

# AI ContactCentre – Teams for iMIS

## Executive Overview

<b>Publisher</b>	ZENTSO S GmbH
<b>Product</b>	AI ContactCentre - Teams for iMIS
<b>Version</b>	2025–2026 Roadmap
<b>Audience</b>	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
<b>Efficiency</b>	Calls handled in Teams; intelligence surfaced directly in iMIS.
<b>AI Assistance</b>	Reduce manual note-taking with accurate AI summaries.
<b>Quality Control</b>	Supervisors gain visibility into call outcomes and recordings.
<b>Insight</b>	Analyse call volumes, sentiment, and common topics.
<b>Consistency</b>	Standardised call records across all staff.
<b>Scalability</b>	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.

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