# Successfully Integrating Microsoft Teams and Contact Center

*To realize benefits in improved productivity and customer experience, organizations must adopt a solution that minimizes complexity and maximizes performance.*

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## Executive Summary

Integrating Microsoft Teams into the contact center offers significant benefits, including the ability for customer service agents and back-office employees to seamlessly engage with one another using the same voice, video, and messaging platform.

Selecting the right contact center integration approach for Teams requires carefully determining requirements and evaluating competing solutions based on their ability to maximize reliability and performance, while minimizing complexity.

A Teams-certified contact center leveraging Microsoft Azure Communication Services provides seamless, off-the-shelf integration to third-party contact center platforms without requiring extensive customization. Additional benefits may come from consolidated management of dial plans, calling contracts, and call routing rules, and integration of additional services including recording and artificial intelligence (AI).

This issue paper provides guidance for IT and customer experience (CX) leaders to evaluate and select the optimal Teams-certified contact center solution for their company's needs.

## Contact Center and Unified Communications Are Converging

Organizations increasingly want to unify their contact center and unified communications (UC) platforms to achieve a variety of goals. These include:

- Improving customer responsiveness by enhancing collaboration between customer-facing agents and back-office personnel
- Simplifying their communications environments to eliminate redundancy and maximize flexibility, thereby reducing operational costs
- Enabling customer service agents and back-office personnel to use the same set of communication and collaboration tools for all their needs
- Enabling the extension of collaboration applications to support lightweight contact center use cases
- Supporting the integration of business applications, including customer relationship management (CRM), with integrated collaboration and customer engagement platforms

Among the nearly 1,600 participants in Metrigy's *Customer Experience MetriCast 2024* global study, 43.8% are already using a unified platform for both contact center and (UC). Another 28.5% plan to do so by the end of 2024.
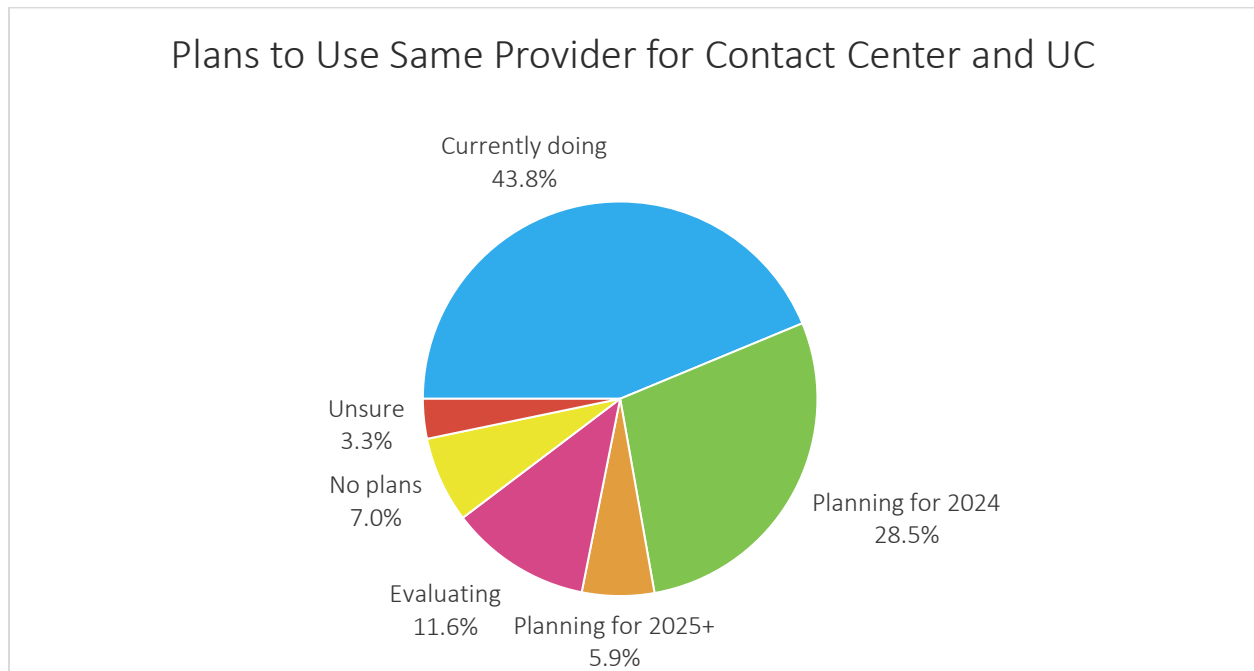


*Figure 1: Plans to Use Same Provider for Contact Center and UC*

At the same time, Microsoft Teams is emerging as the dominant platform for UC (and collaboration). In its April 2024 earnings report, Microsoft boasted of having more than 320 million Teams users, with more than 20 million of them also using Teams Phone, globally.[1]

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[1] https://techcommunity.microsoft.com/t5/microsoft-teams-blog/discover-why-over-20-million-pstn-users-trust-microsoft-teams/ba-p/4124503

Metrigy's *Workplace Collaboration MetriCast 2023* global study of more than 1,400 organizations found that not only is Teams Phone the most widely deployed UC-as-a-Service (UCaaS) platform, but also it is the platform most often under consideration for those moving to UCaaS or replacing their existing UCaaS provider.

## The Need to Support Internal Agents and Informal Contact Centers

As noted above, one use case driving contact center and UC integration is the desire to easily support non-traditional, or lightweight, contact centers. Metrigy's CX research has consistently shown that those using contact center technologies often live outside of the traditional customer-facing contact center. Contact center technologies may be utilized for a variety of use cases, including:

- Internal service desks (e.g., IT support, HR, travel, etc.)
- Ad-hoc use cases such as for time-capped projects or to handle seasonal peak periods with variable call volume
- Application development teams who engage with external groups
- After-hours call routing to appropriate personnel
- Security desks

Figure 2 below shows the percentage of types of contact centers in use by the 641 organizations participating in Metrigy's *Customer Experience Optimization: 2023-24* global research study.



**Type of Contact Center**

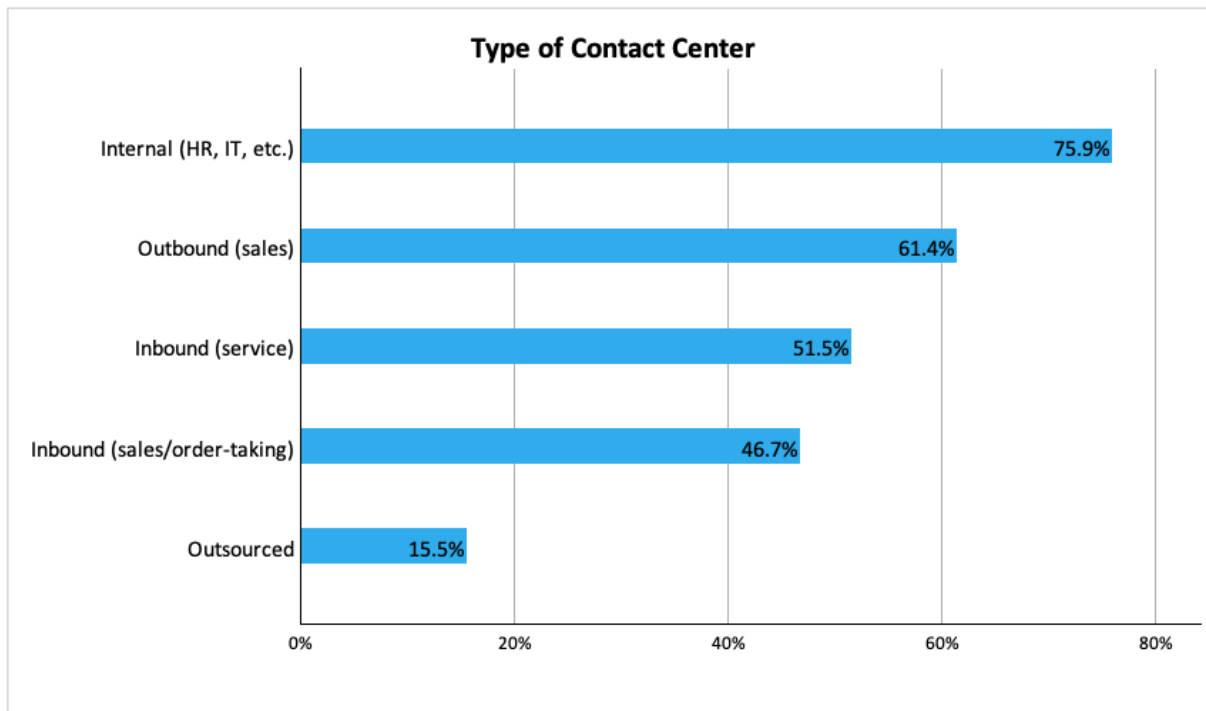| Type | Percentage |
|---|---|
| Internal (HR, IT, etc.) | 75.9% |
| Outbound (sales) | 61.4% |
| Inbound (service) | 51.5% |
| Inbound (sales/order-taking) | 46.7% |
| Outsourced | 15.5% |

*Figure 2: Type of Contact Center*

These informal contact centers often require many of the same capabilities of a customer-facing contact center, such as policy-based call routing, skills-based routing, interactive voice response (IVR), after-hours call routing, automation, and reporting, but at a more limited scale than a full-service contact center. For companies using Teams, the simplest way to meet the need for informal contact centers is to do so by leveraging the same Teams capabilities and features already available for calling, meetings, and chat.

Another driver for integrating Teams and contact centers is the fact that many of those involved in customer support (both internally and externally) are located outside of the contact center. For example, Metrigy's *CX Optimization* global study found that 47.3% of participating companies rely on employees outside of the contact center to help when needed inside the contact center. Among those companies, 29.7% of their non-contact-center employees assist periodically within the contact center. Extending the Teams capabilities that employees are already using for employee engagement to support contact center use cases offers the potential to minimize complexity, training, and support costs.
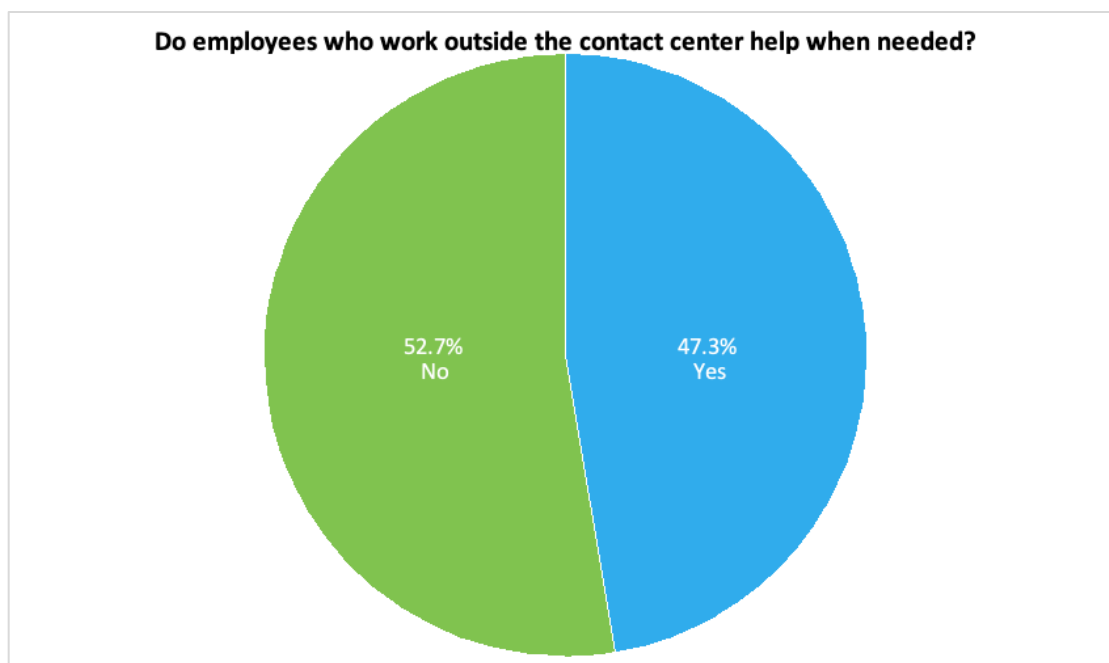
**Do employees who work outside the contact center help when needed?**

52.7%
No

47.3%
Yes

*Figure 3: Do employees who work outside the contact center help when needed?*

## Is Microsoft Teams Good Enough for the Contact Center?

One option for companies is to use Teams, alone, as a basic contact center solution. Teams, with the Phone feature set license, includes several capabilities, such as auto-attendant, IVR, and call queues, that may support very basic contact center needs.

In March 2024, Microsoft announced enhanced capabilities, branded as Microsoft Queues, that are available as part of the Teams Premium add-on license. Call queues, generically, are waiting areas for callers until agents become available. Microsoft Queues enhances existing Teams

Phone queuing capabilities to enable companies to view statistics about their queues, distribute configuration and management of queues outside of IT, and to view caller information for those waiting in a queue, all within the Teams app. Queues also integrates Microsoft Phone features including call monitoring, barge, whisper, and takeover.

For those merely seeking an improved call queue experience, Queues may be sufficient. But Queues is not a sophisticated contact center solution and lacks several crucial capabilities, including:

- Skills-based routing to enable forwarding of calls to the right agent, depending on information provided by the IVR and agent availability
- Queue policy management such as limits on automation
- Omnichannel capabilities to support customer engagement across additional channels, such as email, voice, messaging, video, text, or webchat
- Advanced reporting and management capabilities
- Natural language, conversational IVR to enable a richer experience than simply "press 1 for sales," "2 for customer service," etc.
- Multi-language IVR support
- Ability to dip into information from external applications, such as CRM, to support call response
- AI-powered intelligent virtual agents to support sophisticated self-service support

In addition, companies wishing to use Queues must purchase Teams Premium licenses (with a list price of $10 per user, per month), on top of Teams Phone licenses, for all Queues users. Microsoft does not currently offer pooled or usage-based licensing models.

## Integrating Microsoft Teams and the Contact Center

Teams users seeking a more robust contact center solution benefit from a strategy that natively integrates Teams with a third-party contact center platform. But not all Teams-Contact Center integrations are alike. Today, Microsoft offers two integration models: Connect and Extend. A third model, Power, is on the way.

### Connect Model

The Connect Model simply connects a Teams-certified contact center platform with Teams, via the use of Direct Routing. The Direct Routing model requires companies to deploy Microsoft-certified session border controllers (SBCs) and SIP trunks for connecting Teams Phone to their contact center platform.

The Connect Model simply enables the passing of calls from the contact center platform to Teams Phone, and vice-versa. Additional features include the ability to share presence between Teams and the contact center platform, establish call groups, and use Microsoft Graph and Cloud Communications APIs for additional, customized integrations.

Agents using the contact center platform for their calling needs do not require a Teams Phone license, and the agent uses their contact center interface for call management. Back-office personnel engaging with contact center agents will only use Teams. The Connect Model essentially provides a minimal level of integration but doesn't support the ability to use Teams as the primary interface for all engagement.

## Extend Model

The Extend Model offers a higher level of integration between Teams and the contact center platform by using the Microsoft Graph API to integrate calling and digital channel management from the contact center platform into the Teams app. Users can also leverage application integrations within Teams to see customer information pulled from a CRM. Typically, the contact center platform provider will provide managed PSTN access via Direct Routing or Operator Connect (if available).

The Extend Model allows agents and back-office personnel to engage across all Teams modalities: chat, voice, and video. And it allows system administrators the ability to manage one calling platform rather than separate calling platforms for Teams and contact center as in the Connect Model. Like the Connect Model, the Extend Model also supports the use of Graph and Cloud Communications APIs for customized reporting and application integrations.

## Power Model (Upcoming)

A third way of integrating contact center platforms with Teams will be through Azure-native integration allowing contact center providers to power their calling capabilities via Teams.

Microsoft states that the goal of this model is to "provide a one-app, one-screen contact center experience."[2] In effect, the Power Model will allow Microsoft partners to leverage Teams Intelligent Conversation and Communications Cloud (IC3) capabilities, through Azure Communication Services, to build Teams-powered capabilities into their contact center platforms.

The Power Model will offer the potential to further simplify the agent experience by allowing them to manage all their communications through their contact center platform, with seamless integration to Teams. Already one provider, AudioCodes, is delivering Azure-native integration in its Teams-certified contact center solution.

The table on the next page summarizes key differences between the three Teams-Contact Center integration models.

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[2] https://learn.microsoft.com/en-us/microsoftteams/teams-contact-center?tabs=power

|  | Connect | Extend | Power (Upcoming) |
|---|---|---|---|
| **Agent Experience** | Contact center platform for calling and channel management | Teams, with features integrated from contact center platform | Contact center platform, with features integrated from Teams |
| **Agent Licensing** | Contact center platform | Teams Phone (when using the Teams app for calls) | Teams Phone |
| **PSTN Access** | Via Direct Routing, separately managed | Through Teams Phone (Direct Routing, Operator Connect, or Microsoft Calling Plan) | Through Teams Phone (typically via Azure-connected services) |
| **Platform Architecture** | Separate | Contact center features integrated into Teams Client | Teams components natively integrated into the contact center platform via Azure Communication Services |

## Beyond Integration: Adding Essential Capabilities

Integrating Teams and the contact center provides a centralized place to enable integration of additional unified capabilities across both Teams and contact center platforms, delivered by the contact center platform provider. These include:

- **Call recording** – for any call made using Teams or the contact center platform. Additional capabilities could include classification and storage in accordance with compliance needs as well as monitoring for agent performance and/or data loss prevention
- **Performance management and reporting** – including contact center-specific metrics as well as voice and video quality
- **Generative AI –** features may include call transcription and summarization as well as translation. Generative AI bots may allow for querying of data captured through omnichannel engagement to understand contact center performance, call trends, and call topics as a key source of business intelligence to improve decision making
- **Omnichannel/Digital CX –** Today, customer engagement is far broader than voice. Customers expect the ability to seamlessly move across a variety of channels, including web chat, messaging, email, voice, and even video. Companies often differentiate themselves by their ability to meet the customer on any channel and to support advanced capabilities including screen sharing and co-browsing, and mobile engagement

## Selecting the Right Teams-integrated Contact Center

Selecting the right Teams-integrated contact center solution requires a careful evaluation of the many options available in the market today. IT leaders should evaluate competing providers based on the following:

- **Architecture** – Those offering solutions built on Azure Communication Services can deliver native Teams-powered capabilities directly within their contact center platform, providing seamless access to all underlying Teams services and a common user and management experience for both Teams Phone and contact center calling.
- **Teams Certification** – Achieving Teams certification means that the provider has demonstrated its ability to integrate with Teams and to support the required Teams features. It also means that the provider can offer an integrated management capability that supports Graph APIs.
- **Flexible PSTN Connectivity Options** – An integrated Teams contact center solution that provides PSTN access through either Direct Routing or Operator Connect offers the ability for customers to simplify their PSTN management strategy, avoiding the complexity that comes with separate infrastructures for back-office calling and contact center. PSTN integration also enables easily transferring calls, or adding participants to calls, regardless of if they are on Teams Phone or the contact center platform.
- **Integrated Teams and Contact Center Management, Reporting, and Analytics Capabilities** – Providers may offer different capabilities to deliver call and contact center performance insights, including views into voice quality as well as measurements of agent and queue performance.
- **Flexible billing options** – Some providers offer per-seat licensing models, billed at a fixed monthly cost with separate levels for agent and supervisor. Others offer pooled or usage-based licensing, potentially saving money, especially for informal or ad-hoc contact center scenarios or in scenarios where agent population varies (e.g., seasonally or around specific events).
- **Reliability** – Providers may vary in their ability to guarantee uptime and application availability, as well as in how they compensate customers for unexpected downtime.
- **Global reach, user support, and lifecycle management** – Contact center providers typically vary in their global reach, with some offering broader global availability than others. Additional areas of variance include options for training and support, local implementation and training resources, and ongoing lifecycle management to ensure that customers can fully take advantage of available features to optimize their customer engagement.
- **Customization and Workflow Management** – Some providers offer easy-to-use tools, such as drag-and-drop workflow builders, to design IVRs and customized call flows. Others require a more manual process or the use of a third-party partner to build customizations.
- **Application Integration** – Contact center providers may differ in their ability to support third-party integrations into business applications such as CRM as well as specific vertical applications used for customer management.

## Conclusions and Recommendations

As Teams adoption grows, so too does the need to integrate Teams into the contact center in support of seamless front and back-office communications and collaboration. In addition, companies may need to leverage enhanced contact center capabilities, integrated with Teams, for informal and ad-hoc contact center use cases. In selecting the ideal Teams integrated contact center platform, IT leaders should:

1. Consider a more robust contact center platform as an alternative to Teams-native and Teams Premium capabilities.
2. Evaluate solutions that offer the most seamless integration into Teams, ideally leveraging Azure Communication Services to deliver Teams capabilities directly into the contact center platform.
3. Look for providers that offer both a broad set of contact center capabilities as well as the ability to integrate Teams and contact center PSTN calling and platform management.
4. Carefully consider delivery models offered by contact center providers (e.g., per-seat versus usage/consumption-based pricing) to ensure maximum business value and to align spending with need.

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