Microsoft

Virtual Consults
A Teamwork Solution Opportunity

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Virtual Consult refers to B2C scenarios across different industries that involves remote virtual support to solve a consumer problem

What are Virtual Consults?

Virtual Consult is an umbrella term encompassing all **B2C scenarios** that puts a citizen end user in touch with an SME / Support Agent belonging to a business entity, in order to provide help or support over a topic.

Citizen end users are typically consumers who don't have Teams or any form of M365 license and business end of the consult have Teams users or business propensity to use Teams.

Why is it important?

- With the acceleration of consumer and provider adoption of telehealth and extension of telehealth beyond virtual urgent care, up to $250 billion of current US healthcare spend could potentially be virtualized[1]

- Virtualization has revolutionized banking sector too with substantial number of accounts getting opened through video KYC, video banking support provided by relationship managers

Virtual Consult Scenarios

Industry	Scenario Description	Citizen end user	Business SME
Finance & Banking	A bank's customer is confused with the ideal policy that will suit his needs and wants to speak to an agent from the bank to go through his options in detail	• High net worth individuals • Banking customers, loan requesters	• Relationship managers • Policy Sales Agents
Healthcare	A patient would like to speak to a doctor for routine consultation but wants to avoid physical hospital visits and potential exposure to COVID 19 pandemic.	• Patient	• Doctor
Retail	An avid shopper likes a cleaning equipment they saw on the store's website and would like to see video demo from store executive before placing an order	• Shopping consumer	• Sales Agent • Store FLW
Insurance	An insurance policy holder has met with an accident and has the damaged vehicle. He gets in touch with insurance firm to show vehicle and ask questions	• Insurance policy customers	• Insurance agent
Government	Residents of a city / state can ask questions and get answers from state officials regarding COVID 19 lockdowns, travel and other restrictions	• Residents	• Government support desk

1- _McKinsey Report on Telehealth_

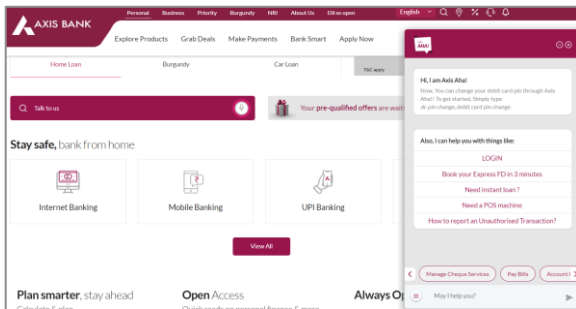# What constitutes a Virtual Consult?
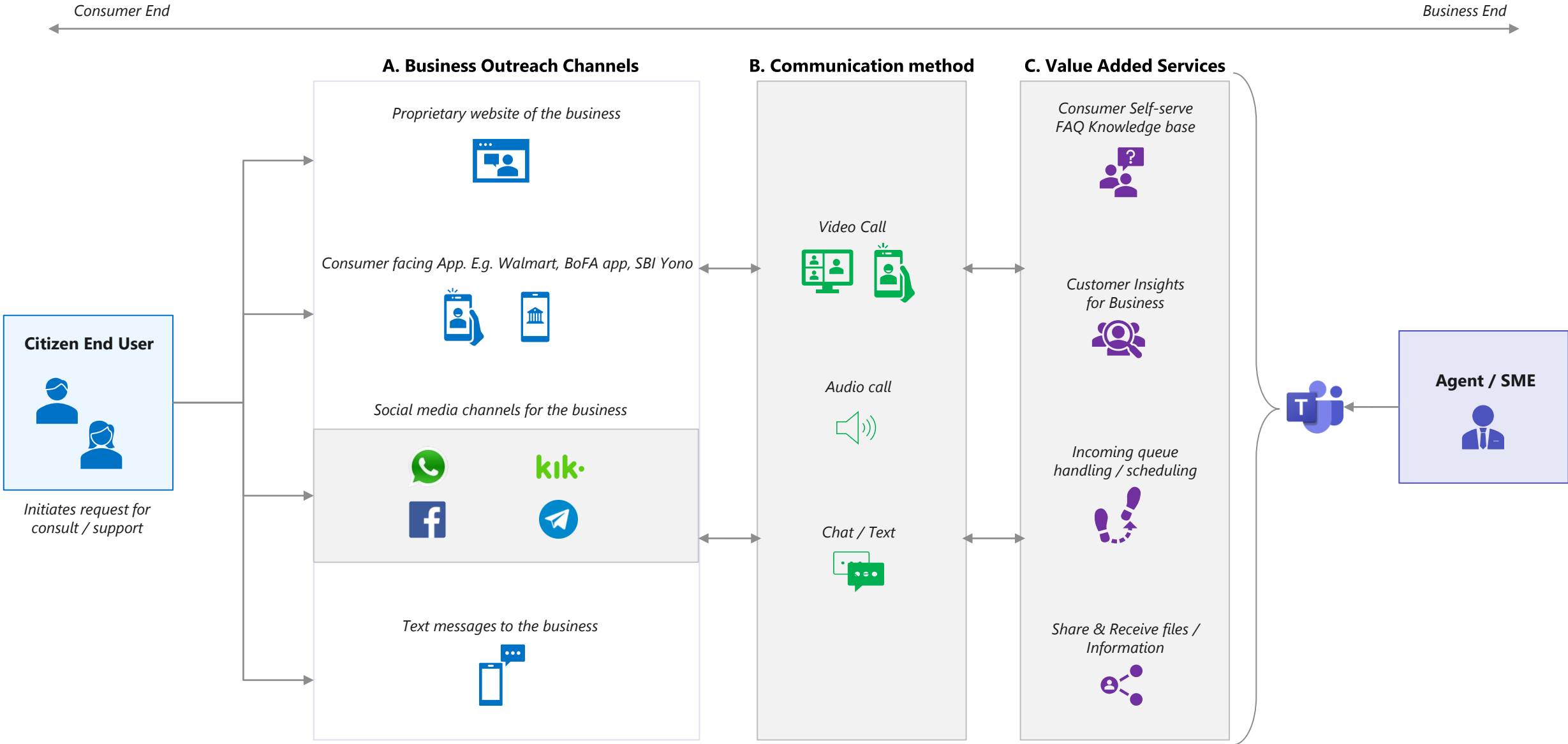
A. Business Outreach Channels can be varied providing multiple options for a consumer to reach the business

Business Outreach Channels

- Business outreach channels form the first digital touchpoints that the consumer interacts with on their journey to solve their problem. These are typically chosen by the business as part of their omnichannel strategy
- These channels can be varied depending on the business's strategy and will keep evolving based on a platform's popularity. E.g. Many businesses have a Facebook page and messenger chat to reach a business in addition to a website
- Consumers prefer a standard experience across these channels and business organizations are keen on unifying these varied platforms and present one branded consumer experience
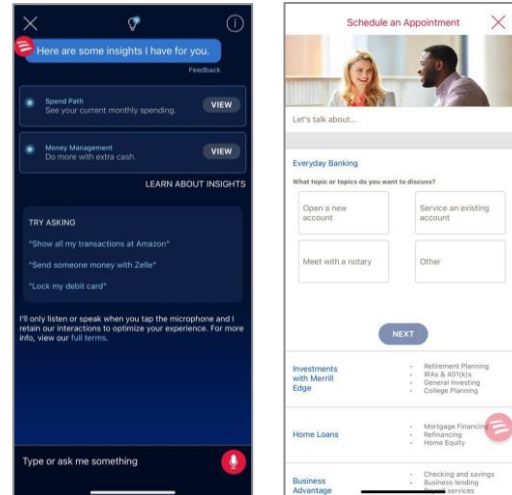
Branded Website   Branded Mobile App   Social Media   WhatsApp

Axis Bank website with a bot on welcome page   *BoFA mobile app with a bot + appointment scheduling*   *BoFA FB page with messenger chatbot*   *HDFC WhatsApp Banking*
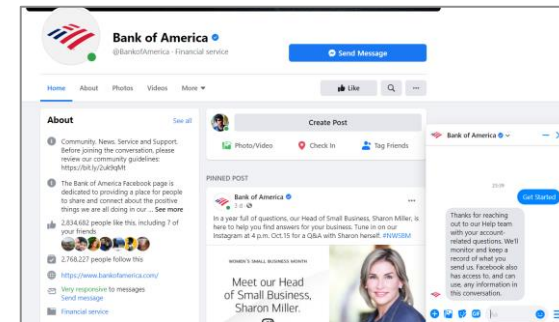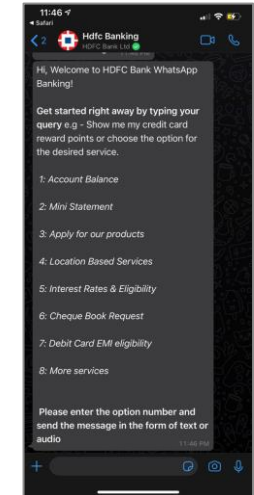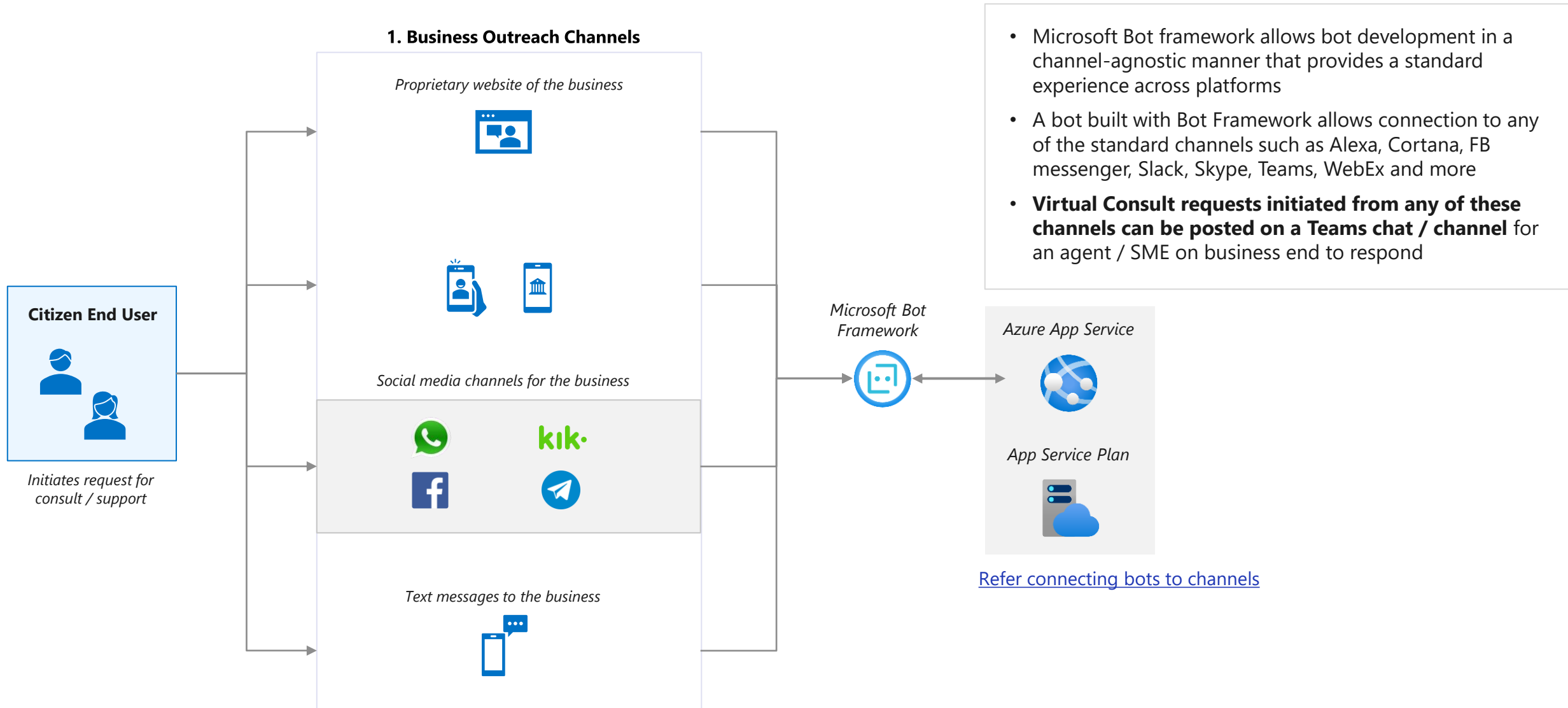
A. The different consumer facing channels can be connected to a bot implemented using Microsoft Bot Framework

1. Business Outreach Channels

Proprietary website of the business

Social media channels for the business

Text messages to the business

Citizen End User

Initiates request for consult / support

Microsoft Bot Framework

Azure App Service

App Service Plan

Refer connecting bots to channels

- Microsoft Bot framework allows bot development in a channel-agnostic manner that provides a standard experience across platforms
- A bot built with Bot Framework allows connection to any of the standard channels such as Alexa, Cortana, FB messenger, Slack, Skype, Teams, WebEx and more
- **Virtual Consult requests initiated from any of these channels can be posted on a Teams chat / channel** for an agent / SME on business end to respond
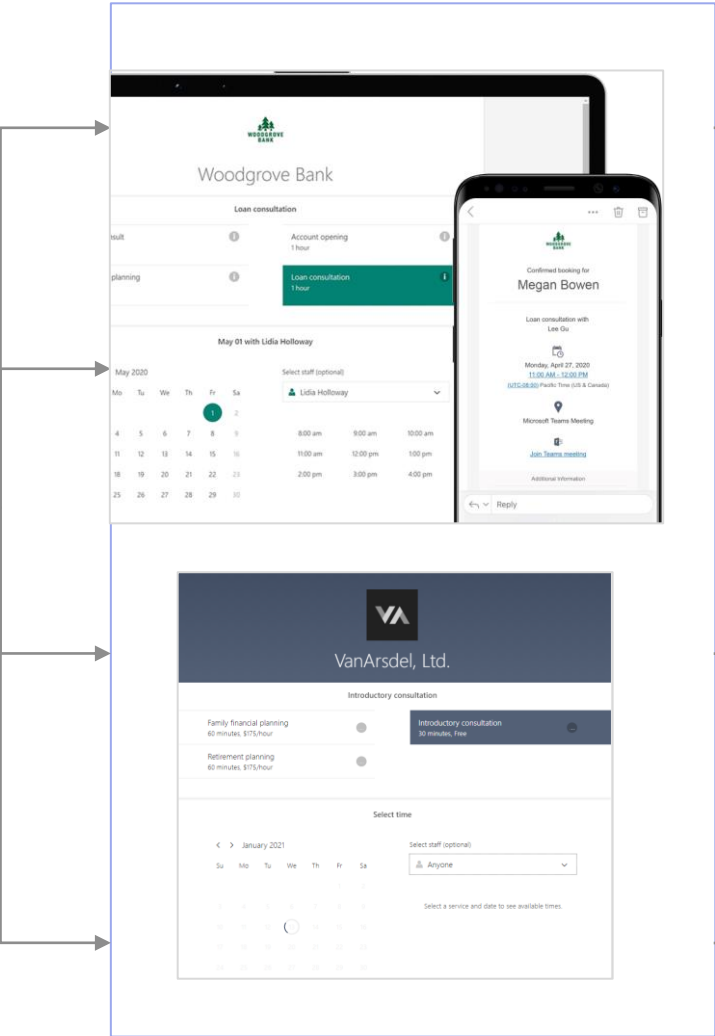
A. For organizations with no digital outreach channels, Microsoft Bookings can provide a simple, intuitive entry point for consumers

1. Business Outreach Channels

- Bookings provides an easy to setup and user interface for businesses to create outreach channels on their website
- [Microsoft Bookings Graph API](#) allows creation of appointments, consult requests from consumers
- Bookings created programmatically can be surfaced in Teams chat / channels for an agent / SME on business end to respond

Citizen End User

Initiates request for consult / support

Microsoft Graph

Bot Framework

Azure App Service

App Service Plan
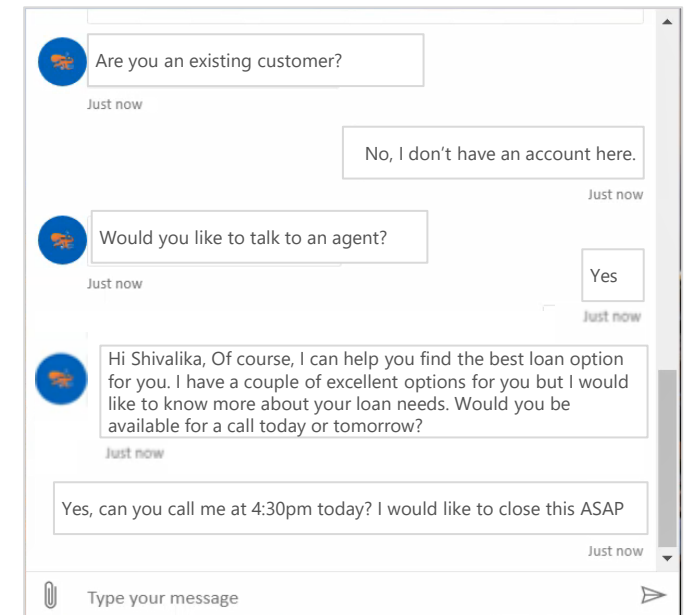
[Refer usage of Microsoft Graph Bookings API](#)

A. Sample: Citizen user chatting on a bot in a business website with an agent / SME responding from bot in a Teams channel
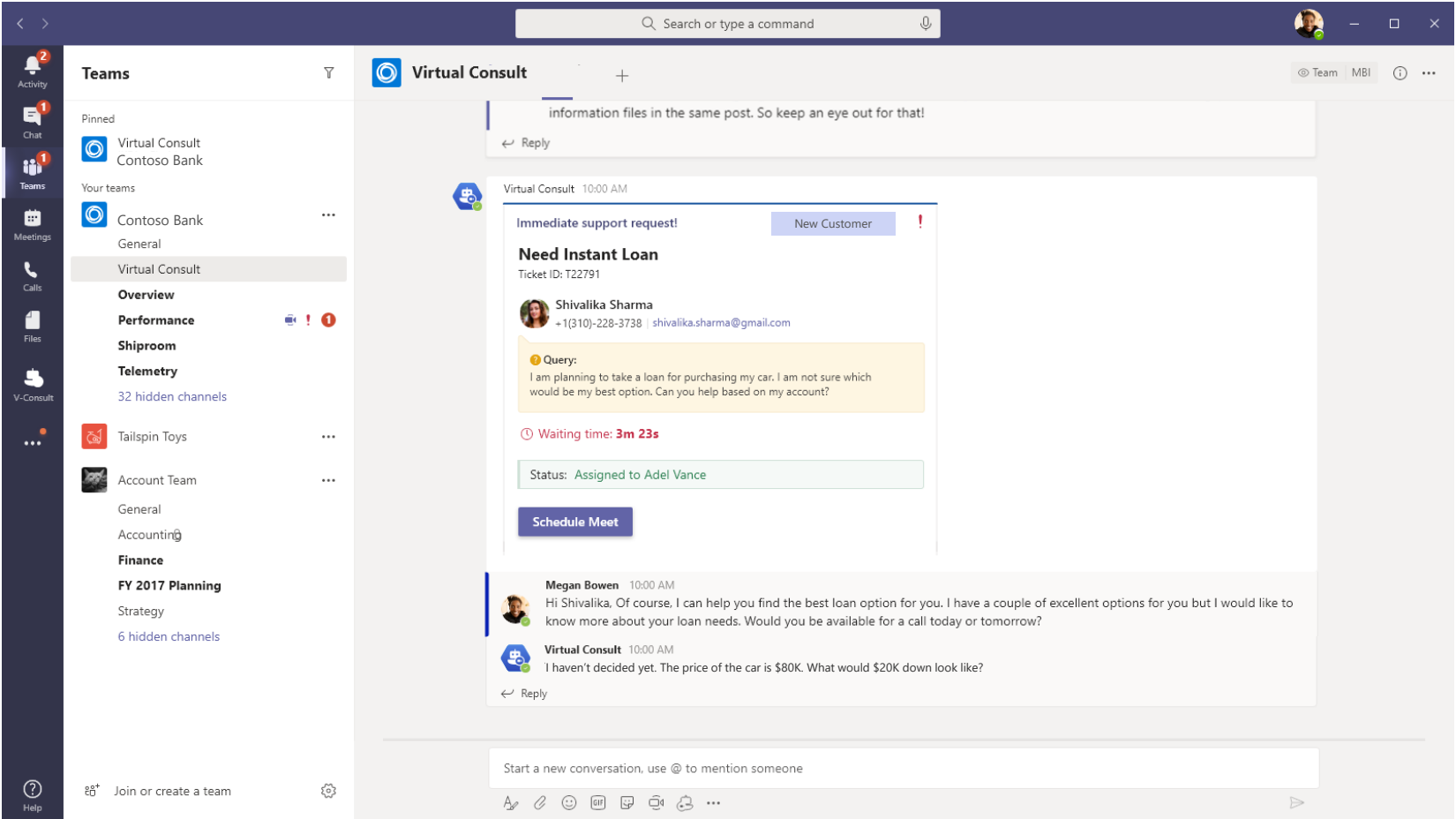
SME / Agent User Interface
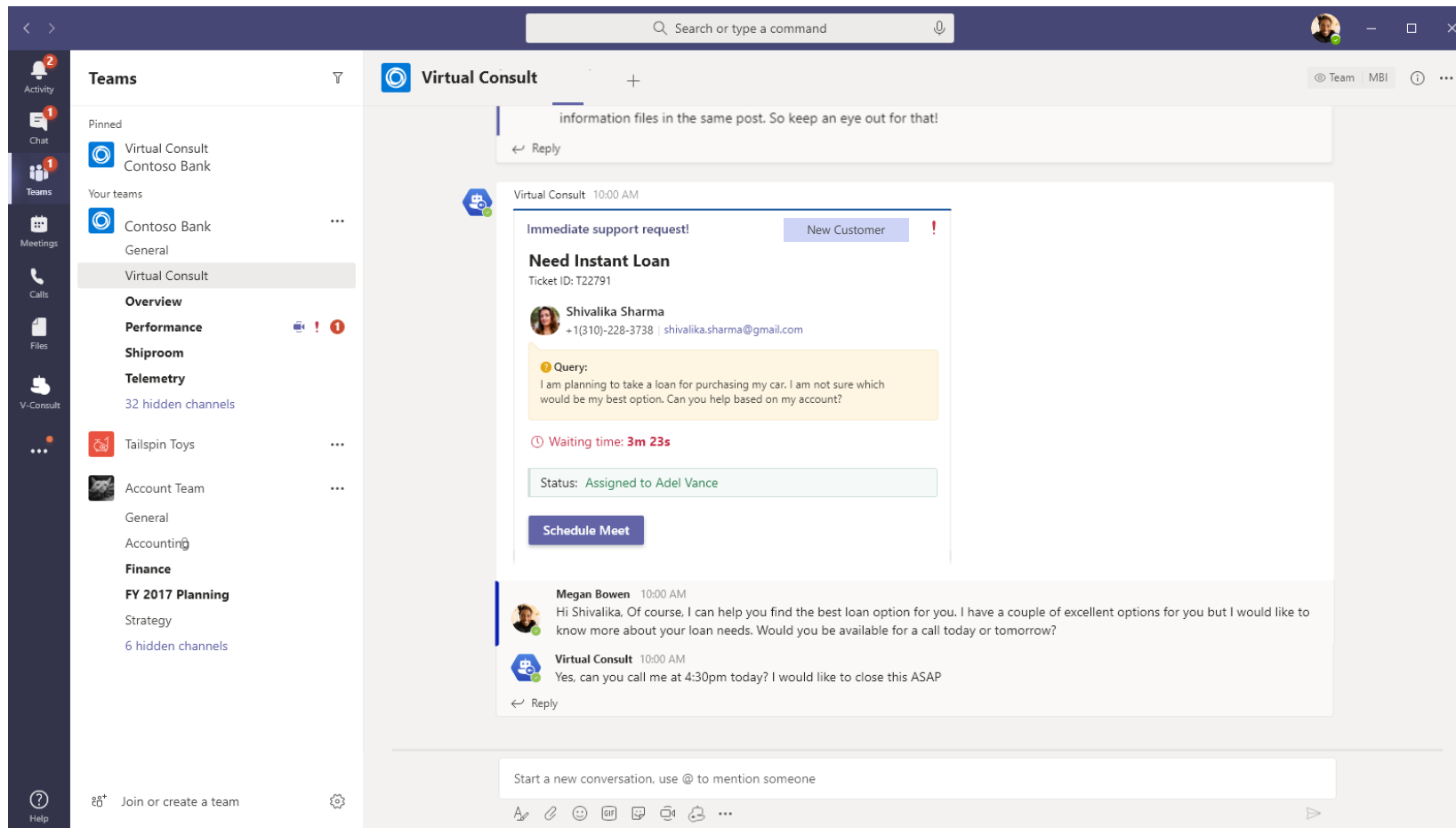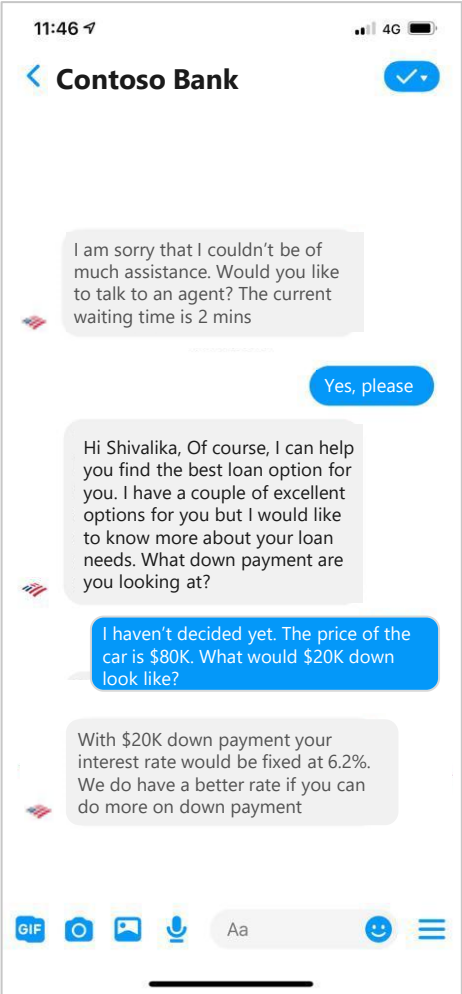
Citizen End User Interface

A. Sample: Citizen user chatting on FB Messenger with an agent / SME responding from bot in a Teams channel

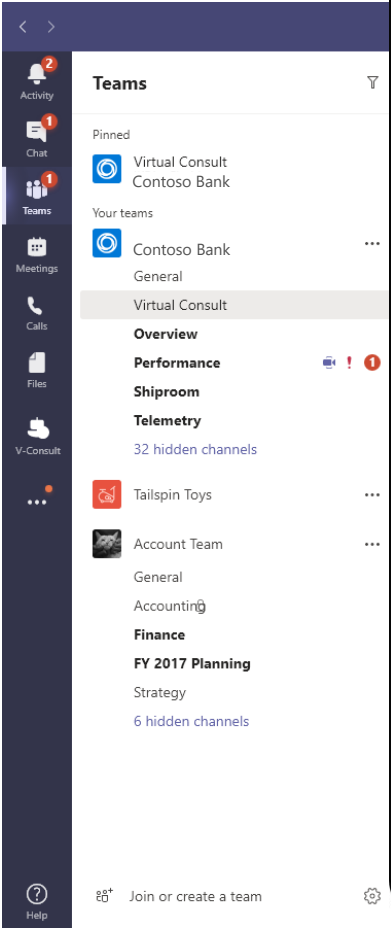**SME / Agent User Interface**

Citizen End User Interface

B. Understanding preferred communication methods of consumers will provide insight into the right implementation approach
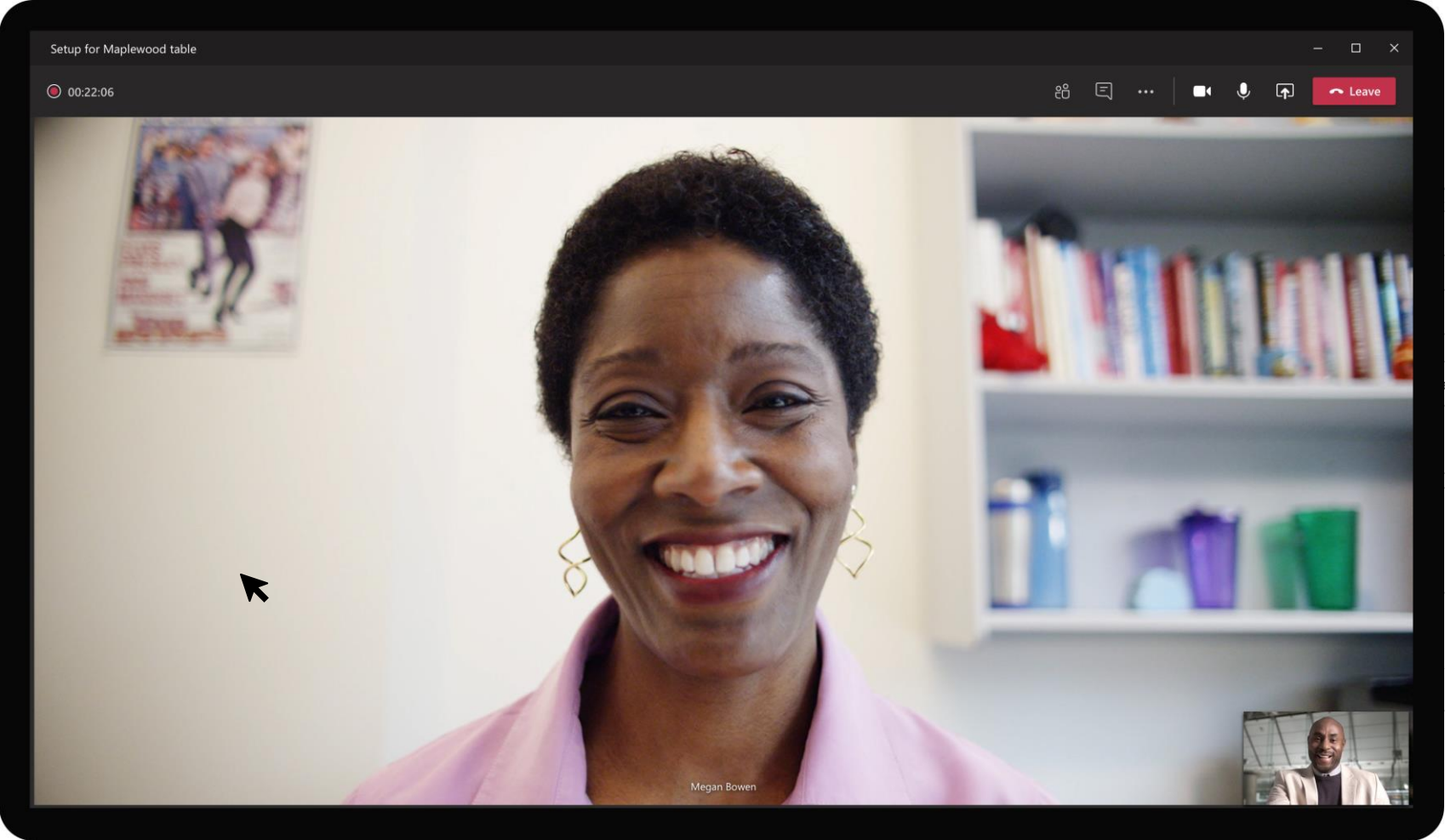
Communication Method

- Consumers of a business can choose to communicate with business through text / chat or might wish to escalate cases to get additional support over a video call.
- Consumers can also request for scheduling a consult for planned interactions or may request for a quick call connection for emergency requests

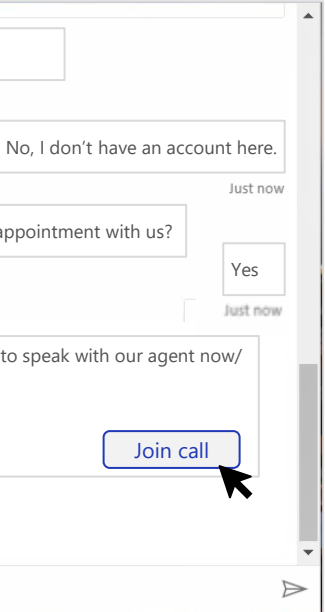| Mode of Communication	Nature of Consult	How to implement?
Text	Not Applicable	• Create a bot in Microsoft bot framework with <u>at least two channels enabled</u> – Microsoft Teams and the channel that the consumer is using to raise consult request • When message is received in any of the consumer channels, create and <u>send proactive messages</u> to Teams. • When SME / agent replies to the bot on Teams, capture the payload and send the message to relevant consumer channel
Audio / Video Call	Planned / Scheduled	• When request is received in any of the consumer channels, create and <u>send proactive messages</u> to Teams. • Use <u>onlineMeeting Graph API</u> to create a Teams meeting based on the request from consumer at requested time slot • Use Power Automate or <u>Graph API</u> to create and send an email with meeting join details. Alternatively, use Azure Mobile Services to send text message with meeting join details to consumer
	Emergency	• Option A: Use <u>onlineMeeting Graph API</u> to create a Teams meeting starting immediately and send meeting join details to end consumer over any of the consumer channels • Option B: Create a <u>calling and meeting bot</u> that places a Teams call immediately between consumer and an <u>available</u> SME / agent

B. Sample: -

C. Value Added Services are the differentiators to a Virtual Consult solution that provides competitive advantage to your IP

1 _Consumer Self-serve FAQ Knowledge base_

2 _Incoming queue handling / scheduling_

- Microsoft bot framework can be integrated with many popular consumer interfacing channels. Adding an FAQ Knowledge Base to this consumer facing bot can handle initial few basic questions
- Since Knowledge base is same across different channels, the experience for FAQs will be same across channels. In addition, it reduces load on human agents`

- There is a queueing aspect to any contact centre like solution where incoming consult requests need to be triaged, categorized and routed to SMEs / agents based on
  - Capability / Skill match (relevant doctor for symptoms, sales agent for the policy and region)
  - Region / Shift timings, availability as per calendar
  - Load balancing (cap number of parallel requests for SME / agent)

Agents

Bot Framework ↔ **Azure App Service** ↔ **QnA**

Bot Framework ↔ **Azure App Service** ↔ **MS Graph**

- Customize FAQ Plus app template to connect Bot framework to Q&A Knowledge base.
- Add ability to add Q&A to knowledge base on the business end as provided by FAQ Plus app template
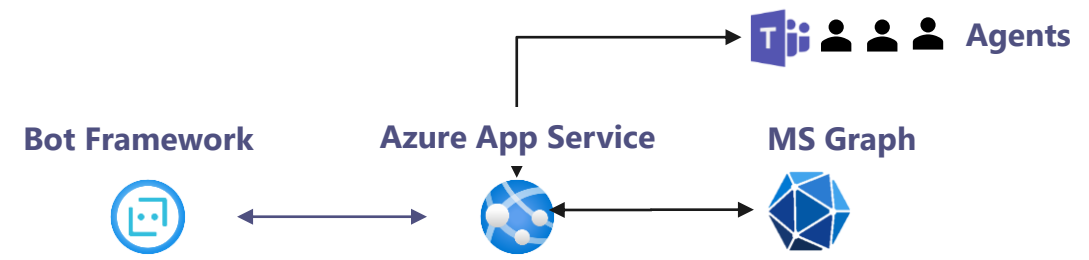
- Calling & Meeting Bot: Use calling and meeting bot to place calls to agents on behalf of users. This is more powerful than setting up meeting and calendar nudges
- Use Get Presence API to check agent's availability & assign consults
- Customize Expert Finder to capture agent / SME skills and assign consults based on skills
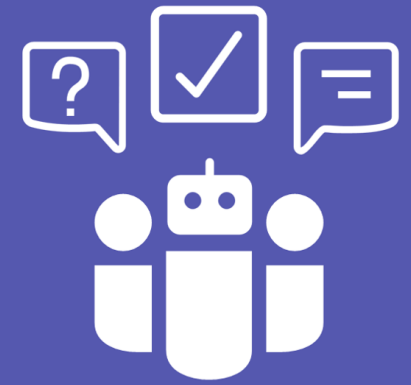
Appendix

Thank you!

Start exploring

- Check out existing integrations already live in the App Gallery (in-app store)

- Play around with Teams App Studio, Node.js, and c#/.NET

- Understand capabilities of the Teams extensible platform

- Brainstorm and finalize scenarios for integrations as a Teams app (tab, bot, messaging extensions, personal apps et al)

Get started developing

- Teams Developer Documentation

- Teams Sample Code on GitHub

Leverage Teams in-house experts

- Discuss scenarios, best practices, and workarounds

- Tap into **Sathya** to build a regular cadence of platform expertise, webinars, code walkthroughs

- Send Microsoft platform feature asks to Sathya (saraveen@microsoft.com)