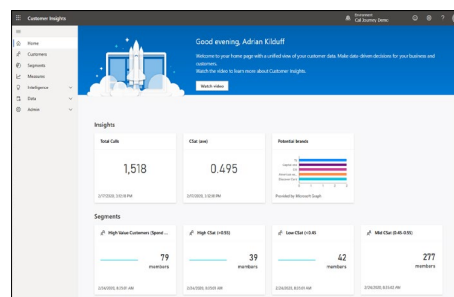
Customers interacting with employees

- Acoustic, linguistic and sentiment analytics to ascertain;
  - customer engagement level trends – predictive NPS for EVERY interaction drive by voice insights
  - duress/stress measures – predictive revenue loss/growth via voice interaction insights
  - enhanced topic and trend analytics with conversation insights added
  - CX root cause analytics improvements – AI accelerated learning and insights
  - More granular insights driven personalized customer experiences introduced by adding voice channels to insights data mix
  - more intelligent automated interactions driven by rolling conversation insights
  - heightened customer journey validation via voice insights

Microsoft

14

3. Reshape/re-tool

Utilize The Microsoft Ecosystem to significantly enhance customer and employee insights.

AZURE DATA LAKE
Push conversation data into Azure Database.

MACHINE LEARNING STUDIO
Enhance data analytics and modelling with Voice Data being added.

CUSTOMER INSIGHTS
Add voice data to the data consolidation environment.

CUSTOMER SERVICE INSIGHTS
Consume data and view trends around CX.

SALES INSIGHTS
Consume data and view trends around revenue.

D365 MARKETING
Consume data and view trends around customer journeys and intent.

D365 CRM
Push conversation data into CRM to achieve a single view of the customer & customer interactions.

PowerBI
Visualize and track trends for further Insights.

TEAMS
Share voice data enhanced insights in Teams.

Microsoft

15

2. Enable your users to securely access 3rd party cloud applications from outside your corporate network

To protect your organization, it's essential that when you enable access to cloud apps from personal devices and from remote locations, it must be done securely.

You can extend your corporate security policy to protect your SaaS applications, requiring controls such as Multi-Factor Authentication (MFA) or use of a compliant device.

For more information, go here.
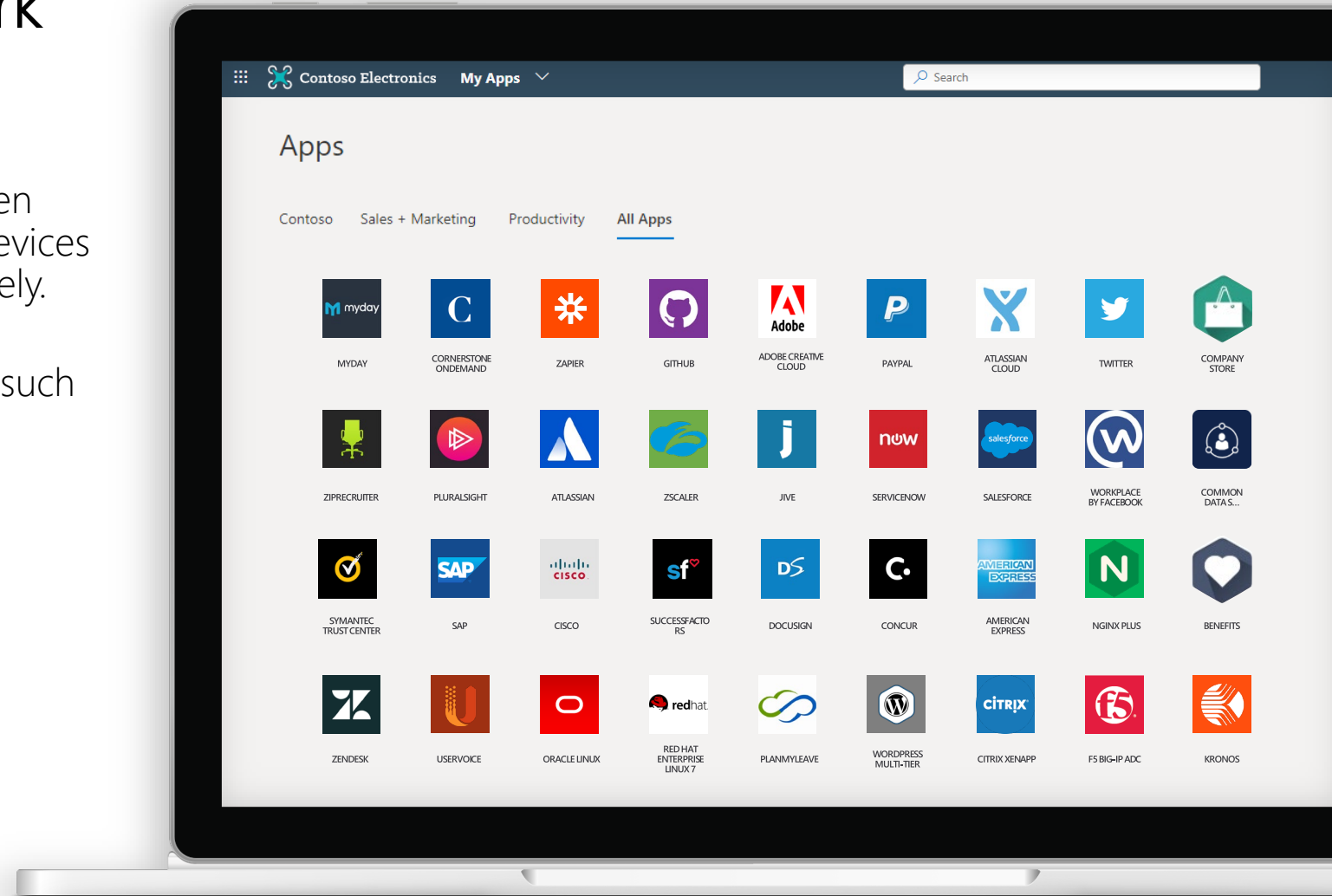
3. Provide secure access to your on-premises applications from outside your corporate network

Most organizations are running some of their business-critical applications on-premises, and many of these may not be accessible from outside the corporate network.

Azure AD App Proxy enables your on-premises applications to be accessible from outside the firewall, without requiring a VPN.

You can combine this with your existing Azure AD Conditional Access policies to help keep your users and data secured.

For more information about Azure AD App Proxy, go here.

4. Collaboration & Document Co-Authoring

- With most organizations eliminating any non-essential business travel, working closely with other employees, business partners and customers can be a challenge.

- Working from home, employees can still have a rich productivity experience using Microsoft Teams, OneDrive or SharePoint.

- These products enable employees to co-author documents and collaborate on content in real time just as if they were in the office together.

- For more information, go here.
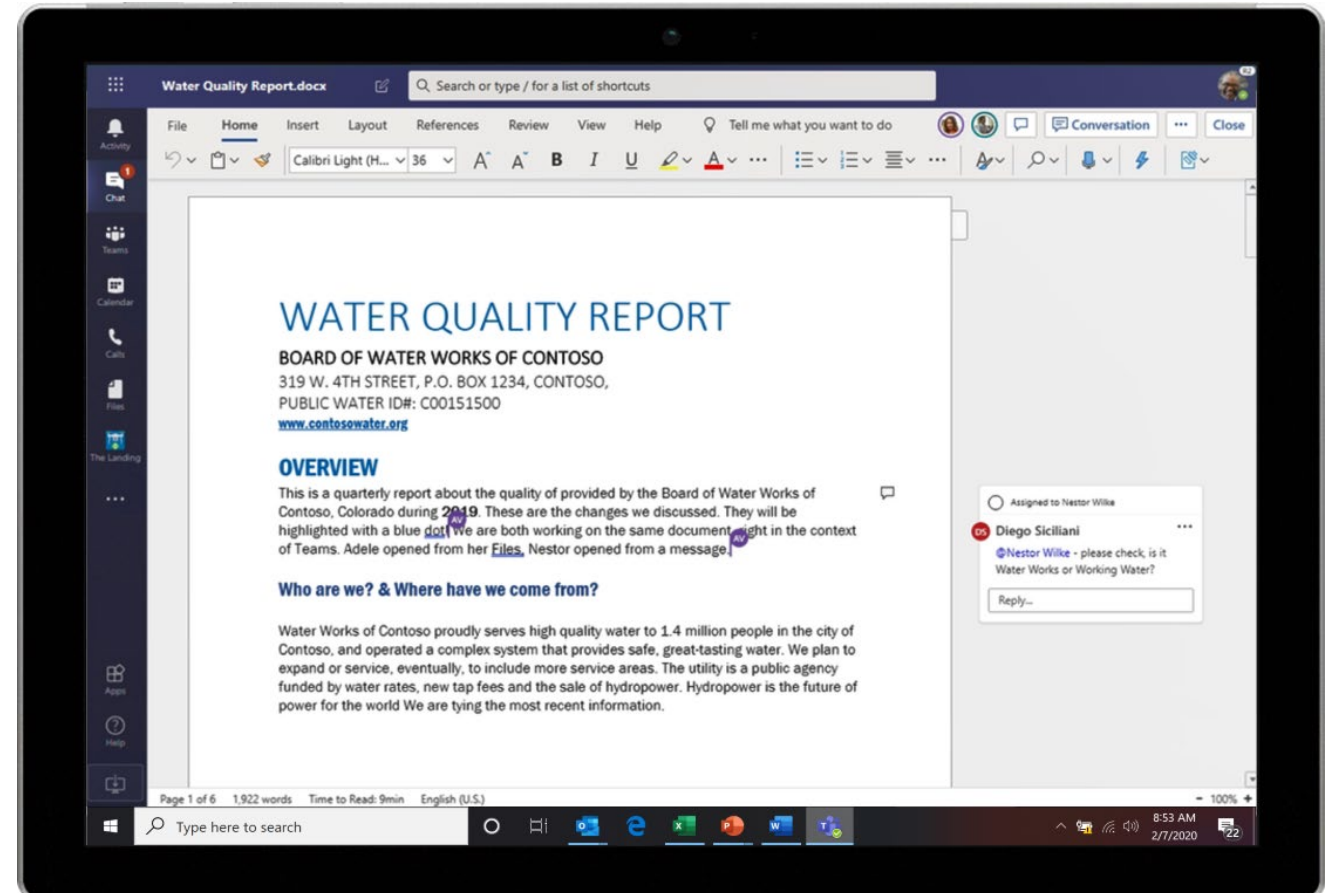
5. Support bring-your-own-device

Not every organization can provide corporate devices for employees who work from home, but in many cases, your corporate policies may allow you to give users the ability to access ~~to~~ corporate data from personally-owned devices using [Microsoft Intune](), or [Windows Virtual Desktop]().

Managed apps

Personal apps

Work from Home Checklist

Work from Home Checklist

☐ Ask your partner about trial software and services for free:
  - Microsoft 365
  - Microsoft Teams
  - Microsoft Enterprise Mobility + Security
  - Azure

☐ Use Microsoft Forms to survey your remote workers. This can help you to determine:
  - What devices users have at home (type and platform)
  - Users' Internet capabilities at home
  - If thin clients or desktop and app virtualization can be leveraged for remote workers
  - Need for additional user training for remote work scenarios
  - Any blockers to enabling remote work

☐ Review your current infrastructure to ensure that you have the necessary core foundation in place, including:
  - A supported identity model
  - A means to connect to any on-premises applications or data, such as VPN, Azure AD Application Proxy, Windows Virtual Desktop, etc.

☐ Optimize your network and reduce the impact Office 365 traffic has on the traditional corporate infrastructure when a large percentage of users are working remotely

☐ Deploy productivity apps to remote workers:
  - Office for the web for unmanaged devices, Office 365 ProPlus for managed devices
  - Office app for iOS / Android , Outlook for iOS / Android, OneDrive for Business for iOS / Android, Yammer for iOS / Android, Teams for iOS / Android
  - Microsoft 365 mobile apps

☐ Implement a way to communicate and connect with end users such as Yammer, SharePoint, or Power Apps

☐ Enable employee access to critical virtual desktops and apps by bursting or scaling out existing desktop and app virtualization on Azure with solutions from Citrix, VMware, Microsoft, and other providers
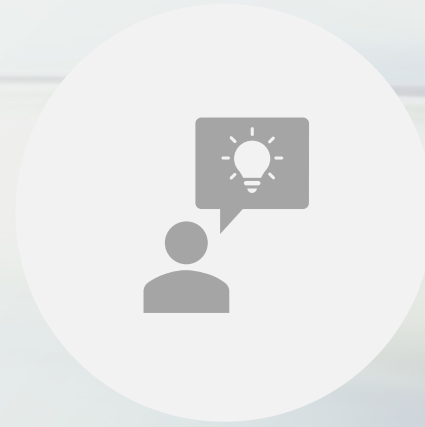
CallCabinet Offers

About our offers

THESE ARE WORK-FROM-HOME OFFERS THE SOUTH AFRICA MODERN WORKPLACE CALLCABINET HAS COMPILED TO ASSIST YOU IN YOUR REMOTE WORKING STRATEGY

PLEASE CONSIDER THESE AS SUGGESTIONS TO ENABLE YOUR ORGANIZATION TO WORK FROM HOME DURING THE CURRENT CRISIS

Teams Calling Offer

Atmos@Home for Microsoft Teams

Description: Unpredictable times require innovative solutions. CallCabinet's Atmos@Home cloud-based platform ensures business continuity and integrates seamlessly with Microsoft Teams to bring award-winning call recording, quality assurance, and agent evaluation solutions to carriers, global enterprises, and businesses of any size.

Atmos@Home for Microsoft Teams features:

- Free installation
- Easily installed across an entire organization in minutes with our enterprise installation script
- Installs directly on the user's computer
- Compliant call recording for any industry
- Unlimited storage per user
- Easy search and playback of recordings

Pricing: R230 per month, per subscriber – pricing includes VAT

Partner Contact: Matthew Balcomb · Sales and Marketing Director · 082 313 4823 · matthewb@callcabinet.co.za

Partner Contact: Yonatan Bacher · New Business Development Manager · 082 430 2033 · yonib@callcabinet.co.za

E1 Trial and Migration Solutions

Free 30-Day Trial of Atmos@Home for Microsoft Teams

Description: CallCabinet is offering South African based businesses a 30-day free trial of Atmos@Home to support business-critical compliant call recording.

Atmos@Home for Microsoft Teams free trail includes:

- Unlimited users
- Unlimited cloud storage per user
- Role-based access to the Atmos web portal to ensure global compliance
- Unlimited ability to search, playback, download and email recordings

Pricing: 30-day Free trial, R230 per month, per subscriber thereafter – pricing includes VAT

Partner Contact: Matthew Balcomb · Sales and Marketing Director · 082 313 4823 · matthewb@callcabinet.co.za
Partner Contact: Yonatan Bacher · New Business Development Manager · 082 430 2033 · yonib@callcabinet.co.za

COVID19 Mobile workforce offerings

Compliant Work from Home Solutions for any Business

Description: Businesses are rapidly transitioning their operations and compliance needs to a Work from Home infrastructure. Atmos' compliant call recording and workforce management software provides a secure foundation for a remote-based workforce by ensuring service standards are met, while maintaining productivity, business continuity and employee engagement.

Atmos Work from Home Features:

- **Quality Assurance:** Call Scoring, Supervisor Notes, Legal Hold, Timed Based Notes, Enhanced Reports on Call Answering and Employee Scoring Screen
- **Agent Interaction Recording:** Collect every aspect of your agency and customer interactions with agent screen recording
    - **Screen Capture:** Set the frequency of desired screen captures and play back a real-time screenshot feed
    - **Desktop Video Recording:** Provides audio-synchronous screen recording of multiple screens
- **PCI DSS Module:** Remove sensitive personal financial data across 4 vulnerable layers, providing maximum PCI security for your business and your customers.

Pricing: R230 per month, per subscriber thereafter – pricing includes VAT

Partner Contact: Matthew Balcomb · Sales and Marketing Director · 082 313 4823 · matthewb@callcabinet.co.za
Partner Contact: Yonatan Bacher · New Business Development Manager · 082 430 2033 · yonib@callcabinet.co.za

Education
Offering

Compliant Call Recording for Educational Institutions

Description: Meeting the requirements and communication needs of hundreds or even thousands of students can be a challenge for any educational institution. Secure, compliant call recording, quality assurance, and agent evaluation tools become vital by simplifying operations, improving engagement, and encouraging multi-department collaboration. Atmos' Cloud call recording can be deployed instantly to fulfill phone-based record keeping needs of operations and, most importantly, students. Atmos delivers actionable insight into student calls; enabling staff to plan for peak season appropriately.

Atmos call recording solutions:

- Record and transcribe calls to resolve disputes and miscommunication
- Securely share call recordings with staff or authorities
- Record calls for compliance and verification of verbal transactions
- Increase operational effectiveness and reduce timely administrative tasks

Pricing: R230 per month, per subscriber thereafter – pricing includes VAT

Partner Contact: Matthew Balcomb · Sales and Marketing Director · 082 313 4823 · matthewb@callcabinet.co.za

Partner Contact: Yonatan Bacher · New Business Development Manager · 082 430 2033 · yonib@callcabinet.co.za

Resources

Best Practices and Guidance

Best practices and discussion for work from home

- [Top 5 ways your Azure AD can help you enable remote work](#)

- The [Microsoft Tech Community](#) has launched a new interactive forum for sharing of best practices and other discussions across fellow customers, partners, and Microsoft subject matter experts

- [Best practices](#) on enabling effective remote work, based on our internal learnings

Enabling Teams

- Teams is a pivotal part of the remote work experience, and Microsoft is committed to making Teams available to everyone.

- Join us on xxxxxxx for best practices on using Microsoft Teams.

Securing your Mobile Workforce

- Security is a pivotal part of the remote work experience, https://docs.microsoft.com/en-us/learn/modules/security-in-m365/

- Join us on xxxxxxx for best practices on using Microsoft Teams.

- ** Please add in additional resources to assist your customer

Call to Action

1. Let's start the discussion to better understand your work from home strategy.

2. Develop your pre-built work from home solutions.

3. Jumpstart your work from home solution for your customer.

4. Questions? Email us at sales@callcabinet.co.za