How to Optimize Microsoft Teams With Cloud Contact Center Platforms

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Initiatives: Customer Service and Support Technology and 1 more

Microsoft Teams, an established enterprise collaboration platform, lacks contact center capabilities largely for key use cases. This note will help application leaders evaluate how and when to collaborate with Microsoft Teams partners for contact center functionality in an increasingly distributed workplace.

Overview

Impacts

- Contact center advisers working remotely during the pandemic have experienced better quality connections to meetings using platforms like Microsoft Teams than using contact center platforms.

- Multiple contact center vendors have established various levels of integration with Microsoft Teams, but many application leaders are not aware of the different vendors and the levels of integration.

- The emergence of Microsoft AppSource as a marketplace on which customers can get connectors for Microsoft Teams has been key to enabling effortless integration with customer service applications.

Recommendations

For application leaders of customer service and support technology who are considering incorporating Microsoft Teams into their contact center platforms:

- Pinpoint the use cases for customer service that will benefit from using Microsoft Teams by engaging with digital workplace leaders to determine optimum interoperability with the contact center platform.

- Shortlist contact center as a service (CCaaS) vendors by cataloging capabilities that are currently provided by them, and also those on their short-/midterm roadmap with Microsoft Teams.

- Catalog dependencies and limitations of contact center partner applications and connectors for Microsoft Teams by familiarizing yourself with the relevant marketplaces for customer service.
Strategic Planning Assumptions

- By 2023, crowdsourcing, work at home (WAH), telecommuting and the gig economy will account for 35% of the customer service workforce — up from 5% in 2017 — driven by changing labor practices and business continuity planning.

- By 2022, 15% of organizations will rely solely on cloud office suites for their business communications needs, up from less than 2% in 2019.

Analysis

The COVID-19 pandemic has forced companies to adopt a remote work culture to maintain the new social distancing norms as they try to maintain business as usual and assure business continuity. Cloud office applications (e.g., Microsoft Office 365) is a foundational framework adopted across organizations and employees can easily access them irrespective of their work location. Microsoft Teams has become a go-to solution among Office 365 customers, especially for application leaders in search of an all-in-one environment for collaboration and communication.

As Teams adoption increases, and in particular its use for voice and telephony services, so too does the demand for integration into contact center and customer support capabilities. As Teams telephony is gaining an increased interest among Gartner clients, application leaders are compelled to find integrated contact center partner solutions for reasons such as better call quality, cost optimization, deeper employee collaboration and unification of tools.

Since Microsoft's announcement of graph cloud APIs, multiple contact center vendors have incorporated and built their own customer service platform based on that API (see Figure 1). As an added layer, these vendors have compliance call/screen/meeting recording and attendant console functionality for Teams to offer, as this is a major shortcoming with Teams currently.

Figure 1. How to Optimize Microsoft Teams With a Cloud Contact Center Platform
This research note will focus on how and when to make effective use of Microsoft Teams for customer service. It will explain how Teams can be optimized as a technology platform to enhance collaboration in customer service, and as a media platform for managing customer service inquiries across an increasingly distributed work environment (see also “A Collaborative Approach to Customer Service Will Drive Higher Customer Satisfaction”).

**Figure 2. Impacts and Top Recommendations for Application Leaders**
Impacts and Top Recommendations for Application Leaders

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Source: Gartner

Note: CCaaS = contact center as a service

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Impacts and Recommendations

Contact Center Advisers Working Remotely During the Pandemic Have Experienced Better Quality Connections to Meetings Using Platforms Like Microsoft Teams Than Using Contact Center Platforms

The global spread of COVID-19 has required organizations to move a large percentage of their employees to a work-at-home environment. This has been particularly challenging for customer service advisers for numerous reasons. Understandably, the biggest challenge for remote customer service advisers is creating for themselves a suitable working environment. For their managers, there are environmental and people challenges such as onboarding staff and keeping them trained and engaged that will drive the success or failure of a work-at-home customer service center (see “Delivering Customer Service During COVID-19: 3 Steps to Implement Business Continuity in the Contact Center”).

The majority of organizations with which we have engaged during the pandemic have expressed a technical challenge — that customer service advisers working at home experience better voice connections to meetings solutions such as Microsoft Teams, Webex and Zoom than to premises-based contact center platforms.

The superior performance of meetings solutions over contact center platforms can be explained in the design of the cloud platforms. Whereas most customer service organizations today are using technology designed to operate in an enterprise local and wide-area network (customer premises equipment), meetings solutions are designed to connect distributed workers over internet
connections. The same can be said for cloud contact center service (CCaaS), customer engagement center (CEC) or other specialist providers, for which clients have also indicated better connections and quality using software applications with embedded WebRTC applications.

There is a strategic opportunity for organizations to gauge whether Microsoft Teams can be leveraged as the enterprisewide platform to support collaboration and manage media for customer service interactions. This is irrespective of whether employees are working in a corporate office or remotely.

We have identified the following use cases for Microsoft Teams in customer service environments (see Table 1).

**Table 1: Use Cases for Microsoft Teams in CS Environments**

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Desk</td>
<td>In cases where employees are users of Teams, contact center solutions can be particularly effective. For instance, employees can easily share their screen with agents, who can then take control and show users how to resolve a problem.</td>
</tr>
<tr>
<td>Outbound Services</td>
<td>In cases where the individuals being reached are Teams users, they can be reached via a Teams “calling.” This “session” can include video, chat and screen sharing. A session can also keep a chat open for an extended period, which can be useful for certain types of interactions. Teams-based outbound calling can be a useful option when the sales or support organization uses Microsoft tools such as Microsoft Dynamics.</td>
</tr>
<tr>
<td>Inbound Services</td>
<td>In cases where the request is from a Teams user, the caller can initiate the request via different media, including voice, video or chat. When initiated via text chat, the session can enable a chatbot to assist clients and then subsequently direct them to agents as needed on the media best suited. Websites that have a chat option can also leverage the chat interface to Teams-based agents.</td>
</tr>
<tr>
<td>Contact Center</td>
<td>Microsoft doesn’t have its own contact center platform as part of Teams. However, following the release of it’s graph cloud APIs, several specialized contact center providers have integrated with Microsoft Teams with demonstrable customer service capabilities.</td>
</tr>
</tbody>
</table>

Source: Gartner (July 2020)

**Recommendations:**
Multiple Contact Center Vendors Have Established Various Levels of Integration With Microsoft Teams, but Many Application Leaders Are Not Aware of the Different Vendors and the Levels of Integration.

There is a common architecture approach for connecting third-party contact center services to Microsoft Teams using “Direct Routing,” as described in Figure 3 below.

**Figure 3: Common Architecture for Contact Center Partner Integration Using Microsoft Direct Routing**

**Common Architecture for Contact Center Partner Integration Using Microsoft Direct Routing**

Phone calls are intercepted at the session border controller and rerouted to the CCaaS provider for call treatment in interactive voice response (IVR), adding services such as call recording or analytics. Using presence and directory information from federation with the Microsoft Teams API,
the contact center application initiates a SIP INVITE message to the employee using Microsoft Teams to join a call with the customer.

Perhaps in tackling the current situation, and factoring in Microsoft Teams’ not so promising roadmap for contact centers, application leaders are left with two options:

1. Basic Teams integration with an existing contact center vendor: This type of integration extends basic use cases such as calling between platforms, directory sync between Active Directory and contact center platform, search for users on Teams, view availability/status of users on Teams, and establish and transfer calls between applications to add SMEs. Vendors such as Genesys and NICEinContact have started progressing their integration with Teams by different approaches using telephony/SIP integration and different APIs made available from Microsoft under a certification program.

2. Native contact center integration within Teams: This type of integration enables single screen/application experience for customer service agents embedded within Teams. The use cases for such native integration could be to fully utilize the Microsoft ecosystem, or full omnichannel contact center functionality delivered within Teams client. This will significantly improve the service provided to the client and the productivity of the agents.

A handful of vendors such as Anywhere365 and Luware extend the native integration within Teams with different sets of features and functionalities. Vendors such as Genesys and NICEinContact have this in their roadmap already, with general availability expected by the end of 2020 or later.

- **Anywhere365**: Anywhere365 is one of a handful of vendors that offers native integration within Teams with full omnichannel contact center functionalities, including voice, email, Whatsapp, chat and social media. The solution is fully powered by Microsoft’s ecosystem including Teams, Azure Cognitive Services, Power BI, SharePoint Online, Dynamics365, and others. Anywhere365 offers Microsoft Power BI tools combined with advanced Anywhere365 data for drill-down analysis and actionable business intelligence. The SharePoint Template is used to manage Anywhere365 directly for configuration services, which is quick and easy for supervisors/Managers. One of the advantages with Anywhere365 is that native integration within Teams is currently available to deploy and the vendor carries a strong roadmap to enhance it further.

- **Genesys**: Genesys has launched the contact center integration for Teams with two main areas of focus: (1) telephony and call flow integration, and (2) application-level integration. The roadmap for Genesys holds three phases. In Phase 1, the vendor will offer the functionalities on user search, status/availability of users on Teams, and establish and transfer calls between platforms, all of which are expected in 2H20. In Phase 2, extended voice use cases such as IVR and queuing and some collaboration use cases are expected later in 2020. In Phase 3, application-level integration will be carried out within Teams and an embedded user experience is expected to be delivered some time in 2021.
Luware: The Luware Stratus cloud platform extends the benefit of utilizing single applications for internal and customer communications within Teams for contact center, advanced routing and attendant console functionalities. It offers universal routing solutions for chat, audio and video currently delivered within Teams application. Luware offers real-time dashboards, reports and KPIs for valuable insights using Power BI and Microsoft Graph APIs. The various integrations within Teams for CRM or ERP systems enable customer service agents with relevant information regarding the customer history. Luware has set a target of offering native Microsoft Cloud applications, which enable customers to obtain their advanced contact center solutions entirely through the Microsoft Cloud using a program called Nimbus. This is set to launch by the end of 2020. Currently, Luware has an application available on Microsoft AppSource named Stratus which can be leveraged for the single application use case.

NICE inContact: The CXone platform from NICE inContact currently enables basic voice routing to the Microsoft Teams client, unified directory and synchronized presence with Teams, and call transfer between applications so that agents can easily connect with SMEs to achieve faster resolution times. NICE inContact has a roadmap for providing embedded controls within Teams by 4Q20 and aims to extend the voice, chat and video channels in the first phase of the launch. NICE inContact recently introduced its native application-level integration with Microsoft Dynamics, and will do the same with Teams to ensure tight integration with the Microsoft ecosystem.

Recommendations:

- Assess whether basic integration is enough, or whether an application-level native integration is what your organization’s use case requires by evaluating the roadmap for contact center and collaboration tools.
- Evaluate the detailed features and functionality along with the roadmap for individual vendors by engaging with vendors in the selection process and carrying out a POC, if possible.
- Recognize that some of the Teams contact center architecture approaches are new to market and, in such cases, the current total number of deployments is limited.

The Emergence of Microsoft AppSource as a Marketplace on Which Connectors for Microsoft Teams Are Available Will Be Key to Enabling Effortless Integration With Customer Service Applications

Future application experiences will be built from composable business capabilities that can quickly enable new business scenarios (see “2020 Strategic Roadmap for the Future of Applications”). The vision that customer service leaders will be able to select the most appropriate and relevant customer service applications from the Microsoft AppSource marketplace and rapidly implement them to their instance of Microsoft Teams is almost upon us. Giving customer service advisers the ability to manage the customer experience through the same Microsoft Teams platform they use to...
engage and collaborate with colleagues is a key technology enabler for the collaborative customer service organization (see “A Collaborative Approach to Customer Service Will Drive Higher Customer Satisfaction”).

The marketplace approach is already well-established for integration between contact center platforms and CRM customer engagement center (CEC) applications. A mature example of this in the customer service space is Salesforce AppExchange. Organizations that select Salesforce as their strategic CEC application can then view the most highly rated contact center applications on the AppExchange. This includes the ability to drill into reviews by industry peers for use in their contact center platform selection criteria.

The Microsoft AppSource marketplace has over 500 applications for the Teams platform. By contrast, there are 46 applications related to contact center platforms that offer integration with either Microsoft Dynamics CRM or Microsoft Teams, or in some cases both. There are fewer peer ratings for AppSource in relation to contact center integrations, but we would expect this to improve as Microsoft partners actively campaign for client ratings. Importantly, organizations should be able to view the rating for integration with Teams separately from the integration with Dynamics. For an organization looking to use a CEC application other than Dynamics, the rating is only going to be relevant to Microsoft Teams integration.

Another source for marketplace applications is to look at the contact center provider for evidence of connectors for Microsoft Teams. Some contact center providers are more mature in their approach to marketplaces (see Genesys AppFoundry and NICE inContact CXexchange). However, none are currently entertaining peer ratings for partner applications. More information can be sourced within their customer communities prior to POC (see “How to Choose Your Best-Fit Vendor for Contact Center as a Service”).

Recommendations:

- Catalog dependencies and limitations of contact center partner applications and connectors for Microsoft Teams by familiarizing yourself with the relevant marketplaces for customer service applications — both Microsoft AppSource and those marketplaces of CCaaS providers.

- Use customer and peer communities for insights into the strengths and challenges of different providers, where there is a lack of application ratings.

- Take the opportunity to provide your own review of the marketplace, thereby fueling the community of reference.

Note: The vendors mentioned in this document are representative examples. This document does not provide a comprehensive list of vendors.

Acronym Key and Glossary Terms
For those with Office 365 E1 and E3 licenses, Microsoft Teams requires the “Direct Routing” feature to be enabled for the integration, which comes as part of the “Phone System” add-on. For those with E5 licenses, it is already included within the offering.

Recommended by the Authors

Magic Quadrant for Contact Center as a Service, North America
Critical Capabilities for Contact Center as a Service
Assess Whether Microsoft Teams Meets Your Telephony Needs
Adoption of Meeting and Workstream Collaboration Solutions Spikes in Response to Coronavirus (COVID-19) Pandemic
How to Choose Your Best-Fit Vendor for Contact Center as a Service
A Collaborative Approach to Customer Service Will Drive Higher Customer Satisfaction
2020 Strategic Roadmap for the Future of Applications
Delivering Customer Service During COVID-19: 3 Steps to Implement Business Continuity in the Contact Center

Recommended For You

Revitalize IT Compensation Practices to Compete for Digital Talent
Define Clear Business Goals and Metrics to Measure and Demonstrate the Business Value of Strategy Execution
Diversity & Inclusion as a Strategic Partner of HR: An Interview with Ameren’s CHRO and CDO
Agile Product Management Teams Require Combined Generalist and Specialist Skills to Succeed