**Microsoft**

**The business value of AI**

# How Microsoft is reinventing Customer Service & Support with Microsoft Copilot

*Microsoft Copilot is helping Microsoft Customer Service and Support (CSS) reinvent how support engineers diagnose and resolve customer cases*

Microsoft CSS is one of the largest customer service organizations in the world, comprising tens of thousands of agents assisting more than one billion customers worldwide across voice calls, emails, and live chats.

Prior to 2020, the team used 16 different case management systems and over 500 individual tools, which complicated training, fragmented information across systems, hindered collaboration between engineers, and produced inefficient workflows. As a result, agents had greater difficulty providing customers with ideal service. The team first migrated to Dynamics 365 Customer Service for a single-pane solution with better routing and integrated data management—and then turned their sights on onboarding Microsoft Copilot to further improve the quality and speed of service delivery.

## Microsoft CSS at a glance

**1+ billion** customers

**92** contact centers

**120** countries & **50** languages

**145+ million** interactions annually

## Goals

**Copilot is essential to the CSS team's transformation**, bringing the power of generative AI and automation to help agents deliver faster and more focused customer care. The team has expected Copilot to be transformative for customers, agents, supervisors, and support leaders.

**For support agents**, Copilot would be embedded across workflows to reduce the time and effort on time-consuming, manual tasks—from composing replies to finding information—helping to resolve customer cases faster.

**For customers**, Copilot would help ensure a seamless, personalized service experience on any preferred channel—with many cases resolved without the need of human interaction through self-help tools, such as AI-powered chatbots, and preemptive and self-healing services.

**Supervisors** would get proactive visibility into operational performance to maximize service operations and enable effective review processes; with greater insight into customers served, processes and the health of the service environment.

**Service leaders** would be empowered to augment and automate elements of the service experience to deliver differentiated, best-in class customer and agent experiences.

## Objectives

**5x** return on investment

**Cases** solved through preemptive and self-healing services across select CSS businesses

**Improve visibility** into operational performance

**Augment and automate** tasks and processes using Copilot to deliver best-in-class agent and customer experiences

# Approach

The support team is **completing the first of three phases in its service transformation journey.** This phase focuses on driving success and adoption of Dynamics 365 Customer Service and launching an initial set of Copilot capabilities. To date, the team has conducted a **phased roll out of Copilot to 43,500 support engineers globally with a four-month ramp up period**.

Copilot capabilities launched in phase one include:

### Case summarization
Copilot can summarize pertinent details in case records, reducing an often 30-minute effort to review a case to just a few minutes.

### Email and live chat responses
Copilot can generate personalized customer responses for email and live chats, articulated in the right tone with details in context to the case—dramatically saving time.

### Answer assist
Agents can use Copilot to find facts and answers across the knowledge management system, reducing both the time to resolution and the number of case transfers to agents with specialized knowledge.

### Chat conversation summary
Agents devote time scrolling through chats for case details. Copilot summarizes discussed topics and details, speeding time to resolution.

> "When a call reaches me, the customer needs reassurance and understanding immediately. I need to absorb a lot of information quickly, and Copilot lets me grasp the details right away."
>
> Mayte Cubino Gonzalez
> **Director of Engineering Support**

# Adoption and Onboarding

To help ensure a seamless, speedy onboarding across global contact centers, the support team deployed a community-driven adoption and onboarding program:

### Dedicated AI team
A dedicated team focuses on onboarding activities, team skilling, and establishing Copilot governance practices to ensure the working model and timeline drive toward defined outcomes.

### Knowledge management optimized for generative AI
To ensure accurate, quality Copilot responses, the team cleaned up inaccurate source data and established standards for content refreshes, structure, tagging and other criteria. Agents can also rate and notate the quality and accuracy of responses to help improve the underlying AI models and source information.

### Business unit syncs
Monthly organization-wide meetings to review the Copilot rollout timeline, usage patterns, success stories and key feedback to keep everyone in the loop.

### Peer-based ambassadors
A **Champions** program engages high-value super users to boost organic adoption, empowering agents' peers to share best practices, tips and answer questions. **Innovators** are agents designated to test new functions and recommend ideas to improve experiences. And a **training guru community** helps create and provide in-person training.

### Listening systems
The team collects suggestions for improvement using in-product feedback and ratings during Hackathons, office hours and events. Collected data is combined with quantitative measurements to refine the engineering roadmap, training, and business goals.

### Sparks week focus groups
accelerate training. Local facilitators host events to collect feedback and foster community support for Copilot usage and best practices.

> Copilot provides our engineers the support to offer the customer understanding while also sorting out their technical problems.
>
> Ric Todd
> Director, Technical Strategy and Innovation, CSS at Microsoft
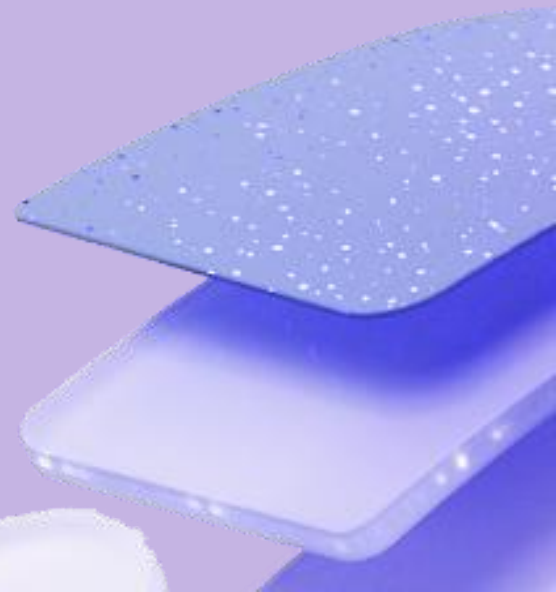
# Impact

Early results from the Copilot deployment demonstrate how rapidly Copilot can deliver value.

### Faster case resolution

**31%**
increase in first call resolution*

**20%**
reduction in missed routes experienced*

*Attributed to adoption of Dynamics 365 Customer Service*

### More customers served

**9%**
faster first response time

**12%**
increase in case volumes

### Junior agents onboarded faster

**13%**
reduction in days to solution

**13%**
increase in cases resolved without peer support

*Outcomes reflect results from 9,900 agents from a specific five-month period (April-September 2023)*

# Lessons learned

The CSS team has learned valuable lessons in the past year to help guide both future phases and customer deployments.

### Prepare for (big) change

When rolling out Copilot, expect a core group of enthusiasts that can help rally the larger majority of users, where most onboarding efforts will be devoted.

### Optimize source content for AI

Copilot is as powerful as the information it is trained on. Ensure knowledge sources are accurate, up-to-date, and organized—and dedicate resources to frequent content optimization to prevent "garbage in, garbage out."

### Carefully plan for deployment

If knowledge sources are clean, deploy Copilot features at once. If you can't optimize content before launch, focus deployment on features on non-content generating features, such as case and email summarization.

### Drive change that lasts

Stand up a change management program focused on community-fostered usage, rather than compliance.

### Engage enthusiasts

Empower super-user champions to evangelize and train peers.

### Listen earnestly, communicate honestly

Offer multiple feedback mechanisms to listen to agents' issues, recommendations, and successes. Share plans for improvements and new features, and address concerns about workflows and other AI topics.

# The path forward

The Microsoft CSS transformation to an AI-powered global service and support team has already delivered incredible value—and the team is only getting started.

In 2024 and 2025, the team will unlock new Copilot features, improve knowledge sources and Copilot prompting, and refine the AI models. Agents will be able to generate root cause hypotheses and prioritized resolution paths through product diagnostic tools, while deepening customer "know-me" and reducing tedious work tasks. Future phases will further reinvent the end-to-end support journey, promising a transformative impact on customers, agents and the entire CSS team.