

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

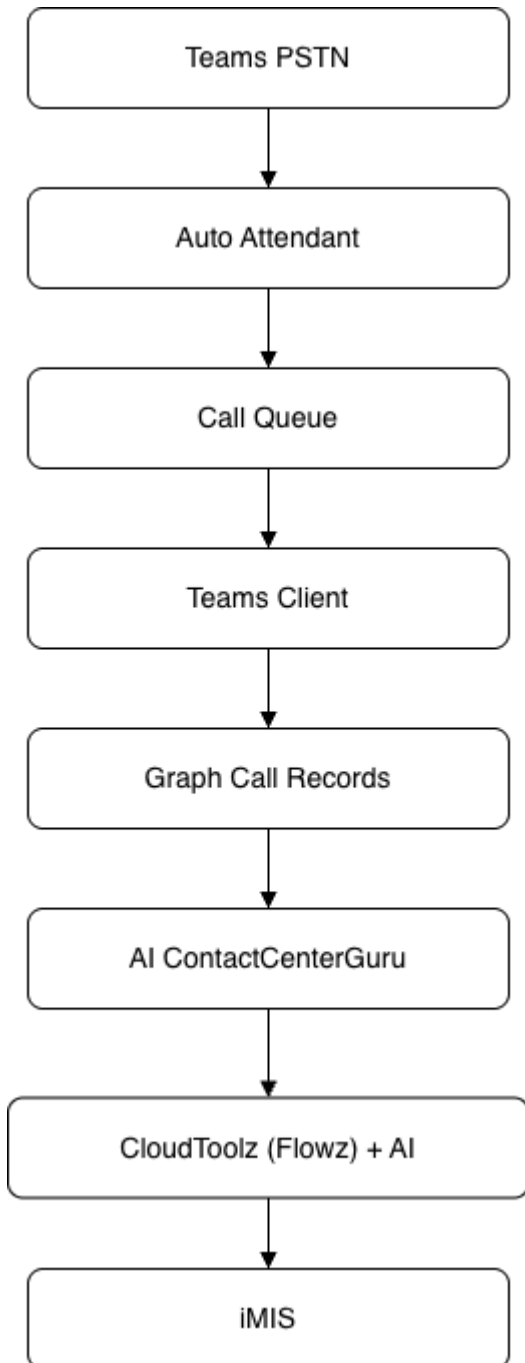
Once clients need a full CCaaS capability:

- 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
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

Revision #4

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