

Service Definition: Communications Consultancy & Implementation Services

SERVICE OVERVIEW

Voxaro provide independent, end-to-end consultancy across the Microsoft communications stack to help organisations modernise enterprise voice, contact centre, and compliance recording; introduce AI-enabled automation; and embed sustainable adoption and governance.

Our consultants work alongside stakeholders to assess the current communications landscape, define a target vision, produce actionable designs and plans, guide implementation, and establish adoption/change strategies and ongoing management frameworks. Engagements are tailored to business objectives, risk posture, compliance obligations, budget, and timescales.

Planning & Architecture (Strategy)

- Current communications landscape assessment: telephony, PSTN connectivity, contact centre capabilities, call recording, routing, reporting, service processes, supplier landscape, risks, and constraints.
- Target Operating Model (TOM): people, process, tooling, governance, skills, and service KPIs.
- Reference architectures and patterns: enterprise voice, omnichannel contact centre, compliance recording, and AI enablement.
- Roadmapping: phased outcomes, value case, risks and mitigations, and change approach.

Deployment & Implementation Guidance (Assurance)

- Teams Phone: numbering strategy, porting plans, SBC/Direct Routing/Operator Connect/Calling Plans advisory, dial plans, call policies, survivability considerations.
- Teams-certified Contact Centres: platform selection, detailed design reviews, omnichannel routing design, knowledge and WFM/WFO integration guidance, reporting and analytics.
- Compliance Recording (Teams): Voxaro Compliance Recording advisory; policy scoping, retention, playback controls, encryption, and audit.
- Dynamics 365 Contact Centre: channel configuration guidance, queues/routing, knowledge, case management, data model, integrations (Dataverse/CRM).
- Copilot Studio and AI: use-case identification (virtual agents, agent assist, auto summarisation), guardrails (privacy, safety), workflow design, and integration options.

Adoption, Change & Enablement

- Stakeholder mapping, success metrics, communications planning, and change impact analysis.
- Role-based enablement: agents, supervisors, admins, service desk, champions.
- Accessibility-centred materials and inclusive learning approaches.
- Hypercare advisory and skills transfer plans for internal teams.

Ongoing Management Advisory (Operate & Optimise)

- Service management frameworks: incident, request, change, problem, knowledge.
- Proactive monitoring and analytics models: QoE, capacity, agent productivity.
- Continual improvement cadence and backlog management.

- Feature lifecycle and roadmap alignment with Microsoft release waves.

Current Communications Landscape Assessment (What We Examine)

- Telephony and PSTN: platforms, contracts, numbering, porting complexity, dial plans, DR/diversion strategies.
- Contact Centre: channels (voice/digital), routing logic, IVR/bot usage, WFM/WFO/QM, reporting and insights.
- Recording and Compliance: scope, policies, retention, encryption, access controls, audit trails, and regulatory drivers.
- Network Readiness: bandwidth, QoS, egress design, Wi-Fi/remote sites, SBC topology (where applicable).
- Service Processes: support model, skills, tooling, SLAs/OLAs, backlog of issues, and change governance.
- Integrations and Data: Microsoft 365/Dynamics 365 posture, line-of-business systems, identity, and data flows.
- Risks and Constraints: technical debt, supplier dependencies, procurement timelines, blackout periods.
 - Outputs include a baseline report, risk register, options appraisal, and a prioritised action plan.

Licensing & Ecosystem Advisory

- Microsoft licensing posture: Teams Phone (domestic/international), Contact Centre options, Dynamics 365 Contact Centre, and Copilot Studio entitlements.
- PSTN models: Calling Plans vs Operator Connect vs Direct Routing (pros/cons, risk, cost, resilience).
- Ecosystem selection: Teams-certified Contact Centres and Voxaro Compliance Recording for regulated capture.
- Cost modelling: comparative TCO drivers (licences, connectivity, migration, training, operations).
- Commercial considerations: contract alignment and phased adoption strategies.

Security, Compliance & Data Protection (Consultancy)

- Personnel: UK-based, SC-cleared consultants, BPSS minimum.
- Compliance enablement: patterns for policy-based recording, PCI-DSS pause/resume, role-based access, audit logging, and retention.
- Data protection: UK GDPR/DPA 2018 advisory, data-minimisation, least privilege, records management.
- Security frameworks: alignment guidance to ISO/IEC 27001 control families and NCSC good practice.
- Data residency: options and constraints within Microsoft cloud services and certified platforms.
 - Note: We provide compliance architecture and governance guidance. Legal interpretation and final policy decisions remain the Buyer's responsibility.

Contact Centre and AI Use-Case Advisory

- Channels and workloads: voice, chat, email, social, SMS/WhatsApp, webchat—prioritised by demand.
- Routing design: skills-based, intent-based, and data-driven routing; escalation policies.
- Workforce enablement: WFM/WFO/QM integration patterns; agent tooling design; performance metrics.
- AI scenarios (Copilot Studio): virtual agents, agent assist, summarisation, classification, guided workflows, automation triggers.
- AI guardrails: prompt management, privacy boundaries, PII handling, safety frameworks, and auditability.

Deliverables (Consultancy Artefacts)

- Assessment and Strategy: baseline report, value case, roadmap, Target Operating Model, risks.
- Designs: high-level and low-level designs for Teams Phone, Contact Centre, recording, Dynamics 365 Contact Centre, and AI.

- Implementation Guidance: migration plans, test approaches, cut-over playbooks, DR/diversion strategies.
- Adoption and Change: communications plan, role-based enablement packs, accessibility guidance, skills-transfer outline.
- Service Management Advisory: governance model, SLA/KPI recommendations, reporting templates, continual improvement plan.
- Handover: consolidated documentation set, knowledge-transfer workshops, and exit advisory.

IMPLEMENTATION & ENABLEMENT SERVICES

In addition to consultancy, we provide full implementation services to deliver Microsoft Communications solutions into production environments.

Implementation Activities

- **Teams Phone Deployment**
 - Configure dial plans, call policies, and number management.
 - Port numbers and set up PSTN connectivity (Calling Plans, Operator Connect, Direct Routing).
 - Validate QoS and network readiness.
- **Contact Centre Deployment**
 - Build and configure Teams-certified Contact Centre platform.
 - Design and implement queues, IVR flows, skills-based routing, and escalation logic.
 - Integrate WFM/WFO/QM tools and reporting dashboards.
 - Conduct functional and performance testing before go-live.
- **Compliance Call Recording**
 - Deploy **Voxaro Compliance Recording** solution.
 - Configure policy-based recording, encryption, retention, and playback controls.
 - Enable PCI pause/resume functionality for regulated transactions.
 - Validate compliance and audit logging.
- **Dynamics 365 Contact Centre**
 - Configure voice and digital channels, routing, and case management workflows.
 - Integrate with Dataverse and CRM systems.
 - Test omnichannel scenarios and agent experience.
- **Copilot Studio AI Automation**
 - Build and deploy AI bots for virtual agents and agent assist.
 - Configure workflows for summarisation, classification, and automation triggers.
 - Apply guardrails for privacy, security, and compliance.
 - Test AI scenarios for accuracy and performance.

User Enablement

- Provision users and assign appropriate licences and policies.
- Configure Teams profiles, voice settings, and contact centre roles.
- Deliver role-based training for agents, supervisors, and administrators.
- Provide adoption materials and run hypercare sessions post go-live.

Testing & Go-Live

- Execute UAT and scenario-based testing for voice, contact centre, recording, and AI.
- Validate integrations with Microsoft 365 and Dynamics 365.
- Perform cut-over planning and phased deployment to minimise disruption.
- Monitor early-life support and optimise configurations based on feedback.