



Copilot scenarios for Customer Service



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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 AI 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



Diagnosis



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

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



Customer satisfaction scores

Microsoft Copilot can improve customer satisfaction by providing real-time 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

¹Gartner. [Gartner for Customer Service - The Connected Rep: Deliver better customer service by enabling reps with technology](#). 2023.

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.

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



Roles

FCR can require input from:

Customer service manager

Customer service agent



Microsoft AI solutions

Copilot for Microsoft 365

Copilot for Service

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.

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



Roles

Average resolution time
can require input from:

Customer service
manager

Customer service
agent



Microsoft AI solutions

Copilot for Microsoft 365
Copilot for Service

KPI – Service quality scores



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

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



Roles

Service quality scores
can require input from:

Customer service
manager

Customer service
agent



Microsoft AI solutions

Copilot for Microsoft 365

Copilot for Service

KPI – Customer satisfaction score (CSAT)



Microsoft Copilot can improve customer satisfaction by providing real-time AI 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



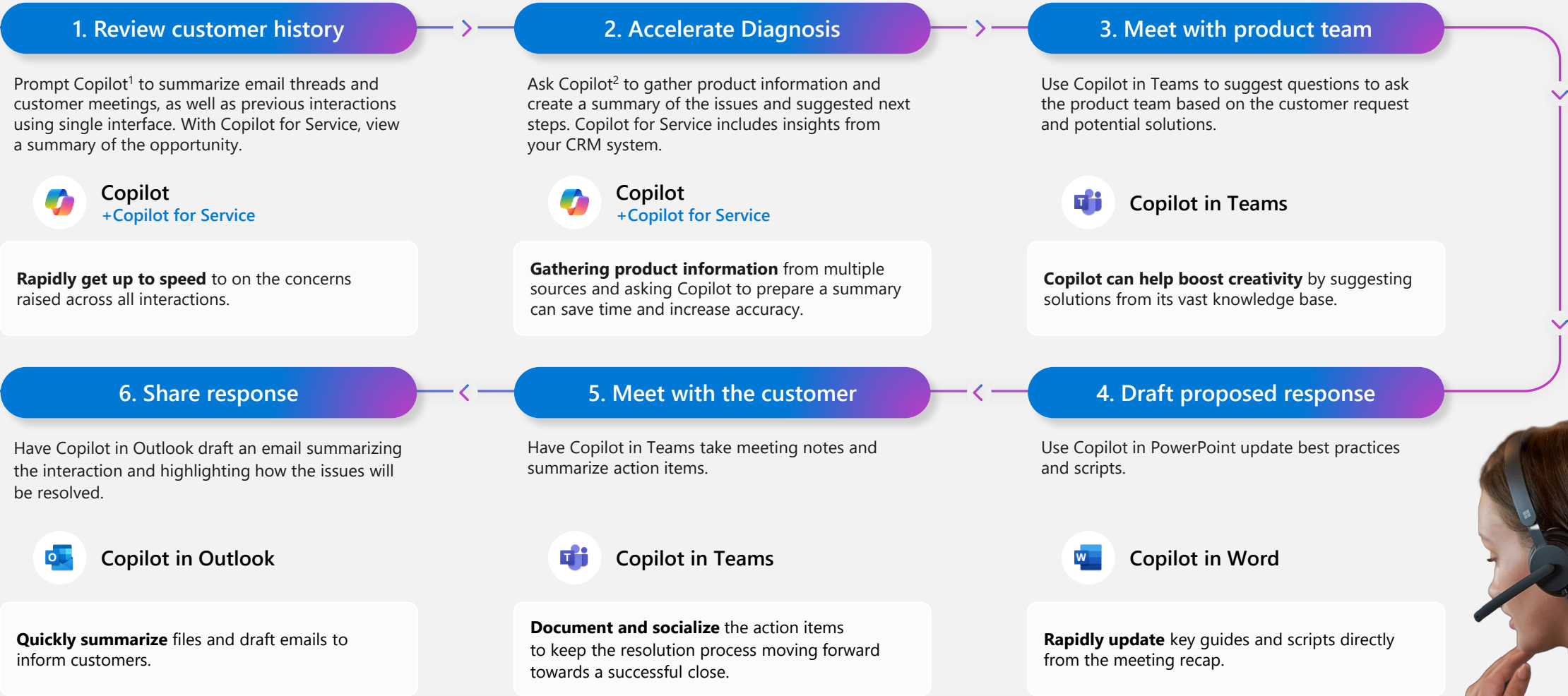
Microsoft AI solutions

Copilot for Microsoft 365

Copilot for Service

Customer Service use case | Respond to a customer complaint

- KPIs impacted
- ✓ CSAT
- ✓ Service quality
- ✓ Resolution time
- Value benefit
- ✓ Cost savings
- ✓ Employee experience

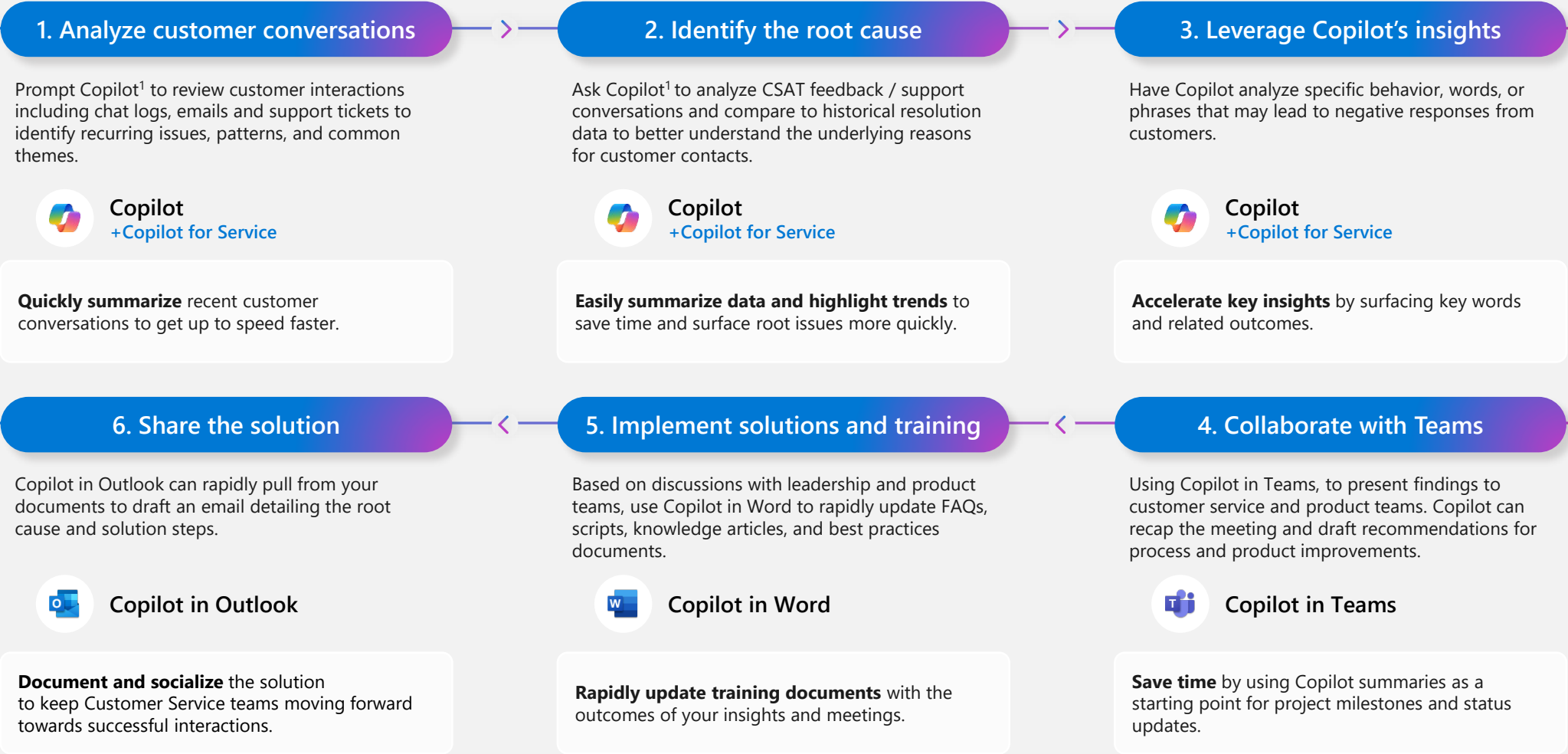


¹Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".
²Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web"



Customer Service use case | Identify a root-cause issue

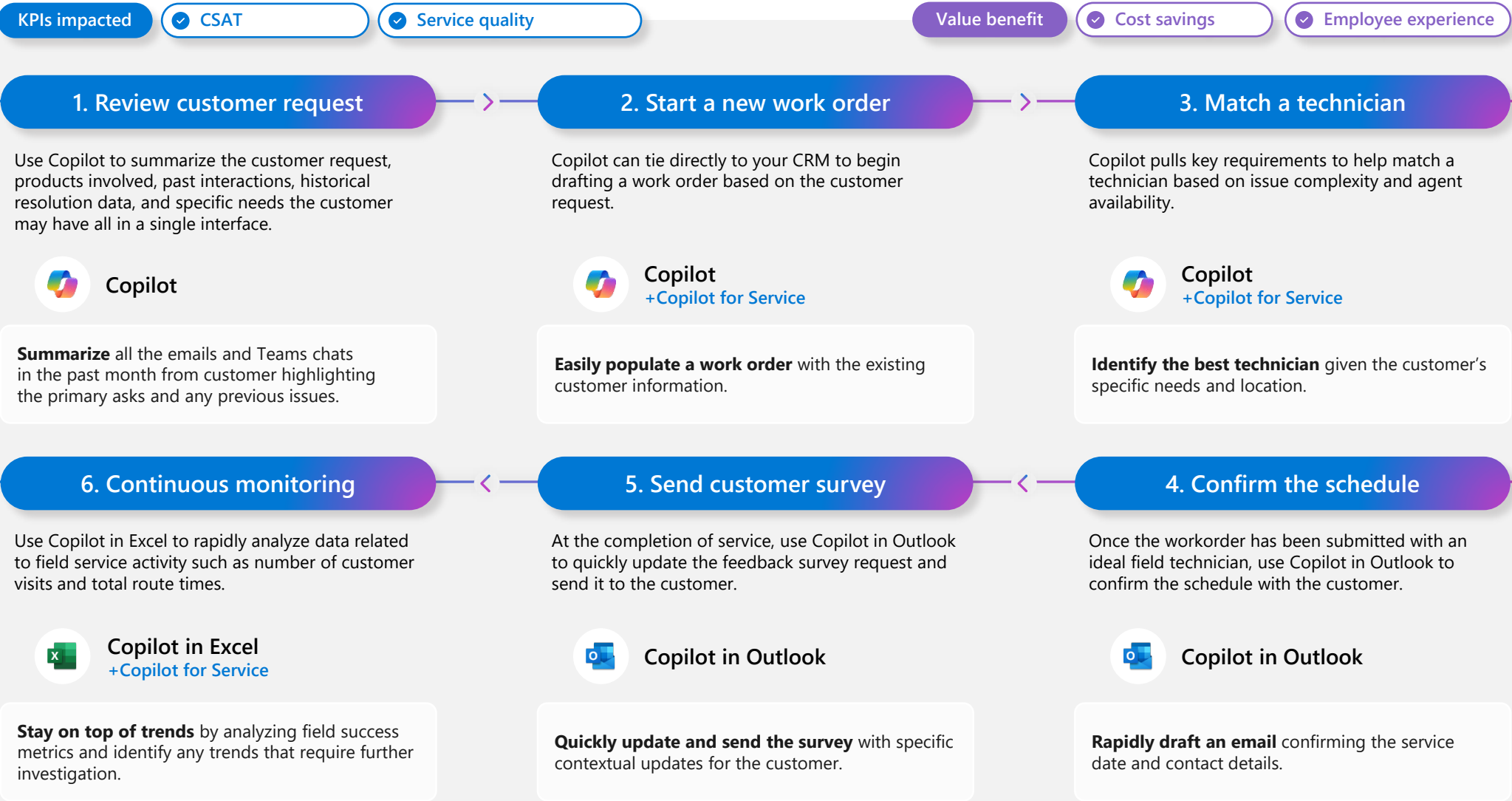
- KPIs impacted
- ✓ CSAT
- ✓ Service quality
- ✓ Resolution time
- Value benefit
- ✓ Cost savings
- ✓ Employee experience



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Customer Service use case | Boost field efficiency



Customer Service use case | Managing service agents

- KPIs impacted
- ✓ CSAT
- ✓ Service quality
- ✓ Placeholder
- 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.



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

2. Review performance

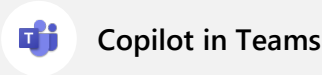
With Copilot in Excel, review the performance of service agents by analyzing data, identifying insights, and automating tasks based on historical interactions and business processes.



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.



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.



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

5. Meet with LT

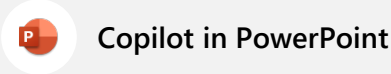
Review the presentation with the leadership team and record feedback and goals. With Copilot in Teams, you can focus on the meeting and utilize the notes to recap key items.



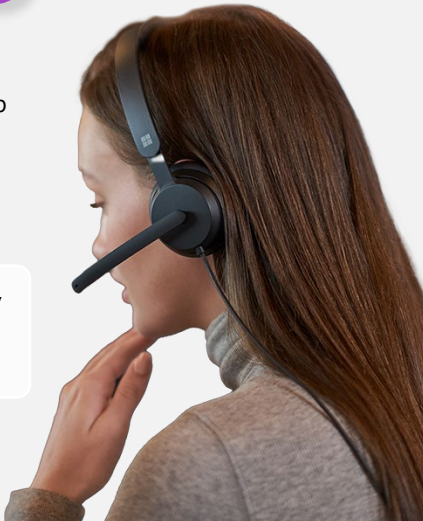
Dedicate your focus to the meeting while CoPilot focuses on capturing the notes.

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.



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

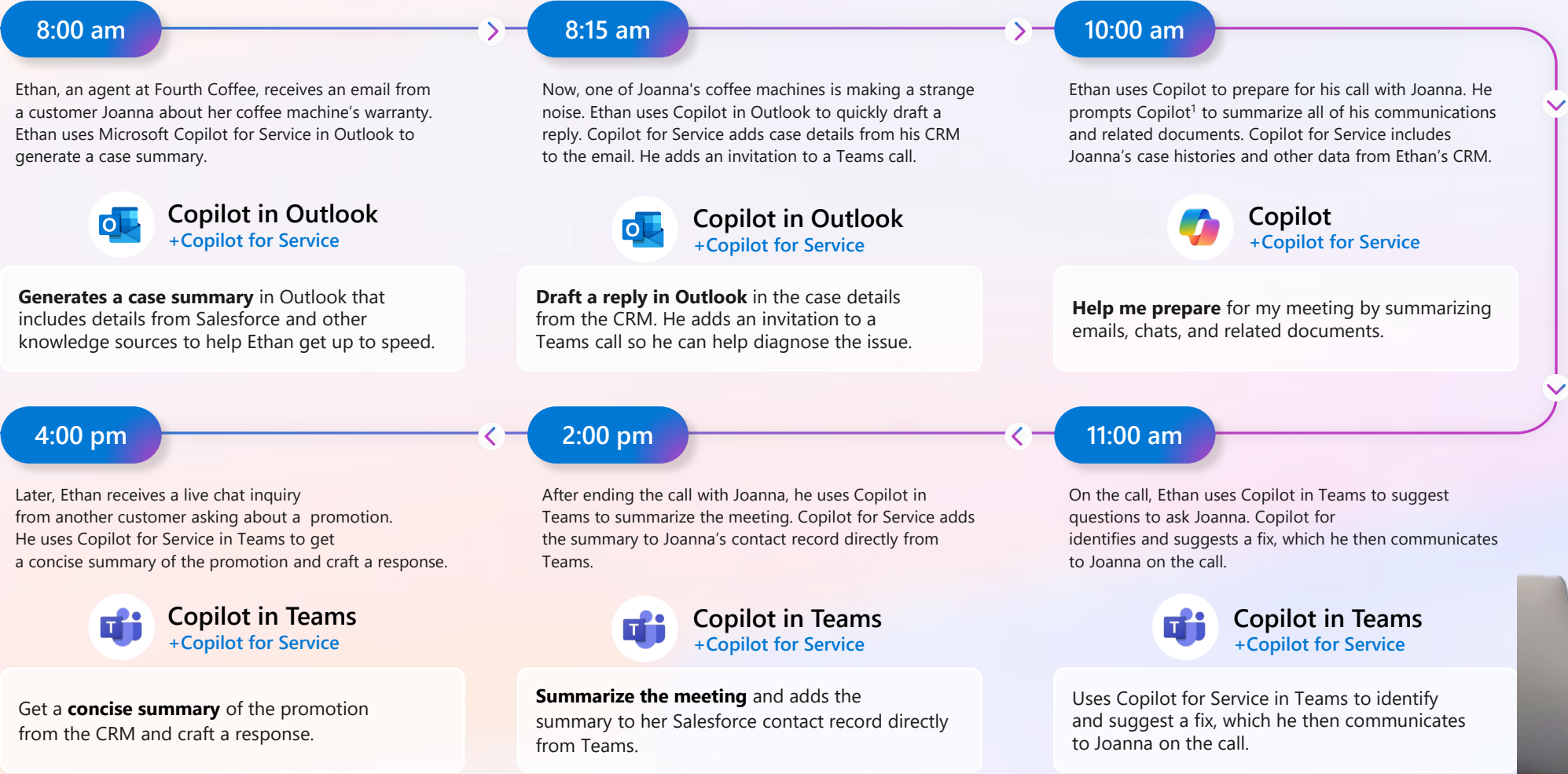


A day in the life of a Service agent

Available with:
Copilot for Service (includes Copilot for Microsoft 365)

Scenario level:   
[Get started](#)

- Benefits
-  ~1 hour
-  Areas of investment: Learning
-  Faster analysis, communications, and streamlining tasks



Ethan
is a Customer
Service Agent



¹Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".

A day in the life of a Customer Support Director

Available with:
Copilot for Microsoft 365 and Dynamics 365 Customer Service

Scenario level: 
Build

Benefits

~1 hour

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



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



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



¹Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".

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