



TECHCON 365 | CHICAGO 2026

Avoiding the “Go-Live Hangover”

Battle-Tested Best Practices for Contact Center Implementations

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About me



Vinoth Balasubramanian

[Principal Program Manager • Copilot & Agent Ecosystem • Microsoft]



Top Concerns

01

Rigid IVR + Voice Latency Frustrations

Static call flows and delays degrade customer experience

02

No Dynamic Prioritization of Live Conversations

Limited ability to re-route or adjust based on context or urgency

03

Poor Handling of Overflow and Capacity Spikes

Inability to intelligently distribute demand across channels or agents

04

Lack of Real-Time + End-to-End Quality Visibility

Difficulty assessing agent performance while interactions are happening—or after

05

“Black Box” Agent Activity During Sessions

No clear way to see what agents did, step-by-step

06

Slow, Rigid, and Lagging Reporting Systems

Insights arrive too late to influence operational decisions

07

Complex and Non-Intuitive Contact Center Setup

Heavy configuration burden slows deployment and iteration

08

Reactive-Only Customer Engagement Models

Limited tools for proactive outreach and outbound customer engagement

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Eliminating rigid flows and reducing voice latency

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Proactive outreach and customer engagement strategies

Ready. Set. Action

What you're about to see is live demos, which means I've boldly chosen excitement over safety.

01

From IVR Mazes to Intelligent Journeys

Eliminating rigid flows and reducing voice latency

The Problem: Rigid IVR flows through topics, voice latency.

The Solution: Real-Time Voice, S2S, Generative Orchestration

Premium Gen AI — When and Why

Premium Gen AI uses GPT-Realtime for end-to-end speech-to-speech processing — choose this when natural conversational flow, low latency, and emotional intelligence are priorities.

Audio In →
Live speech capture

GPT- Realtime
End-to-end speech reasoning

→ **Audio Out**
Natural speech output

✓ Choose Premium Gen AI When

- Natural conversational flow is the top priority
- Ultra-low latency is required for real-time dialogue
- Emotional tone and nuance matter in responses
- Simplicity of a single-model architecture is preferred
- Multilingual handling is required
- Teams want the most advanced voice AI experience

★ Key Advantages

- ⚡ Ultra-low latency — end-to-end speech processing without intermediate text conversion
- ♥ Natural emotional intelligence — understands and responds with appropriate tone and inflection
- 🧩 Simpler architecture — single model handles the entire speech pipeline

⚠ **Key limitation:** Cost and regional availability + customizability and control

Key Capabilities

Enterprise-grade voice features.



Sub-Second Response

Sub-second response times reduce caller frustration and keep conversations flowing naturally.



Natural Pacing

Natural conversational pacing increases trust and engagement with every caller interaction.



Graceful Barge-In

Barge-in handled gracefully, like a human agent — callers can interrupt naturally.



Auto Language Detection

Automatic language detection and maintenance throughout the entire interaction.



Enterprise Voice

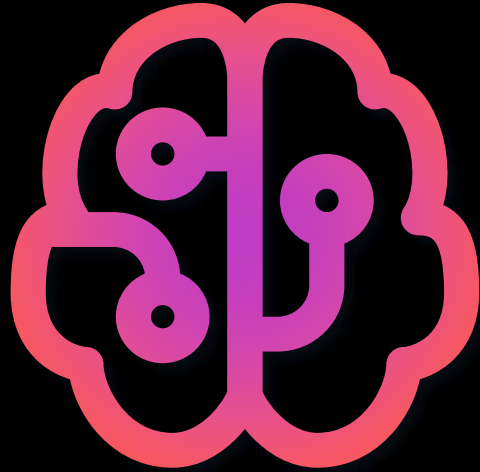
DTMF input, silence detection, latency messages, and transfer to live agents with full context.



IVR Features Included

Key traditional IVR features included out of the box.

Demo – Real Time Voice Agent



**AI
Agent**

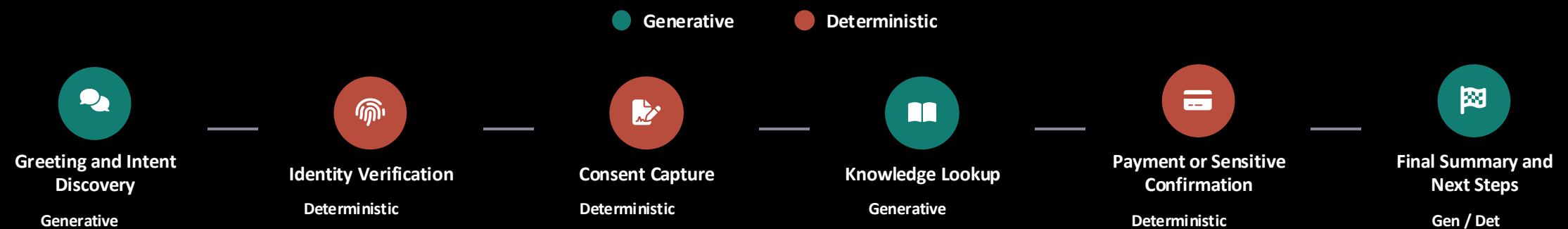


Customer



Hybrid Approach

Most enterprise agents should blend deterministic logic where risk and compliance matter with generative logic where flexibility improves experience — the recommended starting point for most customers.



💡 Simple rule: do not try to make the whole journey fully scripted or fully generative.

02

Context-Driven Routing That Adapts in Real Time

Prioritizing conversations dynamically and managing overflow intelligently

***The Problem:** Ongoing conversations cannot be prioritized dynamically. Overflow cannot be handled by conversation or caller context.*

***The Solution:** Conversational Orchestration*



Dynamics 365 Contact Center Conversation Orchestration

Orchestrate end-to-end routing, assignment and overflow with full spectrum of contact center events, and rich context, using natural language prompts

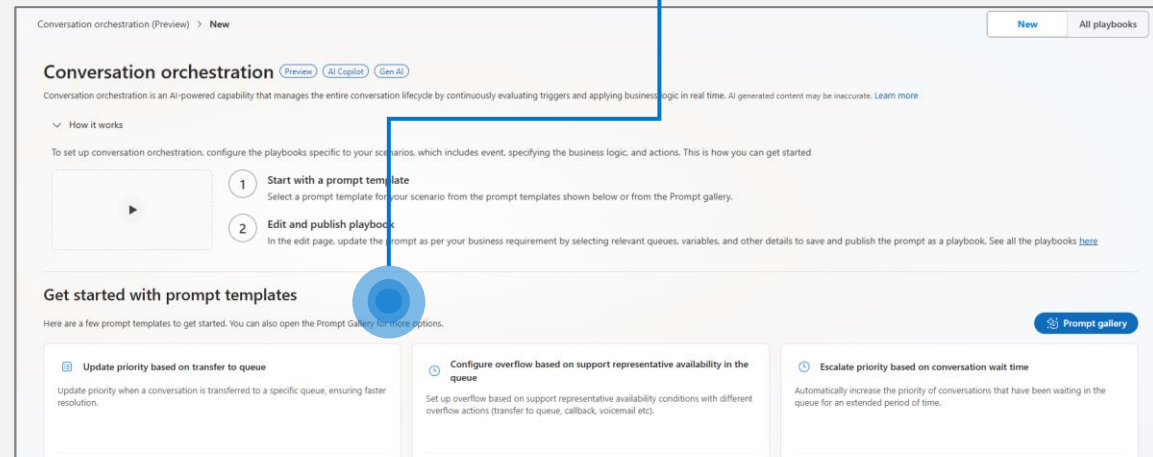
Adapt instantly to real-time contact center KPIs to reduce wait times and boost customer satisfaction

Dynamically adjust routing, prioritization, end customer experience (e.g. wait music) and overflow actions based on sentiment, customer 360, backlog, SLA risk, time of day, or operational signals.

Supports dynamic, context aware expert matching for a customer based on past conversations, customer profile and expert workload.

Empower admins with simplified setup and maintenance through natural language playbooks.

Authoring experience – Template driven playbook authoring with built-in validations and guardrails ensures admins create accurate, compliant orchestration policies with confidence



Conversation orchestration (Preview) > All playbooks

Conversation orchestration is an AI-powered capability that manages the entire conversation lifecycle by continuously evaluating triggers and applying business logic in real time. AI generated content may be inaccurate. [Learn more](#)

Search playbooks...

+ New Playbook

Playbook name	Trigger event	Status	Queue	Channel	Last modified	Action
Escalate priority based on conversation wait time The below priority escalation logic should be followed for every 30 seconds increase in wait time. For all customers, increase priority by 100. Show more	Conversation is waiting in queue	Active	All queues	Voice	04/21/2026 02:08:44 PM	
Configure overflow based on support representative availability in the queue Get the CustomerTier from ContextVariable.CustomerTier. For customers where CustomerTier is Diamond Gold Silver, if no support reps are available immediately End the conversation Show more	Conversation is waiting in queue	Active	DichowdhQ	Messaging	04/21/2026 02:07:40 PM	

Grounding References – Let admins anchor playbooks to precise conversation and customer attributes, making natural-language orchestration accurate, and effortless to author.

Dynamic Prioritization

Continuous Evaluation:

Dynamic priority escalation continuously re-evaluates priority as the conversation progresses.

Reusable Playbooks:

Define the conditions such as wait time thresholds, queue transfers, customer tier, or other context and conversation orchestration adjusts priority automatically throughout the conversation lifecycle. Eg High-value or long-waiting customers move forward without anyone watching the queue manually.

Conversation orchestration (Preview) > **Edit playbook**

Prioritize based on wait time [Preview](#) [AI Copilot](#) [Gen AI](#)

Conversation orchestration is an AI-powered capability that manages the entire conversation lifecycle by continuously evaluating triggers and applying business logic in real time. AI generated content may be inaccurate. [Learn more](#)

Playbook name
Prioritize based on wait time

Queues [Edit](#)
All Voice queues

> **Add variables (optional)**

Add context variables to create conditional logic in your playbook by specifying different actions for different variable values. Ensure that the context variables you use are populated for the workstreams associated with your selected queues.

Build playbook

Update below prompt with correct variables & values. This playbook will be executed when the trigger event shown on this page occurs.

> **Tips for this playbook**

Build your playbook step by step. Select values from the dropdowns to define the playbook. You can also add variables to create more advanced conditions. Saving the playbook will create it in a draft state and publishing it will make it active.

Get the **tier** from **ContextVariable.Tier** and the **region** from **ContextVariable.Region** and the **productcode** from **ContextVariable.ProductCode**.

The below priority escalation logic should be followed for every **30** seconds increase in wait time.

For customers where **Tier** is **Gold, Diamond** and **Region** is **USA, Canada** and **ProductCode** is **2389**, increase priority by **100**

For customers where **Tier** is **Silver, Standard** and **Region** is **EMEA** and **ProductCode** is **1678**, increase priority by **80**

For all other customers, increase priority by **30**

Demo Scenario – Prioritization based on Tier and Product

Business Requirement

Prioritize Credit Card customers over other product customers.

Among Credit Card, start **prioritizing based on the customer value**, determined by Customer Tier (Diamond, Gold, Silver)

After Credit Card, **prioritize all Home Loan product** customers.

Other lower tier customers should also **not indefinitely wait in the queue (prevent starvation)**

Solving it via Dynamic Prioritization

Customer Tier

Diamond
+100 points per 30s (with Credit Card)

Gold
+50 points per 30s (with Credit Card)

Silver
+30 points per 30s (with Credit Card)

Product

Credit Card
Variable by tier
(Diamond +100, Gold +50, Silver +30)

Home Loan
+25 points per 30s (any tier)

All Other Products
+15 points per 30s (default)

Dynamic Score Adjustment: Every 30 seconds of wait time automatically increases priority score based on customer tier and product ownership

Queue level granularity: Prioritization rules apply to all queues which admins require

Overflow based on CSR availability

Availability driven Overflow:

Conversations immediately overflow when no eligible agents are available, while still respecting all configured assignment logic—prioritization rules, skill matching, custom assignment strategies, and capacity.

Queue level granularity:

Admins can enable this behavior per queue, allowing selective adoption

Conversation orchestration (Preview) > **Edit playbook**

Overflow based on support rep availability Preview AI Copilot Gen AI

Conversation orchestration is an AI-powered capability that manages the entire conversation lifecycle by continuously evaluating triggers and applying business logic in real time. AI generated content may be inaccurate. [Learn more](#)

Playbook name
Overflow based on support rep availability

Queues [Edit](#)
All Voice queues

▼ **Add variables (optional)**

Add context variables to create conditional logic in your playbook by specifying different actions for different variable values. Ensure that the context variables you use are populated for the workstreams associated with your selected queue.

+ Add customer attribute ▼

AreaCode ×
Optionally describe how this appears in playbook (e.g. AreaCode)

Build playbook

Update below prompt with correct variables & values. This playbook will be executed when the trigger event shown on this page occurs.

> **Tips for this playbook**

Build your playbook step by step. Select values from the dropdowns to define the playbook. You can also add variables to create more advanced conditions. Saving the playbook will create it in a draft state and publishing it will make it live.

Get the areacode × from ContextVariable.AreaCode.

For customers where AreaCode × is 01, if no support reps are available immediately Transfer to another queue ▼ <CDS System> ▼

For customers where AreaCode × is 02, if no support reps are available immediately Offer direct callback ▼

For customers where AreaCode × is 03, if no support reps are available immediately End the conversation ▼

Demo Scenario – Overflow based on CSR availability

Business Requirement

When no **support reps can be immediately assigned**, Contoso Bank should not treat every caller the same.

- Use **caller context (AreaCode)** to decide the best overflow outcome
- Some regions need an **immediate warm transfer** to a backup specialist.
 - Some callers should **receive a direct callback** instead of waiting.
 - Other areas should **end with a graceful message**, not a silent hold.

Solving it via Overflow

Customer Area Code	Action
Area Code is 01	Transfer to BackupQueue
Area Code is 02	Offer direct callback
Area Code is 03	End the call

Runtime Decision Making: Conversation Orchestration evaluates AreaCode at overflow time and executes the mapped action.

Queue level reuse: The same playbook runs automatically across every configured queue, every time.

Transfer to Queue

If customer is transferred to another queue, increase the priority with or without context variables

Update priority based on transfer to queue

Preview

AI Copilot

Gen AI

Conversation orchestration is an AI-powered capability that manages the entire conversation lifecycle by continuously evaluating triggers and applying business logic in real time. AI generated content may be inaccurate.

Playbook name

Update priority based on transfer to queue

Queues [Edit](#)

All Voice queues

Add variables (optional)

> Add context variables to create conditional logic in your playbook by specifying different actions for different variable values. Ensure that the context variables you use are populated for the workstreams associated with the queue. Only context variables that are supported.

Build playbook

Trigger event

Update below prompt with correct variables & values. This playbook will be executed when the trigger event shown on this page occurs.

Conversation is transferred to another queue

> Tips for this playbook

Build your playbook step by step. Select values from the dropdowns to define the playbook. You can also add variables to create more advanced conditions. Saving the playbook will create it in a draft state and publish it to the selected queues.

For all customers, Priority Action Enter priority score, when transferred to the selected queue.

Playbook preview

For all customers, priority_action priority_score, when transferred to the selected queue.

03

Quality Without Blind Spots

Real-time and post-interaction AI-powered quality management

***The Problem:** It's hard to determine quality in conversations and across all agents, either in real time or after conversations end. And it's hard to train agents to improve.*

***The Solution:** Quality Assurance Agent with Coaching*



Dynamics 365 Contact Center

Quality Assurance Agent

Real Time and Closed Conversations

Increase real-time service quality with AI-led evaluations and automated scoring

Identify **empathy, compliance, and effectiveness** in every interaction with both AI agents and reps

Notify supervisors about quality dips in realtime

Empower **supervisors with insights** to drive continuous improvement

HITL

GA

Real-Time Analysis – Quality metric dashboards for all open and recently completed conversations let your supervisors deliver efficient support

[illegible]

Conversation View – Drill down into individual conversations for detailed analysis that can assist coaching, including summarized Copilot insights

Quality and Coaching

Quality Assurance Agent

AI-driven conversation quality scoring at scale — continuous evaluation of every conversation, with coaching surfaced in context before your supervisors need to go looking.

 Automated AI quality scoring

 In-context coaching workflow

 Trend & pattern analysis

 Proactive coaching nudges to agents

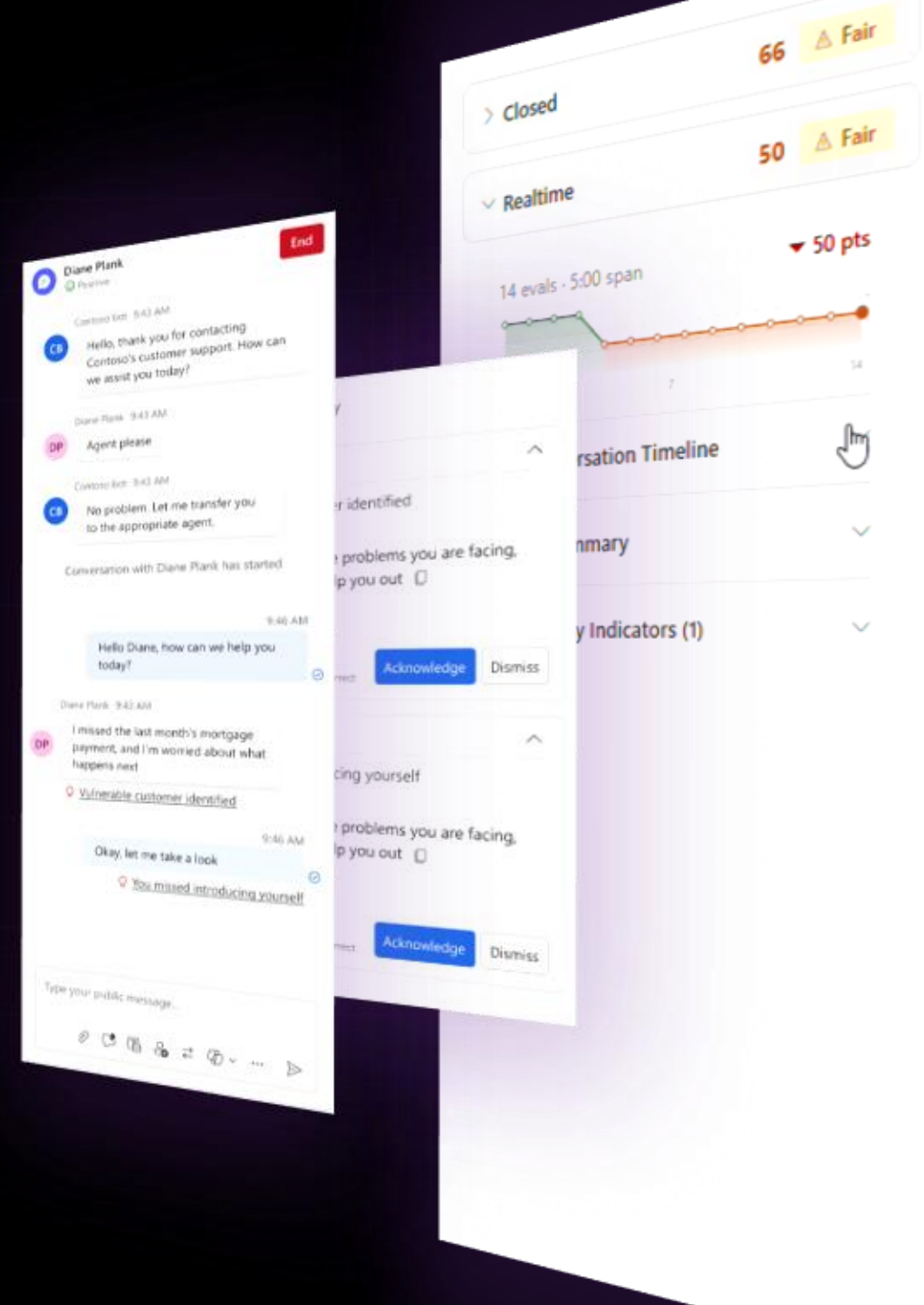
Increase service quality with AI-led evaluations and automated scoring and coaching

Real-time coaching nudges (e.g., “Try rephrasing for empathy”, “Provide clearer next steps”, “You should not provide financial advice”, etc))

Notify supervisors about quality dips in real-time

Empower supervisors with insights to drive continuous improvement

Every conversation scored across configurable rubrics — resolution, tone, compliance, etc.





Demo

Real-time and post-interaction AI-powered quality management

04

Beyond Recordings: Seeing Every Agent Interaction

Session replay, agent assist, and operational visibility

The Problem: I really want to “see” what agents did in a session, not just hear or read.

The Solution: Screen recording



Demo

Session replay, agent assist, and operational visibility

05

From Static Reports to Live Operational Insights

Real-time analytics that drive action, not just reporting

The Problem: Reporting is rigid and not real-time.

The Solution: Real Time Streaming Analytics

All New Real-time Streaming Analytics

Supervisor Application

Continuous, AI-driven monitoring of contact center health — queue performance, SLA burn-down, agent workload, and anomalies — so nothing slips past your supervisor.

-  Live queue & KPI monitoring
-  Enterprise security model adherent – BUs, privileges
-  AI Agent & CSR performance signals

Track contact center metrics in real time through wallboards & customizable dashboards.

- **Real-time wallboards** to monitor critical KPIs that change second by second
- **Drill-down analytics** with queue-level and representative-level views
- **Immediate corrective actions** to address declining performance
- **Customizable dashboards** with configurable thresholds, color coding, and visuals
- **Flexible metric framework** to modify existing KPIs or create custom metrics and wallboards

[RTA Dashboard — Sandbox](#)



Wallboard

5 second refresh

Wallboard

For Last 15 min | Channel: All | BU: All | Queues: All

Exit Full Screen

8:16 15 PM
Local time

Active conversations

Live



With Representative
7 ▲ 12%

With virtual agents
4 ▼ 5%

Online Representatives

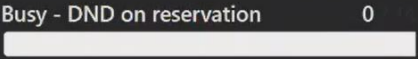
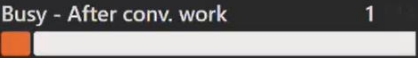
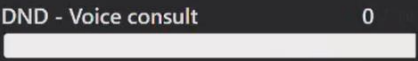
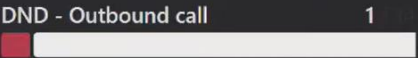
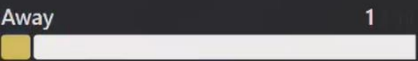
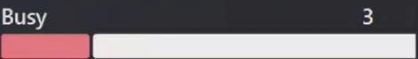
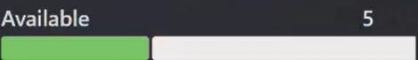
Live

13

▼ -3s

Representative Presence

Live



Critical

Live

Conversations in queue

Live

Critical

3

Conversations pending assignment



▲ +0

Current Longest Wait time

Live

04:32

mm:ss



▼ -13s

Service level



216/225 answered within 20 sec

▼ -1%

Abandon rate

Critical



5/79 customer abandons

▼ -0.5%

Avg. Speed to answer

00:21

mm:ss



▼ -4s

Avg. Handle time (AHT)

At Risk

07:00

mm:ss



▼ -13s

LIVE

Consider activating overflow routing for the next 2 hours

•

Chat resolution rate improved to 87.3% — best performance this quarter

•

12 a

06

Simplifying Contact Center Administration

Best practices for faster setup, configuration, and change management

The Problem: Setting up the Contact Center is not so intuitive.

The Solution: Service Operations Agent

// MEET YOUR AGENT

Service Operations Agent

One agent that guides you — designing, simulating,
and launching your contact center end to end.

- ✔ Guides you end to end
- ✔ Builds from prompts, docs or transcripts
- ✔ Simulates conversations to validate
- ✔ Ships live with confidence



06

Turning Service into Engagement

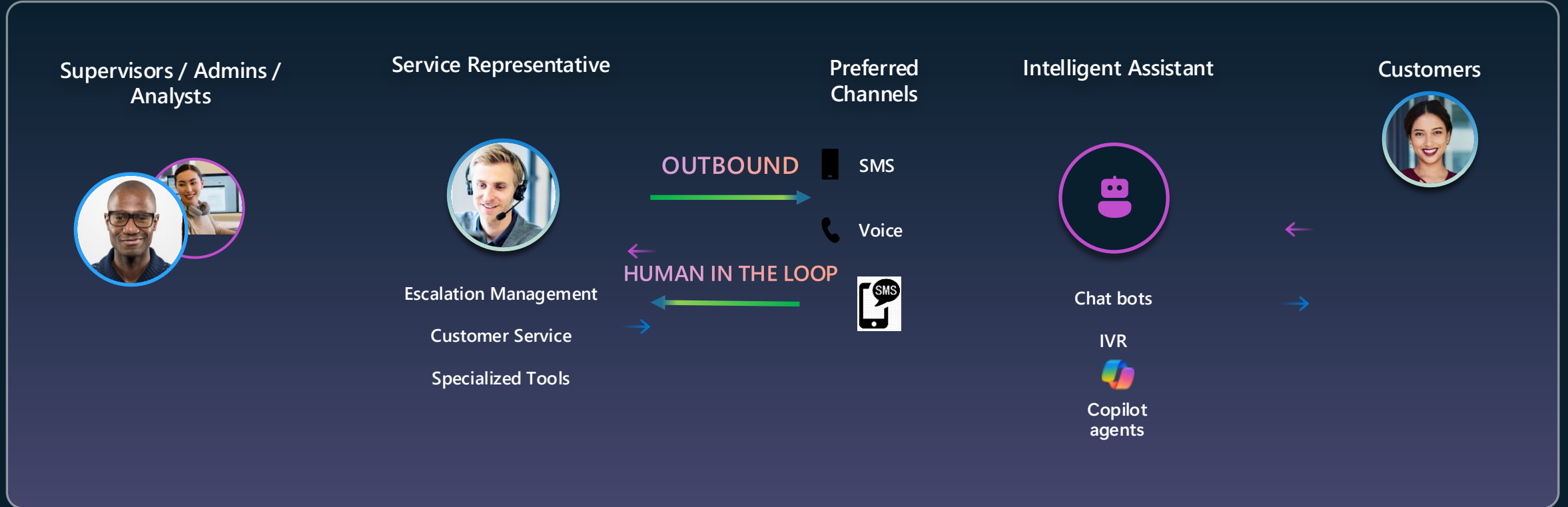
Limited tools for proactive outreach and outbound customer engagement

***The Problem:** I need to proactively and automatically contact my customers through AI agents, text messages, outbound dial for various reasons like appointment confirmations, package deliveries.*

***The Solution:** Proactive Engagement*



Dynamics 365 Contact Center Proactive Engagement



Hi, Dianne. You have an upcoming delivery scheduled tomorrow 11/6 at 1:30 PM. We require an authorized adult to receive the delivery. Please confirm your availability.

I should be home on Friday. Can I schedule for then?

Hi, Dianne. You're speaking with Mike.

Can I get connected with a CSR?



Demo

Limited tools for proactive outreach and outbound customer engagement

Key Takeaways

01

Kill the IVR Bottleneck

Eliminating rigid flows and reducing voice latency

02

Route Smarter, Not Harder

Prioritizing conversations dynamically and managing overflow intelligently

03

Quality at Scale

Real-time and post-interaction AI-powered quality management

04

See What Agents Actually Do

Session replay, agent assist, and operational visibility

05

Analytics in the Moment

Real-time analytics that drive action, not just reporting

06

No-Code, No Headaches

Best practices for faster setup, configuration, and change management

07

Don't Wait for Customers to Call

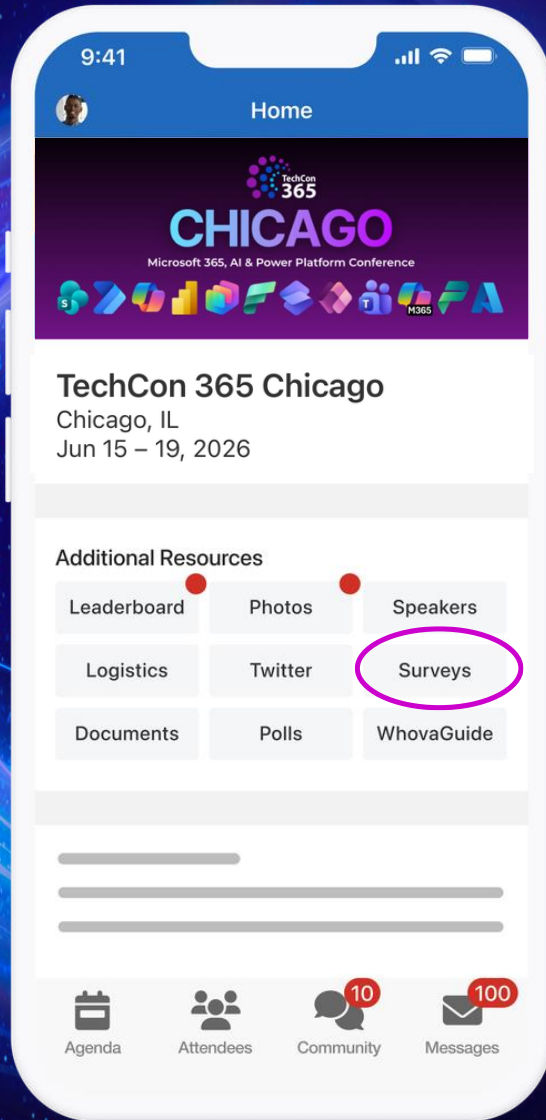
Proactive outreach and customer engagement strategies

How was the session?

Search for *Whova* in the App Store or Google Play



Fill out the Session Surveys in the TechCon 365 Chicago Event App and be eligible to **WIN PRIZES!**



Thank you

Questions?

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