



Service Definition Document

TTEC Digital Microsoft Dynamics 365 Contact
Centre



Table of Contents

Table of Contents	2
1. Introduction	4
1.1. Company Overview	4
1.2. Value Proposition.....	5
1.3. What the Service Provides	8
1.4. Overview of the G-Cloud Service	20
1.5. Associated Services.....	21
2. Data Protection	24
2.1. Information Assurance/Security.....	24
2.2. Back-Up and Restore	26
2.3. Data Processing and Storage Location	27
2.4. Data Restoration / Service Migration	27
2.5. Business Continuity Statement / Plan.....	28
2.6. Privacy by Design	32
3. Using The Service.....	33
3.1. Ordering and Invoicing Process.....	33
3.2. Availability of Trial Service	33
3.3. On-Boarding	33
3.4. API	34
3.5. International SMS.....	35
3.6. Off-Boarding	36



3.7. Training	37
3.8. Implementation Plan	38
3.9. Service Management	39
3.10. Service Constraints	40
3.11. Service Levels	41
3.12. Outage and Maintenance Management	41
3.13. Financial Recompense Model for not Meeting Service Levels...	41
4. Provision of the Service	43
4.1. Customer Responsibilities	43
4.2. Technical Requirements and Client-Side Requirements	45
4.3. Browsers	46
4.4. Outcomes/Deliverables	46
4.5. Development Life Cycle of the Solution	47
4.6. After Sales Account Management	48
4.7. Termination Process	49
5. Other Messaging Services	50
6. Environmental Action and Social Value	52
6.1. Environmental Action	52
6.2. Social Value	53
7. Our Experience	55
7.1. Case Study 1	55
7.2. Case Study 2	56



1. Introduction

1.1. Company Overview

G-Cloud 15 Legal Entity and Ownership

TTEC Consulting (UK) Limited, a TTEC Digital Company, is the legal entity for G-Cloud 15. TTEC Consulting (UK) Limited is ultimately owned by TTEC Holdings, Inc a listed company publicly traded on the NASDAQ Stock Exchange.

Parent Company Overview: TTEC Holdings, Inc.

TTEC Holdings, Inc. (NASDAQ:TTEC) is a leading global customer experience (CX) technology and services innovator for AI-enabled digital CX solutions. Serving iconic and disruptive brands, TTEC's outcome-based solutions span the entire enterprise, touch every virtual interaction channel, and improve each step of the customer journey.

TTEC operates through two business segments:

- TTEC Digital: Designs, builds, and operates omnichannel contact centre technology, CRM, AI and analytics solutions.
- TTEC Engage: Delivers AI-enabled customer engagement, customer acquisition and growth, tech support, back office, and fraud prevention services.

TTEC Digital: Customer Experience Technology and Consulting Services

At TTEC Digital, we offer customer experience (CX) consulting, software and technology services at the intersection of contact centre, CRM, AI and analytics. We call this intersection the point of conversation and we apply our expertise here to drive shareholder value for our clients in the form of revenue growth, cost reduction, and productivity improvement.

In today's digital landscape, customer conversations and the contact centre technologies that support them are inseparable. With decades of innovation across leading contact centre



platforms and deep expertise in CX strategy, data, and AI, TTEC Digital enables organisations to maximise their technology investments and create exceptional customer experiences.

Microsoft Credentials

TTEC Digital is recognised among top Microsoft partners worldwide for our commitment to innovation and delivering outstanding customer solutions. In addition to achieving 2025 Microsoft Dynamics 365 Service Partner of the Year, TTEC Digital has also been named to Microsoft's Inner Circle for AI Business Solutions for ten years in a row. Our deep expertise spans the full Microsoft ecosystem, including their Cloud and AI Platform (Azure, Fabric, Analytics) and AI Business Solutions portfolio (Dynamics 365, Copilot Studio, Power Platform, Teams), enabling us to deliver faster, smarter outcomes.

1.2. Value Proposition

TTEC Digital delivers a robust Microsoft Dynamics 365 Contact Centre solution that empowers public sector organisations to modernise citizen engagement through secure, scalable, and AI-enhanced omnichannel experiences. By integrating voice, chat, SMS, and social channels with Dynamics 365 and Microsoft Teams, TTEC enables seamless customer journeys, intelligent routing, and real-time insights across every interaction. Their Adaptive Iterative Methodology (AIM) ensures structured delivery, governance, and measurable outcomes, while SurroundCX™ Managed Services and Centres of Excellence provide ongoing optimisation and support. With deep expertise in AI, sentiment analysis, and Copilot enablement, TTEC helps clients unlock productivity and service quality, all while meeting UK public sector standards for compliance, data protection, and Net Zero commitments.



Contact Centre Technology

Your contact centre serves as the main point of interaction between your business and your customers. Effective technology, empowered agents, and clear processes are critical to converting these customer interactions into key business outcomes like customer satisfaction, loyalty and sales growth.

Artificial Intelligence

Along with our technology partners, TTEC Digital has pioneered AI solutions in the contact centre for more than a decade. That means we are ready to help you solve the tough questions, because we have solved them before. If AI is on your list, our team of CX experts can help you assess your AI roadmap, design an AI strategy, and deploy the right AI toolset to enhance your contact centre's productivity.

Customer Relationship Management

Your customer interactions take many forms. From sales to service to every touchpoint in between, a cohesive customer experience is the key to earning repeat business and lifetime loyalty. With CRM at the centre, TTEC Digital can help you execute a holistic CX strategy that strengthens your connection with customers and drives business growth.

CX Strategy and Design

Customer experience (CX) is evolving, but a significant gap remains between what brands think they are delivering and what customers actually experience. Despite investing in new CX technologies, many organisations still face declining customer satisfaction.

At TTEC Digital, we recognise that technology alone cannot bridge the experience gap; it demands a comprehensive strategy. Our CX designers and strategists focus on integrating



effective design and operational strategies first, ensuring they deliver the results your brand and customers deserve.

Data and Analytics

Harnessing the power of your data is critical to differentiate your customer experience. TTEC Digital's data and analytics solutions gather customer and journey data from across your organisation, transforming it into insights that strengthen your connection with customers and introduce valuable efficiencies to your contact centre operations.

Managed Services

The world is moving to a multi-cloud, multi-platform, multi-AI landscape. It is a complicated environment, and your customer experience depends on all aspects working perfectly in harmony.

So, how do you monitor the clouds and make sure apps are running as expected? How do you know which new platform features are best for your business? And how do you deploy these features safely and effectively?

You need to spend your time innovating and differentiating, not babysitting your CX technology. SurroundCX™ Managed Services can help.

Software and Digital Engineering

Built on the legacy expertise of Avtex, Serendebyte, Voicefoundry, Aria, and others, our comprehensive portfolio of IP solutions is designed to help you effortlessly deploy new features and customer experience capabilities into your contact centre environment.



1.3. What the Service Provides

TTEC Digital provides a comprehensive Microsoft Dynamics 365 Contact Centre Platform. Microsoft Dynamics 365 Contact Centre offers an extensive set of capabilities designed to deliver a unified, intelligent, and secure customer engagement platform. These capabilities span omnichannel communication, AI-driven automation, advanced analytics, and seamless integration with Microsoft's ecosystem, ensuring organisations can deliver exceptional experiences while maintaining compliance and scalability.

Contact Centre Capabilities Include:

- Omnichannel engagement across voice, chat, SMS, and social channels.
- Unified agent desktop with contextual customer views.
- Intelligent routing and work distribution engine.
- Conversational IVR and virtual agents powered by Copilot Studio.
- Real-time transcription and sentiment analysis.
- AI-driven insights, topic clustering, and predictive analytics.
- Integrated case management and knowledge base.
- Supervisor dashboards with real-time and historical reporting.
- Embedded collaboration via Microsoft Teams.
- Secure, cloud-native architecture with compliance for GDPR and Cyber Essentials Plus.

Workforce Management (WFM) Capabilities include:

- Forecasting and scheduling powered by machine learning to predict demand across all channels.
- Intraday management tools for real-time adherence, schedule optimisation, and live re-forecasting.
- Automated shift generation with skills-based scheduling and compliance-aware work rules.
- Agent self-service portal for shift bidding, time-off requests, and schedule visibility.



- Capacity planning models to balance service levels, cost, and staffing efficiency.

Quality Management (QM) Capabilities include:

- Automated quality evaluations using AI to assess interactions across channels.
- Configurable scorecards aligned to organisational KPIs and compliance requirements.
- Supervisor review workflows, coaching plans, and performance insights.
- Interaction tagging and compliance alerting to identify high-risk or vulnerable customer scenarios.
- Holistic agent performance dashboards combining QA, CSAT, sentiment, and operational metrics.

Autonomous AI Agents:

Customer Intent Agent

- Automatically identifies and classifies customer intents in real time across all channels.
- Routes interactions based on intent, urgency, sentiment, and customer profile.
- Provides intent trend dashboards that support service improvement, optimisation, and channel automation.
- Generates recommendations for knowledge article creation, workflow automation, or policy updates.

Customer Knowledge Management Agent

- Automatically creates, updates, and maintains knowledge articles based on real call/chat data.
- Continuously monitors interactions to detect knowledge gaps and propose new content.
- Ensures knowledge consistency across channels, including agent desktop, IVR/IVA, and self-service portals.
- Uses generative AI to produce article drafts, summaries, and structured responses aligned to compliance standards.



Quality Evaluation Agent

- Performs AI-driven quality scoring across 100% of interactions (vs. manual sampling).
- Identifies coaching opportunities by linking behaviours to outcomes (AHT, FCR, sentiment, CSAT).
- Provides automated compliance detection for regulated environments (vulnerability checks, disclosures, mandatory statements).
- Generates targeted coaching recommendations and highlights high-performing behaviours.

Additional Autonomous Agents (Optional Integration):

- Agent Assist Copilot providing real-time guidance, suggested responses, and automated wrap-up notes.
- Post-Interaction Summary Agent generating case notes, next steps, and system updates.
- Operational Insights Agent forecasting demand anomalies, channel shifts, or service risks.
- Process Automation Agent triggering back-office workflows based on conversation context or detected intents.

The Microsoft Dynamics 365 Contact Centre solution delivers a modern, AI-powered platform designed to transform citizen engagement through secure, scalable, and omnichannel experiences. By combining intelligent routing, conversational IVR, real-time analytics, and integrated case management, this service empowers public sector organisations to improve customer satisfaction, optimise operational efficiency, and accelerate digital transformation. The following list outlines the core features and associated benefits that underpin this capability:

- Omnichannel Customer Service with Case Management and Digital Delivery: Enables seamless engagement across voice, chat, email, and social channels, improving accessibility and responsiveness.



- Intelligent Intent/Skill-Based Routing for Optimised Agent Engagement: Matches interactions to the most qualified agent, reducing handling time and improving first-contact resolution.
- Conversational IVR Powered by Copilot Studio: Automates routine queries and enhances self-service, reducing call volumes and improving customer experience.
- Live Transcription with Real-Time Sentiment Analysis: Provides supervisors and agents with actionable insights during interactions, enabling proactive support.
- AI-Driven Topic Clustering and Suggestions: Improves agent productivity by surfacing relevant knowledge articles and suggested responses in real time.
- Actionable Call Insights for Performance Improvement: Delivers analytics on call trends, agent performance, and customer sentiment to drive continuous improvement.
- Automated Contact Identification and Context Enrichment: Reduces manual effort by pre-populating customer details and history, enabling faster resolution.
- End-to-End Lifecycle Delivery, Deployment, and Support: Ensures structured implementation and ongoing optimisation through proven methodologies and governance.
- Microsoft SaaS Platform Enabling Scalable CX Transformation: Provides enterprise-grade security, compliance, and scalability to meet evolving public sector needs.
- CX Strategy and Roadmap Aligned to Digital Innovation Goals: Supports long-term transformation through strategic planning and alignment with Microsoft's product roadmap.

This platform is designed to offer a seamless and integrated omnichannel experience for customer service and engagement. Some of the key capabilities are:

Omnichannel Customer Interaction:

- TTEC Digital's platform enables organisations to engage with customers across various channels, including phone, email, chat, social media, and more.



- Agents can handle interactions seamlessly, ensuring consistent and personalised experiences for customers.
- Agents benefit from a modern, high-productivity interface with session management, contextual customer views, and real-time notifications.

Unified Agent Desktop

- The platform aggregates customer data from different touchpoints, creating a holistic view of each customer.
- Agents have access to relevant information, allowing them to provide informed, empathetic and efficient support.

Intelligent Routing and AI-Driven Automation

- AI-powered intelligent routing assigns interactions based on agent availability, skill, and customer context; ensuring optimal engagement outcomes.
- Sentiment analysis, predictive analytics, and automated workflows reduce manual effort and improve resolution speed.
- Virtual Agents handle routine queries and escalate seamlessly to live agents when needed.
- Conversation Insights, Agent Insights, and Voice Analytics provide actionable data to supervisors and business leaders.
- Automation streamlines processes, reducing manual effort and enhancing efficiency.

Integration with Microsoft Ecosystem:

- The platform integrates with Microsoft Dynamics 365, Microsoft Teams, and Azure services.
- This seamless integration ensures a unified experience for both agents and customers.

Secure and Scalable Solution:

- TTEC Digital's solution prioritises security and compliance.



- It scales to meet the needs of large enterprises while maintaining data privacy.

Microsoft Dynamics 365 Contact Centre Platform offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organisations to instantly connect and engage with their customers across digital messaging channels.

Microsoft Dynamics 365 Contact Centre Platform is a robust application that extends the power of Dynamics 365 Customer Service to enable organisations to instantly connect and engage with their customers via channels like Live Chat, voice, and SMS.

Microsoft Dynamics 365 Contact Centre Platform also provides a modern, customisable, high-productivity app that allows agents to engage with customers across different channels. The application offers contextual customer identification, real-time notification, integrated communication and agent productivity tools like KB integration, search, and case creation to ensure agents are effective

Supervisors get real-time and historical visibility and insights into the operational efficiency of agents and the utilisation across various channels.

The enterprise-grade routing and work distribution engine allows customers to configure agent presence, availability, and routing rules, thus ensuring agents are working on the most relevant engagements.



With Microsoft Dynamics 365 Contact Centre Platform, agents have the following features available to them:

- **Session management:** The Session panel allows agents to work with multiple customer sessions simultaneously. They can switch between sessions without losing the context of the conversation or any customer details.
- **Customer interaction:** The Conversation panel allows agents to interact directly with customers from the communication panel. Agents can leverage the knowledge base, collaborate with colleagues, and more.
- **Multiple applications:** The Applications tab bar allows agents access to relevant supporting applications in the context of the session. These applications remain open if the agent navigates to another session.
- **Customer summary:** The Unified Interface panel provides a single contextual view of the customer based on the current conversation. Agents can access customer details and related case information, and view activities from related records from one screen.
- **Quick access to familiar Dynamics 365 tools:** Leverages existing Dynamics 365 functionality, by providing agents access to record searching, quick record creation, and agent presence information.
- **Real-Time notification:** Agents receive real-time notification messages of incoming communication from customers.



AI Capabilities in Agent Experiences

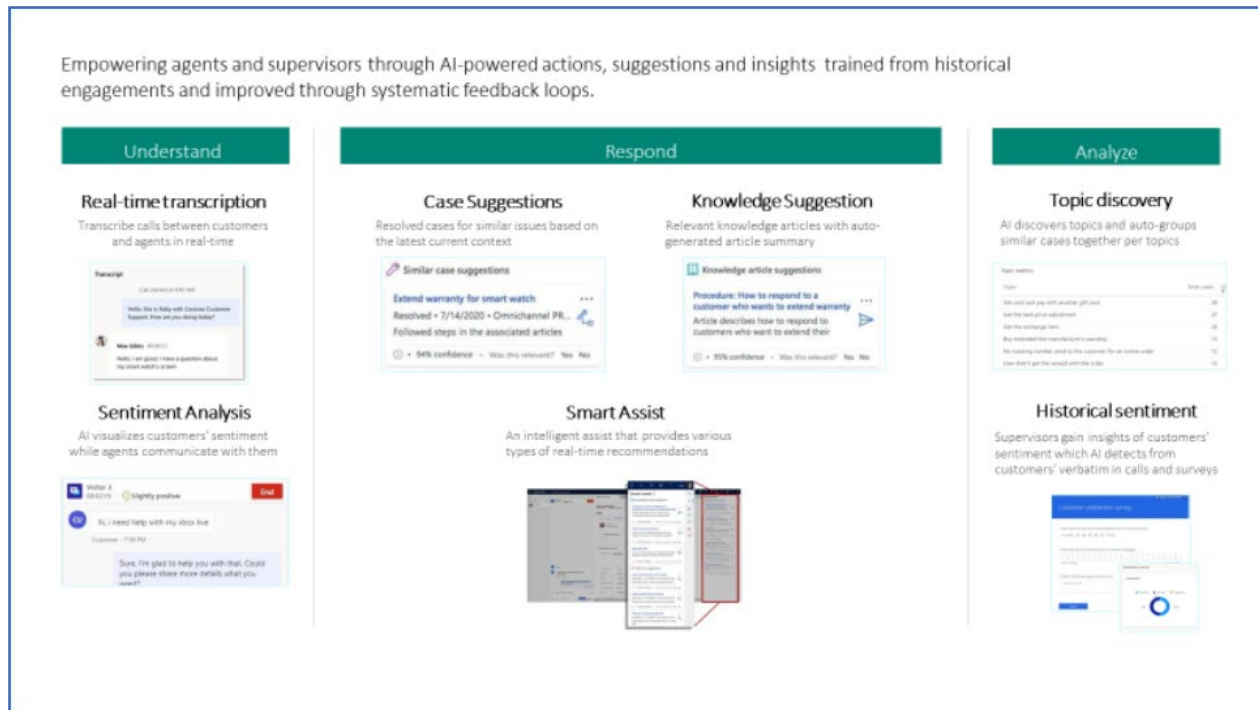


Figure 1 AI Capabilities

Intelligent Routing & Assignment

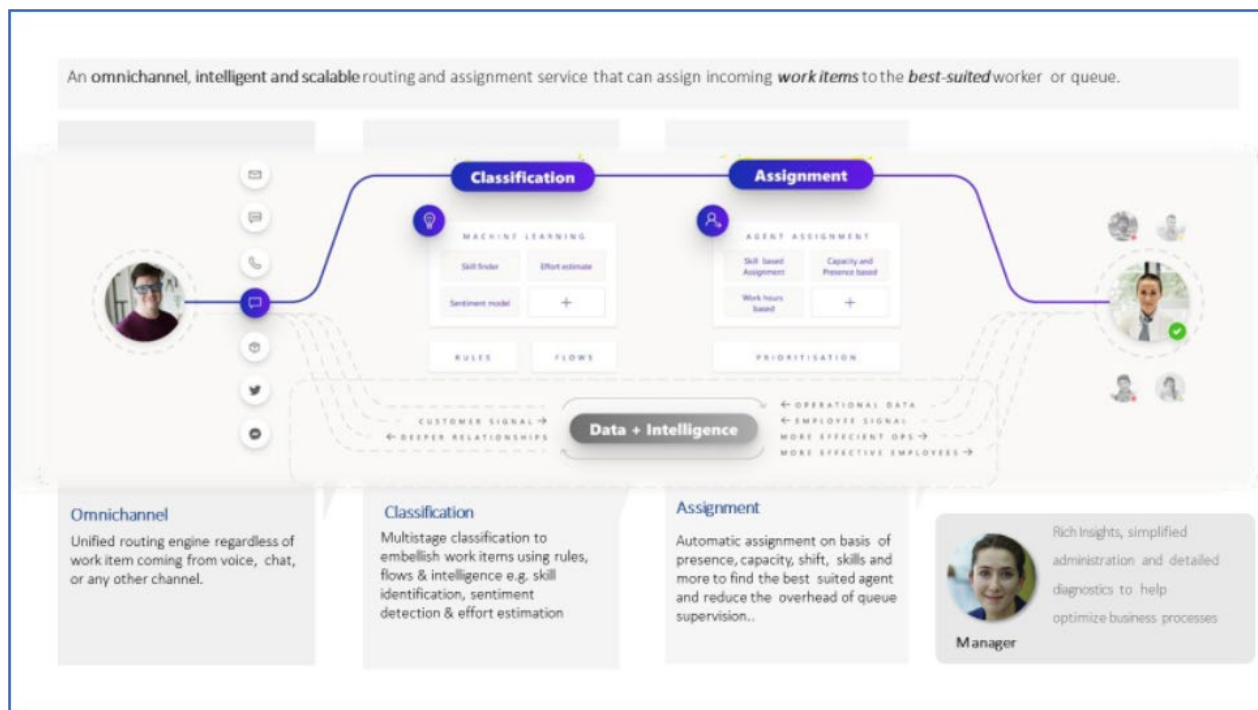


Figure 2 Intelligent Routing



Reports and analytics

- Omnichannel Intraday Insights
- Conversation Insights
- Agent Insights
- Voice channel historical analytics, reports, and call insights

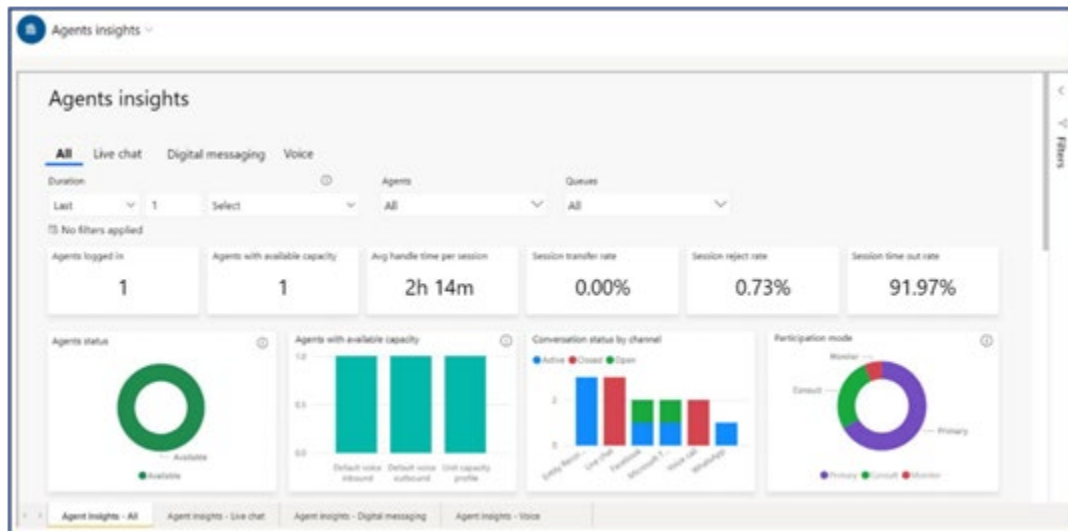


Figure 3 Sample Agent Insight View



Figure 4 Sample Report

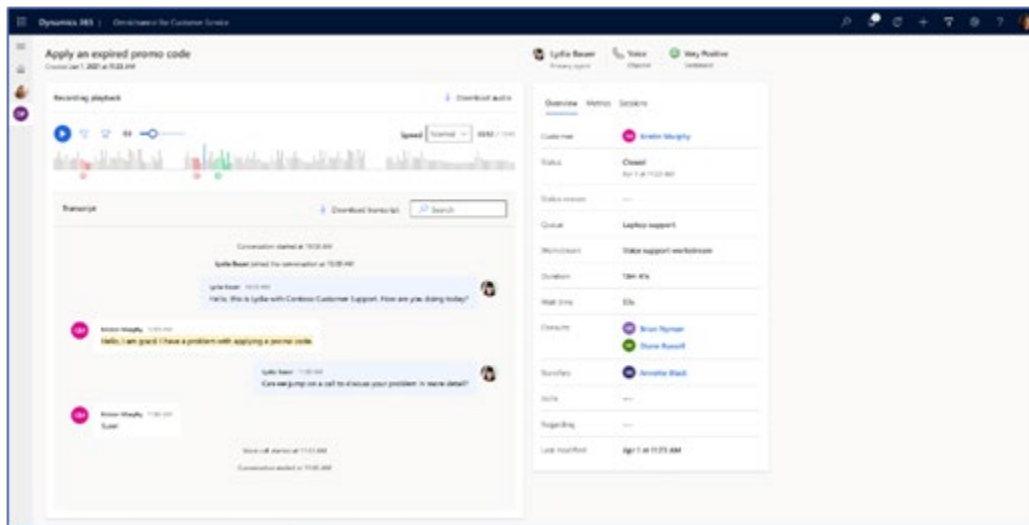


Figure 5 Sample Report 2

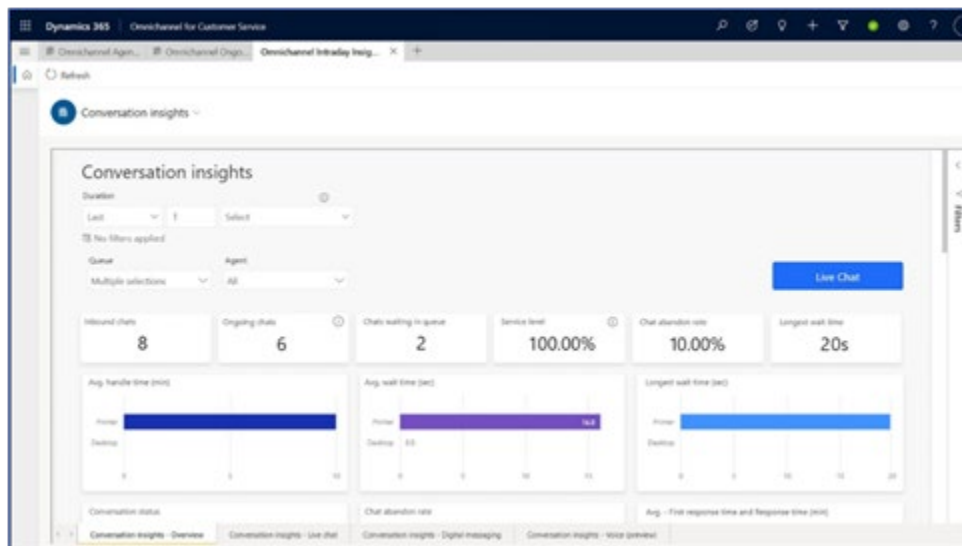


Figure 6 Conversation Insight

Delivery Methodology

TTEC Digital has delivered over 500 full lifecycle Dynamics 365 programmes. Combining TTECs industry-proven AIM (Adaptive Iterative Methodology) framework with our deep Dynamics experience helps our customers achieve their transformation goals. AIM has five distinct phases, namely: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy and Adapt and Sustain. Each phase has quality gates with well-defined entry and exit criteria.

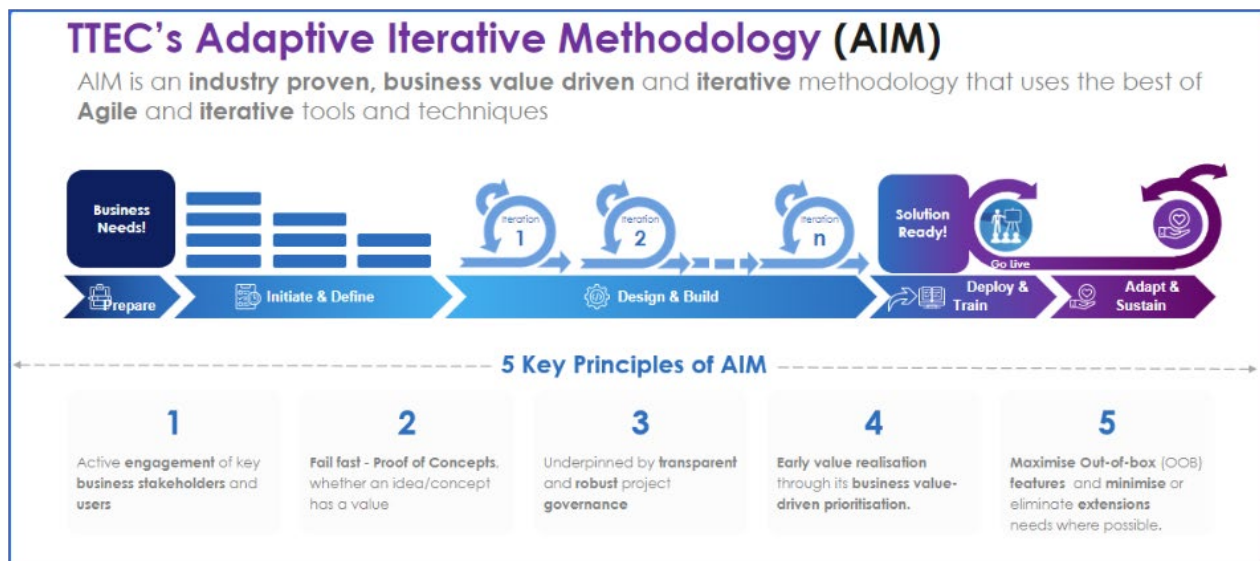


Figure 7 AIM

AIM focuses on three key tenants

1. Customer Experience:
 - o Co-creation of CX vision and journey maps with business stakeholders to define experiences that inspire loyalty and engagement.
 - o Development of comprehensive and actionable CX strategies aligned to measurable business outcomes and KPIs.
 - o Focus on experience transformation that balances customer satisfaction with operational efficiency and ROI.



2. Robust and scalable architecture:

- o Plug-and-play to onboard different regions.
- o An architectural best practice is applied across the technology stack and line of business applications.
- o A strong and repeatable test and release strategy.
- o Integration is stable, scalable, and monitorable as each region is onboarded.
- o Internal tickets categorised as application services, integration and other architecture are low.

3. Adoption and Ownership:

- o High adoption rates among user groups that contribute most to the business case and ROI.
- o End users proactively request new features and upgrades, demonstrating strong engagement.
- o A growing base of internal advocates and change champions drives momentum and cultural alignment.

Our Governance

This delivery approach is reinforced by TTEC Digital's governance model, which ensures effective oversight throughout the software development lifecycle (SDLC). Governance includes structured phase reviews, risk and issue management, change control, and executive stakeholder engagement. It is further supported by TTEC's Centre of Excellence (CoE) and Lifetime Services, which provide ongoing support, alignment with Microsoft's roadmap and continuous change enablement.

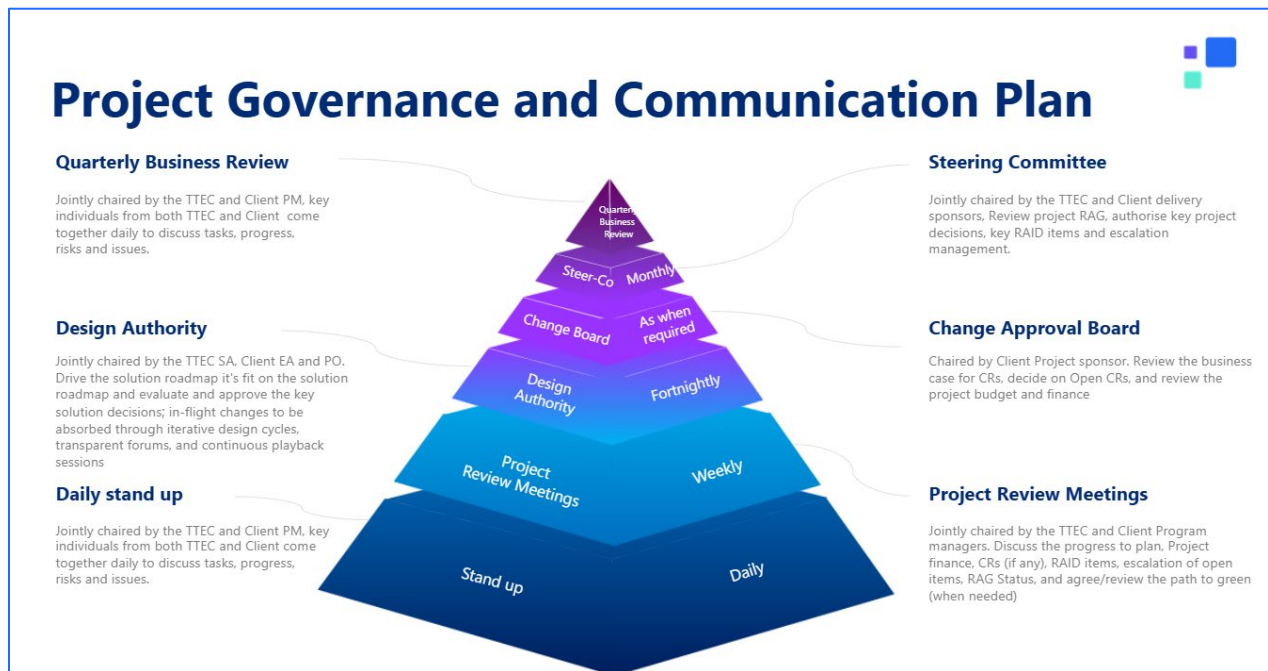


Figure 8 Governance

1.4. Overview of the G-Cloud Service

The CCS G-Cloud 15 framework provides public sector organisations with a streamlined, compliant, and flexible route to procure cloud-based services, including hosting, software, and support. Established under the Procurement Act 2023 as an open framework, G-Cloud 15 spans five refined lots covering cloud hosting (IaaS/PaaS), software (SaaS), and cloud support services. It replaces previous frameworks such as Cloud Compute and introduces direct award capability across all lots, enabling faster access to solutions without mandatory competition.

G-Cloud 15 is designed to support the UK government's Cloud First policy and digital transformation goals. It simplifies procurement while ensuring suppliers meet high standards for quality, security, and public value. The framework places increased emphasis on Social Value, requiring suppliers to demonstrate contributions to community, environmental, and economic outcomes. It also enforces sustainability commitments through Carbon Reduction Plans and aligns with Net Zero targets. Suppliers must adhere to cybersecurity standards such as Cyber



Essentials Plus and maintain responsible business practices including prompt payment and ethical delivery.

TTEC Digital EMEA combines humanity and technology to serve the public with a digital-first approach. Our award-winning cloud contact centre and digital transformation solutions are available on the Digital Marketplace, supporting public sector organisations in modernising citizen services. We specialise in omnichannel customer experience (CX) platforms, AI-enabled automation, and scalable cloud solutions that align with government priorities. Our services include contact centre transformation, optimisation accelerators, omnichannel deployment, integration, analytics, training, and managed support.

With a proven track record in delivering secure, compliant, and impactful cloud solutions across the public sector, TTEC Digital is a trusted partner for organisations seeking to enhance citizen engagement, operational efficiency, and long-term digital resilience.

1.5. Associated Services

TTEC Digital offers a comprehensive suite of services that enhance the deployment and long-term success of the Microsoft Dynamics 365 Contact Centre Platform. These services are designed to support public sector organisations in modernising their customer engagement capabilities while ensuring operational continuity and compliance. Migration and modernisation activities begin with structured assessments of legacy contact centre and CRM platforms, followed by strategic planning to transition to Dynamics 365 Customer Service and Omnichannel.

For a full Contact Centre as a Service migration, TTEC Digital employs a robust and specialised toolset designed to support every aspect of the transition. For voice and telephony enablement, solutions such as AudioCodes, Ribbon SBCs, and Direct Routing are used to integrate Microsoft Teams voice capabilities, while Azure Communication Services supports programmable voice, chat, and SMS across channels. In regulated sectors, Nuance Mix is utilised for conversational IVR



and voice biometrics to enhance security and customer experience. Contact centre configuration is managed through the Omnichannel Admin Centre, which allows for precise setup of channels, routing rules, and agent presence. Custom workflows and productivity enhancements are delivered using Microsoft technologies, tailored to meet operational and compliance needs. For secure phone payment integration, TTEC Digital uses PCI-compliant solutions such as PCI Pal, Semafone, and Pay360, enabling customers to complete transactions safely during live or automated voice interactions. Monitoring and analytics capabilities provide visibility into system performance and agent operations, supporting continuous improvement and informed decision-making.

Integration services within TTEC Digital's Microsoft Dynamics 365 Contact Centre offering are designed to support secure, scalable, and omnichannel customer engagement. Delivered using Azure Integration Services, these integrations enable seamless connectivity with telephony platforms (including SIP, VoIP, and PSTN), citizen portals, payment gateways, and third-party applications. TTEC Digital supports PCI-compliant phone payment solutions, allowing customers to complete secure transactions during live or automated voice interactions. Our integration accelerators include pre-built templates for case management, service request workflows, and citizen engagement journeys, tailored to public sector needs. These capabilities ensure that agents can access real-time customer data across channels, while customers benefit from consistent, frictionless experiences. Customisation services extend Dynamics 365 through plugins, workflows, and Power Platform components, enabling organisations to meet unique service delivery and compliance requirements. AI-infused features such as intelligent routing, sentiment analysis, and predictive analytics further enhance agent productivity and operational efficiency.

To support successful adoption, TTEC Digital provides structured change management programs that include stakeholder engagement, communication planning, and adoption tracking. Training services are delivered through tailored sessions for trainers and end users, with content aligned to role-based scenarios and impact measurement against key performance indicators. Post-go-

live, hypercare services ensure system stability and performance through dedicated support, usage analytics, and enhancement planning.



Figure 9 Support Model

TTEC is a global organisation with extensive experience supporting clients on a regional and global scale. Our global Centres of Excellence (CoE) underpin the Lifetime Services model, offering:

- **Continuous Contact Centre Optimisation:** Ongoing enablement of new features and capabilities aligned with Microsoft release waves, including voice, chat, and AI enhancements within the Dynamics 365 Contact Centre Platform.
- **Reusable Accelerators for CCaaS:** Pre-built templates and components designed specifically for contact centre scenarios such as case management, citizen engagement, service request workflows, and escalation paths from virtual agents to live agents.
- **Expert Advisory for Contact Centre Strategy:** Access to FastTrack Recognised Solution Architects with deep experience in omnichannel contact centre design, AI-infused CX delivery, and Microsoft platform optimisation.



2. Data Protection

2.1. Information Assurance/Security

Information security is one of the important pillars of TTEC Holdings, Inc. (NASDAQ: TTEC) and TTEC affiliates core global business model, and maintaining it is crucial for our company, our stakeholders, and our clients. By performing internal audits and independent IT compliance audits, the results provide information that can be used to improve operations, enhance accountability, and identify areas for improvement.

The adherence and certification to multiple compliance frameworks ensures that TTEC maintains industry standards to secure data and network systems for our business and our clients. To maintain compliance across these frameworks, TTEC contracts an independent, third party, accredited, qualified auditing firm to conduct the following assessments. Depending on the platform, TTEC technology environment and business facility space, TTEC aligns and is certified under these compliance frameworks:

Engage:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 1 Type II (SSAE 18) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.
- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

Digital:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.



- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

TTEC Consulting (UK) Limited and TTEC (UK) Solutions Limited Environments (EU Cloud Services Only):

- Cyber Essentials Certificate of Assurance (Basic) - maintained and assessed annually for EU cloud services only.
- Cyber Essentials Certificate of Assurance (Plus) - maintained and assessed annually for EU cloud services only.

Cyber Essentials and Cyber Essentials Plus are certifications developed and recognised by the UK government to help organisations protect themselves against common cyber threats and demonstrate their commitment to cybersecurity best practices.

TTEC's achievement of the Cyber Essentials and Cyber Essentials Plus certifications validates TTEC's security controls and safeguards implemented and maintained adhere to these cybersecurity best practices, how we secure TTEC and our clients against common cyber threats and how TTEC demonstrates, annually, our commitment to improving our cybersecurity posture to align to these best practices.

The following provides an overview of each Cyber Essentials Certification assessment which includes but not limited to:

- Cyber Essentials Certification:
 - Focuses on five key areas of cybersecurity: boundary firewalls and internet gateways, secure configuration, user access control, malware protection, and patch management.
 - Designed for organisations of all sizes and sectors.



- Requires organisations to complete a self-assessment questionnaire and provide evidence of their cybersecurity measures.
- Certification is valid for one year and can be renewed annually.
- Provides a basic level of assurance to customers, suppliers, and stakeholders that an organisation has implemented essential cybersecurity controls.
- Cyber Essentials Plus Certification:
 - Includes all the requirements of Cyber Essentials certification.
 - Involves an independent assessment and verification of an organisation's systems to ensure they meet the necessary security standards.
 - Requires organisations to undergo vulnerability scanning and penetration testing.
 - Provides a higher level of assurance compared to Cyber Essentials certification.
 - Certification is valid for one year and can be renewed annually.

2.2. Back-Up and Restore

TTEC Digital provides consulting services for the Microsoft Dynamics 365 Contact Centre Platform, a SaaS solution hosted on Azure. While platform-level backup and restoration are managed by Microsoft, TTEC Digital advises clients on how to leverage Microsoft's built-in data protection features, including automated backups, geo-redundancy, and recovery options that apply to Dynamics 365 Customer Service and Omnichannel environments. Our consulting engagements include guidance on designing governance and continuity strategies aligned with Microsoft's SLAs and compliance standards.

For contact centre-specific continuity planning, TTEC Digital offers tailored Business Continuity and Disaster Recovery (BCDR) services that reflect the operational criticality of voice, chat, and digital engagement channels. These plans are developed in collaboration with clients and align with industry frameworks such as ISO 22301, NIST 800-34, and the Cyber Security Framework (CSF). Our approach includes geo-redundant data centres, dual MPLS WAN via multiple carriers,



and carrier-grade disaster recovery for voice services (PSTN, VoIP, SIP). We also support PCI DSS-compliant phone payment integrations and ensure that critical customer interaction data is protected and recoverable.

2.3. Data Processing and Storage Location

TTEC Digital's services for Microsoft Dynamics 365 Contact Centre are consulting-led and delivered on Microsoft's SaaS platform hosted in Azure cloud environments. Data processing and storage for the Dynamics 365 Contact Centre Platform, including voice, chat, and omnichannel interaction data, are governed by Microsoft's compliance with UK data residency and sovereignty requirements, including hosting within UK or EU data centres where applicable. This includes the secure handling of customer interaction data, session transcripts, and analytics outputs generated by Dynamics 365 Omnichannel for Customer Service and Azure Communication Services.

TTEC supports clients in understanding and configuring data location settings, retention policies, and privacy safeguards in line with contractual obligations and regulatory frameworks. For contact centre implementations, this includes guidance on storing voice recordings, chat transcripts, and customer metadata in accordance with GDPR and sector-specific compliance requirements. Where required, bespoke Data Processing Agreements (DPAs) are established to define roles, responsibilities, and technical and organisational measures for data protection, including intercompany standard contractual clauses.

2.4. Data Restoration / Service Migration

TTEC Digital provides strategic consulting and delivery services to support seamless service migration and restoration within Microsoft Dynamics 365 Contact Centre environments. Our Adaptive Iterative Methodology (AIM) governs each phase of the transformation lifecycle; Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain,



ensuring continuity, compliance, and operational resilience throughout. This methodology is particularly suited to CCaaS transitions, where voice, chat, and digital engagement channels must be migrated with minimal disruption.

We conduct structured assessments of legacy contact centre platforms, including on-premise telephony and CRM systems, and plan secure transitions to the Microsoft Dynamics 365 Contact Centre Platform. Migrations are executed using scalable tools such as Azure Data Factory and Dynamics-native migration utilities, with a focus on preserving interaction history, routing logic, and customer context. Each AIM phase includes defined quality gates and governance checkpoints to mitigate risk and align outcomes with business objectives.

For CCaaS migrations, TTEC Digital also supports the integration of SIP trunks, PSAPs, and payment gateways, ensuring that voice and transactional services are resilient and compliant. Restoration planning includes fallback routing, survivability options, and network-level controls that must be engineered in collaboration with telecommunications providers. These elements are not guaranteed by Dynamics or any CCaaS platform alone, but require careful orchestration of carrier-grade infrastructure and Dynamics wiring to ensure continuity during outages or failover scenarios.

2.5. Business Continuity Statement / Plan

TTEC and TTEC's affiliates are committed to business continuity planning, a prudent business practice to protect employees, clients, stakeholders, and TTEC from various risks and events that may impact the ability to conduct business. TTEC's programme aligns with ISO 22301, NIST 800-34 & 84, CSF (Cyber Security Framework) and Disaster Recovery Institute International – The Professional Practices for Business Continuity Management.

TTEC, being a global company, must remain diligent and be prepared when unexpected incidents occur (fire, earthquakes, typhoons, hurricanes, human events, etc.). TTEC's Crisis and Resiliency



Management programme, which includes Business Continuity (BC) and IT Disaster Recovery (DR), emphasises the ability to continue providing business services in the face of adverse operational impacts. TTEC's Global Crisis Management Programme is led by the Vice President of Business Continuity (BC) and IT Disaster Recovery (DR).

Importantly, while Dynamics 365 Contact Centre provides high availability and resilience at the application level, true end-to-end uptime for CCaaS solutions, especially voice, is dependent on the broader integration architecture. TTEC Digital supports clients in designing and implementing resilient integrations with telco infrastructure, SIP trunks, PSAPs, and payment gateways. This includes fallback routing, local survivability options, and network-level controls that must be engineered in partnership with telecommunications providers. These elements are not guaranteed by Dynamics or any CCaaS platform alone, but require careful orchestration of carrier-grade infrastructure and Dynamics wiring to ensure continuity during outages or failover scenarios. TTEC's Crisis and Resiliency Management programme is led by dedicated leadership and integrates with our global Centres of Excellence. It includes regular testing, after-action reviews, and continuous improvement cycles. This ensures that contact centre operations remain resilient, secure, and available, even in the face of unexpected disruptions.

TTEC's approach to global crisis and business continuity and IT disaster recovery is to adhere to guiding principles of: Putting People First; Establish Trust; Protection of Clients; and Providing Leadership, with managing unexpected and expected incidents and events. With a strong focus on these principles, TTEC will have the ability to anticipate, prevent, recover from, and learn from crises that may impact employees, facilities, brand/reputation, or operations. Along with TTEC achieving the protection of TTEC's people, TTEC's clients and client's brand, profits and TTEC's brand.

TTEC's Global Crisis and Business Continuity (BC) and IT Disaster Recovery (DR) Management programme has developed a product-driven customer focused recovery model that is both practical and scalable. TTEC establishes, implements, and maintains world class crisis response



capabilities through solidifying policies and procedures for response to an emergency or other occurrence that can compromise the privacy, confidentiality, integrity, or availability of Client Personal Information and/or damage TTEC's information systems. Such policies and procedures include, but are not limited to: creating and maintaining retrievable copies of Client Personal Data; restoring any loss of Client Personal Information; enabling continuation of critical business processes involving Client Personal Information in emergency mode; assessing relative criticality of specific applications and Client Personal Information to support other contingency plan components; periodic and annual testing and updates of contingency plans and implement lessons learned from testing.

The programme integrates and builds upon existing capabilities within our Security Event Handling Plan, Information Security Operations, Business Continuity, IT Disaster Recovery and Virtual Response teams. Additional partners in resiliency include Information Technology, Operations, Real Estate and Facilities, Legal, People and Culture, and other shared services. The unifying approach and framework are contained in TTEC's Global Crisis Management Policy for managing and responding to crises across TTEC's global enterprise (including but not limited to WFH environment).

TTEC provides redundancy in our technology through hardware and software configuration. Redundancy provides clients with the services that in the event of hardware failure, or software failure, services remain active and available.

Redundant premise equipment mitigates the risk of equipment failure; dual firewalls with stateful inspection, dual routers, and dual core switches in the data centre provide a highly available architecture for client links. TTEC firewall infrastructure provides stateful inspection and the configuration is in active/active or active/standby mode depending on the project specifications/requirement.



The different types of DRP technology and redundancy capabilities used include but not limited to:

- Geo-redundant centralised data centres.
- Dual MPLS WAN via multiple carriers.
- Carrier grade disaster recovery.
- Voice via PSTN TFN/DID, TDM, VoIP, or SIP (SBC).
- Regular testing to ensure readiness and After-Action Plans for lessons learned.
- Functional Management tool that enables systemic, collaborative, and controlled resiliency programme management.

In addition, at least annually, TTEC's Executives (Sr. Advisor BCDR/Resiliency, CSO, CIO, IT, and other supporting departments) review the Global Crisis Programme and the Business Continuity and IT Disaster Recovery plans, processes, and policies, update (as needed) to align to TTEC's business, security and compliance models and adherence with industry compliance framework requirements. TTEC's BCDR and applications are exercised annually and are governed by our Crisis Management and Disaster Recovery policies and guidelines. TTEC's Global Crisis and Resiliency Management Programme, including TTEC's Security Event Handling Programme is assessed and maintained annually, and is certified against TTEC's ongoing industry compliance audit assessments of PCI DSS, SOC 2 Type II, ISO 27001:2022, HITRUST and more.

Lastly, regarding TTEC's Business Continuity (BC) and IT Disaster Recovery (DR) plan approach, TTEC bridges a partnership with our clients with the development of a specific client focused business continuity (BC) and disaster recovery (DR) plans. TTEC collaborates with clients to build a tailored, resilient, and mutually agreeable BC and IT DR plan that encompass applicable TTEC Technology and Services, prevailing industry compliance standards, information security controls, safeguards, and measures, along with operational best practices, and client-specific SLA requirements. Through TTEC and client partnership and strong collaboration will result with eliminating risks and returning to "business as usual" status, and more.



2.6. Privacy by Design

TTEC Digital accommodates applicable data privacy regimes through bespoke data processing agreements (DPA) with its customers that set forth relevant rights and obligations in the context of the data controller-data processor relationship. TTEC Digital also applies appropriate agreed technical and organisational measures and data privacy safeguards (including intercompany standard contractual clauses) to satisfy the legal requirements and the DPA undertakings.



3. Using The Service

3.1. Ordering and Invoicing Process

Buyers wishing to find out more about this service and how to order should contact Wayne Kay, VP EMEA, at gcloud@ttecdigital.com

3.2. Availability of Trial Service

There is currently no Trial Service available.

3.3. On-Boarding

TTEC Digital's onboarding process for Dynamics 365 Contact Centre as a Service begins with a collaborative scoping exercise, where we work closely with the customer to define a precise scope of work based on our service definitions and associated rate card. This scope forms the foundation of the engagement and is aligned with our Adaptive Iterative Methodology (AIM), which governs each phase of delivery; from preparation through deployment and sustainment.

For CCaaS engagements, onboarding includes stakeholder alignment across IT, customer service, and telephony teams, access planning for Azure and Dynamics environments, and readiness assessments to ensure a smooth and secure project start. We tailor implementation plans to reflect the complexity of omnichannel configurations, including voice, chat, SMS, and social channels, and ensure that routing logic, agent presence, and session management are correctly established in the Omnichannel Admin Centre.

To drive adoption, we provide training accelerators and change management support focused on agent experience, supervisor tools, and operational reporting. This includes enablement of AI-powered features such as intelligent routing and sentiment analysis, as well as guidance on



integrating with SIP trunks, payment gateways, and third-party platforms. Our onboarding approach ensures that the solution delivers measurable business value from day one, with minimal disruption to live contact centre operations.

3.4. API

TTEC Digital delivers robust and scalable API and integration services as part of its Microsoft Dynamics 365 Contact Centre implementations. Our approach leverages Microsoft Dataverse, RESTful APIs, and Power Platform connectors to enable secure, extensible, and monitorable integration with telephony platforms, payment gateways, citizen portals, and third-party applications critical to contact centre operations. These integrations support omnichannel engagement across voice, chat, SMS, and social channels, ensuring agents have access to real-time customer context and interaction history.

Using Azure Integration Services, including Logic Apps, Service Bus, and API Management, we design architectures that support real-time data exchange, event-driven automation, and AI-powered features such as intelligent routing and sentiment analysis. These capabilities are essential for enabling seamless escalation paths, agent productivity tools, and supervisor insights within the Dynamics 365 Omnichannel Admin Centre.

Integration requirements are captured and validated throughout the delivery lifecycle using our Adaptive Iterative Methodology (AIM), which includes governance checkpoints and quality gates across each phase. Where required, TTEC Digital can develop custom APIs to meet unique contact centre needs or collaborate with third-party vendors who have built connectors or integration components. This flexible and future-ready approach ensures seamless interoperability across the public sector's digital ecosystem while aligning with Microsoft's evolving CCaaS capabilities.



3.5. International SMS

TTEC Digital incorporates international SMS capabilities as part of its multichannel Dynamics 365 Contact Centre implementation strategy, enabling public sector organisations to extend citizen engagement beyond traditional voice channels. During implementation, SMS is integrated into the Dynamics 365 Omnichannel environment and telephony infrastructure, supporting deflection from IVR to messaging and enabling citizens to initiate contact via SMS or web-based entry points. These capabilities are designed to handle high-volume contact scenarios and are fully embedded within CRM workflows to ensure continuity of service and accurate data capture. As part of upgrade services, TTEC Digital ensures that existing SMS capabilities are modernised in line with Microsoft Dynamics 365 enhancements and evolving citizen expectations. This includes aligning SMS workflows with new CRM features such as real-time messaging, asynchronous communication, and AI-powered automation via Microsoft Copilot. TTEC also supports the reconfiguration of SMS connectors and APIs to ensure compatibility with upgraded environments and compliance with regional telecom standards.

TTEC Digital supports the migration of SMS services from legacy platforms to Dynamics 365 Contact Centre, ensuring seamless continuity of messaging capabilities. This includes assessing existing SMS infrastructure, planning secure transitions, and implementing scalable solutions using Azure Communication Services. Where required, TTEC Digital develops custom SMS APIs or collaborates with third-party international SMS providers, such as Twilio, Sinch, Vonage, or Infobip; to integrate pre-built connectors. These partnerships enable global reach, localised compliance, and high-throughput messaging, ensuring that international SMS remains responsive, secure, and fully integrated with the Dynamics 365 Contact Centre environment.

TTEC Digital plans and coordinates all international SMS implementation, upgrade, and migration activities to ensure minimal disruption to existing telephony services. Our delivery teams work closely with client stakeholders and technical leads to align integration timelines, validate routing configurations, and conduct controlled testing prior to go-live. This approach ensures continuity



of service, preserves citizen experience, and supports a smooth transition to enhanced messaging capabilities within the Dynamics 365 Contact Centre platform.

3.6. Off-Boarding

TTEC Digital's offboarding process for Dynamics 365 Contact Centre as a Service is designed to ensure a smooth, structured, and secure disengagement at the conclusion of the engagement. In alignment with the agreed scope of work and commercial terms, TTEC works collaboratively with the customer to define a clear exit plan that includes the transfer of all relevant deliverables, documentation, and knowledge required to support continuity of contact centre operations.

This includes final performance reports, configuration artefacts, routing logic documentation, agent desktop customisations, and training materials related to the Dynamics 365 Omnichannel environment. Where applicable, TTEC supports the customer in transitioning services to internal teams or alternative providers, including guidance on maintaining integrations with SIP trunks, payment gateways, and third-party messaging platforms.

Offboarding activities also include deactivation planning for Azure Communication Services, session management configurations, and data retention policies to ensure compliance with privacy and regulatory standards. All activities are planned in coordination with client stakeholders and technical leads to minimise disruption to live services and preserve citizen experience.

TTEC Digital ensures that all offboarding steps meet contractual obligations and uphold data protection and confidentiality standards. Our approach is underpinned by governance checkpoints and quality gates, consistent with our Adaptive Iterative Methodology (AIM), to ensure that disengagement is executed with the same rigour and transparency as onboarding and delivery.



3.7. Training

TTEC Digital's training approach for Dynamics 365 Contact Centre as a Service is designed to accelerate adoption, build user confidence, and ensure measurable business impact. Training is delivered as part of rollout implementation support and includes expert project management to ensure successful enablement of omnichannel capabilities across voice, chat, SMS, and digital messaging.

Training begins with the development of a comprehensive training plan aligned to the client's operational model and user roles. This includes content creation and delivery through flexible formats such as Train-the-Trainer programmes and role-based enablement sessions. For contact centre agents, supervisors, and administrators, training focuses on the Dynamics 365 Omnichannel Agent Desktop, session management, routing logic, and customer interaction tools.

To support adoption of new Microsoft features such as Copilot for Contact Centre, TTEC Digital incorporates targeted enablement sessions that help users understand and apply AI-powered capabilities within their day-to-day workflows. These sessions are designed to demystify Copilot functionality, promote confidence in its use, and accelerate productivity gains through intelligent summarisation, suggested responses, and real-time insights.

Training is delivered alongside a structured change management plan, which includes stakeholder communication strategies, adoption tracking, and reinforcement activities to drive engagement and ensure a smooth transition to enhanced contact centre capabilities. TTEC Digital also provides post-training support and performance measurement to ensure that learning translates into sustained business value.



3.8. Implementation Plan

TTEC Digital provides a structured and comprehensive implementation plan for Dynamics 365 Contact Centre as a Service, aligned with our Adaptive Iterative Methodology (AIM). This methodology governs each phase of delivery: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain; ensuring transparency, quality, and alignment with business objectives throughout the engagement.

Upon completion of the scope of works, a detailed delivery plan is shared with the buyer, tailored to the agreed requirements and CCaaS-specific needs. This includes omnichannel configuration (voice, chat, SMS, social), agent desktop setup, routing logic, integration with SIP trunks and telephony platforms, and enablement of AI-powered features such as intelligent routing and Copilot.

Each phase of the implementation is governed by quality gates and defined entry and exit criteria. The plan includes:

- **Timelines and Milestones:** Clearly defined delivery stages with milestone tracking for configuration, testing, and go-live.
- **Resource Allocation:** Assignment of TTEC Digital specialists across solution architecture, telephony integration, AI enablement, and training.
- **Risk Mitigation:** Identification and management of risks related to voice channel continuity, data migration, and third-party integrations.
- **Stakeholder Engagement:** Regular governance checkpoints, steering meetings, and alignment workshops with client stakeholders.
- **Change Management and Training:** Embedded enablement strategy including Train-the-Trainer programmes and Copilot adoption sessions.



TTEC Digital's implementation approach ensures that public sector organisations can confidently transition to a modern, scalable, and AI-infused contact centre platform, with minimal disruption and maximum value realisation.

We also recognise that not all contact centres are immediately ready to adopt AI-powered features such as Microsoft Copilot. As part of our implementation planning, TTEC Digital assesses organisational readiness for Copilot and other advanced capabilities. Where required, we support clients with roadmap development, phased enablement strategies, and tailored advisory to ensure that Copilot adoption aligns with operational maturity, user confidence, and business priorities.

3.9. Service Management

TTEC Digital's service management approach for Dynamics 365 Contact Centre as a Service is structured to ensure consistent delivery, operational transparency, and long-term value realisation. Service management is aligned to the specific scope of work agreed with the buyer and is governed by our Adaptive Iterative Methodology (AIM), which embeds service oversight, quality assurance, and stakeholder alignment into each phase of the CCaaS lifecycle, from preparation through to sustainment.

Each engagement is supported by a dedicated Customer Success Manager (CSM) who acts as the strategic advisor and primary point of contact. The CSM ensures that service delivery remains aligned with business objectives, facilitates regular service reviews, and supports roadmap planning for future enhancements, including AI enablement, omnichannel expansion, and Copilot readiness.

Our service management model includes structured governance checkpoints, performance tracking across key contact centre metrics (e.g. agent productivity, channel utilisation, resolution rates), and escalation protocols to ensure accountability and responsiveness. TTEC Digital



integrates with client-side programme and service teams to ensure seamless coordination across delivery, support, procurement, and finance functions.

We recognise that contact centre environments are dynamic and evolving. Our service management framework is designed not only to deliver consistent outcomes and minimise risk, but also to foster long-term partnerships. This includes proactive support for platform optimisation, feature enablement aligned with Microsoft release waves, and continuous improvement initiatives driven by data and user feedback.

TTEC Digital's values: customer-centricity, transparency, and innovation are reflected in every aspect of our service management approach. We aim to empower public sector organisations with resilient, scalable, and future-ready contact centre capabilities that evolve with their needs.

3.10. Service Constraints

There are no fixed service constraints for a CCaaS consulting engagement beyond the essential requirement for timely access to relevant stakeholders, systems, and information necessary to support the successful delivery of the engagement. TTEC Digital will collaborate closely with your teams during the scoping phase to define all required inputs, including access to telephony infrastructure, CRM environments, and subject matter experts across voice, chat, and email channels. These dependencies, along with any technical, functional, and governance-related assumptions, will be clearly documented in the Scope of Work (SoW). This ensures alignment on deliverables such as IVR design, routing strategies, reporting requirements, and integration points with platforms like Dynamics 365 Contact Centre and Microsoft Teams.



3.11. Service Levels

TTEC Digital does not provide formal Service Level Agreements (SLAs) for consulting-only engagements. However, for CCaaS technical implementations (such as those involving Dynamics 365 Contact Centre, Microsoft Teams Phone, or Copilot Studio) Service Levels may be defined in alignment with the delivery phases and support models outlined in the Scope of Work. These typically include commitments around deployment timelines, configuration milestones (e.g., IVR setup, queue routing, analytics enablement), and post-go-live support (e.g., hypercare, knowledge transfer). Where applicable, SLAs for ongoing operations and support are governed by separate managed services or support contracts.

3.12. Outage and Maintenance Management

Outage and Maintenance Management is not required for this engagement. As a cloud-native Contact Centre as a Service (CCaaS) solution, Dynamics 365 Contact Centre is hosted on Microsoft Azure, where platform availability, maintenance, and updates are managed directly by Microsoft. This includes automated patching, high availability, and built-in resiliency features. As such, customers are not responsible for coordinating or managing outages or maintenance windows.

3.13. Financial Recompense Model for not Meeting Service Levels

TTEC Digital does not provide Service Levels for consulting arrangements. Service Levels are available for technical implementations.

TTEC Digital does not provide formal Service Level Agreements (SLAs) for consulting-only engagements related to Dynamics 365 Contact Centre. However, for technical implementations



of D365 CCaaS, including voice, digital, and omnichannel deployments, Service Levels may be defined in the Scope of Work. These typically cover delivery milestones, configuration timelines (e.g., IVR, routing, analytics), and post-deployment support such as hypercare and transition to managed services.

Where SLAs are contractually agreed for ongoing support or managed services, a Financial Recompense Model may be applied. This model outlines the conditions under which service credits or other remedies may be issued in the event of SLA breaches, such as failure to meet uptime, response, or resolution targets. These terms are typically governed under a separate support agreement or managed service contract and are tailored to the client's operational risk profile and service criticality.



4. Provision of the Service

4.1. Customer Responsibilities

TTEC Digital's successful delivery of Microsoft Dynamics 365 Contact Centre (D365 CCaaS) services depends on active collaboration with the customer. The following responsibilities and assumptions apply and will be tailored based on the specific channels (e.g., voice, chat, email, social) and capabilities being implemented. We acknowledge that not all customers will adopt every channel from the outset, some may begin with a single channel such as voice or chat and expand their capabilities over time.

1. Access and Availability

The customer will provide timely access to relevant personnel, systems, and environments required to perform the service. This includes:

- Business stakeholders and contact centre leadership.
- Subject matter experts for the selected channels (e.g., voice routing, chat workflows).
- Technical contacts for telephony, CRM, and identity management systems.
- Access to existing IVR flows, chat scripts, or routing logic, where applicable.

2. Data and Information Provisioning

The customer is responsible for supplying accurate and complete data and documentation to support:

- Contact centre workflows (e.g., queue structures, escalation paths).
- Historical interaction volumes for the selected channels.
- Existing telephony infrastructure and SIP trunking details (if voice is in scope).
- Integration points with CRM, ERP, WFM, and third-party systems.



3. Decision-Making and Governance

The customer will:

- Participate in governance checkpoints and design workshops.
- Provide timely feedback on deliverables (e.g., IVR scripts, chat flows, agent desktop configurations).
- Approve configuration changes and test plans to avoid delays.

4. Environment Readiness

The customer will ensure that the following are provisioned and accessible:

- Azure subscriptions and environments for D365 CCaaS deployment.
- Identity and access management (e.g., Azure AD, MFA policies).
- Test and production environments for CRM and integrated systems.

5. Third-Party Coordination

If third-party systems or vendors are involved (e.g., SIP trunk providers, SMS gateways, payment platforms), the customer will:

- Facilitate introductions and access for integration and testing.
- Ensure contractual and technical readiness for go-live.

6. Compliance and Security

The customer is responsible for:

- Ensuring internal compliance with PCI-DSS, GDPR, and other regulatory requirements.
- Providing security policies and access controls for integration with Azure Communication Services, Copilot Studio, and other Microsoft services.

7. Operational Readiness

The customer will:

- Prepare internal teams for change management, training, and adoption.
- Support user acceptance testing (UAT) and provide feedback on agent workflows.



- Define success metrics (e.g., SLA adherence, containment rate, AHT) and provide baseline KPIs.

These responsibilities will be validated and refined during the scoping phase and documented in the final Scope of Works. TTEC Digital will work collaboratively with the customer to ensure all dependencies are clearly understood and managed to support a successful CCaaS engagement; whether starting with a single channel or deploying a full omnichannel solution.

4.2. Technical Requirements and Client-Side Requirements

TTEC Digital's successful delivery of Microsoft Dynamics 365 Contact Centre (D365 CCaaS) services requires specific technical and organisational prerequisites to ensure a smooth and effective engagement. As per "Customer Responsibilities" section, these requirements are shaped by the nature of the CCaaS deployment (whether focused on voice, digital channels, or a full omnichannel rollout) and will be tailored accordingly during the scoping phase.

These requirements, including access to key stakeholders and systems, channel-specific readiness (e.g., voice, chat, email), environment provisioning, third-party integration support, security and compliance alignment, and operational readiness, will be validated and agreed during the scoping phase. They will be documented in the final Scope of Works to ensure alignment, manage dependencies, and minimise delivery risk. TTEC Digital will work collaboratively with the client to ensure all prerequisites are clearly understood and addressed; whether the engagement begins with a single channel or evolves into a broader omnichannel strategy.



4.3. Browsers

TTEC Digital's delivery of Microsoft Dynamics 365 Contact Centre (D365 CCaaS) services is underpinned by Microsoft's cloud-based SaaS platform, which is accessible via modern web browsers. For optimal performance and compatibility, (particularly across agent desktops, supervisor dashboards, and embedded communication interfaces) users should access D365 Contact Centre using supported browsers such as Microsoft Edge, Google Chrome, Mozilla Firefox, or Apple Safari.

We recommend using the latest stable versions of these browsers to ensure full access to omnichannel features, real-time communications, and security updates. Where applicable, browser settings may need to:

- Allow pop-ups for embedded voice, chat, and video components
- Enable JavaScript for dynamic UI elements and real-time updates
- Support cookies for session management and authentication

These requirements apply across all supported channels; whether the solution includes voice, chat, email, or a phased rollout starting with a single channel. TTEC Digital will validate browser compatibility during the scoping and testing phases to ensure a seamless user experience for agents, supervisors, and administrators.

4.4. Outcomes/Deliverables

The deliverables and outcomes of this service will be aligned with the specific Scope of Work agreed with the buyer at contract award. These will reflect the channels and capabilities in scope, whether voice, chat, email, or a full omnichannel deployment, and will be tailored to the client's transformation objectives.

**Typical deliverables include:**

- Documented customer experience vision and strategy
- Documented customer journey maps and prioritised friction points
- Solution prototypes (e.g., IVR flows, agent desktop configurations, chat workflows)
- Documented implementation plan, including phased rollout and channel onboarding
- Documented reports on the performance of the change against key performance indicators (e.g., AHT, FCR, CSAT, containment rate)
- Successful fulfilment of the agreed functional and non-functional requirements
- Documented change management plan, including stakeholder engagement and communications
- Documented training plan and training content tailored for agents, supervisors, and administrators
- High-level and detailed solution design documentation (e.g., routing logic, integration architecture, IVR call flows)
- Configuration of Dynamics 365 Contact Centre components (e.g., queues, user roles, voice and digital channels, Copilot Studio IVRs)
- Tailored demonstrations and playback sessions based on operational workshops
- Operational readiness assessment and go-live support plan
- Post-implementation hypercare and transition-to-support documentation

4.5. Development Life Cycle of the Solution

TTEC Digital applies a structured and proven delivery framework to all Dynamics 365 Contact Centre (D365 CCaaS) engagements. Our approach is grounded in the Adaptive Iterative Methodology (AIM), which is tailored to the unique demands of CCaaS transformation, whether deploying voice, digital, or omnichannel capabilities.

The specifics of the delivery lifecycle are aligned with the agreed Scope of Work and refined during the scoping phase. AIM ensures that each stage of delivery is governed by quality gates,



stakeholder alignment, and clearly defined entry and exit criteria. This iterative approach supports “right-first-time” delivery, promotes transparency, and enables measurable outcomes across all phases of the engagement.

For CCaaS implementations, our delivery framework incorporates:

- **Unified Service Model:** A product-driven, continuous delivery model that enables rapid deployment of MVPs, iterative enhancements, and streamlined release management across voice and digital channels.
- **Channel-Specific Workstreams:** Parallel delivery tracks for voice (e.g., IVR, call routing, ACS integration) and digital (e.g., chat, email, social, Copilot Studio) to support phased or full-scale rollouts.
- **Proof of Technology & Validation:** Where appropriate, we validate technical approaches (e.g., agentic vs. traditional IVR, Copilot Studio flows) before scaling to full deployment, reducing risk and accelerating time to value.
- **Lifecycle Governance:** Our governance model ensures the solution evolves in line with business objectives, user needs, and Microsoft’s roadmap, while maintaining compliance, scalability, and operational resilience throughout the engagement.

This delivery framework is designed to support clients at any stage of their contact centre transformation journey; whether starting with a single channel or deploying a fully integrated omnichannel CCaaS solution.

4.6. After Sales Account Management

Once you become a TTEC Digital Customer, you will be assigned a Client Success Manager (CSM), who will be responsible for the relationship with your organisation. Your CSM will act as your trusted advisor and will get to know you and your business and help you to identify key strategic objectives to meet your organisational goals. Your CSM will also run regular business/service reviews with you to make sure that we are helping you to deliver effective solutions and will also



help you to roadmap your journey to digital transformation. Your CSM is your first point of escalation in times of need. Whilst our teams will align directly with your teams (Project & Programme Management, Service, Support, Procurement, Finance, etc), your CSM will take overall responsibility for the relationship and communication with your organisation. TTEC Digital's Account Strategy is to make sure that we meet and exceed your expectations. We see the role as a key function to ensure smooth service delivery and to educate, benchmark and challenge the status quo, helping you to drive efficiencies and outstanding Customer Experience wherever possible.

We see effective Account Management as a way to build a long term and valuable partnership with your organisation.

4.7. Termination Process

TTEC Digital is open to entertaining reasonable termination mechanisms as part of the contract negotiation that will account for the specificities of the individual business opportunity and the associated commercial terms.



5. Other Messaging Services

TTEC Digital offers a robust portfolio of messaging services as part of its Dynamics 365 Contact Centre (D365 CCaaS) solution, enabling public sector organisations to engage citizens across a wide range of digital channels. These services are designed to complement traditional voice and email channels, supporting both real-time and asynchronous communication strategies.

SMS and International SMS

TTEC Digital integrates SMS capabilities directly into the Dynamics 365 Omnichannel environment, supporting:

- Inbound and outbound SMS for appointment reminders, service updates, and citizen notifications.
- IVR-to-SMS deflection, allowing callers to switch from voice to messaging for faster resolution.
- International SMS delivery, using trusted providers such as Twilio, Sinch, Vonage, and Infobip to ensure global reach and compliance.
- Migration from legacy SMS platforms, including reconfiguration of connectors and alignment with Microsoft's evolving messaging APIs.
- Asynchronous messaging, enabling citizens to engage at their convenience while maintaining full context within CRM workflows.

Social and Digital Messaging Channels

TTEC Digital enables seamless integration with a variety of social and digital messaging platforms, including:

- WhatsApp for Business, Facebook Messenger, and Twitter Direct Messages.
- Web chat and live chat, embedded in public-facing portals with support for proactive engagement and AI-powered virtual agents.
- Microsoft Teams integration, enabling internal collaboration and escalation workflows.



- Copilot Studio integration, allowing the creation of intelligent bots that automate routine interactions and escalate to live agents when needed.

Secure Messaging and Compliance

All messaging services are designed with public sector compliance in mind:

- End-to-end encryption and secure session management via Azure Communication Services (ACS).
- Data residency and sovereignty aligned with UK and EU regulations.
- Audit trails and message archiving to support GDPR, FOI, and sector-specific compliance requirements.

Custom Messaging Integrations

TTEC Digital supports bespoke messaging use cases through:

- Custom API development using Microsoft Dataverse, Power Platform connectors, and Azure Integration Services.
- Integration with sector-specific platforms, such as GOV.UK Notify, NHS 111, or local authority messaging systems.
- Event-driven messaging using Azure Logic Apps and Service Bus for real-time citizen engagement and workflow automation.

Complementary CCaaS Features

These messaging services are fully integrated with the broader D365 CCaaS platform, leveraging:

- Unified agent desktop with session management across all channels.
- Intelligent routing, ensuring messages are directed to the most appropriate agent based on skills, availability, and context.
- AI-powered insights, including sentiment analysis, conversation summarisation, and suggested responses.
- Omnichannel analytics, providing visibility into messaging performance, agent productivity, and citizen engagement trends.



6. Environmental Action and Social Value

6.1. Environmental Action

Global Environmental Governance and Strategy

TTEC manages its environmental impact through a structured governance and operational framework. Oversight is provided by a dedicated Board committee and an Environmental, Social, Governance (ESG) Executive Council. We operate under a formal [Climate Change and Environmental Responsibility Policy](#) and align our disclosures with recognised frameworks, including SASB and TCFD. Our environmental strategy includes initiatives focused on energy efficiency, waste reduction, and emissions tracking, with progress informed by regular materiality assessments.

UK-Specific Environmental Action and Net Zero Commitment

TTEC Consulting (UK) Limited is committed to environmental sustainability and achieving net zero emissions by 2045, ahead of the UK Government's 2050 target. Our UK Executive Team has formally endorsed and published a comprehensive [Carbon Reduction Plan](#) that fully complies with PPN 06/21 and its associated guidance. The plan includes transparent disclosures of Scope 1 and Scope 2 emissions, as well as relevant Scope 3 categories, and is reviewed annually to ensure continued alignment with evolving regulatory standards and net zero objectives. This proactive approach reflects our leadership in climate responsibility and our dedication to supporting public sector clients in meeting their sustainability goals.



6.2. Social Value

Creating Positive Impact for Customers and Communities

At TTEC Digital, we are committed to creating lasting social value that benefits both our clients and the communities they serve. Our efforts focus on tackling economic inequality, advancing equal opportunities, and expanding digital inclusion throughout the UK.

To support this mission, every UK-based TTEC Digital employee is encouraged to participate in corporate social responsibility (CSR) initiatives, with one paid day annually reserved for volunteering and community engagement.

Empowering Youth Through Digital Skills

At TTEC Digital, we believe in leveraging our expertise and partnerships to create opportunities for the next generation. One example is the Digital Dev Academy, a collaborative programme that equips students from underserved communities with essential digital and technology skills. The programme is delivered in partnership with TTEC Digital and its network of clients, with support from local authorities and education stakeholders. Its goal is to create inclusive pathways into technology careers by providing hands-on learning experiences and exposure to real-world digital environments.

We work closely with clients to co-design the curriculum, ensuring it reflects current industry needs and emerging technologies. These partners also contribute mentorship, resources, and opportunities for students to engage with professionals across sectors. Their involvement helps bridge the gap between education and employment, making the learning experience both practical and aspirational.

In parallel, we collaborate with county councils to identify eligible schools and students, coordinate logistics, and ensure the program is accessible to those who need it most. This partnership is vital for community engagement and helps embed the academy within local



development strategies. It culminates in a showcase event where students present their work and explore career opportunities with participating partners. The Digital Dev Academy is a powerful example of how cross-sector collaboration can drive social impact and digital inclusion.

Promoting Fair Employment and Economic Resilience

TTEC Digital is a Living Wage accredited employer in the UK, reinforcing our commitment to fair pay, community resilience, and inclusive growth. This milestone reflects our broader mission to empower future talent, support public sector innovation, and create lasting social impact.

At TTEC Digital, we believe that fair pay fosters a positive and collaborative work environment. By ensuring our employees feel genuinely valued, we strengthen relationships across teams and empower individuals to thrive. This leads to better outcomes for our clients, including:

- More engaged teams focused on solving customer challenges.
- Technical experts who go the extra mile to deliver innovative solutions.
- Project managers who build stronger, more trusting relationships.
- Consultants who invest their full expertise in transforming businesses.



7. Our Experience

7.1. Case Study 1

UK COUNCIL MODERNISES CX WITH TTEC DIGITAL AND MICROSOFT

The Challenge

A City Council provides over 700 services to local residents in its community. Like many government entities facing budget pressures, they have been tasked to do more with less – a difficult proposition with their previous technology stack. They needed a system that streamlined citizen journeys, offered channels of choice, and provided self-service capabilities to achieve operational efficiency and improved citizen experiences as part of their wider digital transformation strategy.

The Solution

The council partnered with TTEC Digital due their rich expertise in contact centre optimisation to assist in identifying an alternative platform aligned to their needs. Through the initial assessment, TTEC Digital identified Microsoft Dynamics 365 Contact Centre Platform as a solution that could deliver an integrated omnichannel approach to customer service, bringing together customer data across various business line applications and digital channels such as chatbot, voice, and social into a single cohesive platform to deliver a connected experience.

The Result

With TTEC Digital and Microsoft, the Council has seen the following benefits:

- Full visibility across customer journeys.
- Improved call handling time and advisor workflow.
- Ability to identify repeat calls with improved insights.
- Enhanced self-service capabilities through Chatbot & IVR.
- Opportunities to innovate with Microsoft's rich product roadmap.



7.2. Case Study 2

TTEC DIGITAL BUILDS A MODERN CX HUB FOR UK HOUSING RESIDENTS

The Challenge

The company, a leading affordable housing provider in the UK, had a vision to create a Customer Service Hub that put the customer voice at the heart of every interaction. They aimed to deliver a unified system where agents could easily access everything they needed to support residents across all service areas.

To solve challenges like long wait times, high call volumes, and legacy systems that made personalisation and operational efficiency difficult, the company turned to TTEC Digital to help remove data silos, streamline operations, and build connected customer journeys. Implementing a unified CCaaS and CRM platform was only part of the solution. More importantly, they needed a partner who could help transform how their services operated day to day.

The Solution

TTEC Digital began with workshops and operational reviews to map out existing processes, pain points, and gaps in the customer journey. After a technical evaluation, they built a proof of concept that allowed the client to test key journeys in a sandbox environment and refine the solution before going live.

The final implementation focused on a true omnichannel experience and included:

- Voice, live chat, and email communication channels.
- A unified desktop for agents to access all tools in one place.
- Intelligent IVR and call routing based on a skills matrix.
- Real-time transcription, AI-powered sentiment analysis, and agent assist tools.
- Auto case creation and reporting to monitor and manage service demand.

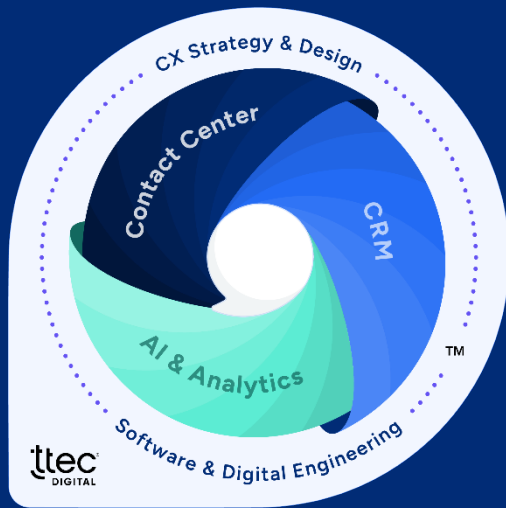


The Result

By creating a Customer Hub that unified systems and services, the customer was able to deliver faster, more effective, and more personalised support.

From day one, the results spoke for themselves:

- 65% improvement in Average Queue Time (AQT).
- 96.3% of calls answered.
- 89% of calls answered within 60 seconds.
- 20% reduction in Average Handling Time (AHT).
- 39% reduction in After-Call Work (ACW).



About TTEC Digital

TTEC Digital is a global leader in customer experience orchestration, combining technology and empathy at the point of conversation. Today customer conversations, and the contact centre technologies that support them, are inseparable. We bring decades of innovation experience across the world's leading contact centre technology platforms – and blend it with in-house expertise in CX strategy, data and analytics, AI and more – to help organisations maximise their technology investments and create truly exceptional customer experiences.

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