

Case Study

**Cash Management Firm
Boosts Agent Productivity
and Service Efficiency with
Intelligent IVR & Contact
Center Transformation**



Customer Overview



Customer

A global cash management technology provider.



Profile

The client helps financial institutions and consumer businesses optimize the performance of their cash ecosystems through a single end-to-end partnership and a unique business intelligence platform.



Industry

IT Services and IT Consulting



Services

Intelligent Contact Center IVR Implementation on Microsoft Dynamics 365

Business Need

As global service volumes expanded, managing cases had become increasingly complex. Customer interactions grew across regions and time zones, and the existing support structure struggled to maintain consistent case resolution standards, controlled enhancements, and structured release management within the Microsoft Dynamics 365 Customer Engagement environment.

The client's objective was to establish a centralized Call Center Hub at a designated location to serve customers across multiple regions. This initiative was aimed at streamlining operations, enhancing service consistency, and delivering a unified customer experience globally.

The primary focus of this engagement was to elevate the Contact Center experience by leveraging the full capabilities of the D365 Omnichannel Customer Service Workspace application within Microsoft Dynamics 365.



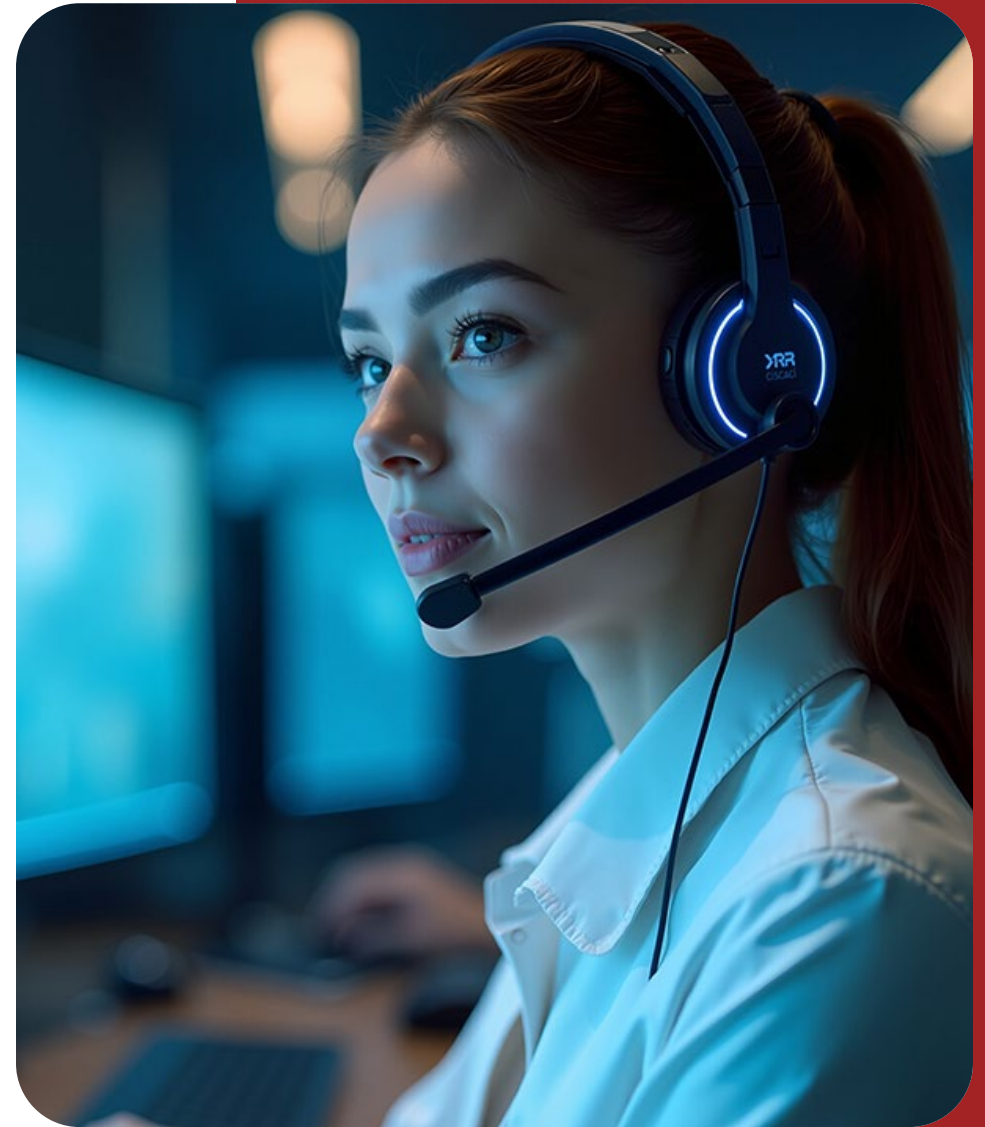
Solution and Approach

The solution surrounded two primary service channels: Voice (Phone) and Email. To enable advanced telephony capabilities, Synoptek utilized the Voice Channel through the Contact Center Voice Add-on license, ensuring intelligent routing, real-time insights, and seamless customer interaction throughout the service resolution process.

Given the client's multi-regional presence, multilingual support was a critical component of the solution. The system was designed to support language detection and automated transcript generation, ensuring accurate communication, improved agents' calling experience, and enhanced service quality across diverse customer segments.

Our team incorporated voice channel advanced IVR functionalities for this engagement using Microsoft Copilot Studio. This enabled automated call flows, intelligent customer language detection, and streamlined the phone calls-to-case creation process in D365.

This centralized model not only improved operational efficiency but also delivered a scalable, future-ready customer engagement platform capable of expansion across multiple other regions for customers.



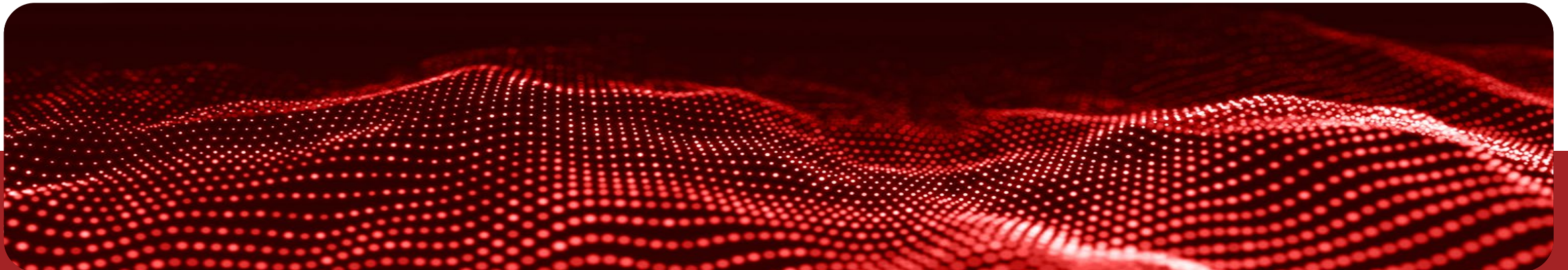
Technical and Operational Challenges

As the engagement began, several challenges needed to be addressed:

Pioneering Technology: The Contact Center IVR is a newly launched Microsoft capability, with evolving documentation and deployment practices. Synoptek conducted deep product analysis, specialized configurations, and workflow stress testing to ensure the IVR architecture could support multilingual routing, case identification, and automation without impacting user experience.

High Product-Level Coordination: The scale of coordination required with Microsoft added complexity to the project. Leveraging our strategic partnership, Synoptek accelerated remediation cycles and prevented rollout delays. Over five months, the team managed 17 Microsoft support tickets and resolved 16 product-level challenges through continuous escalation and follow-through.

Agile Scope Management: The client's multi-region user base introduced evolving requirements across languages, compliance standards, and workflows. Over a seven-month sprint cycle, Synoptek managed 400+ Modification Task Lists through a centralized governance model, ensuring structured prioritization, controlled enhancements, and system integrity



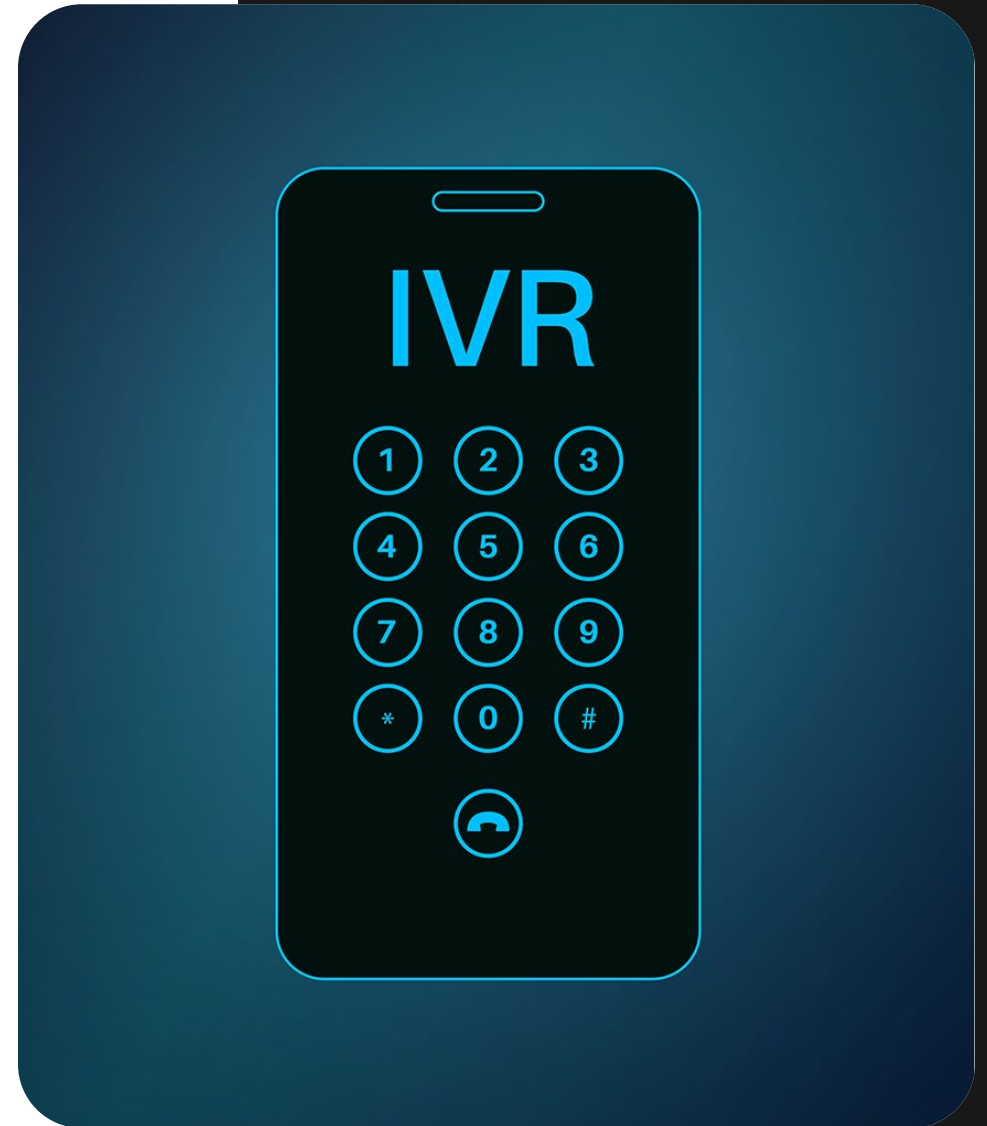
Deployment

The implementation focused on delivering an Intelligent Contact Center IVR solution designed to enhance the customer experience. The system allows callers to select their preferred language, identify case types through guided prompts, and request callbacks when agents are unavailable, reducing wait times and improving service efficiency. Operational service windows were configured to ensure calls are routed to agents within defined business hours, supporting SLA compliance and optimized workforce management.

Synoptek successfully deployed a fully integrated multilingual IVR and email management solution for the client's Budapest Contact Center, followed by a subsequent rollout for Denmark.

Intelligent Contact Center (IVR)

- Customer Language Capture: Automatic language detection for localized customer experiences.
- Call Recording: Recording capabilities for compliance and quality monitoring.
- Case Type Identification: Guided IVR prompts to identify call intent.
- Intelligent Call Routing: Routes calls to the most appropriate agent based on case type and preferred language.
- Workstreams & Queues: Advanced routing rules and capacity-based distribution.
- Post-Call Surveys: Automated feedback collection to measure service quality.
- Outage Support: IVR notifications redirect customers during planned or unplanned outages to reduce call volumes.



Deployment

Service Automation

- Email-to-Case: Automatic language detection and response for incoming emails, with case creation and language mapping.
- Keyword Analysis: Intelligent keyword detection from email content to determine case eligibility and route cases appropriately.
- Workstreams & Queues: Case routing based on origin and case type.
- Email & Survey Automation: Automated, language-specific customer surveys to track service performance and sentiment.
- SLA Management: Region-specific SLAs configured by language, case type, and origin, with proactive breach alerts.

Customization & Integration

- CRM Customization: Tailored architecture for customer assets, products, accounts, and case management.
- Knowledge Base: Internal solution for agent troubleshooting and knowledge sharing.
- SharePoint Integration: Document management and collaboration capabilities.
- Advanced Filtering: Dynamic case filters and custom logic enabling intelligent routing and personalized customer communication.

Post-go-live Support

Beyond establishing the Contact Center calling framework and managing releases, Synoptek delivered strategic advisory support across complex enhancement requests, including feasibility assessments, rigorous QA oversight, and post-go-live stabilization, ensuring a structured and region-prioritized deployment.

Business Benefits

The intelligent IVR transformation delivered scalable global operations, stronger governance, and measurable improvements in agent productivity and customer experience.

20+ Agents Enabled

Unified voice, email, and case management within a single Microsoft Dynamics 365 environment increased visibility and operational consistency across regions.

17 Microsoft Escalations Resolved

Proactive coordination with Microsoft addressed product-level challenges and accelerated remediation during early-stage IVR deployment.

400+ Enhancements Governed

Structured sprint governance and release management framework protects production stability while enabling continuous improvement.

100% Centralized Voice Management

All global voice and case services consolidated into a single D365 Contact Center platform eliminates fragmented systems.

Multi-region Rollout

Successfully deployed multilingual IVR and service automation across Sweden, Norway, Netherlands, Denmark, and Budapest operations.

Real-time CSAT Visibility

Live multilingual surveys and automated feedback loops provide immediate insight into service quality and performance gaps.

This transformation positioned the client with a scalable, intelligent contact center platform—driving higher agent productivity, structured governance, and consistent multilingual customer experience across regions.

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.



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