

Copilot scenarios for Customer Service



Copilot scenarios for Customer Service

Overview and KPIs

KPIs play a crucial role in the sector, providing a compass to navigate toward success. Let's dive into KPIs for Customer Service and how Copilot can assist.

Use case by role

Copilot can simplify the tasks that Customer Service pros perform every day. Look at key use cases and how Copilot can be your Al assistant along the way.

Day in the life

See how real-life Add Customer Service pros are using Copilot in their day-to-day.

Using Copilot in Customer Service



Goals and challenges

Microsoft Copilot in Customer Service is your strategic partner to enable customer service teams. 43% of customer service reps report they were overwhelmed by the number of systems and tools needed to complete work¹. With Microsoft Copilot, embedded directly into agent desktops, Customer service teams can find answers fast and collaborate easily.



Copilot can assist with ...

Copilot assists Customer Service with tasks like process optimization, collaboration, and delivering a fast, tailored, experience for customers.

- Responding to customer complaints
- Identifying root cause issues
- · Boosting field efficiency
- Managing service agents



Customer Service roles



Customer Service Account Manager



Customer Service Manager



Customer Service Representative



Escalation Manager

Transform Customer Service processes







Resolution



Support entry

Microsoft Copilot opportunity to impact key departmental KPIs



First call resolution

In customer service, First Call Resolution (FCR) is a game changer because it improves customer satisfaction, enhances agent efficiency, and fosters long-term customer loyalty.



Average resolution time

Microsoft Copilot can help with lowering resolution times which in turn leads to increased agent productivity and higher customer satisfaction rates.



Service quality scores

Al is elevating service quality in the professional services industry by enabling smarter, more efficient, and customer-centric operations.



<u>Customer</u> <u>satisfaction</u> scores Microsoft Copilot can improve customer satisfaction by providing realtime AI assistance for faster issue resolution, generating personalized email responses, analyzing customer feedback, and allowing agents to focus on delivering high-quality service.



Revenue growth



Cost savings and avoidance



Improve employee experience

KPI – First call resolution (FCR)



In customer service, First Call Resolution (FCR) is a game changer because it improves customer satisfaction, enhances agent efficiency, and fosters long-term customer loyalty.



Roles

FCR can require input from:

Customer service manager

Customer service agent

How Microsoft Copilot can help FCR

Improve customer satisfaction

- Diagnose a problem quickly using external and internal databases
- Automated analysis using customer data and knowledge base
- Quicker and more accurate draft responses based on historical resolution data
- Proactive and personalized follow-up communications

Enhance agent efficiency

- Address more queries
- · Research customer information
- Organize information from past interactions
- Completely focus during the interaction



Microsoft AI solutions

KPI – Average resolution time



Microsoft Copilot can help with lowering resolution times which in turn leads to increased agent productivity and higher customer satisfaction rates.



Roles

Average resolution time can require input from:

Customer service manager

Customer service agent

How Microsoft Copilot can help average resolution times

Boost productivity

- Rapidly research customer interactions
- Create first drafts faster
- Check for similar issues and resolutions
- Quickly send follow-up communications

Reduce churn

- Address more queries in less time
- · Personalize solutions
- Improve staff availability based on automated capacity-based scheduling
- Diagnose problems faster



Microsoft AI solutions

KPI – Service quality scores



All is elevating service quality in the professional services industry by enabling smarter, more efficient, and customer-centric operations.



Roles

Service quality scores can require input from:

Customer service manager

Customer service agent

How Microsoft Copilot can help service quality scores

Analyze trends

- Rapidly identify themes and trends
- Access data from multiple data sources using single interface
- Recommend actions to address pain points using customer data, past service interactions and knowledge database
- Analyze agent effectiveness

Focus interactions

- · Rapidly update scripts and issue logs
- Limit need for escalations
- Completely focus during interactions
- Quickly recap the interaction and action items



Microsoft AI solutions

KPI – Customer satisfaction score (CSAT)



Microsoft Copilot can improve customer satisfaction by providing real-time Al assistance for faster issue resolution, generating personalized email responses, analyzing customer feedback, and allowing agents to focus on delivering high-quality service.

How Microsoft Copilot can help CSAT

Incorporate feedback

- Rapidly analyze customer feedback
- Quickly create recommendations
- Swiftly update scripts and processes
- Create communications to socialize the changes

Enhance customer loyalty

- Better understand customers
- · Resolve issues on the first call
- Limit the need for escalations
- Anticipate emerging trends



Roles

CSAT can require input from:

Customer service manager

Customer service agent



Microsoft AI solutions

Scenario level: Get started

Customer Service use case | Respond to a customer complaint

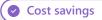
KPIs impacted







Value benefit





1. Review customer history

Prompt Copilot¹ to summarize email threads and customer meetings, as well as previous interactions using single interface. With Copilot for Service, view a summary of the opportunity.



Copilot

+Copilot for Service

Rapidly get up to speed to on the concerns raised across all interactions.

2. Accelerate Diagnosis

Ask Copilot² to gather product information and create a summary of the issues and suggested next steps. Copilot for Service includes insights from your CRM system.



Copilot

+Copilot for Service

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy.

3. Meet with product team

Use Copilot in Teams to suggest questions to ask the product team based on the customer request and potential solutions.



Copilot in Teams

Copilot can help boost creativity by suggesting solutions from its vast knowledge base.

6. Share response

Have Copilot in Outlook draft an email summarizing the interaction and highlighting how the issues will be resolved.



Copilot in Outlook

Quickly summarize files and draft emails to inform customers.

5. Meet with the customer

Have Copilot in Teams take meeting notes and summarize action items.



Copilot in Teams

Document and socialize the action items to keep the resolution process moving forward towards a successful close.

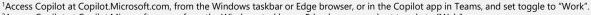
4. Draft proposed response

Use Copilot in PowerPoint update best practices and scripts.



Copilot in Word

Rapidly update key guides and scripts directly from the meeting recap.



²Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web"



Copilot for Service (includes Copilot for Microsoft 365)

KPIs impacted

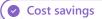


Service quality



Resolution time

Value benefit



Employee experience

1. Analyze customer conversations

Prompt Copilot¹ to review customer interactions including chat logs, emails and support tickets to identify recurring issues, patterns, and common themes.



Copilot

+Copilot for Service

Quickly summarize recent customer conversations to get up to speed faster.

6. Share the solution

Copilot in Outlook can rapidly pull from your documents to draft an email detailing the root cause and solution steps.



Copilot in Outlook

Document and socialize the solution to keep Customer Service teams moving forward towards successful interactions.

2. Identify the root cause

Ask Copilot¹ to analyze CSAT feedback / support conversations and compare to historical resolution data to better understand the underlying reasons for customer contacts.



Copilot

+Copilot for Service

Easily summarize data and highlight trends to save time and surface root issues more quickly.

5. Implement solutions and training

Based on discussions with leadership and product teams, use Copilot in Word to rapidly update FAQs, scripts, knowledge articles, and best practices documents.



Copilot in Word

Rapidly update training documents with the outcomes of your insights and meetings.

3. Leverage Copilot's insights

Have Copilot analyze specific behavior, words, or phrases that may lead to negative responses from customers.



Copilot

+Copilot for Service

Accelerate key insights by surfacing key words and related outcomes.

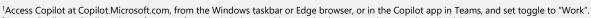
4. Collaborate with Teams

Using Copilot in Teams, to present findings to customer service and product teams. Copilot can recap the meeting and draft recommendations for process and product improvements.



Copilot in Teams

Save time by using Copilot summaries as a starting point for project milestones and status updates.



²Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web"

Copilot for Service (includes Copilot for Microsoft 365)

KPIs impacted





Value benefit





1. Review customer request

Use Copilot to summarize the customer request, products involved, past interactions, historical resolution data, and specific needs the customer may have all in a single interface.



Copilot

Summarize all the emails and Teams chats in the past month from customer highlighting the primary asks and any previous issues.

Use Copilot in Excel to rapidly analyze data related to field service activity such as number of customer visits and total route times.

6. Continuous monitoring



Copilot in Excel +Copilot for Service

Stay on top of trends by analyzing field success metrics and identify any trends that require further investigation.

2. Start a new work order

Copilot can tie directly to your CRM to begin drafting a work order based on the customer request.



Copilot

+Copilot for Service

Easily populate a work order with the existing customer information.

5. Send customer survey

At the completion of service, use Copilot in Outlook to quickly update the feedback survey request and send it to the customer.



Copilot in Outlook

Quickly update and send the survey with specific contextual updates for the customer.

3. Match a technician

Copilot pulls key requirements to help match a technician based on issue complexity and agent availability.



Copilot

+Copilot for Service

Identify the best technician given the customer's specific needs and location.

4. Confirm the schedule

Once the workorder has been submitted with an ideal field technician, use Copilot in Outlook to confirm the schedule with the customer.



Copilot in Outlook

Rapidly draft an email confirming the service date and contact details.



KPIs impacted







Value benefit

Employee experience

1. Recap daily activity

Prompt Copilot¹ to summarize email threads and meetings from the past day and identify key actions and issues.



Copilot

Rapidly get up to speed to focus on key issues and concerns.

2. Review performance

With Copilot in Excel, review the performance of service agents by analyzing data, identifying insights, and automating tasks based on historical interactions and business processes.



Copilot in Excel

Identify insights with Copilot in Excel.

3. Discuss with the team

With Copilot in Teams, meet to discuss trends and issues while focusing on the meeting and letting Copilot in Teams take notes and record critical items for you.



Copilot in Teams

Dedicate your focus to the meeting while CoPilot focuses on capturing the notes.

6. Update procedures and socialize

Using the notes from the leadership team meeting, make rapid updates to policies and procedures using Copilot in Word. To socialize these changes, Copilot in Outlook can draft an update email to the org.



Copilot in Word



Copilot in Outlook

Save time updating documents and preparing emails with Copilot as your drafting partner.

5. Meet with LT

Review the presentation with the leadership team and record feedback and goals. With Copilot in Teams, you can focus on the meeting and utilize the notes to recap key items.



Copilot in Teams

Dedicate your focus to the meeting while CoPilot focuses on capturing the notes.

4. Create an LT presentation

Based on the data analysis and the feedback from the team, use Copilot in PowerPoint to rapidly create a draft presentation to update the leadership team.



Copilot in PowerPoint

Creating a presentation makes it easier to convey a clear message especially when it's critical feedback..



Benefits



Areas of investment: Learning



* Faster analysis, communications, and streamlining tasks

8:00 am

Ethan, an agent at Fourth Coffee, receives an email from a customer Joanna about her coffee machine's warranty. Ethan uses Microsoft Copilot for Service in Outlook to generate a case summary.



Copilot in Outlook +Copilot for Service

A day in the life of a Service agent

Generates a case summary in Outlook that includes details from Salesforce and other knowledge sources to help Ethan get up to speed.

8:15 am

Now, one of Joanna's coffee machines is making a strange noise. Ethan uses Copilot in Outlook to quickly draft a reply. Copilot for Service adds case details from his CRM to the email. He adds an invitation to a Teams call.



Copilot in Outlook

+Copilot for Service

Draft a reply in Outlook in the case details from the CRM. He adds an invitation to a Teams call so he can help diagnose the issue.

10:00 am

Ethan uses Copilot to prepare for his call with Joanna. He prompts Copilot¹ to summarize all of his communications and related documents. Copilot for Service includes Joanna's case histories and other data from Ethan's CRM.



Copilot

+Copilot for Service

Help me prepare for my meeting by summarizing emails, chats, and related documents.

4:00 pm

Later, Ethan receives a live chat inquiry from another customer asking about a promotion. He uses Copilot for Service in Teams to get a concise summary of the promotion and craft a response.



Copilot in Teams

+Copilot for Service

Get a **concise summary** of the promotion from the CRM and craft a response.

2:00 pm

After ending the call with Joanna, he uses Copilot in Teams to summarize the meeting. Copilot for Service adds the summary to Joanna's contact record directly from Teams.



Copilot in Teams +Copilot for Service

Summarize the meeting and adds the summary to her Salesforce contact record directly from Teams.

11:00 am

On the call, Ethan uses Copilot in Teams to suggest questions to ask Joanna. Copilot for identifies and suggests a fix, which he then communicates to Joanna on the call.



Copilot in Teams

+Copilot for Service

Uses Copilot for Service in Teams to identify and suggest a fix, which he then communicates to Joanna on the call.

Ethan is a Customer Service Agent





Copilot for Microsoft 365 and Dynamics 365 Customer Service

Benefits



Areas of investment: Team building



★ Analysis and communications

8:00 am

Back from her daily school run for her three kids, Mayte gets ready to kick off the day by asking Copilot to summarize the emails and Teams chats she received since she went offline the day before, and her agenda for the day



Copilot

Summarize all the emails and Teams chats since yesterday 8pm CET and all the meetings scheduled for today.

8:15 am

One of the emails she received overnight is a request for support in an executive escalation. Mayte goes into Copilot in Dynamics 365 to gain insights on the specific support case to ensure she can provide effective guidance and solutions.



Copilot in Dynamics 365 Customer Service

Case summarization (Summary) feature in Copilot in Dynamics 365 provides a summary of all the case history and actions taken to-date.

9:00 am

Ready to reply, Mayte uses the summary generated by Copilot in Dynamics 365 Customer Service and drafts an email with Copilot in Outlook with an executive summary and next steps.



Copilot in Outlook

+Copilot in Dynamics 365

Draft and Coaching in Copilot features in Copilot in Outlook help draft and provide coaching feedback to improve communications.

4:00 pm

As an Al enthusiast, Mayte asks Copilot to suggest interesting readings and emerging news from the Al world and the industry to stay informed and ahead of trends, enabling her to innovate and apply the latest insights in her interactions.



Copilot

Suggest the most interesting news and articles about AI in the last week

2:00 pm

It's time to prepare the Monthly Business Review for her org, so she uses Copilot in Excel to generate some great charts to create charts and show trends in the Key Performance Indicators (KPIs) for her teams, and present in the business review.



Copilot in Excel

Quickly get to data insights and visualize the data.

11:00 am

Mayte is preparing a presentation for a customer event next week. She has been gathering input from peers, quotes and her own remarks in Word, and now it's time to build a PowerPoint presentation out of it.



Copilot in PowerPoint

Create a presentation based on this Word file [add the link to the Word doc in her One Drive]

Mayte is a Customer **Support Director**







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