

# UNFYD<sup>®</sup> COMPASS

**GenAI – DXP  
Response  
Automation**



Social Media | Messengers | Chat Apps | Website | Web App | Mobile App | IoT



Devices

Marketing

Sales

Service

Digital XP

Mobility

Communication

Collaboration

Automation



Omnichannel  
Response  
Automation

Omni-channel Response automation powered through GenAI tools, with seamless RPA capabilities interlaced with **UNFYD.LINK** suite of offering

# GenAI Response Automation

## + Problems

- ✘ Volumes – Increase Manpower
- ✘ 9x5 / 9x6
- ✘ Lack of consistency
- ✘ Limited scale
- ✘ Mushrooming Costs
- ✘ Delayed Resolutions
- ✘ Lack of data-driven approach
- ✘ Complex issues – delayed
- ✘ Language Support
- ✘ Lacks Personalization
- ✘ Error prone
- ✘ No Templatization
- ✘ Lacks Workflow
- ✘ Lack of technology intervention
- ✘ Lack of Strategic Focus

## + GenAI Adoption

- ✘ Handle Large Volumes
- ✘ 24x7
- ✘ Consistent – Tone, Accuracy
- ✘ Unlimited scale expansion
- ✘ Reduce staffing, training etc
- ✘ Immediate Response/Resolution
- ✘ Data-Driven Insights
- ✘ Human-Agent Support
- ✘ Multi-Lingual
- ✘ Personalized (data-driven)
- ✘ Reduced Errors (automation)
- ✘ Update/Enhance automation
- ✘ Workflow (routing, personalize)
- ✘ AI powered approach
- ✘ Significant focus on strategic initiatives

# UNFYD. LINK

## AI Powered Response Automation + Ticketing Solution

- + **UNFYD.LINK** features an intuitive **multilingual, multichannel drag / drop & configurable interface**, lets IT and business users easily automate email actions without writing a line of code
- + Integrated with **NLP/ChatGPT**, it analyses the **intent, sentiment, entity, keywords** of the email conversation to 'draft' responses for incoming mails/ tickets, without assigning to human-agents
- + **Easy-to-configure rules/routing engine**, where a combination of intent, sentiment and context can be used to define scenarios, logic, handling and action needed
  - ✦ Action needed can be **result oriented**, basis "context":
    - + Ticket creation and allocation (team allocation, team member allocation)
    - + Ticket categorization, classification and segmentation (Types, Sub-types)
    - + Child ticket creation, Child-Parent ticket mapping
    - + Response – Auto send, save as draft, send for approval
- + The platform also enables an **auto summary**, which briefs the entire email thread/ticket interaction, the back and forth into a summary format which is easily readable, presentable for the senior management.
  - ✦ Conversation **summary classification, C2A identification**
  - ✦ Helps with **quicker resolutions of problems**
- + **Multi-intent capture, handling and response** automation
- + Drive **synopsis across conversation** for a quick-peek of overall conversation sentiment,
- + Integrated with **CRM, Knowledge Base** to use the same CDP and defined, seamless, stitched, user stories
- + Integrate with third-party systems, to drive **end-2-end process automation**
- + Human-assist transition to drive exception management (maker-checker process)
- + Reports / Dashboards / Analytics (integrated across channels)

# GenAI Automation



## Case Categorization

- + Define a system to automatically sort incoming emails into predetermined case types.
- + Introduce the necessity for efficient email classification.
- + Explain the benefits: streamlined workflows, quicker response times.

## Sentiment Analysis

- + Incorporate sentiment analysis to evaluate customer email emotions.
- + Prioritize and manage emails based on sentiment for timely, appropriate responses.
- + - Illustrate how this enhances customer experience.

## Case Summarization

- + Automatically generate brief summaries of email content.
- + Show how summaries aid agents/Managers for quick issue understanding.
- + Highlight the importance of faster response times.

## Case Assignment

- + Implement an automated system to assign cases to suitable agents or teams.
- + Factors considered: skills, priority, and case category.
- + Emphasize efficient workload distribution.

## Business Rules Configuration

- + Establish a configurable framework for defining email handling business rules.
- + Highlight the need for adaptable rule-setting in handling diverse queries.
- + Explain how this enhances flexibility and responsiveness.

## Automated/Suggestive Response

- + Integrate automated response mechanisms to handle routine queries.
- + Explain how this improves efficiency and consistency.
- + Mention suggestions aiding agents in drafting better responses.

# GenAI Automation

## Automatic Replies for Standard Queries/Requests

- + Implement automated responses for common queries.
- + Tailor responses to the specific nature of inquiries.
- + Emphasize prompt customer acknowledgment.

## Checker Stage for Suggested Scripts

- + Include a review stage for system-generated responses by agents.
- + Ensure appropriateness and accuracy of automated replies.
- + Highlight the importance of human oversight.

## GenAI Response Based on CRM Data

- + Integrate with CRM systems to personalize email responses.
- + Demonstrate the significance of dynamic customer data incorporation.
- + Illustrate improved customer relations through personalization.

## GenAI Response Based on FAQs/Knowledgebase

- + Link email automation with a knowledge base repository.
- + Automatically refer to the database for response content.
- + Showcase how it enhances response accuracy.

## Attachments in Responses

- + Allow attachment inclusion in email responses.
- + Ensure safety measures for secure attachment handling.
- + Explain the added value of providing relevant attachments.

## Feedback Capture

- + Implement mechanisms to gather customer feedback on email responses.
- + Emphasize the importance of continuous improvement.
- + Show how feedback enhances system accuracy.

## Feeding Case Details to CRM

- + Ensure seamless integration to update CRM with case details.
- + Provide agents with comprehensive customer interaction views.
- + Highlight improved relationship management.

## Unified Agent Desktop with Customer Interaction History

- + Develop a unified desktop interface consolidating all relevant information.
- + Display comprehensive customer interaction history for agents.
- + Stress better decision-making through holistic insights.

# Platform Enhancers

- + Seamless extension of process across digital channels
  - ✘ WhatsApp / Facebook / Twitter / Mobile App etc.
  - ✘ QRC / Grievance handling across channels
  - ✘ Build-once deploy multi-channels – architecture
  - ✘ Single-window platform interface (CLJ / CDP...)
  - ✘ Enable contextual assistance across touchpoints
- + Agent-Assist intervention during onboarding process
  - ✘ Proactive web notification across journey of customer
  - ✘ Event-driven push notification basis customer journey
  - ✘ Form-fill assistance through co-browse / video
  - ✘ Seamless extension of KYC, document collection process
  - ✘ Document Validation (OCR) real-time (Aadhar, PAN, Driving LIC...)
  - ✘ Voice-assisted form filling (multi-lingua)
- + Enhanced Portfolio
  - ✘ Co-pilot (agent assistance – cognitive automation)
  - ✘ Conversation Analytics (Voice / Email, Chat...)

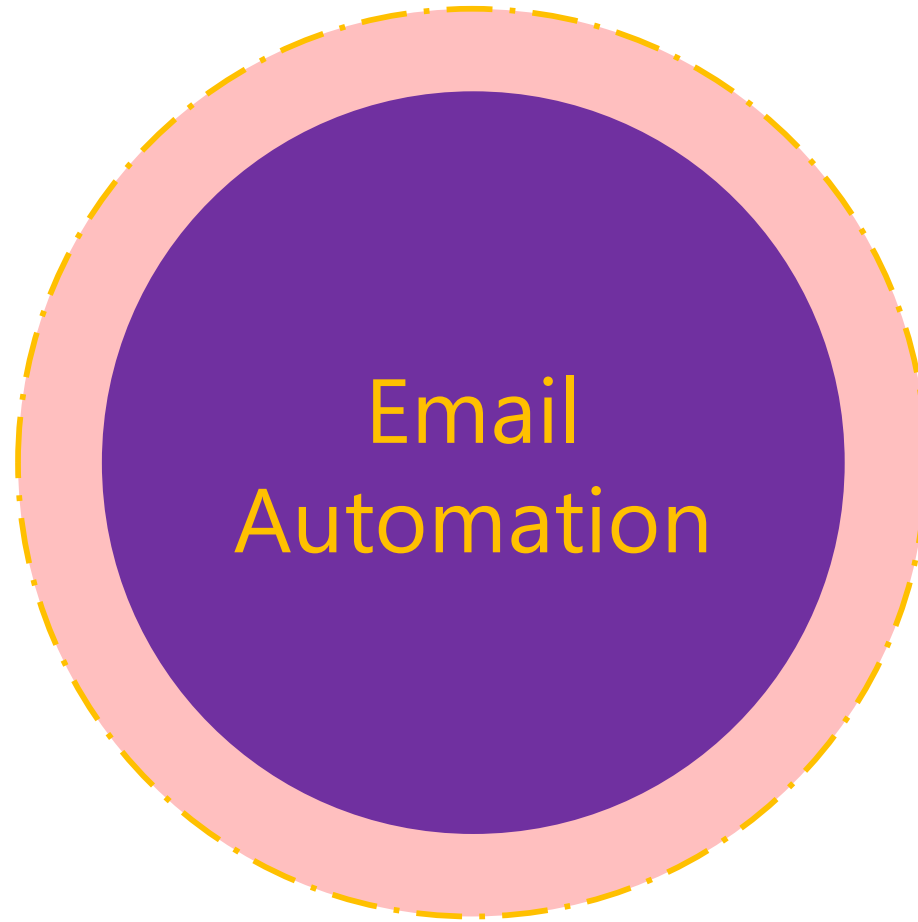
# GenAI Response Automation - Features

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- + Multi-Language Support
- + Single and Multiple Intent Handling
- + Business rules configuration
- + Case categorization, assignment & tagging basis business rule configuration
- + Sentiment Analysis
- + Case Summarization
- + Automated / Suggestive Response
- + BOT Flow Builder
- + Automatic Replies for Standard Queries/Requests
- + Checker Stage for Suggested Scripts
- + Configurable agent validation for suggested response
- + Response Based on CRM Data (email, WhatsApp ...)
- + Response Based on FAQs/KB (email, WhatsApp ...)
- + Attachments in responses (email, WhatsApp ...)
- + Feedback Capture
- + Feeding Case Details to CRM
- + Unified Agent Desktop





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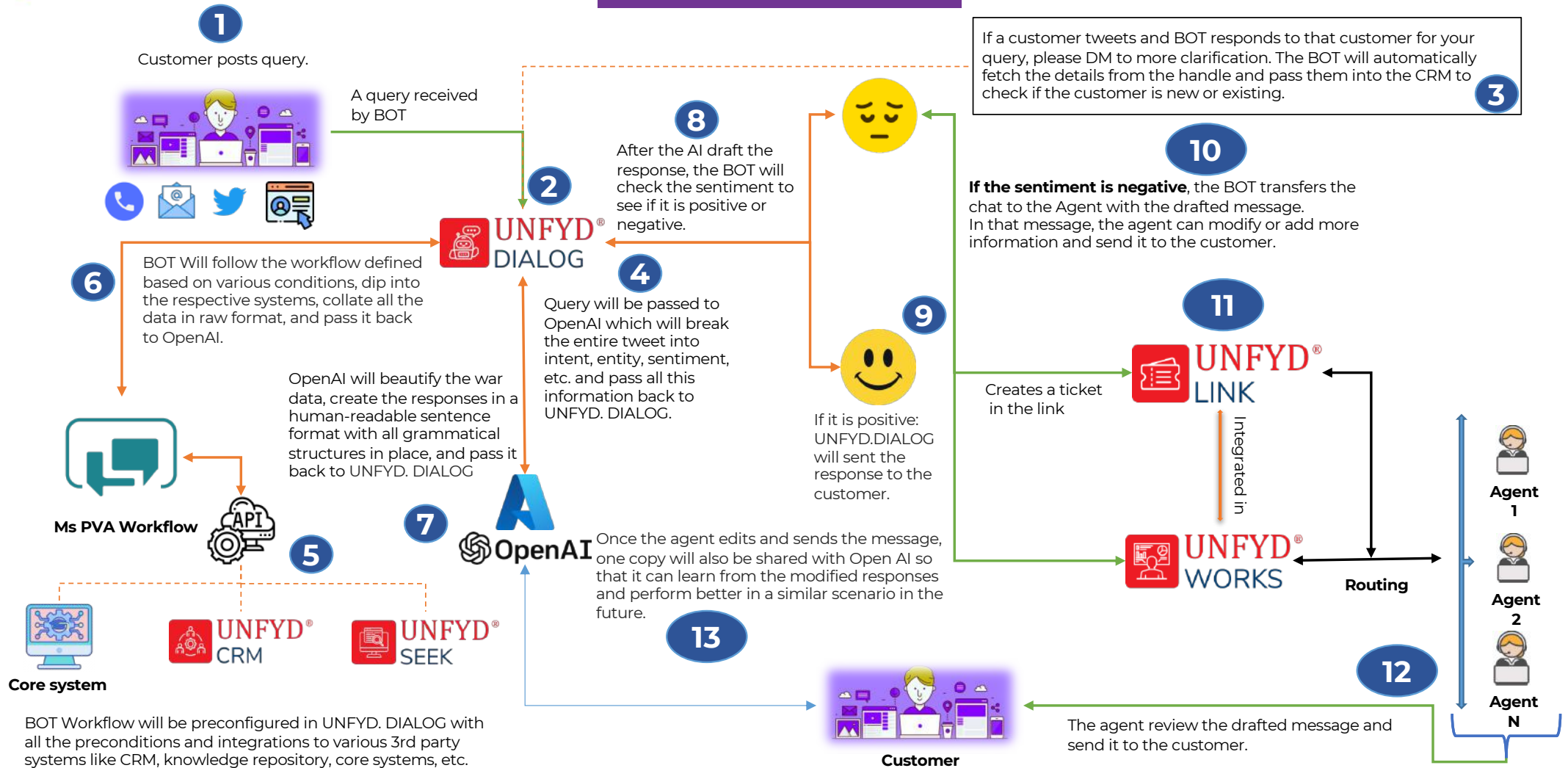
Mobility

Communication

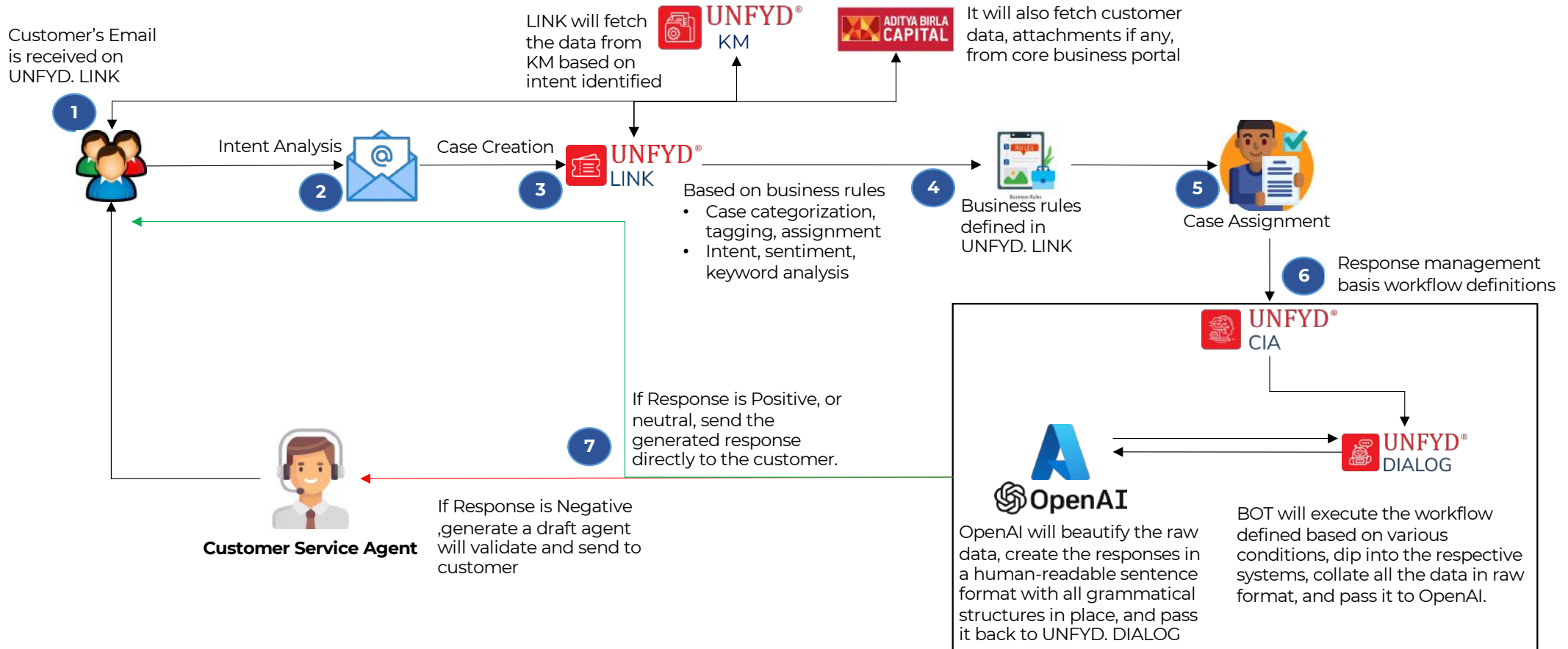
Collaboration

Automation

# AI Powered – Email Interaction Management



# Process Flow - Email Automation



# Process Flow – Steps Explained

## Email Process Automation

1. **Mailbox Integration:** We will integrate with the business mailbox. Post which, the customer's email will land on UNFYD. LINK+
2. **Intent Analysis:** The system performs intent analysis on the customer's email to understand the purpose or query, so that the necessary action can be invoked
3. **Case Assignment and Action Initiation:** Based on the intent analysis, the system assigns the case to the appropriate category and initiates necessary actions. This may involve a dip into CRM (Customer Relationship Management) and Knowledge Base (KB) to gather relevant information.
4. **Business Rules Definition:** The entire workflow is defined using business rules within UNFYD. LINK.
5. **Negative Response Handling:** If the response is negative, a draft is generated. An agent validates the draft before sending it to the customer, ensuring accuracy, human touch, validation and professionalism.
6. **Positive or Neutral Response Handling:** If the response is positive or neutral, the generated response is sent directly to the customer without agent validation, streamlining the process for positive interactions.
7. **BOT Workflow Execution:** The BOT executes a defined workflow based on various conditions. It interacts with different systems, collects raw data, and passes it to OpenAI for further processing.
8. **OpenAI Processing:** OpenAI beautifies the raw data, creating responses in a human-readable sentence format with proper grammatical structures. The refined data is passed back to the BOT.
9. **Data Retrieval from KM and Core Business Portal:** UNFYD. LINK fetches data from Knowledge Management (KM) based on the identified intent. • Customer data and any attachments are retrieved from the core business portal.
10. **Case Categorization, Tagging, and Assignment:** Based on business rules, the system categorizes, tags, and assigns the case to the appropriate team or individual.
11. **Response Management:** The final step involves managing responses based on predefined workflow definitions.

# Email Automation – Benefits

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**UNFYD.LINK stands out by offering a combination of Cognitive and AI capabilities, customizable workflows, human-in-the-loop validation, and a holistic approach to customer data.**

- 1. Advanced Intent Analysis:** UNFYD. LINK+'s intent analysis goes beyond basic keyword matching. It leverages advanced algorithms, across the entire trail to truly understand the nuanced intentions behind customer emails. This ensures that responses are prompt and relevant.
- 2. Dynamic Business Rules Definition:** The platform allows for dynamic and customizable business rules, providing organizations with the flexibility to adapt and fine-tune workflows. This adaptability is a key differentiator in addressing diverse business needs.
- 3. Human-in-the-Loop Validation:** While automation is a core feature, UNFYD. LINK+ recognizes the importance of human oversight. The system intelligently routes negative responses for agent validation, striking a balance between efficiency and the need for human judgment, thereby ensuring high-quality and personalized interactions.
- 4. Seamless Integration with OpenAI:** The integration with OpenAI sets UNFYD. LINK+ apart by incorporating advanced natural language processing capabilities. OpenAI's language model enhances the quality of responses, making them not just accurate but also engaging and natural, contributing significantly to the overall customer experience.
- 5. Knowledge Management Integration:** Seamless integration with the business Knowledge repository, enabling quick and accurate retrieval of information relevant to the customer's query. This integration ensures that responses are not only timely but also enriched with the latest and most accurate information.
- 6. Holistic Customer Data Retrieval:** Beyond just extracting information from KM, UNFYD. LINK fetches comprehensive customer data and attachments from the core business portal. This holistic approach ensures that responses are personalized and take into account the customer's history across the email trail and specific context.
- 7. Intelligent Case Categorization and Tagging:** The platform's intelligent case categorization and tagging mechanism, enable organizations to efficiently organize and manage their customer interactions. This feature also facilitates valuable insights for strategic decision-making.
- 8. Real-time Sentiment Analysis:** It incorporates real-time sentiment analysis, allowing organizations to gauge customer emotions and tailor responses accordingly. This emotional intelligence is a significant differentiator in creating a customer-centric approach.
- 9. Scalability with Performance Analytics:** The platform is designed to scale with the growing demands of customer interactions. Performance analytics provide organizations with actionable insights into system efficiency, allowing them to continuously optimize and enhance their automated processes.

# UNFYD.LINK (BPM Automation)



The screenshot displays the UNFYD.LINK web application interface. The browser address bar shows the URL `cx1.unfyd.com/Link/#/case`. The application header includes the UNFYD.LINK logo and various navigation icons. On the left, a sidebar lists several cases with their IDs and titles, such as "Deeply Disappointed with Product Quality And Performance" (Case ID: UW13062023106) and "A Heartfelt Thank You for Exceptio...". The main content area shows a detailed view of the selected case, including a "Conversation" tab with an email thread. The email content reads: "Dear Pintu Pal, Thank you for taking the time to reach out to us with your concerns. We understand your disappointment and frustration and we apologize for the inconvenience caused. We take customer feedback seriously and we are committed to providing the best possible experience for our customers. We are currently looking into the issue and we will be in touch with you shortly with a resolution. Thank you for your patience and understanding. Sincerely, ABC Customer Support". Below the email content, the sender's name "Pratidnya Jade" and contact information are visible. At the bottom of the email view, there are buttons for "Discard", "Save As Draft", and "Send". On the right side, there are summary panels for "Requested Data", "Summary", and "Response". The "Requested Data" panel contains the text: "Dear ABC Customer Support, I am writing to express my utmost disappointment and frustration regarding the product I recently purchased from your company. I must say that my experience with the product has been nothing short". The "Summary" panel indicates the intent: "To express disappointment and frustration with a product purchased from ABC Customer Support and to request a replacement or refund." and the sentiment: "Negative". The "Response" panel contains the text: "Dear Pintu Pal, Thank you for taking the time to reach out to us with your concerns. We understand your disappointment and frustration and we apologize for the inconvenience caused. We take customer feedback seriously and we are committed to". At the bottom right, there are "Rate" buttons with thumbs up and thumbs down icons. The footer of the application shows the login time as 11:35:43 AM and the login duration as 02:18:38.

# UNFYD.LINK - Multilingual Email Automation



Customer Email in Hinglish

The screenshot displays the UNFYD.LINK interface. On the left is a sidebar with a 'Cases' dropdown and a list of email threads. The main area shows a selected email titled 'Account Statement Request' (Case ID UW02122023104, Created On 02/12/2023 11:31 AM). The email content is in Hinglish, requesting an account statement. A PDF attachment 'Anurag Kapoor SOA.pdf' is visible. The right sidebar shows 'Contact Info' for Preeti Mishra (preetim@unfyd.com) and 'Case Info' with details like Status (Open), Priority (Low), and Case ID (UW02122023104).

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# UNFYD.LINK - Multilingual Email Automation



Translated to English

The screenshot displays the UNFYD.LINK interface. On the left, a sidebar shows a list of cases with details like case ID, subject, sender, and time. The main area shows a detailed view of a case titled 'Account Statement Request' (Case ID UW02122023105, Created On 02/12/2023 11:55 AM). The conversation history includes an email from Preeti Mishra to Pranal with the subject 'Appreciation for Exceptional Custome...', a PDF attachment 'Anurag Kapoor SOA.pdf', and a reply from Preeti Mishra to preetim@unfyd.com with the subject 'Account Statement Request'. The reply text reads: 'Dear Team, Could you please send me my latest account statement. Thanks! Regards, Preeti Mishra'. A link to 'https://unfyd.com/disclaimer.html' is also visible. On the right, the 'Contact Info' section shows Preeti Mishra's profile and email address (preetim@unfyd.com). Below this, a 'Case Info' section lists details such as Status (Open), Priority (Low), Assign To Team (Schedule change), Assign To (preetim), Case ID (UW02122023105), Created On (02/12/2023 11:55 AM), and Case Type (Statements & Docum...).

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# UNFYD.LINK - Easy Workflow Configurations

Email/Ticketing Response Automation – Define Intent/Sentiment/Keyword rules in Rules Engine

## Add New Routing Rule

Application Name  
Link

### Routing Rule Details

#### Routing

- Get Customer Profile
- Check Blacklist
- Check Holiday and Business Hours
- NLP
- Routing Condition

#### Condition

Condition Name  
Condition Name

Field	Condition	Value	And	Or	
Intent	Equal To	Cracked Display	And	Or	<input type="checkbox"/>
Sentiment	Equal To	Frustration	And	Or	<input type="checkbox"/>
Overall Sentiment	Equal To	Negative	And	Or	<input type="checkbox"/>
Keyword	Equal To	Samsung	And	Or	<input type="checkbox"/> +

#### Action

Select Action Route To	To Whom Agent Group	Group Name Escalations	<input type="checkbox"/>
Select Action Send Response	To Whom Customer		<input type="checkbox"/>
Select Action Suggest Response	To Whom Agent		<input type="checkbox"/> +

Flushing

# UNFYD.LINK - Intent Analysis

## Multi-Intent Management (cross-lang)

**Request for SOA and Loan Pre-Closure Process** 02/12/2023 12:07 PM

Reply to preetim@unfyd.com

Dear Team,

Could you please email me my latest account statement? Additionally, I'm interested in the process for pre-closing my loan. Appreciate your swift assistance.

Stay safe, stay UNFYD®

Cheers

Preeti Mishra  
UNFYD® |  
Break Digital  
Silos  
Hello: +91

**Request For SOA And Loan Pre-Closure Process**  
Case ID UW02122023106 Created On 02/12/2023 12:11 PM

Conversation Logs Summary

**Request for SOA and Loan Pre-Closure Process** 02/12/2023 12:09 PM

Reply to preetim@unfyd.com

Dear Preeti Mishra,

Thank you for reaching out to us. We have received your request for your latest account statement and information on the pre-closure process for your loan.


Regarding your account statement, we will email it to you shortly. Please note that it may take some time to generate the statement, so we appreciate your patience.

For the pre-closure process of your loan, we will provide you with detailed instructions and the necessary documents via email. Kindly follow the instructions to initiate the pre-closure.


If you have any further questions or need additional assistance, please feel free to reach out to us. We are here to help.

Stay safe and stay UNFYD(r)!


**Our digital channels will make you more self-reliant**




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# UNFYD.LINK - Summarization

Auto summary of conversation for a quick peek

The screenshot displays the UNFYD.LINK interface. On the left is a sidebar with a list of cases. The main area shows a detailed view of a case titled 'Due Till Date' (Case ID UW02122023110, Created On 02/12/2023 12:57 PM). The 'Summary' tab is active, showing a neutral sentiment and a list of key points from the conversation. A 'Follow Up' action is listed at the bottom of the summary. On the right, the 'Contact Info' for Preeti Mishra (preetim@unfyd.com) is visible, along with a 'Case Info' section showing details like Status (Open), Priority (Low), and Case ID.

**Case List (Left Sidebar):**

- UW02122023110: Due Till Date (12:57 PM)
- UW02122023107: Urgent: Unexplained Extra Charges - ... (12:19 PM)
- UW02122023109: Inquiry Regarding Charges (12:17 PM)
- UW02122023108: Appreciation for Exceptional Custome... (12:17 PM)
- UW02122023106: Request for SOA and Loan Pre-Closur... (12:11 PM)
- UW02122023105: Account Statement Request (11:55 AM)

**Case Summary (Main View):**

**Case:** Due Till Date  
**Case ID:** UW02122023110  
**Created On:** 02/12/2023 12:57 PM

**Sentiment:** neutral

**Summary:**

- Shivam Chhbara informs Preeti Mishra that her loan account has been closed
- He provides details of the outstanding amount, balance installments, overdue amount, and next EMI due date
- He shares links to the statement of account and repayment schedule
- Shivam offers assistance for any further queries or account-related matters

**Follow Up:** Provide statement of account and repayment schedule

**Contact Info:** Preeti Mishra (preetim@unfyd.com)

**Case Info:**

- Status: Open
- Priority: Low
- Assign To Team: ABFL
- Assign To: Pratinnya
- Case ID: UW02122023110
- Created On: 02/12/2023 12:57 PM
- Case Type: Account Related,Stat...
- Sub Case Type: Account Details / Emi...

# Categorization, Tagging, Sentiment Analysis



## Detailed Analysis of Calls

Case Info	
Assign To	Pratidnya
Case ID	UW02122023106
Created On	02/12/2023 12:07 PM
Case Type	Statements & Docum...
Sub Case Type	Statement of Accoun...
Requested By	preetim@unfyd.com
Source Id	demounfyd229@gm...
Source Channel	EMAIL

1 Case Trace 11/17/19 AM

1 Case Properties 02/26/19

Case Info	
Source Channel	EMAIL
Callback Request	No
Escalation	No
Remarks	No
Language	English
Category	Query,Request
Sentiment	Neutral
Intents	Account Statement R...



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# Digital Workspace

## Omni Channel Agent



**U WORKSPACE**

Pratik Shivalkar  
Created On - 09/06/2022 03:22:21 Duration - 00:30:25

Bot message.

Sure, you can extend the warranty. Kindly help me with your name and smartphone model no. please.

Thanks, You can extend the warranty instantly by visiting a Samsung store nearby. Would you like me to help you locate a nearby store?

Samsung A 32.

Customer Journey

- Chat Conversation
- Voice Call
- Video Call
- WhatsApp Chat
- Email Conversation

©UNFYD\* Login Time : 3 :39 :00 PM Login Duration : 00 : 45 : 25 Not Ready Duration - 00 : 45 : 25

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# Digital Workspace

## Email Interaction



**U WORKSPACE**

20/05/2021 2:30PM

**Samaya Mantri Venkata**  
Duration - 29:30:25

**Website not working**  
Samaya Mantri Venkata Reported in issue

Hi,  
Lorem Ipsum is simply dummy text of the printing and typesetting industry...

**Reply**

To : samaya.venkata@gmail.com

CC :

Attachment Template

Discard Save Send

**Contact Info**

**Samaya Mantri Venkata**

- +91 9778488841
- samaya.venkata@gmail.com
- samayav@facebook.com
- samayav@twitter.com

More Details >

**Customer Journey**

- Chat Conversation (Disposition, Sub Disposition)
- Voice Call (Disposition, Sub Disposition)
- Video Call (Disposition, Sub Disposition)
- WhatsApp Chat (Disposition, Sub Disposition)
- Email Conversation (Disposition, Sub Disposition)

Ready Duration - 00 : 45 : 25 Login Duration : 00 : 45 : 25 Login Time : 3 : 39 : 00 PM

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# Digital Workspace

Buddy Assist – Powered by ChatGPT

**U WORKS**

**Pratik Shivalkar**  
Created On - 09/06/2022 03:22:21 Duration - 00:30:25

**Samaya Mantri Venkata**  
I am unable to make the payment to purchase galaxy mobile...

**Pratik Shivalkar**  
Hi, I have an issue with my TV. It suddenly stopped working, and...  
Last Seen Today at 12:05 am

**Vijay Patil**  
+91 9778487745  
I want to know if I can extend the...  
Last Seen Today at 7:00 pm

**Rajshri Mathur**  
My phone screen broke. Need to replace. Where is your service centre near me?

**Ajay Jaiswal**  
Drive Home The New Tiago With 4-Star Global NCAP Safety Rating..

**Chat History:**

Thank you for contacting our customer support. How may I assist you today? (12:00 AM)

Hi, I have an issue with my TV. It suddenly stopped working, and I'm not sure what the problem is. (12:01 AM)

I'm sorry to hear that your TV stopped working. I'll do my best to help you. Can you please provide me with some more details about the issue? Is there any error message displayed on the screen, or is it completely unresponsive? (12:02 AM)

Hi, There are no error messages, and the screen remains blank. The TV doesn't respond to the remote or any buttons on the device. (12:03 AM)

**Buddy**

**Requested data**  
Suggest Troubleshooting steps for "I have an issue with my TV. It suddenly stopped working, and I'm not sure what the problem is".

**Summary**  
Intent: TV Issue Report  
Summary: The customer is reporting a problem with their TV, stating that it suddenly stopped working and they are unsure about the cause.  
Sentiment: Neutral  
Overall Intent: Troubleshooting and assistance for TV problem.  
Keywords: TV, issue, stopped working, unsure, problem.

**Response**  
I suggest trying a few troubleshooting steps.  
1. Check the power: Make sure the TV is properly plugged into a working power outlet and that the power switch is turned on.  
2. Remote control: Replace the batteries in



# Digital Workspace

Interaction Summary – Powered by ChatGPT

**U WORKS**

Pratik Shivalkar  
+91 9557841124

Hi, I have an issue with my TV...

Closed at : 28-08-2021 03:45:00

Samaya Mantri Venkata  
samaya.venkata@gmail.com

I want to know if I can extend the...

Closed at : 28-08-2021 03:45:00

Rajshri Mathur  
+91 9557841124

My phone screen broke...

Closed at : 28-08-2021 03:45:00

Rajan Vijay Jadeja  
+91 9557841124

I want to know if I can extend the...

Closed at : 28-08-2021 03:45:00

Abhishek Narwal  
+91 9557841124

I want to know if I can extend the...

Closed at : 28-08-2021 03:45:00

**Pratik Shivalkar**  
+91 9557841124

Sub Disposition - Blank Screen

Remarks - Shared troubleshooting steps to address the TV blank screen issue.

**CIA Analytics**

Overall Intent - The customer contacted customer support regarding an issue with their TV that suddenly stopped working. The agent's intent is to assist the customer in troubleshooting and resolving the problem.

Overall Sentiment - The overall sentiment is positive. The customer appreciates the assistance, and the agent is polite and helpful throughout the interaction.

Synopsis - The customer reports a non-responsive TV with a blank screen and no error messages. The agent suggests a series of troubleshooting steps, including checking power, remote control, input sources, cables, restarting, and a factory reset if needed. The customer expresses gratitude and indicates they will follow the provided steps.

Follow-up Action - The customer has been advised to follow the troubleshooting steps provided. The agent expressed readiness for further assistance and wished the customer a great day. The follow-up action would be for the customer to perform the suggested steps and contact customer support again if the issue persists or if they need additional help.

**Customer Feedback**

Is this the first time you chatted with us about this case - 👍 Yes

Was the case resolved during the chat - 👍 Yes

How would you rate this chat - ★ Good

Comments - I am really happy with the support provided and the agent was very polite throughout the conversation.

**Contact Info**

**Pratik Shivalkar**  
Loyal Customer

+91 9557841124

+91 9557841124 DND

pratik.s@gmail.com

pratik.s@facebook.com

[More Details >](#)

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**Customer Journey**

- ✓ **Chat Conversation**  
TV, Repair  
05/7/2021 15:34
- 📞 **Voice Call**  
TV, Installation  
05/7/2021 15:34  
10:25
- 📺 **Video Call**  
05/7/2021 15:34
- ✓ **WhatsApp Chat**  
TV, Purchase

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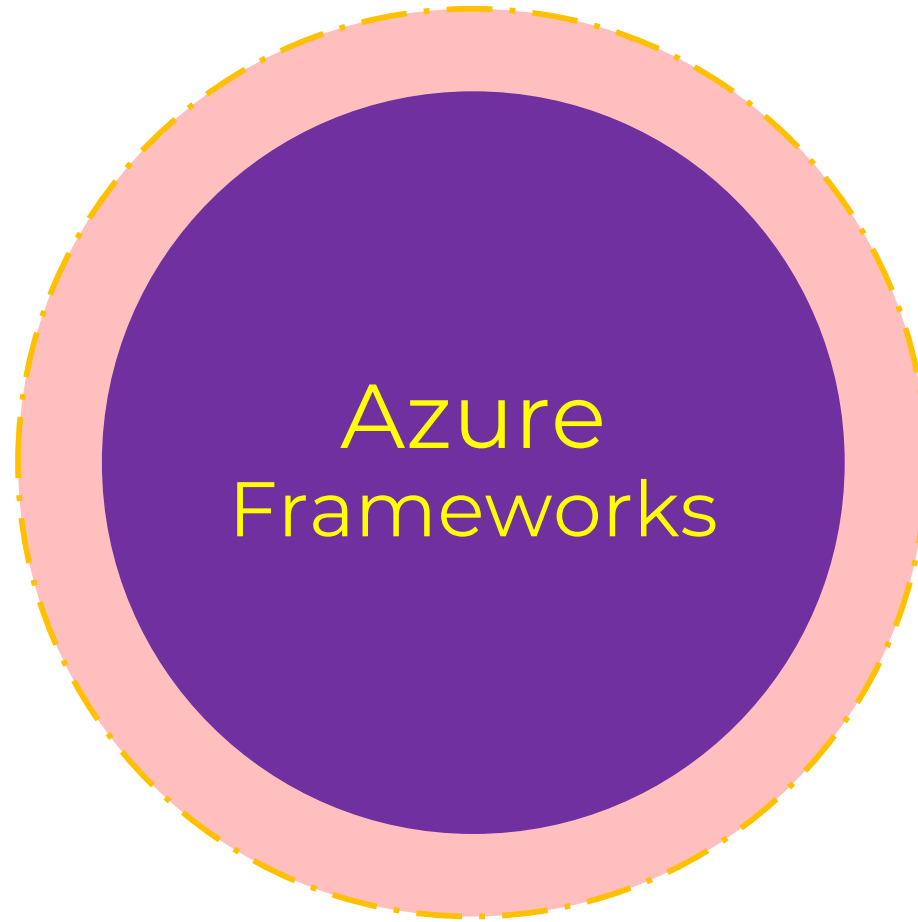
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Mobility

Communication

Collaboration

Automation

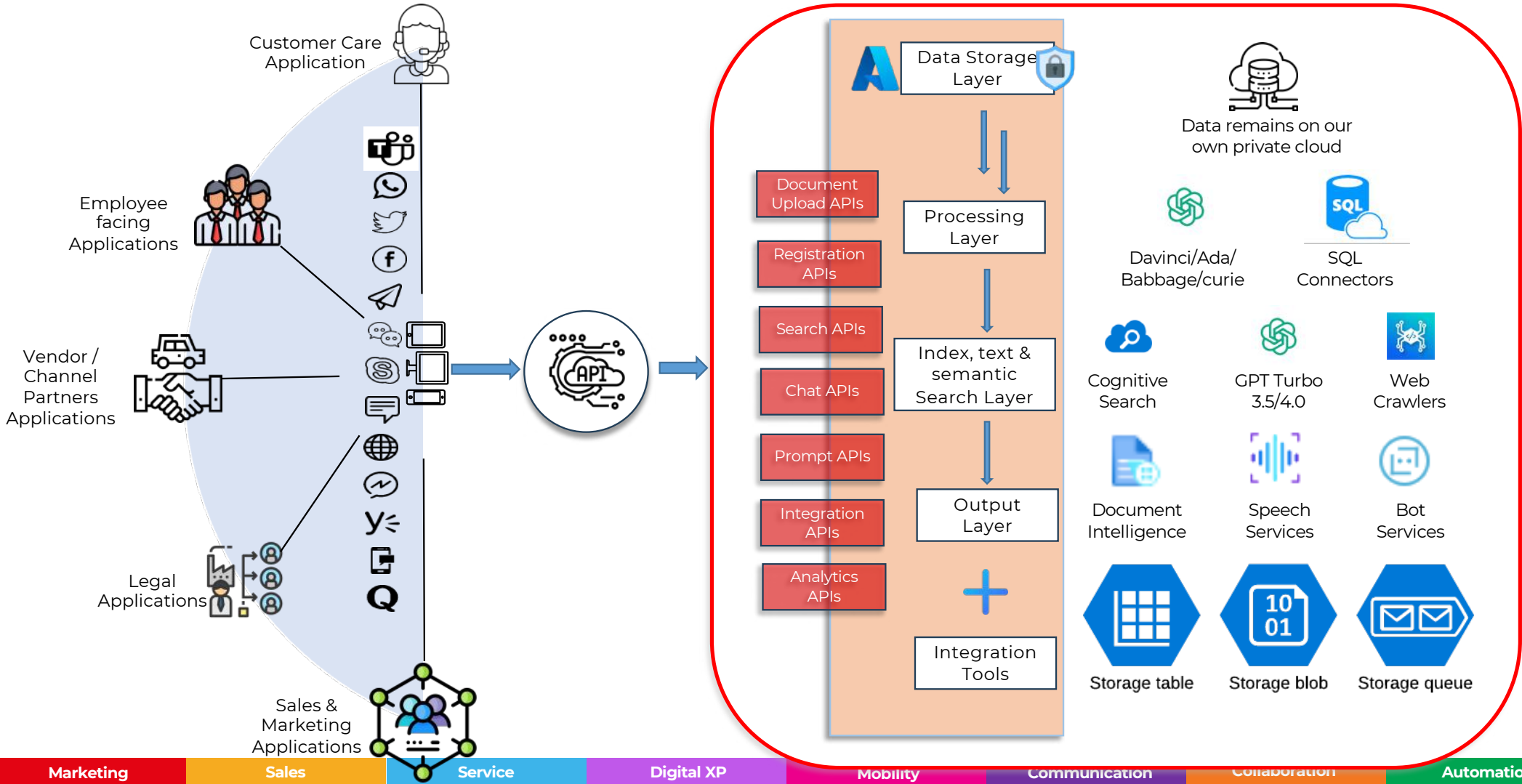
# Microsoft Azure – AI Platforms



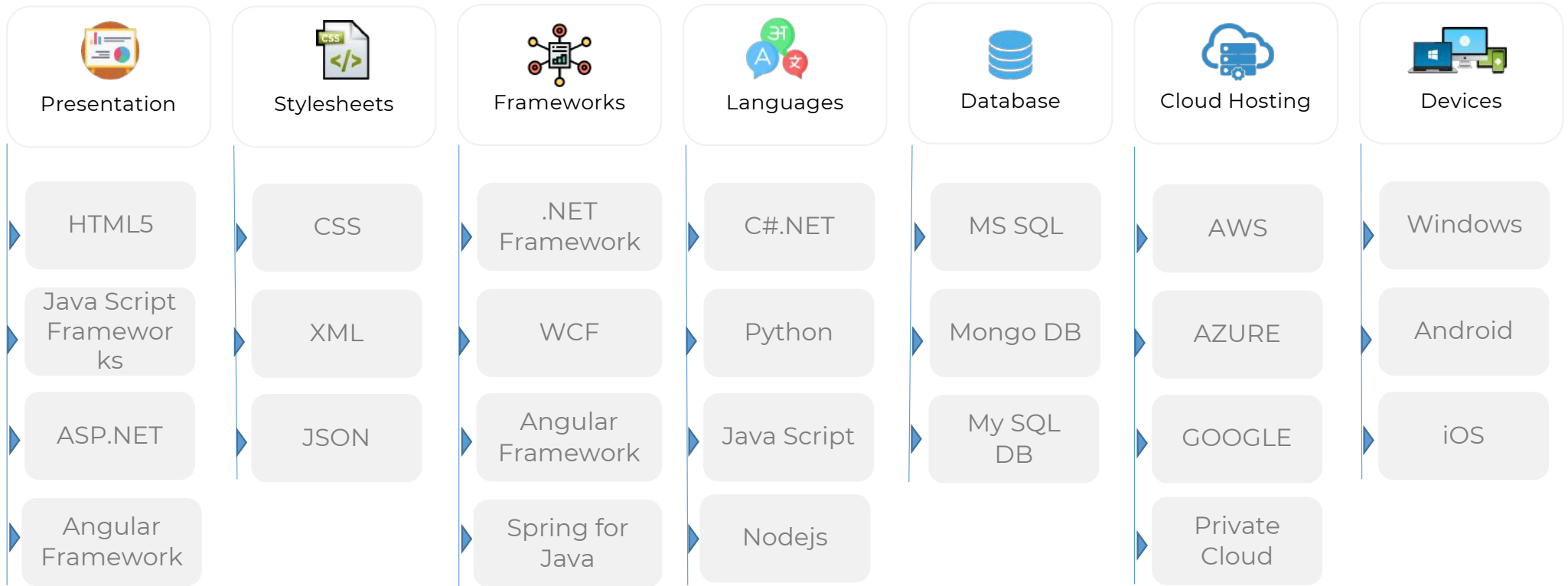
## + Key Platform Utilities

- ✘ Azure Platform
- ✘ SQL Storage
- ✘ BLOB
- ✘ Microsoft Graph API
- ✘ Language API
- ✘ NLP
- ✘ Form Recogniser
- ✘ Cognitive Search
- ✘ Azure AI Services
- ✘ Azure Machine Learning
- ✘ Real Time Analytics
- ✘ Azure OpenAI
- ✘ Power Virtual Agents (PVA)
- ✘ Power BI (WIP)
- ✘ Power Automate (WIP)

# UNFYD.CIA :: Platform Architecture



# UNFYD. COMPASS - Technology Stack



Marketing

Sales

Service

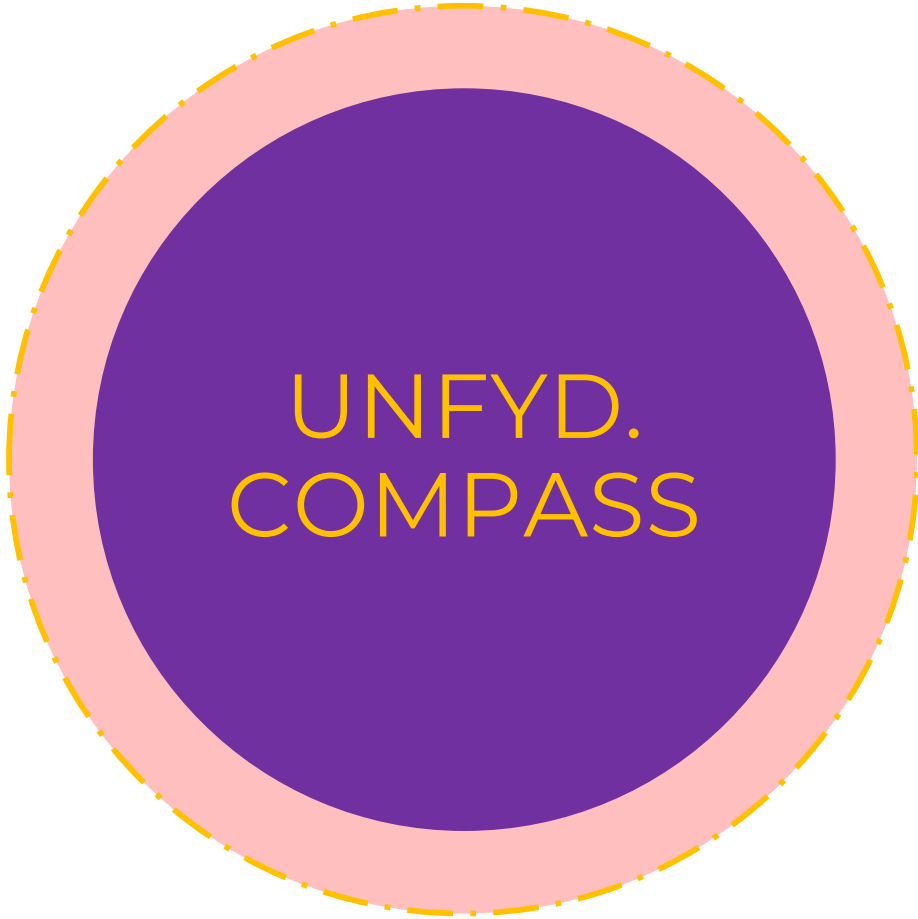
Digital XP

Mobility

Communication

Collaboration

Automation



# UNFYD. COMPASS



Marketing

Sales

Service

Digital XP

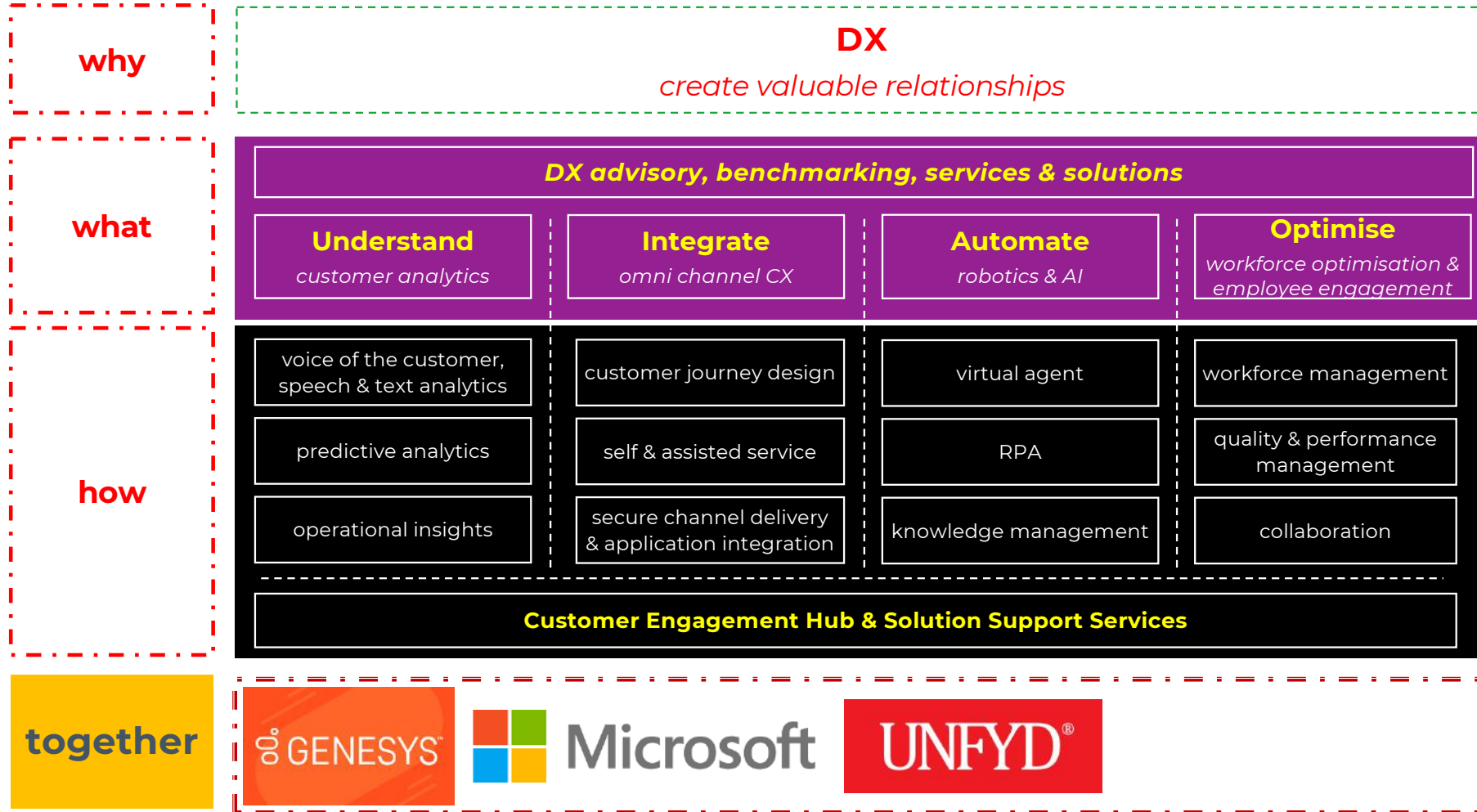
Mobility

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# Transform DX



↑ Transformative global market citizens:  
 Business advisory, operational outsourcing & DX solution expertise

↑ Create DX value by leveraging our range of services:

- Advisory
- Design
- Technical
- Cloud
- Managed Services

# UNFYD® COMPASS - IP Framework



Modules	Capability Matrix
UNFYD@SX	Omni-channel sales automation - Lead Management, Sales Force Automation & operations process enablement
UNFYD@MX	Omni-channel marketing automation – Social listening, Campaign Automation, Communities etc..
UNFYD@CX	Omni-channel service automation -- CASE/Ticketing Management tool, field-service operations
<b>PRODUCT CAPABILITY MATRIX</b>	
UNFYD@WORKS	Multi-channel cross-social interaction platform, enabling ecosystem players, reach their service providers, at their comfort (Customer Front Door)
UNFYD@RESPOND	Off-line multi-channel queue-based message response mechanism, respond to all pending messages in the next business hour
UNFYD@SEEK	Content / Knowledge Base - Management platform, which enables seamless information access for Omni-channel, BOT & CAI driven engagements
UNFYD@MAIL	Email automation solutions, workflow process, escalation, SLA management
UNFYD@LINK	Ticketing / CASE management suite, with auto-routing, intelligent automation, SLA management
UNFYD@DOC	Document Management platform, for enterprise-wide operations (collect, imaging , extract, orchestrate...)
UNFYD@ENGAGE	Proactive engagement with users based on their behaviour on the web / mobile App – intelligent routing and notifications
UNFYD@COLLAB	Collaboration (co-browse/screenshare/annotate) on web/mobile engagements, to facilitate / guide users across process journey
UNFYD@TALK	Integrated workspace for telephony / video integration (WebRTC integration across various telephony platforms)
UNFYD@PITCH	Omni-channel campaign management platform, drip-campaigns, journey-led pitch .....
UNFYD@SCOR	Quality Monitoring & Score-card tool to evaluate performance of interactions by CSE to bring effective workforce management
UNFYD@BUZZ	Social/Listening platform, with mixed initiative sentiment tagging & process management to integrate seamlessly with enterprise operations
UNFYD@POLL	NPS-led omni-channel poll platform, configurable for each process-line separately, extendable with platform data for better NPS analysis
UNFYD@TRACK	End-2-end field-service management, FOS - integrated with SCM operations, advanced scheduling techniques, geo-tagging, route-mapping etc.
UNFYD@FORUM	Community-based engagement platform, with cognitive abilities to self-serve, interaction management (closed-user groups)
UNFYD@INSIGHT	BI/Visualization/Analytics of various operations, provide dashboard/predict analytics for operations enhancements
UNFYD@PMO	Program / Project Management Tools – with end-2-end process automation, HR & FIN integration to analyse project CBA

Marketing

Sales

Service

Digital XP

Mobility

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Automation



# UNFYD®CIA - Intelligent Automation



Modules	Capability Matrix
UNFYD®LINK	Email Response automation, basis intent / sentiment & KB integrations, enterprise applications
UNFYD®TALK	Omni-channel conversation automation, powered by GenAI suite, with seamless integration to enterprise applications / KB portals / web
UNFYD®BUDDY	Co-pilot platform to assist human-agent, during live conversations – provide auto-answers, next best offers, process-flow scripts – better CX
UNFYD®DIALOG	Flow-based, Self-service BOT with Knowledge Base integration, to automate various service engagement operations
UNFYD®CONVERSE	Omni-channel - Conversation chatbots powered by GenAI to drive end-2-end experience automation (web / mobile app, voice...)
UNFYD®VOICE	Voice-bots (multit-lingua) to drive end-2-end process automation across acquisition, form-filling, enquiry etc.
UNFYD®SCOR	Automated score-card & quality management process – across voice / text, to deliver 100% compliance & deliver better business analytics
UNFYD®DOC	Image Extraction, Interpret, Process Data --- Digitisation, Document Management
UNFYD® WEB	Web scraping & KB powered interactions
UNFYD®PEEK	Advanced analytics (text / voice) - across sentiments, emotions etc.

Marketing

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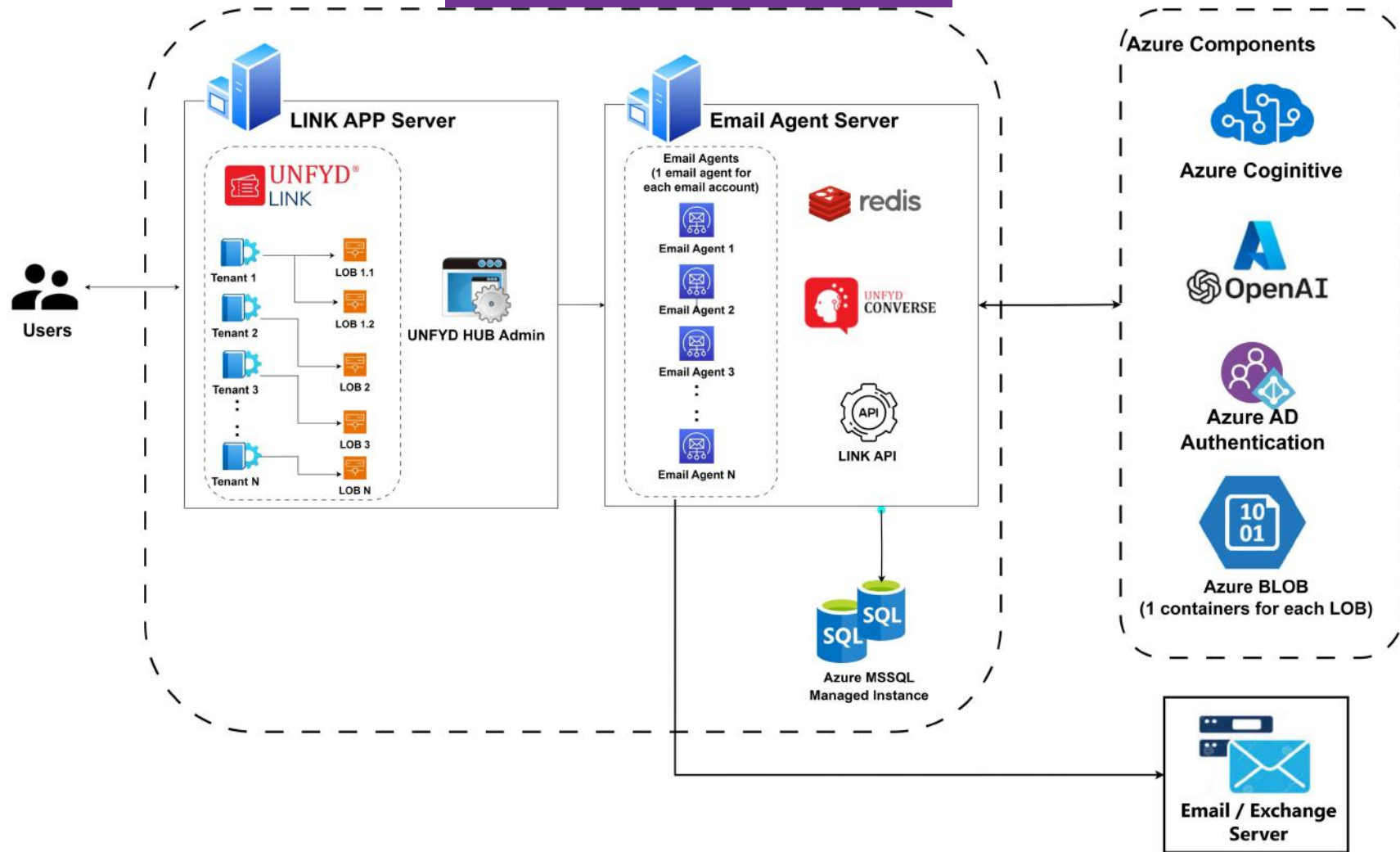
Automation

# Architecture



- + Agnostic to prem / cloud infra
- + Multi-tenanted architecture
- + Vertical & Horizontal Process agnostic
- + Built on Microsoft stack
- + API-driven architecture
- + Low-code & no-code
- + Mobile interventions (iOS / Android..)
- + SDK / APK construct
- + Identity & Access Management
- + Audit Trail
- + Reporting / Dashboard / Analytics

# Architecture Diagram



# Federation



- + UNFYD. federated architecture enables seamless integration with powerful, business-critical applications.
- + Using a mobile-first approach, users are able to conduct instant conversations through ecosystem partners' preferred channels, all within a secure and unified environment.
- + Federation also allows adding features and functions that go beyond just messaging, such as message transformations and media transcoding, chatbots that augment and amplify professionals in the conversation, and more.



# Governance & Control



## + Governance and Control

- ✘ As instant messaging and communication further intertwine with daily life, the challenge of maintaining a separate business persona for business conversations grows.
- ✘ UNFYD. gives businesses a comprehensive view and full visibility of employee-customer communication without capturing employees' private and personal messages.
- ✘ With enhanced modules including Information Barriers/Ethical Walls and Data Leakage Prevention (DLP), enterprises are now able to manage business communication – messages, documents, images, or videos sent to customers, keeping everyone safe, professional, and in compliance.



# Security



- + UNFYD. was created to be “secure by design.” Every element of our platform is led by this ethos in an effort to deliver the most robust product for customers, businesses, and employees alike.
- + Maintaining the highest levels of security doesn’t mean compromising on customers’ preferred modes of communication.
- + The platform also enables advanced features such as AntiVirus/AntiMalware to protect your enterprise security perimeter.

## + Encryption

- ✘ Data stored in the back end is encrypted using most modern encryption AES 256bit encryption algorithm including the SSL level protocol and techniques.

## + Risk Assessment

- ✘ For identification and prevention of any possible issues and risks, the platform is tested against Risk management elements like Cost of Solution, Impact of Risk, Identifying the involved Asset, hence reducing the risks.

## + Multi-factor Authenticon

- ✘ Using multi-factor authentication, only genuine users will be able log in the system.

## + Data Control

- ✘ The platform follows all regulatory data controls as applicable (HIPAA/HITECH, GDPR, etc.)

# Archiving, Surveillance & Compliance



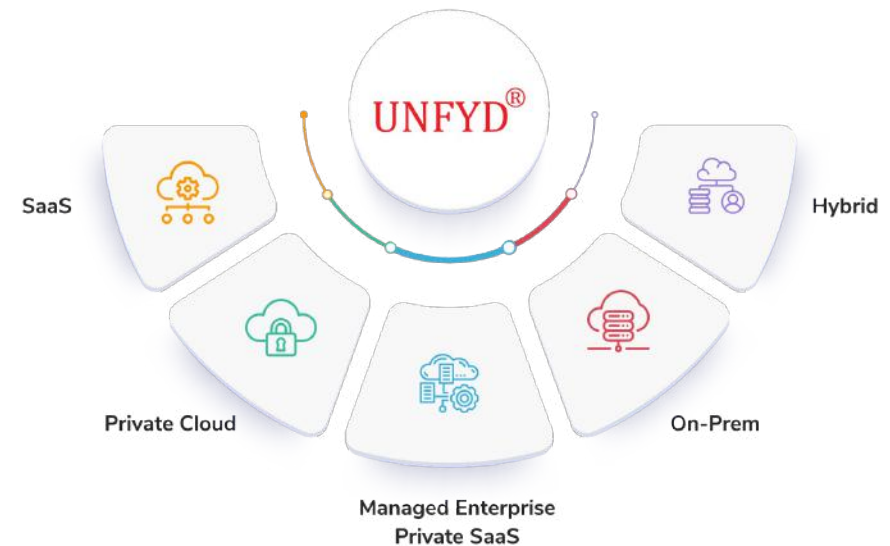
- + UNFYD. maintains a complete record of all conversations between enterprise employees and their ecosystem partners, to ensure that data privacy and governance standards are met.
- + Set rules and requirements with built-in instant messaging compliance modules for the types and levels of materials that can be sent internally or externally, including specific keywords and phrases.
- + Full audit and monitoring of dashboards, displaying the real-time status of all messages, conversations, data sent, and flagging when conditions and rules have been breached.
- + Integrated with leading third-party archiving, surveillance, and analytics platforms, all messaging records are securely stored and available alongside all the existing business data.



# Deployment Models

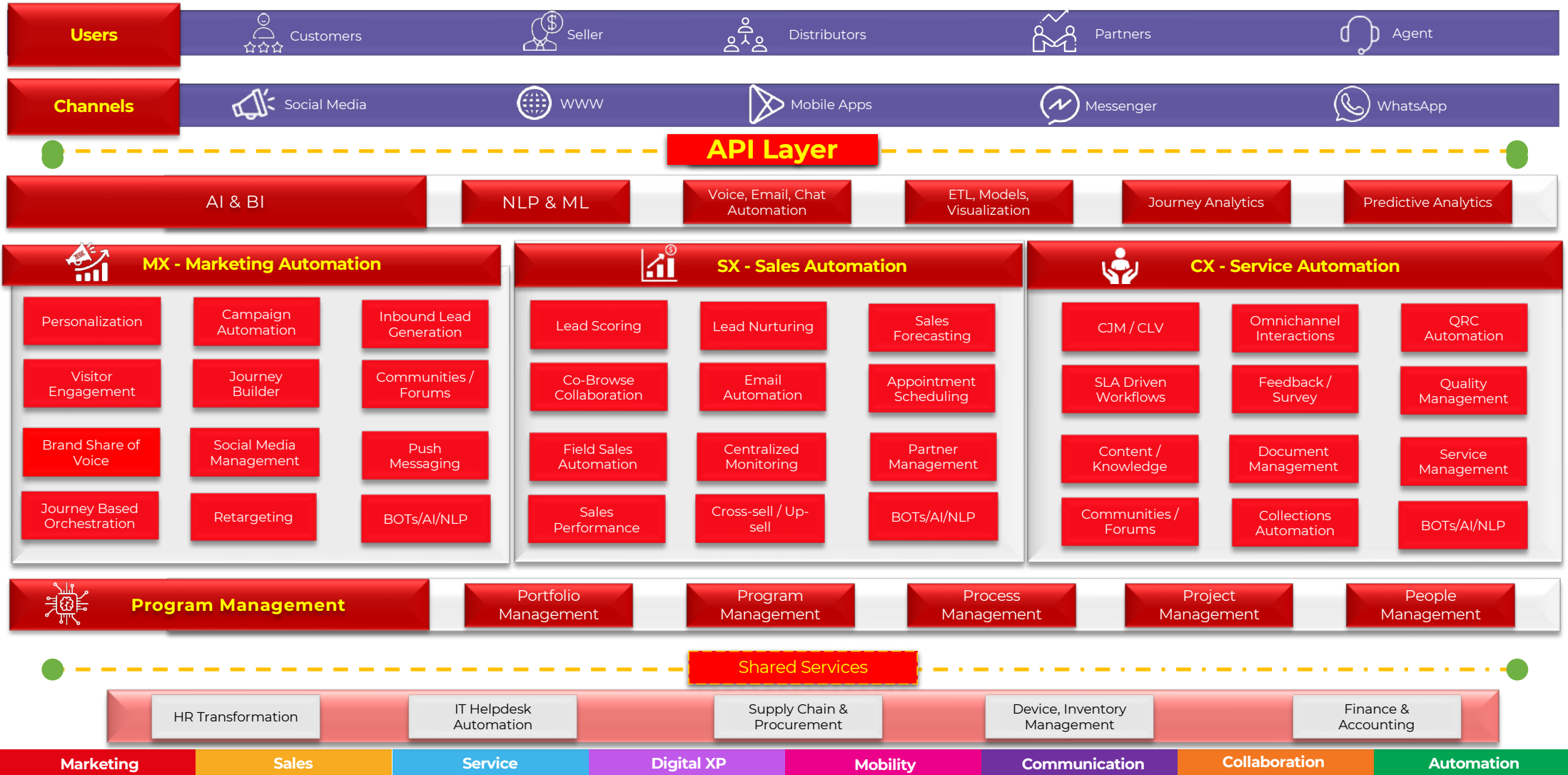


- + Based on a cloud-native architecture, UNFYD. is available through various deployment models to fit one's geographic location, business need, and industry.
- + Our customers get the freedom to choose their preferred supported mode of deployment: **SaaS, private cloud, on-premise installation, managed enterprise private SaaS, or a hybrid approach.**





# UNFYD.COMPASS – CRM & Automation



**Users**

- Customers
- Seller
- Distributors
- Partners
- Agent

**Channels**

- Social Media
- WWW
- Mobile Apps
- Messenger
- WhatsApp

**API Layer**

AI & BI

NLP & ML

Voice, Email, Chat  
Automation

ETL, Models,  
Visualization

Journey Analytics

Predictive Analytics



**MX - Marketing Automation**

- Personalization
- Campaign Automation
- Inbound Lead Generation
- Visitor Engagement
- Journey Builder
- Communities / Forums
- Brand Share of Voice
- Social Media Management
- Push Messaging
- Journey Based Orchestration
- Retargeting
- BOTs/AI/NLP



**SX - Sales Automation**

- Lead Scoring
- Lead Nurturing
- Sales Forecasting
- Co-Browse Collaboration
- Email Automation
- Appointment Scheduling
- Field Sales Automation
- Centralized Monitoring
- Partner Management
- Sales Performance
- Cross-sell / Up-sell
- BOTs/AI/NLP



**CX - Service Automation**

- CJM / CLV
- Omnichannel Interactions
- QRC Automation
- SLA Driven Workflows
- Feedback / Survey
- Quality Management
- Content / Knowledge
- Document Management
- Service Management
- Communities / Forums
- Collections Automation
- BOTs/AI/NLP



**Program Management**

- Portfolio Management
- Program Management
- Process Management
- Project Management
- People Management

**Shared Services**

- HR Transformation
- IT Helpdesk Automation
- Supply Chain & Procurement
- Device, Inventory Management
- Finance & Accounting

- Marketing
- Sales
- Service
- Digital XP
- Mobility
- Communication
- Collaboration
- Automation

# Journey ....

## BFSI CLIENTS



## ENTERPRISE CLIENTS



## GTM PARTNERS



## GTM ENGAGEMENTS (IP Vendors)



## TECHNOLOGY PARTNERSHIPS



Marketing

Sales

Service

Digital XP

Mobility

Communication

Collaboration

Automation



# Smart Connect

*Innovate* | *Transform* | *Enterprise*

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Marketing

Sales

Service

Digital XP

Mobility

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Thank  
you



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