



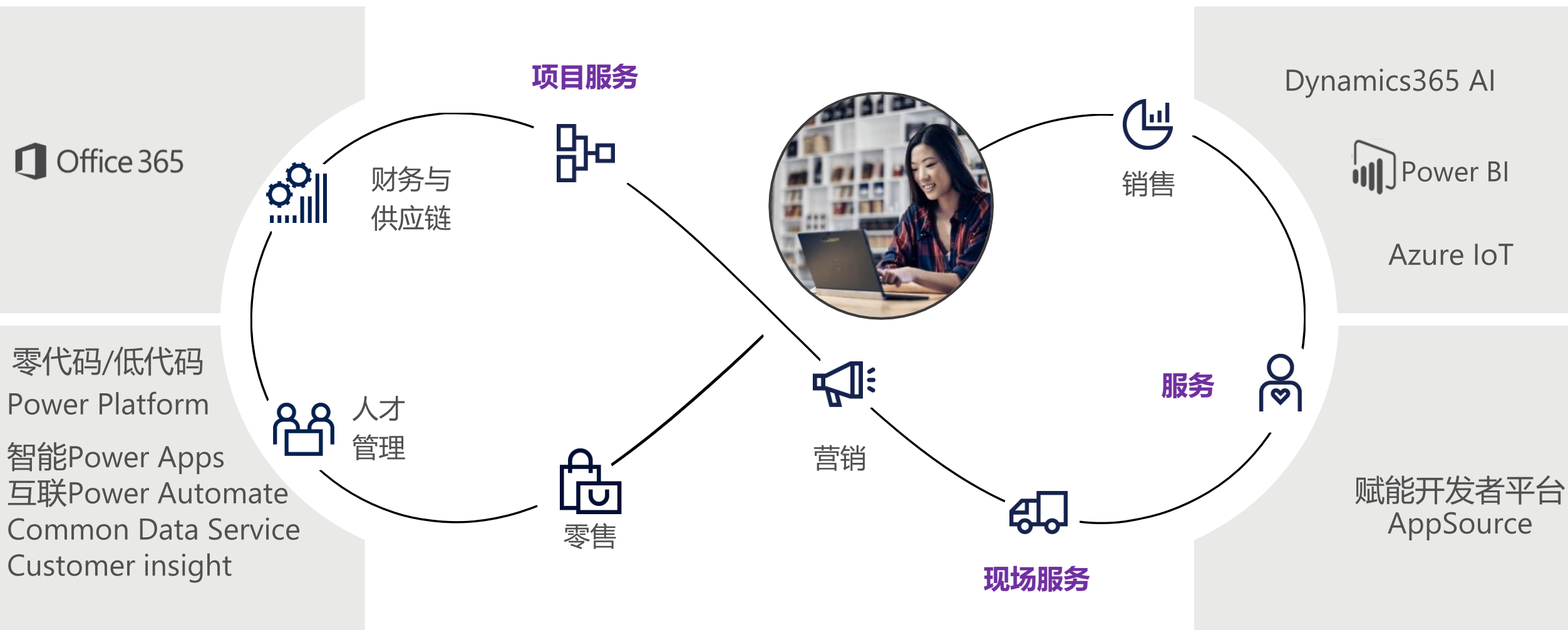
Microsoft Online Tech Forum

微软在线技术峰会

多渠道触点智能客服技术架构及混合现实  
现场服务演示

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# 微软点亮智能客户服务



# Dynamics 365 智能客服全景图

| 客户管理  | 全渠道服务  | 服务管理  | 互动管理 | 知识管理   | 服务分析   | O365集成                       | 综合能力      |
|-------|--------|-------|------|--------|--------|------------------------------|-----------|
| 基本信息  | 热线     | 服务请求  | 任务管理 | 案例库    | 回访报告   | Dynamics 365 App for Outlook | 服务区域      |
| 联系人管理 | 短信     | 工单管理  | 邮件同步 | 行业信息   | 满意度分析  | 方案文档管理                       | 服务价目表     |
| 组织架构  | 邮件     | 退换货管理 | 日历管理 | 产品信息   | KPI统计  | Excel导入导出                    | 服务中心      |
| 客户资产  | 社交媒体   | 服务分派  | 活动提醒 | 知识生命周期 | 报价模板   | Word模板设定                     | 路由规则      |
| 服务权益  | 门户     | 服务执行  | 互动看板 | 工作手册   | 备件分析   | Teams 协同                     | 满意度管理     |
| 工单历史  | 移动App  | 服务升级  | 地图跟踪 | 规范     | 客户服务分析 | OneNote 会议纪要                 | Power BI  |
| 活动交互  | 专属服务经理 | 服务关闭  |      | 知识评价   | 服务商分析  | 邮件内容洞察                       | HoloLens+ |
|       | 在线问答   | 审批管理  |      | 知识归档   | 服务进程分析 |                              |           |
|       | 论坛     |       |      | 知识维护   | 工单预测   |                              |           |
|       | 社区空间   |       |      |        |        |                              |           |



# 智能客户服务包含的技术，微软是如何串联起来...



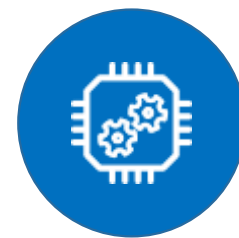
全渠道服务



人工智能



现场服务



虚拟现实

# 全渠道服务-多方式接入并提供一致客户服务体验

电子邮件



网页/门户



Chat



电话



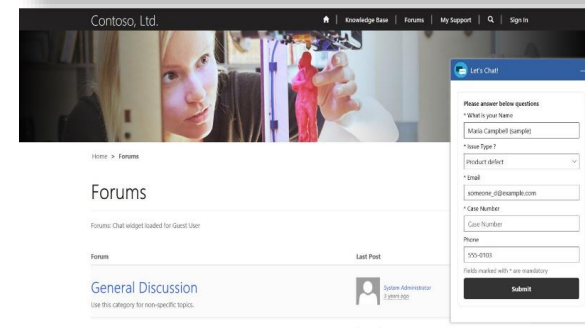
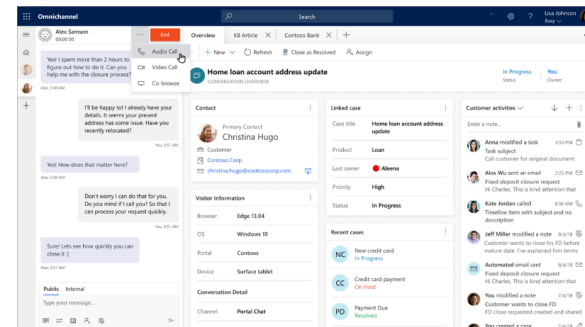
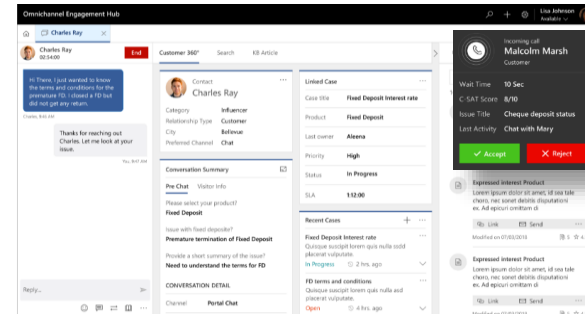
短信



Facebook



其他自定义通道



# 支持在线聊天online chat

- ❑ 在网站中嵌入和设计聊天组件
- ❑ 通过聊天前的问题和遥测信息（包括位置跟踪和附件屏蔽），自动识别和加载客户和案例细节
- ❑ 为经过验证和未经验证的访问者提供支持
- ❑ 访问存储在 CDS-T 中的脚本并同步到客户/工单360视图中
- ❑ 连接您的 Teams 数据 – Chat for Dynamics 365 基于 Microsoft Teams 后端而构建

The screenshot displays a customer support website for 'Contoso, Ltd.' with a navigation bar containing 'Knowledge Base', 'Forums', 'My Support', and 'Sign In'. The main content area features a forum post titled 'Increase cash withdraw limit for credit card' with a conversation overview. The chat interface shows a customer, Charles Ray, asking for help with increasing his cash withdraw limit, and a bot providing assistance. A 'Let's Chat!' form is overlaid on the right, containing fields for name, issue type, email, case number, and phone, with a 'Submit' button.

Contoso, Ltd. | Knowledge Base | Forums | My Support | Sign In

Home > Forums

Forum

Forums: Chat widg +

Forum

General

Use this category t

Omnichannel

Charles Ray 00:00:10

Just one more thing. Can you increase my withdraw limit as well?

Charles, 9:47 AM

Well our live agent can do that for you. Want to connect?

Contoso Bot, 9:47 AM

Sure! That would really helpful.

Charles, 9:47 AM

Hey Lisa! Escalating Charles' request to you. Please increase his cash withdraw limit for credit card.

Issue

Increase cash withdraw limit for credit card.

Contoso bot, 9:48 AM

Public Internal

Type your message...

Overview

KB Article x Contoso x +

+ New v Refresh Close as Resolved Assign

Increase cash withdraw limit for credit card

CONVERSATION OVERVIEW

Contact

Primary Contact

Charles Ray

Northwest Park Service

+1-425-555-0154

charles.ray@outlook.com

Linked case

Case title Increase cash wit for credit card

Product Credit card

Last owner Marie

Priority High

Status In Progress

Recent cases

NC New credit card In Progress

CC Credit card payment On Hold

PD Payment Due Resolved

Visitor Information

Browser Edge 13.04

OS Windows 10

Portal Contoso

Device Surface tablet

Conversation Detail

Channel Portal Chat

Let's Chat!

Please answer below questions

\* What is your Name

Maria Campbell (sample)

\* Issue Type ?

Product defect

\* Email

someone\_d@example.com

\* Case Number

Case Number

Phone

555-0103

Fields marked with \* are mandatory

Submit



# Power Virtual Agent 支持企业快速搭建机器人服务渠道

- ❑ 将传入的聊天请求路由到通过 Dynamics 365 Virtual Agent for Customer Service 创建的虚拟代理
- ❑ 将内联的、完整的虚拟代理对话脚本自动转交给人工代理
- ❑ 发现支持数据中的所有潜在主题，识别最适合虚拟代理的主题
- ❑ 通过将建议的主题导入虚拟代理配置 UI，快速创建虚拟代理内容

The image displays two screenshots of the Power Virtual Agent interface. The left screenshot shows a chat window titled 'Test Virtual Agent' with a user 'luca@email.com'. The chat history includes a user message about a SmartPrinterX purchase date, a bot response offering to look up the issue, and a user response 'Yes, please look up the issue for me'. Below the chat is a 'Start a conversation' section with buttons for 'Store hours', 'Store location', and 'Pay bill'. The right screenshot shows the 'SmartPrinter X troubleshooter' flowchart. It features a central 'Bot Says' node with a message: 'I can contact your latestPrinter (serial number [x] SerialNum) directly to get more information on your issue. Would you like me to do so?'. This node branches into two 'Expression' nodes: 'Yes, please look up the issue for me' and 'No, I'll describe the issue myself'. The 'Yes' branch leads to a 'User Responses' section with options 'Yes, please look up the issue for me' and 'No, I'll describe the issue myself'. The 'No' branch leads to an 'Escalate' node. The 'Yes' branch also leads to a 'Redirect' node with the message 'Printer - Printer is not printing'. The 'Escalate' node leads to a 'Bot Says' node with the message 'Ok, I am contacting the printer now'.

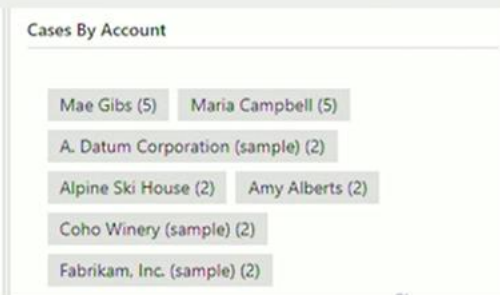
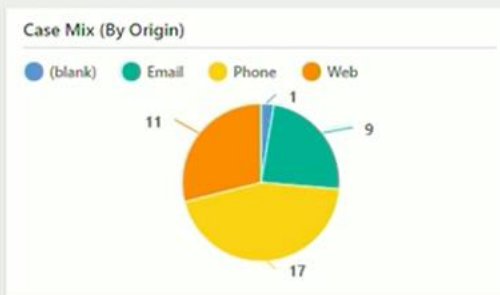
# 演示

Omni channel customer service 全渠道互动服务体验



- Printer is making noise
- Product Manual

Tier 1 Dashboard This Quarter 10/1/2019 To 12/31/2019



### Active Cases

38 Modified On

| Priority | Origin       | Subject                 | Status      |
|----------|--------------|-------------------------|-------------|
| Normal   | Web          | SYSTEM                  | In Progress |
| Normal   | Web          | Printer is making noise | In Progress |
| Normal   | Charles Li   | Product Manual          | In Progress |
| Normal   | Question Web | Lilly Michael           | In Progress |
| Normal   | Question     | Need help               | In Progress |

### My Resolved Cases

1 Modified On

| Priority | Origin | Subject                    | Status         |
|----------|--------|----------------------------|----------------|
| High     | Web    | Charles Li                 | Problem Solved |
| High     | Web    | Printer issue for Mae Gibs | Problem Solved |

### My Draft Emails

3 Modified On

| Priority | Origin                    | Subject                                 | Status |
|----------|---------------------------|---|--------|
| Normal   | Mae Gibs                  | Product Manual                          | Draft  |
| Normal   | Printer issue for Mae ... | A case has been opened for your request | Draft  |
| Normal   | Patrick Sands             | Patrick Sands                           | Draft  |

### My Activities

63 Last Updated

| Activity Type | Priority | Subject                  | Status |
|---------------|----------|--------------------------|--------|
| Phone Call    | Normal   | Incoming Product Manual  | Open   |
| Email         | Normal   | Product Manual           | Open   |
| Phone Call    | Normal   | Product Manual           | Open   |
| Phone Call    | Normal   | Call with Maria Campbell | Open   |

# Dynamics 365 全渠道服务 2020春季最新

- More channels



Teams



Twilio SMS



LINE



WeChat



Twitter



WhatsApp

- Channel elevation



Voice



Video

- 3rd party co-browse and remote desktop

- Teams channel for B2E

Help desk experiences (HR, Finance, IT, Legal) accessed directly via Teams chat with Virtual Agent that escalates to assisted

- Bring Your Own Channel (preview)

# 客户服务中的智能场景

Power  
Virtual  
Agent  
智能客服  
机器人

客户服务洞察

Question

Ask a question

Do you see yourself as a home user, a gamer or a business user?

Identify

Usage Type

Options for user

Home User

Gamer

Business User

Save response as

pva\_UsageType (Usage Type)

Condition

pva\_UsageType (Usage Type)

is equal to

Gamer

Condition

pva\_UsageType (Usage Type)

is equal to

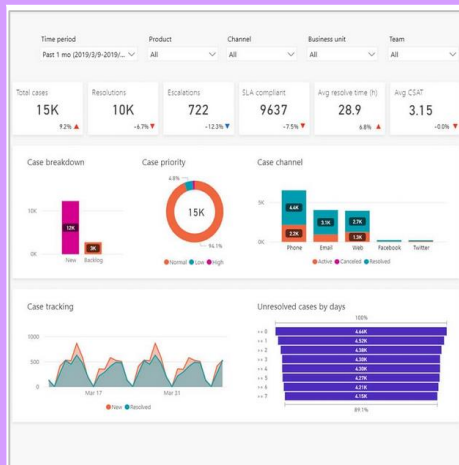
Business User

品牌洞察

销售洞察

- 助手
- 留言分析
- 预测性评分
- 谈话要点
- 对话智能

类似案例和支持  
文本分析的  
知识库搜索



客户洞察

Smart assist

Knowledge article

Credit card transaction fee on cash withdrawal

Every time a credit card is used to withdraw cash, a cash advance fee, whi...

Send Copy URL

Macro

Credit card transaction fee on cash withdrawal

情绪判断

# 场景#1 实时对话智能

## • 实时代理指引

自动理解客户的需求

跨越语言障碍

根据上下文自动执行代理操作、路径选择和通知

## • 跨渠道的一致性

实时语音

实时支持全渠道消息

实时电子邮件和案例

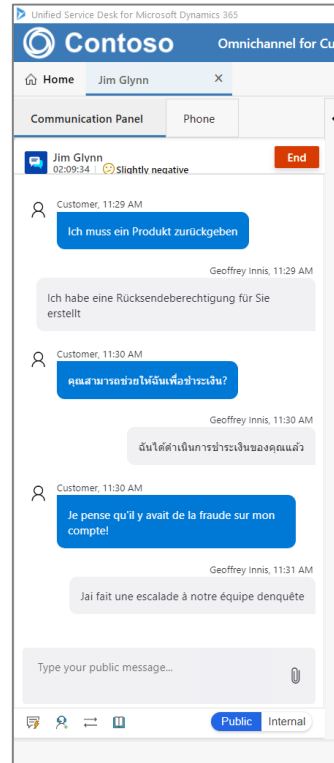
## • 分析和翻译交互

翻译语音和消息内容

粗俗用语、个人身份信息或警示词的实例

客户意图 => 自动操作

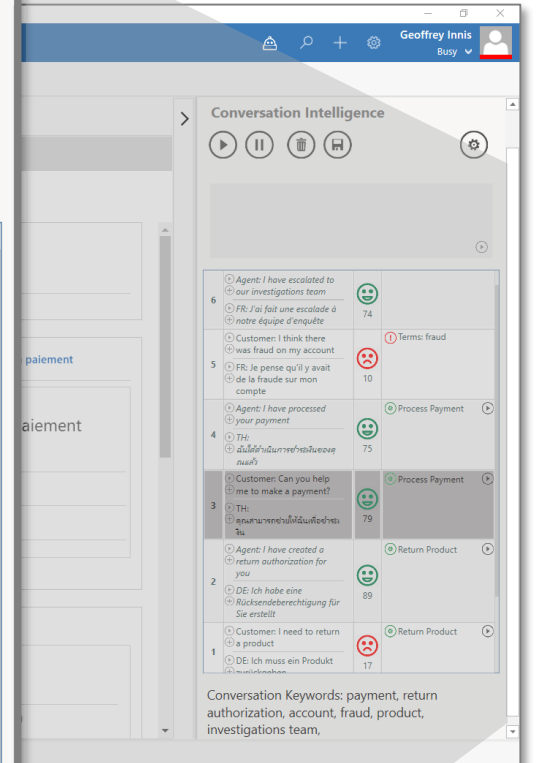
根据提及的实体自动指引



### Conversation Intelligence

|   |  |    |                 |
|---|--|----|-----------------|
| 6 | Agent: I have escalated to our investigations team<br>FR: J'ai fait une escalade à notre équipe d'enquête        | 74 |                 |
| 5 | Customer: I think there was fraud on my account<br>FR: Je pense qu'il y avait de la fraude sur mon compte        | 10 | Terms: fraud    |
| 4 | Agent: I have processed your payment<br>TH: ฉันได้ดำเนินการชำระเงินของคุณแล้ว                                    | 75 | Process Payment |
| 3 | Customer: Can you help me to make a payment?<br>TH: คุณสามารถช่วยให้ฉันเพื่อชำระเงิน                             | 79 | Process Payment |
| 2 | Agent: I have created a return authorization for you<br>DE: Ich habe eine Rücksendeberechtigung für Sie erstellt | 89 | Return Product  |
| 1 | Customer: I need to return a product<br>DE: Ich muss ein Produkt zurückgeben                                     | 17 | Return Product  |

Conversation Keywords: payment, return authorization, account, fraud, product, investigations team,



# 实时对话智能：总体数据流





# 场景#2 实时专家连接

## • 基于上下文的专家指导

按技能和可用性安排专家参与  
连接到 Individuals 或 Teams for  
Swarm

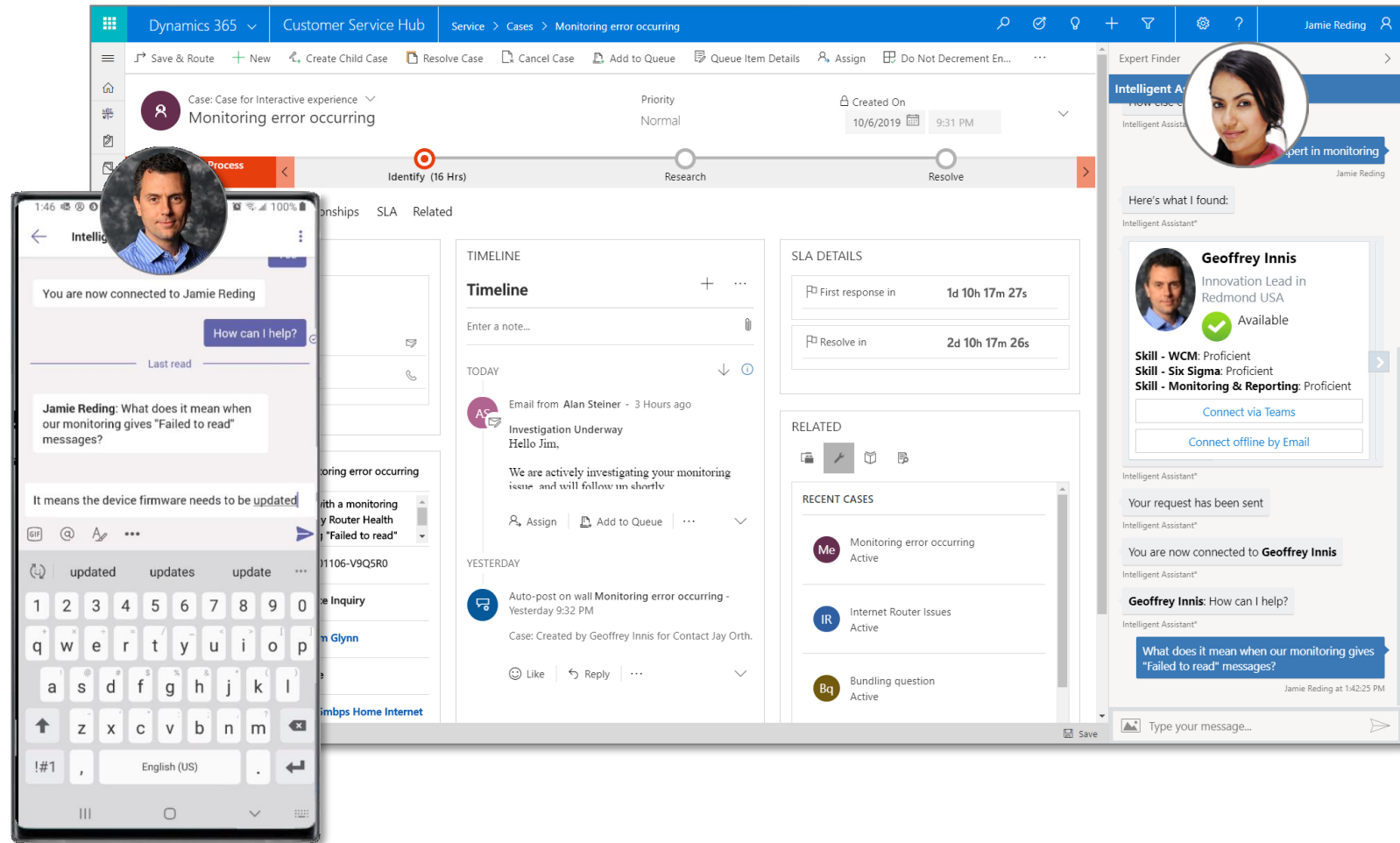
实时或离线聊天

## • 应用内和跨渠道

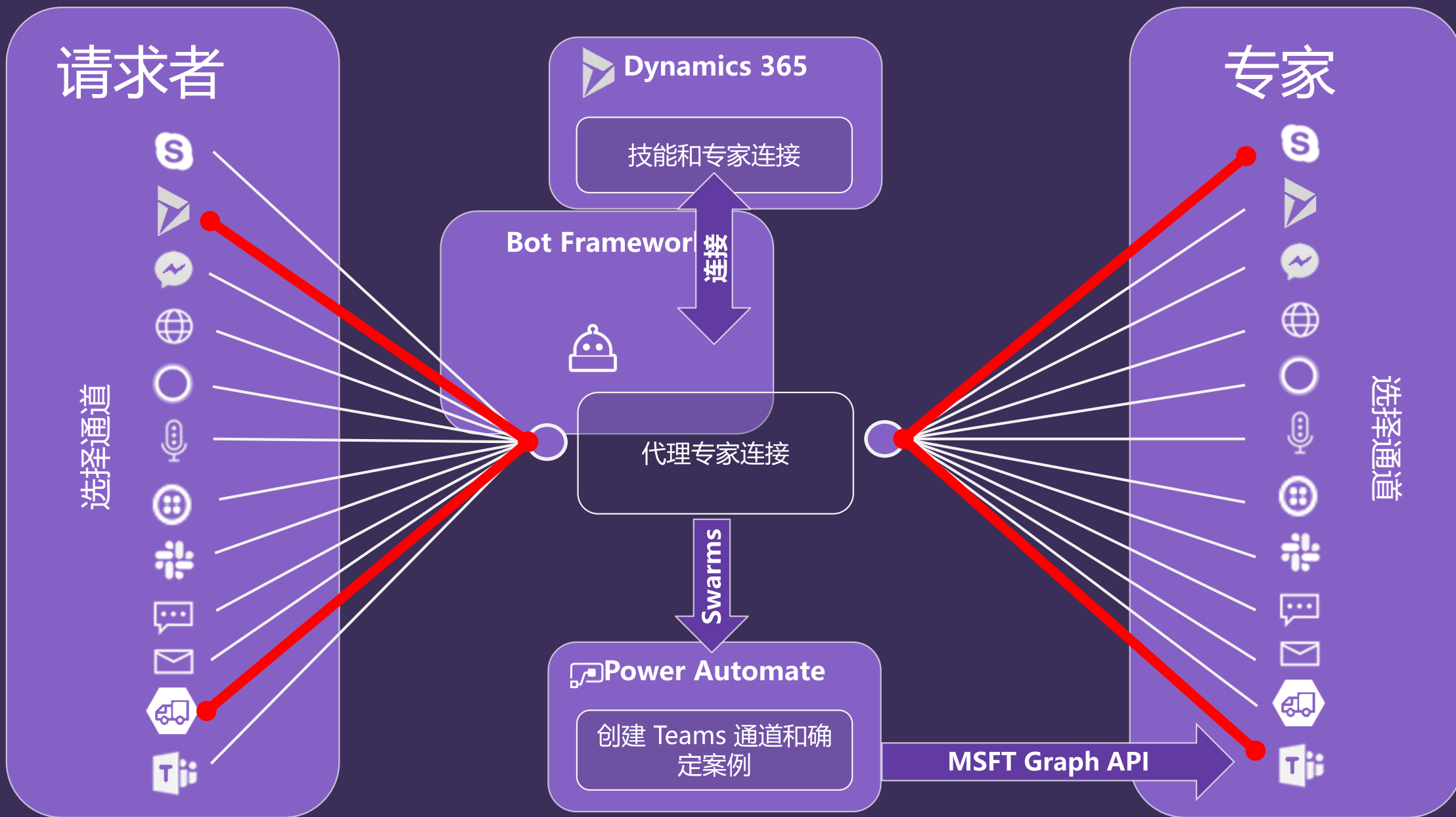
嵌入在 D365 和其他应用中  
在选定消息通道上安排专家

## • 分析与激励

跟踪和奖励专家参与  
有关技能和参与的组织洞察  
转录本保留上下文记录



# 实时专家连接：总体数据流



# The Remote Assist journey so far..



RA HL1 GA  
(Nov '18)



Android  
iOS

RA Mobile Preview  
(April '19)



Android  
iOS

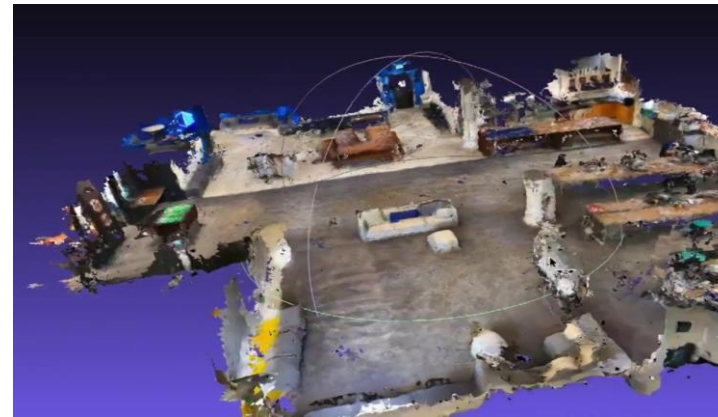
RA Mobile GA  
(October '19)



HoloLens 2 GA  
(November '19)



MR Annotation / Calling



3d / Spatial Reconstruction



MR Content / Spatial Data/Indoor maps

# Dynamics 365 Remote Assist

## 实时解决问题

随时随地与专家沟通，快速解决问题，降低成本，提高效率

## 展示关键信息

从熟悉的应用程序访问虚拟文档，例如PDF，JPG或图表

## 集成，安全且灵活的平台

通过与 Dynamics 365 Field Service、Microsoft Teams 和 Azure 的集成，增强远程协助的能力





## 与 Dynamics 365 Field Service 集成

- 从远程协助应用查看和更新Dynamics 365现场服务预订
- 直接在预定页面致电专家
- 自动捕获呼叫日志信息以供参考——参与者，日期和时间以及呼叫持续时间
- 从呼叫中捕获屏幕截图，并将其保存到现场服务工作单中以记录相关细节

The screenshot displays the Dynamics 365 Field Service interface for a 'Belt repair' booking. The main card shows the following details:

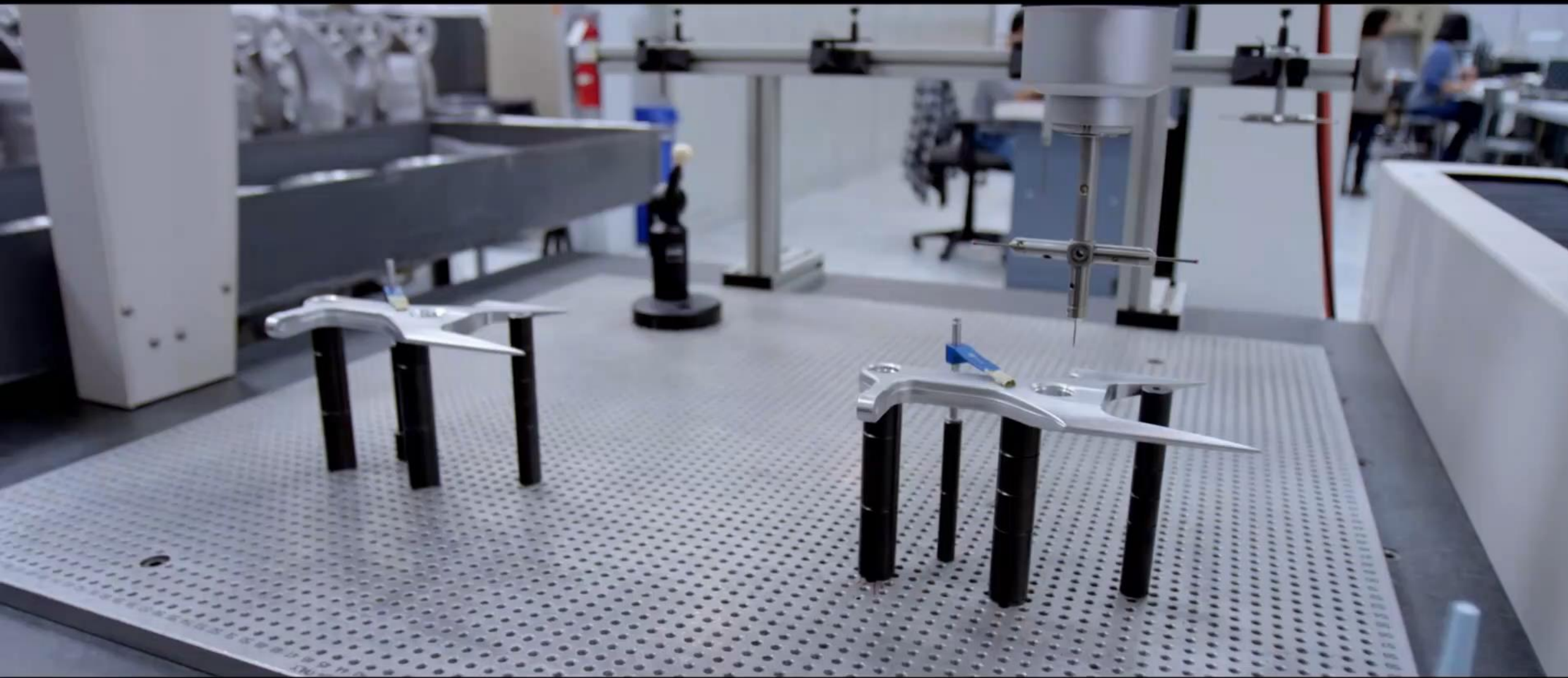
|                       |   |
|-----------------------|---|
| Name                  | Belt repair   |
| Start Time            | 9/6/2018 5:00 PM  |
| End Time              | 9/6/2018 8:00 PM  |
| Duration              | 3 hours   |
| Capacity              | 1.0000  |
| Resource              | Steve Raccoon   |
| Booking Status        | In Progress   |
| Booking Type          | Solid   |
| Resource Requirement  | RE 00004  |
| Booking-Specific Link | <a href="https://powerbi.microsoft.com/en-us/">https://powerbi.microsoft.com/en-us/</a> |

The 'Booking Status' field is highlighted with a red box. To the right, there is a 'Timeline' section with a note entry field and the text 'No records to show.' The browser address bar shows the URL: <https://anjeandyntest.crm.dynamics.com/main.aspx?appid=337fd74-66b0-e811-a96c-000d3a364086&pagetype=entityrecord&etn=b...>



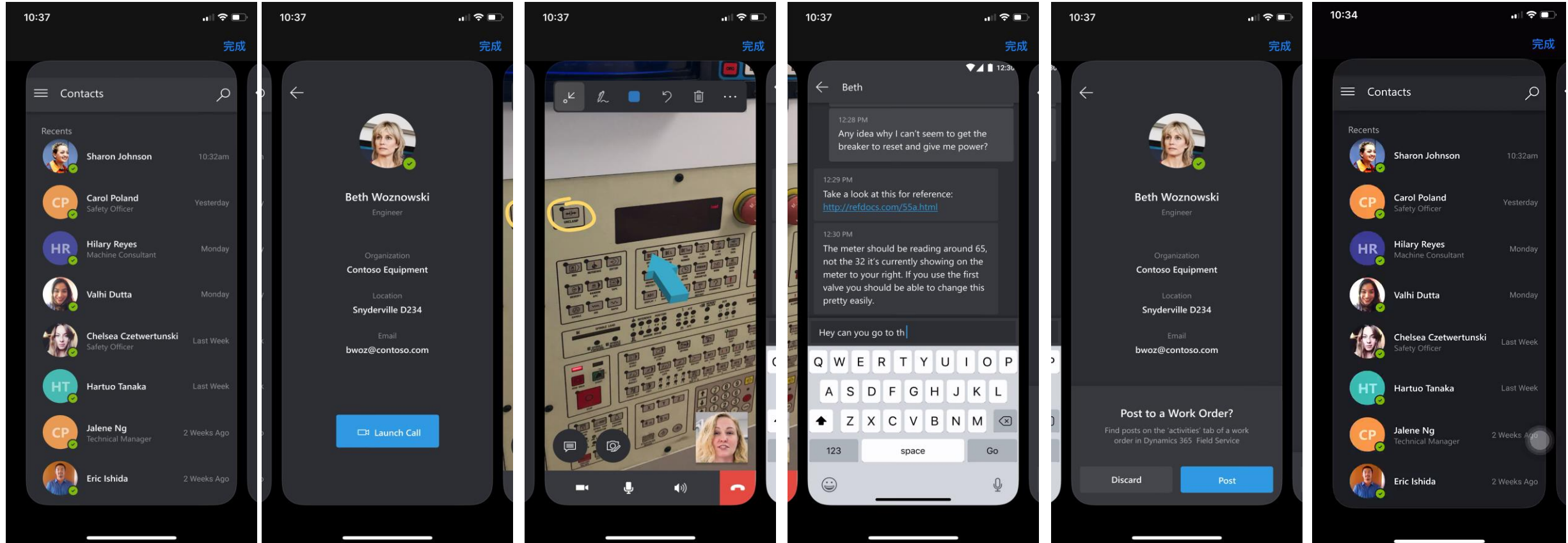
# 演示

Dynamics 365 Remote Assist for HoloLens 2 and mobile devices



# Dynamics365 Remote Assist 手机应用

支持在各大手机应用市场下载



# Dynamics 365 Guides 帮助员工更快地学习新技能

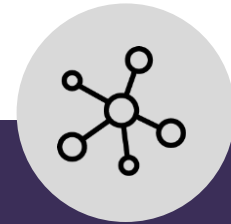


## 授权员工

无需编码即可编写员工培训

在真实环境中培训员工

使用Guides Analytics & Power BI  
分析培训效果



## 可扩展技术

建立在通用数据服务上

与  
PowerApps 和 Flow 集成

与  
Dynamics 365 Field Service 集成



## 在现实环境中培训员工

- 通过全息分步说明在实际环境中培训员工，向他们展示在哪里做什么
- 查看警告和注意事项，并在需要的地方查看工作细节
- 通过可扩展的培训加快员工实战
- 使用 PowerApps 和Flow将Guides 到现有流程和工作中





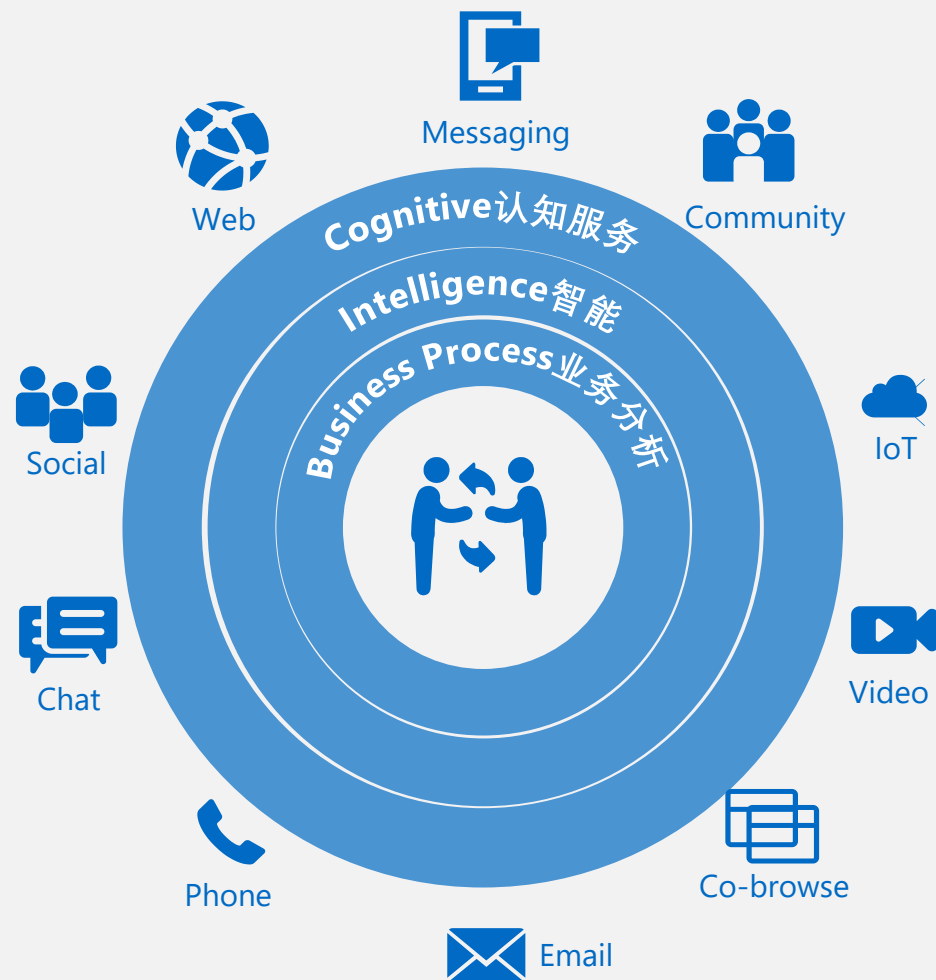
# 演示

Dynamics 365 Guides and HoloLens 2



# 微软售后服务解决方案—现代服务一体化

- ↑ Call center服务效率
- ↑ 服务可拓展
- ↑ 服务可视化
- ↑ 服务个性化
- ↑ 服务质量
- ↑ 客户服务体验
- ↑ 多途径客户触点
- ↑ 服务商优化
- ↓ 服务成本



传统渠道

社交渠道

IM

社区

Services



扫码下载讲师PPT  
更多精彩尽在【微软市场活动】