

CallRecordz

MS Teams ContactCentre solution for iMIS

- [AI ContactCentre - Teams for iMIS](#)
- [AI ContactCenterGuru - Teams for iMIS](#)
- [Business Value: Suggested Marketing Copy](#)

AI ContactCentre – Teams for iMIS

Executive Overview

Publisher	ZENTSO S GmbH
Product	AI ContactCentre - Teams for iMIS
Version	2025-2026 Roadmap
Audience	iMIS and CloudToolz Clients

1. Vision: AI-Enhanced Calling for iMIS

AI ContactCentre brings Microsoft Teams calling directly into iMIS by combining your existing Teams Phone auto attendants, call queues, and softphone with CRM context and AI documentation.

Staff receive calls through the **Teams app**, see who is calling in **iMIS**, click to call from inside iMIS, and get automatic summaries, transcripts, and follow-up actions — all without changing your telephony infrastructure.

This is a **CRM Companion Strategy**: enhance your existing Teams Phone environment with intelligent, integrated CRM capabilities that improve service quality and reduce manual work.

2. The Low-Hanging Fruits

Immediate value without workflow redesign or telephony changes.

1) Caller Identification in Real Time

As calls arrive through your existing auto attendants and call queues, iMIS instantly shows:

- Member name and status
- Recent activity
- Engagement history

- Outstanding tasks, cases, or renewals

No searching. No context switching.

2) One-Click Call Capture

After the call:

- Click “Save Call”
- iMIS records call metadata, duration, and notes automatically
- No duplication or manual re-entry

3) AI Summaries and Transcripts

AI ContactCentre provides:

- Complete transcription
- Condensed summary
- Key decisions
- Follow-up actions

Staff only need to review → approve → save.

4) Teams Recording Linked Automatically

iMIS stores:

- Call summary
- Transcript
- Metadata
- Secure Teams recording link

Everything is captured in one CRM record.

5) Automated Follow-Up Actions

Flowz automation can:

- Create tasks
- Assign staff
- Trigger renewals
- Flag risk indicators

AI listens → Flowz automates → iMIS updates.

3. Key Benefits

Category	Benefit
Efficiency	Calls handled in Teams; intelligence surfaced directly in iMIS.
AI Assistance	Reduce manual note-taking with accurate AI summaries.
Quality Control	Supervisors gain visibility into call outcomes and recordings.
Insight	Analyse call volumes, sentiment, and common topics.
Consistency	Standardised call records across all staff.
Scalability	Roll out team by team across the organisation.

4. Solution Overview

AI ContactCentre is a **CRM Companion Layer for Microsoft Teams Phone**, designed specifically for iMIS environments.

It integrates:

- **Teams Phone calling** (receive calls in the Teams app)
- **Existing auto attendants and call queues**
- **iMIS CRM** (real-time caller recognition and history)
- **CloudToolz Flowz** (automated post-call workflows)
- **AI intelligence** (summaries, transcripts, insights)

There is **no change** to PSTN routing, calling plans, carriers, or SBCs.

You enhance what you already have.

What Staff Can Do

- **Receive inbound calls in the Teams app**
Calls flow through your existing routing configuration.
- **See who is calling in iMIS immediately**
Automatic caller recognition and CRM context.
- **Make outbound calls directly from iMIS**
Click-to-call launches the Teams softphone with context.
- **Capture structured call records automatically**
Including metadata, summary, transcript, and recording link.
- **Trigger Flowz workflows after calls**
Tasks, escalations, renewals, or follow-up processes.

This is a low-friction, high-impact enhancement layered on top of Microsoft Teams Phone.

5. Recommended Client Next Steps

To successfully adopt AI ContactCentre and realise immediate value, we recommend the following phased approach:

- 1. Review your current call flows**
Auto attendants, queues, business hours rules.
- 2. Select a pilot team**
Membership, customer service, renewals, or support.
- 3. Enable AI summaries for that team**
Deliver immediate reduction in manual documentation.
- 4. Roll out in a controlled phase**
Train staff on one-click logging and AI-assisted workflows.
- 5. Scale to additional departments**
Expand to finance, events, certifications, or broader service teams.

This structured approach ensures quick wins, clear visibility, and smooth organisational adoption.

AI ContactCenterGuru – Teams for iMIS

Chapter 1 — Executive Overview

Executive Summary

Publisher	ZENTSO S GmbH
Product	AI ContactCenterGuru - Teams for iMIS
Audience	iMIS & CloudToolz Clients
Version	2025-2027 Roadmap

AI ContactCenterGuru integrates Microsoft Teams Phone with the iMIS Staff Site, providing agents with caller identification, AI call summaries, call transcripts, and automated follow-up workflows — all inside iMIS.

Core Promise:

“ Every call becomes an intelligent CRM event — enriched, analysed, and automated.

Key Benefits

Category	Benefit
Efficiency	Handle calls directly within iMIS and see caller info instantly.
Automation	Flowz automates post-call tasks and CRM updates.
AI Insights	Summaries, transcripts, sentiment, next actions.
Accuracy	Consistent call logging into iMIS.
Scalability	Start with CRM Companion; expand to full contact center later.
Compliance	Azure AD identity, org_id isolation, GDPR-aligned.

Business Value by Role

Role	Value Proposition
Agents	Reduce admin; AI handles summaries & logs.
Supervisors	Queue visibility, call outcomes, agent metrics.
Executives	KPI dashboards & engagement intelligence.
IT/Admins	Secure, Teams-native, easy to manage.

Chapter 2 — Product Strategy

CRM Companion Strategy

AI ContactCenterGuru begins as a **CRM Companion**, using:

- Teams Phone Auto Attendants
- Call Queues
- Teams Client (for audio)
- Graph APIs (call records & metadata)
- CloudToolz + Flowz (workflow automation)
- AI (summary, transcript, next steps)

This approach provides:

- Fast implementation
- Zero disruption to Teams calling
- Minimal change management
- High immediate value
- No need for Unify/TPE yet

Future Unify/TPE Strategy

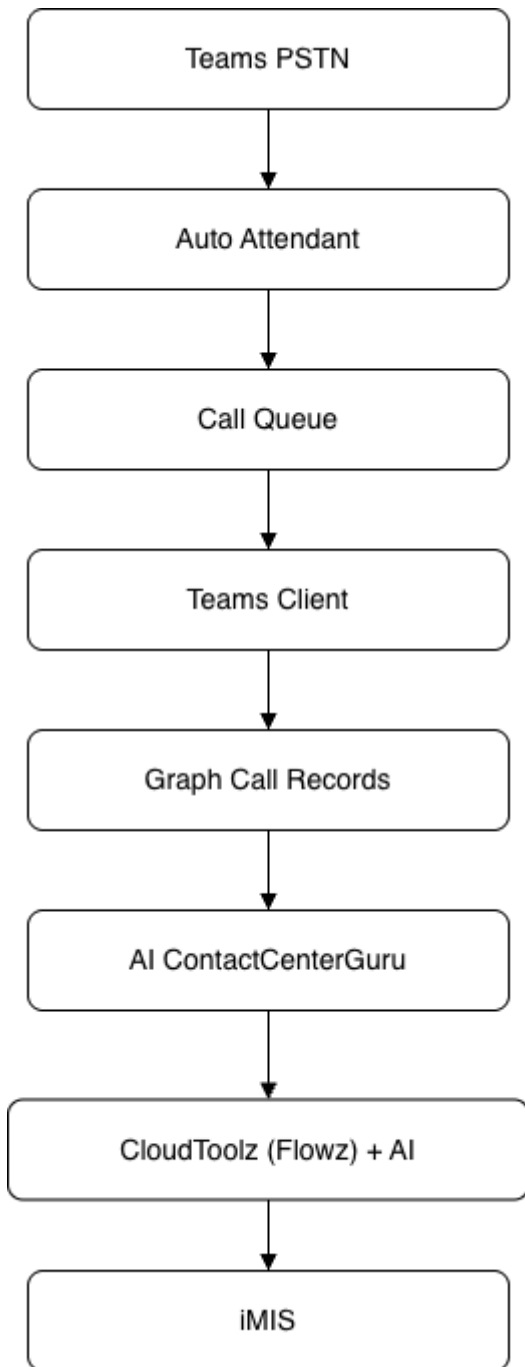
Once clients need a full CCaaS capability:

- Add native softphone inside iMIS (ACS Calling SDK)
- Use Teams Phone Extensibility + Event Grid for PSTN routing
 - Whisper/coach
 - Live supervisor monitoring
 - Custom call flows
 - Contact Center Certification pathway
 - Build advanced supervisor & routing features:

This becomes **AI ContactCenterGuru CCaaS for iMIS**.

Chapter 3 — Solution Architecture

Architecture Overview



Agents keep using the Teams client for audio, but all integration, automation, and AI run through CloudToolz.

Inbound & Outbound Call Flows

Inbound Call Handling

1. Caller reaches Auto Attendant → Call Queues

2. Agent answers in Teams
3. AI ContactCenterGuru detects call via Graph
4. Contact match → iMIS screen pop / Contact not match -> iMIS screen pop for new contact
5. Flowz logs the call
6. Recording → AI → Summary + Transcript
7. Results written back into iMIS

Outbound Call Handling

- iMIS contact → Call via Teams button
- Teams client initiates the call
- Call results logged by AI ContactCenterGuru

AI & Flowz Automation

- AI transcription
- AI call summary
- Key actions extracted
- Sentiment scoring
- Suggested follow-up tasks
- Flowz creates:
 - Activities
 - Cases
 - Renewal tasks
 - Service workflows

Security & Compliance

- Azure AD OAuth2
- CloudToolz instance data isolation
- GDPR- and Privacy Act 1988-aligned call record handling
- Optional recording retention policy
- Logging for audits

Chapter 4 — Roadmap

Roadmap Overview (2025–2027)

- Phase 1 - MVP (Q1 2026)
- Phase 2 - AI & Automation (Q2-Q3 2026)
- Phase 3 - Supervisor Tools (Q4 2026)
- Phase 4 - Optional Unify/TPE (2027+)

Phase Details

Phase 1 – MVP (CRM Companion Core)

- Screen pop
- Caller matching
- Call logging
- Basic analytics

Phase 2 – AI & Automation

- AI summary
- Transcript
- Recording link
- Flowz task automation
- Enhanced dashboards

Phase 3 – Supervisor Tools

- Queue visibility
- Agent presence
- Real-time dashboards

Phase 4 – Optional Unify/TPE

- Native softphone inside iMIS
- Advanced call control

Chapter 5 — PERT & Implementation

PERT Overview

AI ContactCenterGuru CRM Companion implementation is based on **13 core work packages**, totalling:

≈ **540-720 hours**

(depending on AI features and recording availability)

Work Breakdown Structure (13 Tasks)

#	Task	Phase	O	M	P
1	Tech Spec & Architecture	1	16	20	28

#	Task	Phase	O	M	P
2	UI Shell Integration	1	32	44	64
3	Contact Match & Screen Pop	1	24	36	50
4	Call Logging	1	24	32	48
5	Basic Dashboard	1	16	24	40
6	AI Transcription	2	28	40	56
7	Flowz Automation	2	32	48	64
8	iMIS Summary Storage	2	24	40	56
9	Enhanced Dashboards	2	16	28	40
10	Queue Monitoring	3	20	32	48
11	Supervisor Panel	3	24	36	56
12	UAT & Hardening	All	16	28	40
13	Docs & GTM	All	20	40	60

Implementation Timeline & Milestones

Milestone	Target
Prototype	Jan 2026
Internal Pilot	Feb 2026
Client UAT	Mar 2026
GA Release	Apr 2026
Full AI + Supervisor	Q3-Q4 2026
Optional TPE	2027

Chapter 6 — Deployment & Adoption

Deployment Milestones

- Technical setup of Auto Attendants & Call Queues
- CloudToolz integration
- AI model configuration
- Flowz workflows
- User training
- Go-live

Recommended Client Next Steps

- Review call flows
- Identify pilot team
- Enable AI summaries
- Roll out in a controlled phase
- Scale to additional departments

Business Value: Suggested Marketing Copy

A few questions about CallRecordz

- What are the job roles of the people who would be looking for this product?
Any department or staff who is responsible for membership support and management. In the broader market this would be useful for any organization that handles customer service through phone calls.
- What tools are people currently using? Key competitors or similar tools I can look at please

<https://www.velosio.com/blog/imis-membership-hub-ifit-for-microsoft-teams/>

<https://learn.microsoft.com/en-us/microsoftteams/teams-contact-center?tabs=unify>

This one from connect systems global [Connect for Phone Connect Systems Global](#)

- Does it only work with people using Microsoft Teams to handle calls? How does it work when someone calls a landline?
One can assign landline numbers to Microsoft Teams. For the member or end user, it is like calling a landline but the service staff can receive these calls on Microsoft Teams.
- At the moment, the messaging shouldn't mention the AI summary of calls, this is later in the roadmap?
Yes, we can leave this for later. That said, we might be able to integrate this functionality pretty soon as well.

iMIS + Microsoft Teams Phone

Your team already answers the phone.
Now *every call* counts.

A native iMIS integration that turns every inbound call into a complete, documented member interaction — automatically.

The challenge

Your staff are on the phone all day — answering member queries, handling renewals, resolving issues. But that knowledge lives in their heads, on sticky notes, or gets lost entirely. **Every call that isn't captured is a missed opportunity** to serve your members better, spot trends, or hold teams accountable.

Most associations cobble together a phone system and a CRM that were never meant to talk to each other. The result? Agents scrambling to find contact records mid-call, managers with no visibility into what's actually being said, and members who have to repeat themselves every time they ring.

The opportunity



Instant context

The member record appears the moment the phone rings — no searching, no delay.



Structured call records

Duration, caller details, and agent notes are captured and stored directly in iMIS.



Full member history

Every call, every note — one place. Any agent can pick up where the last one left off.



Management visibility

See call volumes, duration patterns, and agent activity without chasing anyone for reports.

Business value

0

Calls that fall through the cracks

100%

Of calls logged in iMIS automatically

~40%

Less time spent on manual note entry

"From the moment a call comes in, your agent knows exactly who they're talking to, what matters to them, and where to pick up the conversation."

What's coming next

This is just the beginning. The roadmap includes **AI-generated call summaries** and **full transcripts powered by Microsoft Teams AI** — stored directly against the member record in iMIS, alongside the agent's own notes. For leadership, this means true quality assurance and member insight at scale, without any extra effort from your team.

Imagine a world where you can search a member's record and read exactly what was discussed on their last three calls — without asking anyone to recall it from memory. **That's the world this integration is building toward.**

Ready to see it in action?

Works natively inside the iMIS Staff Site. No new software to learn.

[Book a demo](#)