



# Business Applications

Empowering today's workforce to  
respond to the digital imperative



# At Microsoft, we build technology that enhances the power of your employees

**500k** organizations  
each month

**97%** of Fortune 500  
companies

are using Dynamics 365  
or the Power Platform



A Leader in 7 Gartner®  
Magic Quadrant™ reports



A Leader in 5 Forrester  
Wave™ reports



A Leader in 3 IDC  
MarketScape reports

# Microsoft Cloud

## Business data & processes



## Low-code Innovation



Power BI



Power Virtual Agents



Power Apps



Power Pages



Power Automate

## Insights & Analytics



Dynamics 365  
Insights applications



Power BI

## Productivity & Collaboration



Teams



Excel



Word



PPT



Outlook

## ISV Solutions

Pre-Built Apps

Vertical Solutions

LOB Apps

Customer Experience

Finance

Service

Supply Chain

Business  
Data and  
Processes



Data  
Connectors

Common  
Data Model

Azure



# Dynamics 365 Customer Insights

2022 Release Wave 2

Features releasing October 2022 through March 2023



# Elevate customer experiences



## Understand your customer

Combine and enrich all your data in real time and leverage AI-driven insights to predict customer intent.



## Personalize every experience, across every channel

Deliver customer-led personalization with AI-assisted orchestration across all touchpoints.



## Maximize ROI and business impact

Accelerate time to value with an integrated marketing solution. Optimize budget allocation across channels.

## Protect customer privacy and your brand

Maintain full ownership of data, backed by industry-leading security, compliance and privacy



# Accelerate customer understanding

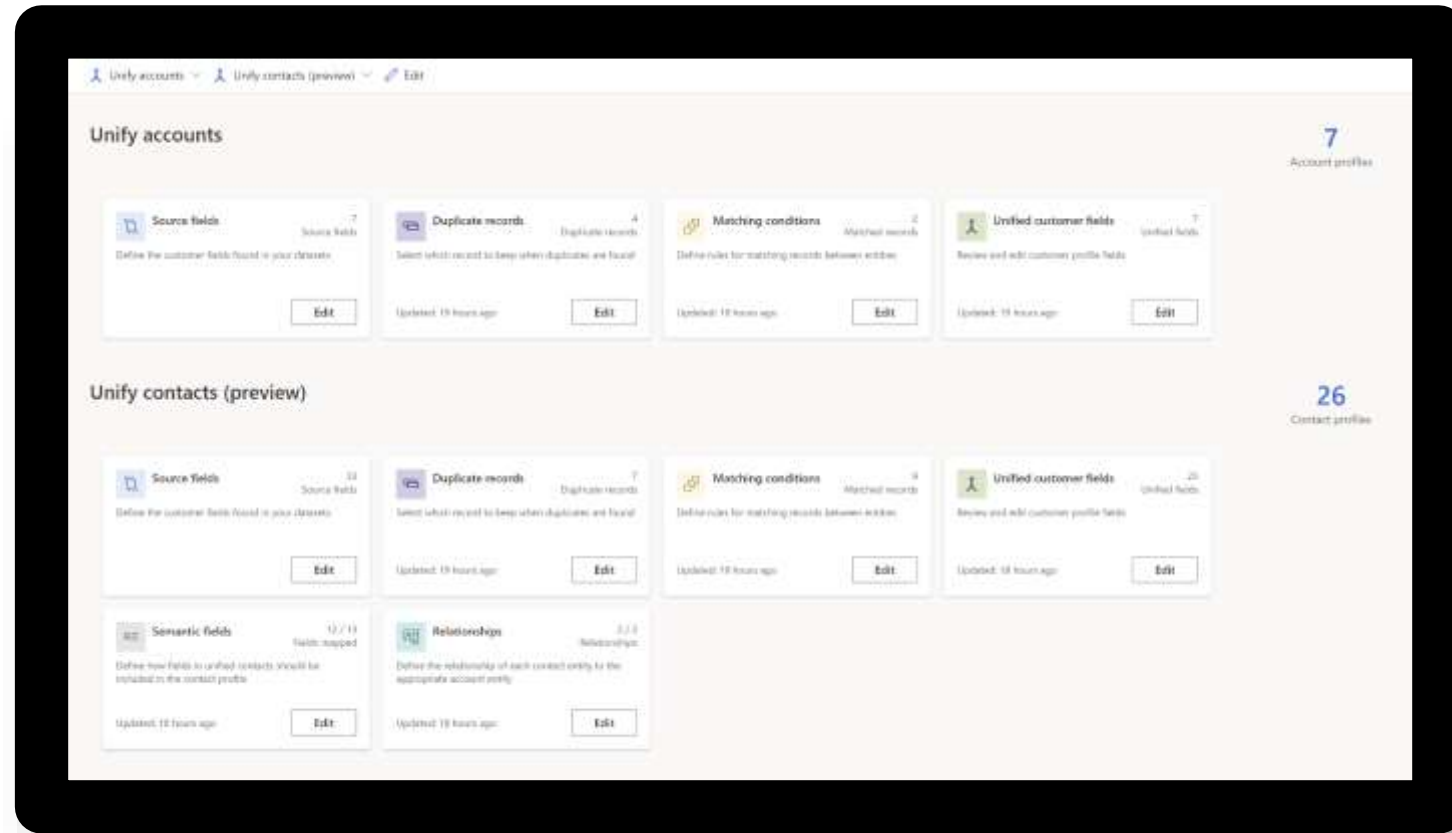


2022 Release Wave 2: Oct '22 – Mar '23

# Unify contacts to improve B2B insights

Unify B2B contacts and B2B accounts to get a full view of business contacts resulting in improved insights that span both unified accounts and contacts

- Unify account data and contact data using the same unification process
- Associate the unified contacts with the unified accounts
- See unified contacts for each account on the customer cards
- Create segments of contacts using criteria from either contacts, accounts, or both.
- Export segments of contacts for activation in any product



# Save time with AI-Assisted activity mapping

Use AI-powered suggestions to quickly and easily map activity data

- Quickly and easily consolidate customer activities from various data sources
- Associate activities with customer profiles

The screenshot shows the 'Create an activity' screen in the Microsoft Dynamics 365 Customer Insights application. The interface is divided into a left sidebar with navigation options (Home, Customers, Segments, Markets, Intelligence, Data, Entities, Activity, Relationship, Events, Admin) and a main content area. The main content area has a breadcrumb 'Activities > Create an activity' and a list of steps: Activity date, Relationship, Activity validation, Activity type, and Review. The 'Activity type' step is currently selected. The 'Set activity type' section prompts the user to 'Choose the type of activity you want to monitor' with a dropdown menu showing 'SalesOrderLine'. Below this, there's a section for 'Set your mapping preferences' with a question 'Provide semantic mapping for your activity's attributes?'. The 'Yes' radio button is selected. A toggle switch for 'Intelligent mapping' is also visible. The 'How map your data to this activity type's related fields' section contains a table with columns 'Column' and 'Type'. The table lists several data fields and their corresponding activity types.

Column	Type
Order line ID *	OrderLineID
Order line number	OrderLineNum
Order ID	PurchaseID
Order date *	PurchaseDate
Product ID	ProductID
Quantity	Quantity







# Dynamics 365 Sales

## 2022 Release Wave 2

Features releasing October 2022 through March 2023



# Sales accelerator and process automation

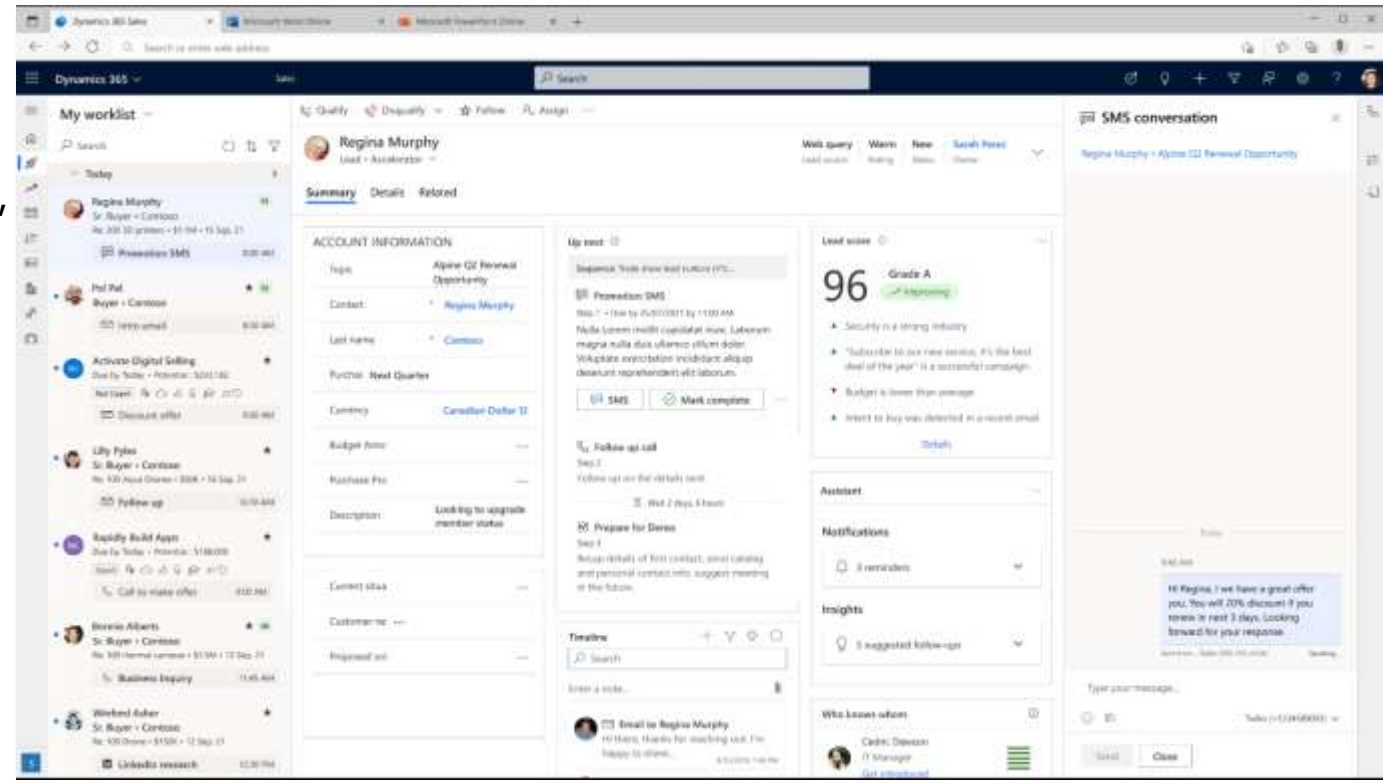


 Microsoft  
Dynamics 365

# Engage with your customers using SMS

In the current B2B industry, it's important to meet customers via their preferred channel. Customers and sellers find SMS as a convenient and effective channel to send reminders, provide quick updates, or respond to customers' queries.

- Allow sales managers to choose a service provider for sending and receiving SMS.
- Ability to add SMS or automated SMS as a step in a sequence.
- Create and add SMS template as part of a configured sequence step
- Send SMS from the Sales Accelerator workspace
- Easily access past SMS interactions in context with relevant sales entities such as, lead and opportunity records.



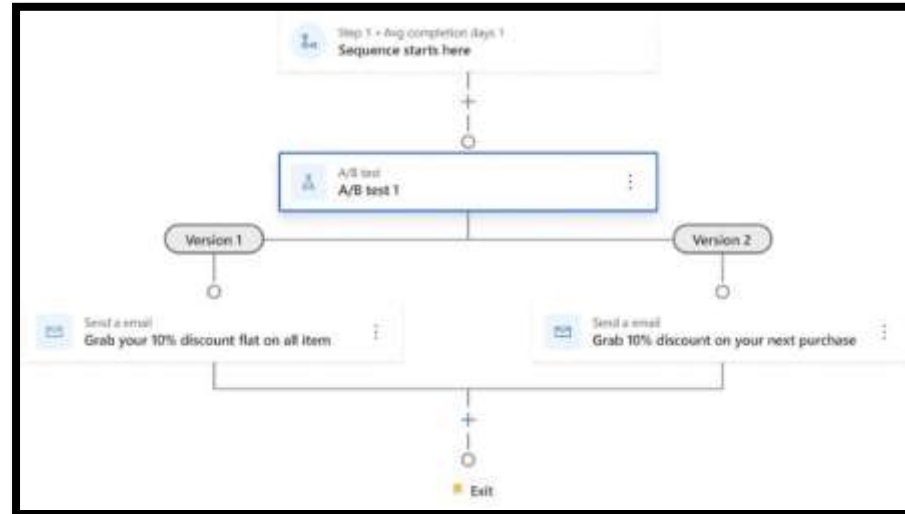


# Improve sales processes using A/B testing in sequence

With sequences, SEMs offer sellers guidance to the best next step they need to take. To make sure that sellers get the optimal suggestions for customer outreach, they need tools to experiment, measure, and compare sequences performance.

Conduct experimentation with two or more variants of a customer outreach or sequence that sellers use for prospecting and compare their performances to determine the optimal engagement method.

- A/B test email steps to experiment with different email subjects and contents.
- Measure A/B test performance at sequence step-level, for example, email open, reply, and download rate.



**A/B test**

Title\*  
Discount

Versions  
Content type for each version

Version A 10% discount flat

Version B 10% discount on next purchase

Audience  
Determine how much of the total audience should receive each test version

A 50% B 50%

Test Completion  
Set the winning criteria and test duration

Winning metric  
Email open

This test ends  
Automatically (on statistical significance)

Default version  
Version A

If there's no clear winner when the test ends, or is stopped, this version will be sent to new people added to the audience.





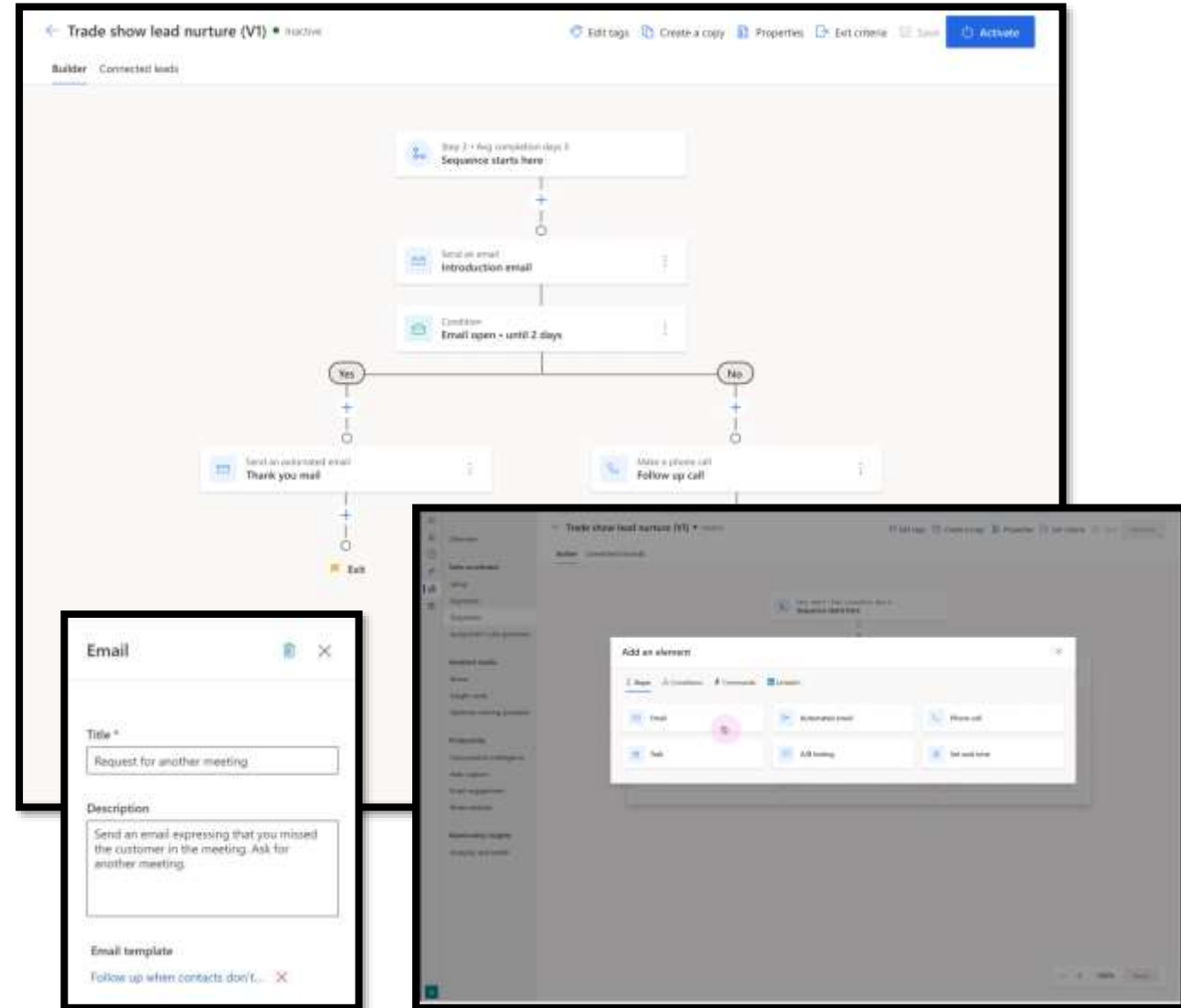
# Try enhanced sequence creation experience with new designer

Sequences help to propagate and ensure winning selling strategies. SEMs will benefit from the sequence designer's enhanced user experience and features.

With this change, you will now have a consistent automation experience across Dynamics 365 Marketing customer journey orchestration and Dynamics 365 Sales sequences, making it convenient for you to use both systems.

Using the new sequence designer, the sales manager and operation team can:

- Edit a sequence step using a side panel that provides more space with an improved experience.
- Discover and provide an exit criterion for a sequence.
- Understand the end of any sequence branch with an exit icon.
- Save all the changes of sequence steps with a single click.



# Use sequences and Up next with any form, and empower sellers to create sequences

Sales enablement managers can enable sequences and the Up next widget to guide sellers in any grid and form.

- The Up next widget is embedded in the default lead, opportunity, contact, and account forms and you can include Up next in any other entity form.
- You can use sequences to guide sellers on any page or form.
- The default Salesperson security role has added privileges to create and customize sequences.
- You can change permissions of any security roles to allow users to create and connect sequences.
- Sellers and other allowed users can use the sequence designer from the **\*\*Personal settings\*\*** area of the Sales hub app.
- Sellers can personalize outreach plans by customizing sequences with their preferred communication medium (email, phone call, LinkedIn, and others), language, wait time, follow-up technique, and other steps.

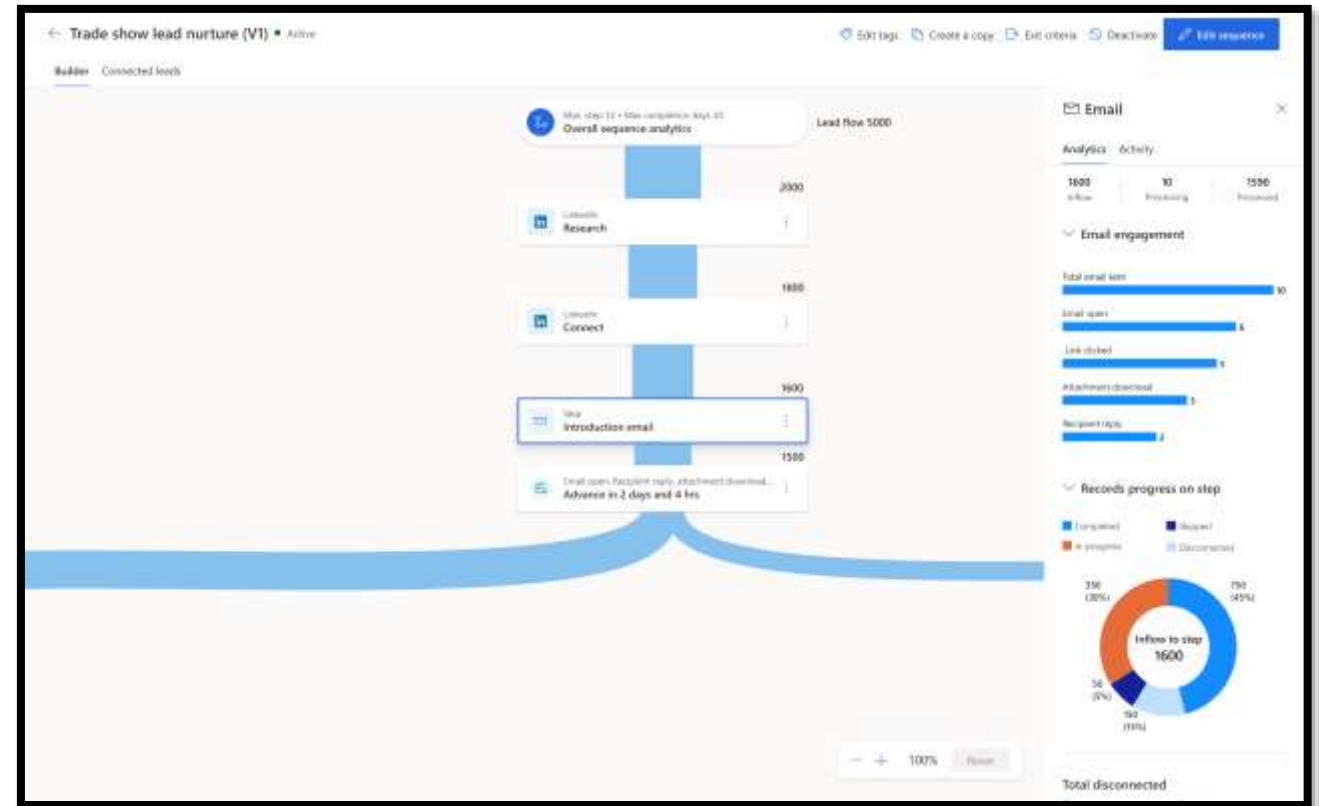
The screenshot displays the Microsoft Dynamics 365 Sales application interface. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, My work, Sales accelerator, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Collateral, Quotes, and Orders. The main content area shows the 'Regina Murphy' record page, which includes tabs for Summary, Details, and Related. The 'Summary' tab is active, displaying 'ACCOUNT INFORMATION' with fields for Topic (Likes our products), Contact (Regina Murphy), Last name (Contoso), Purchase Timeframe (Next Quarter), Currency (Canadian Dollar 12), Budget Amount, Purchase Process, and Description (Looking to upgrade member status). On the right side of the record page, there is a 'Up next' widget. This widget features an illustration of a person at a laptop and the text 'Automate your activities. Know what your activities are by connecting the record to a guided sequence. Learn more.' Below this text is a blue button labeled 'Connect lead to sequence'. At the bottom of the page, there is a 'Timeline' section with a search bar and a note entry for 'Email from Regina Murphy'.



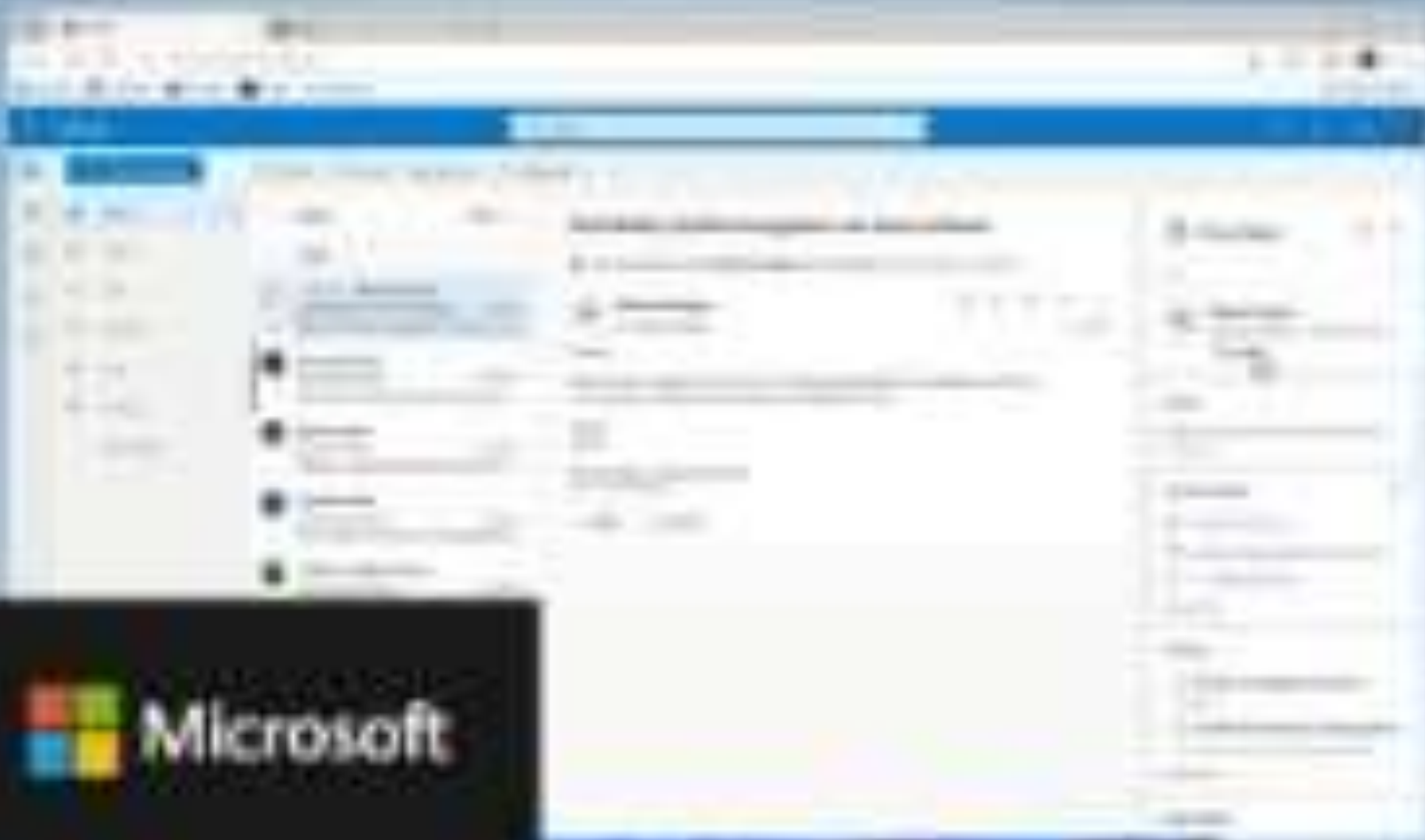
# Improve process efficiency using sequence insights

This capability would enable the sales engagement managers to identify the inefficiencies within a sequence to refine for greater impact. This capability lets SEMs to:

- Analyze the sequence steps and get detailed insights to find ways to improve the steps for better sales outcomes and sequence performance.
- Identify the deviation of the process and devise ways of improving adherence. They can also establish a co-relation between the success rates of the entities (such as leads and opportunities) and the sequence steps.
- Identify the communication channels that works best for their business



**Viva Sales – Offentlig tilgjengelig**



# Conversation intelligence



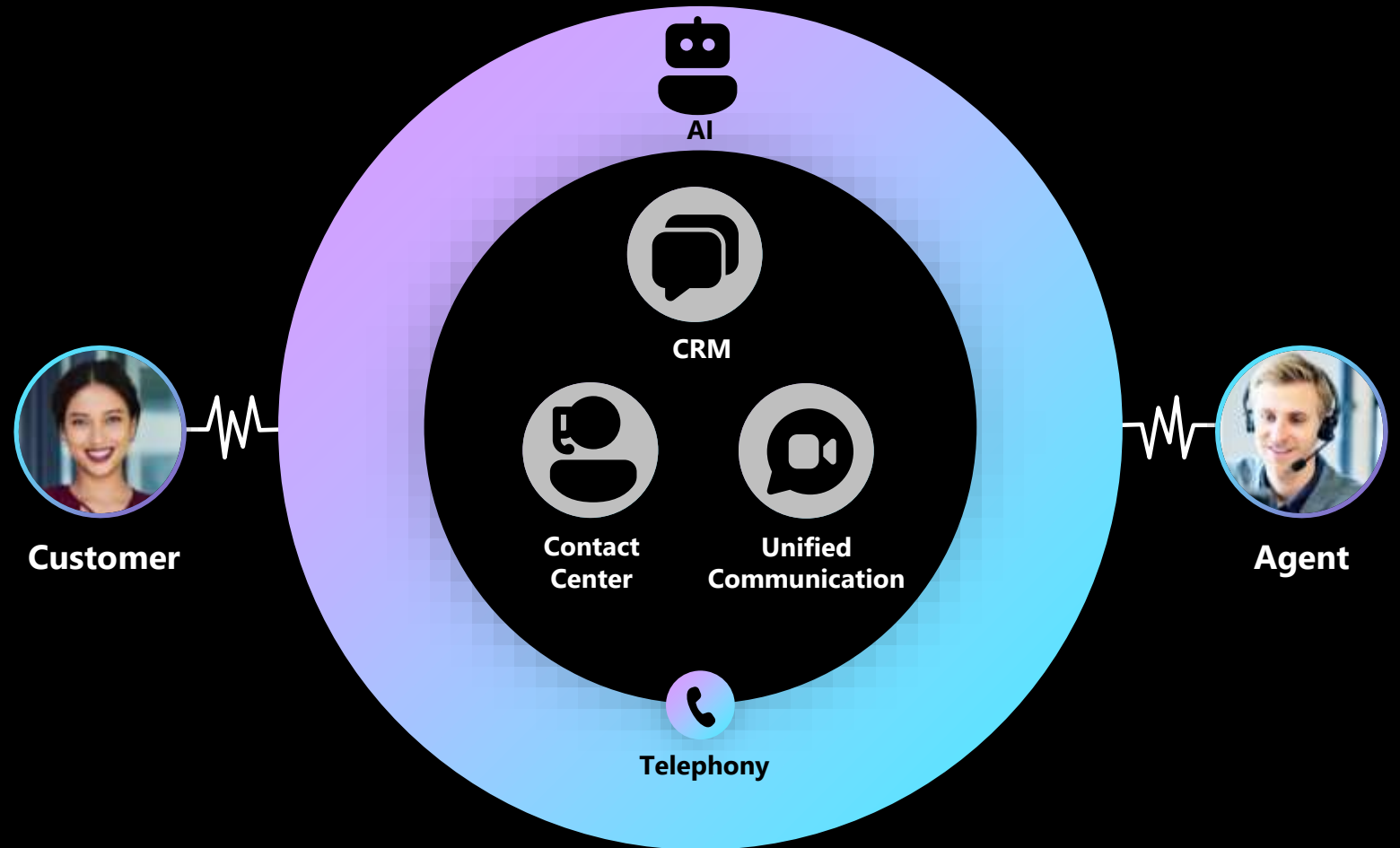


# The Microsoft Digital Contact Center Platform

A comprehensive, flexible,  
and collaborative customer  
experience solution



Connect  
the stack.  
Connect the  
experience.



Introducing

# The Microsoft Digital Contact Center Platform



Teams



Power Platform



Dynamics 365



Azure



NUANCE



# Dynamics 365 Marketing

## 2022 Release Wave 2

Features releasing October 2022 through March 2023



Microsoft Confidential: Content Shared under NDA

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# Waves of innovations



2020

## Multi-channel content engagement

- Content-rich social media posts
- Re-imagined email editor
- AI spam checker
- Integration for Microsoft Teams live events and meetings



2021

## AI powered real-time interaction management

- Event-based customer journey orchestration
- SMS messages & push notifications
- AI-powered ideas to automatically generate content for emails
- AI-driven run-time channel optimization



2022 Wave 1

## Enterprise orchestrations capabilities

- Collaborate using the built-in Microsoft Teams
- Unified view of customer activity across Marketing, Sales, and Customer Service
- Journey UX optimization
- Power Automate triggers journeys

10M interactions



100M interactions  
W2 2021



300M interactions  
W2 2022

# Themes for 2022 release wave 2

Enable **moments-based** marketing -  
with real time journey  
orchestration



Build **collaborative**  
**experiences** - across  
people, departments, and  
channels for meaningful  
engagement



Embrace  
**personalized**  
**content** - to grow your  
audience engagement



Leverage the **power**  
**of data and AI** - to  
market at scale and  
achieve higher levels of  
marketing maturity



# Enable moments-based marketing with Real time journey orchestration

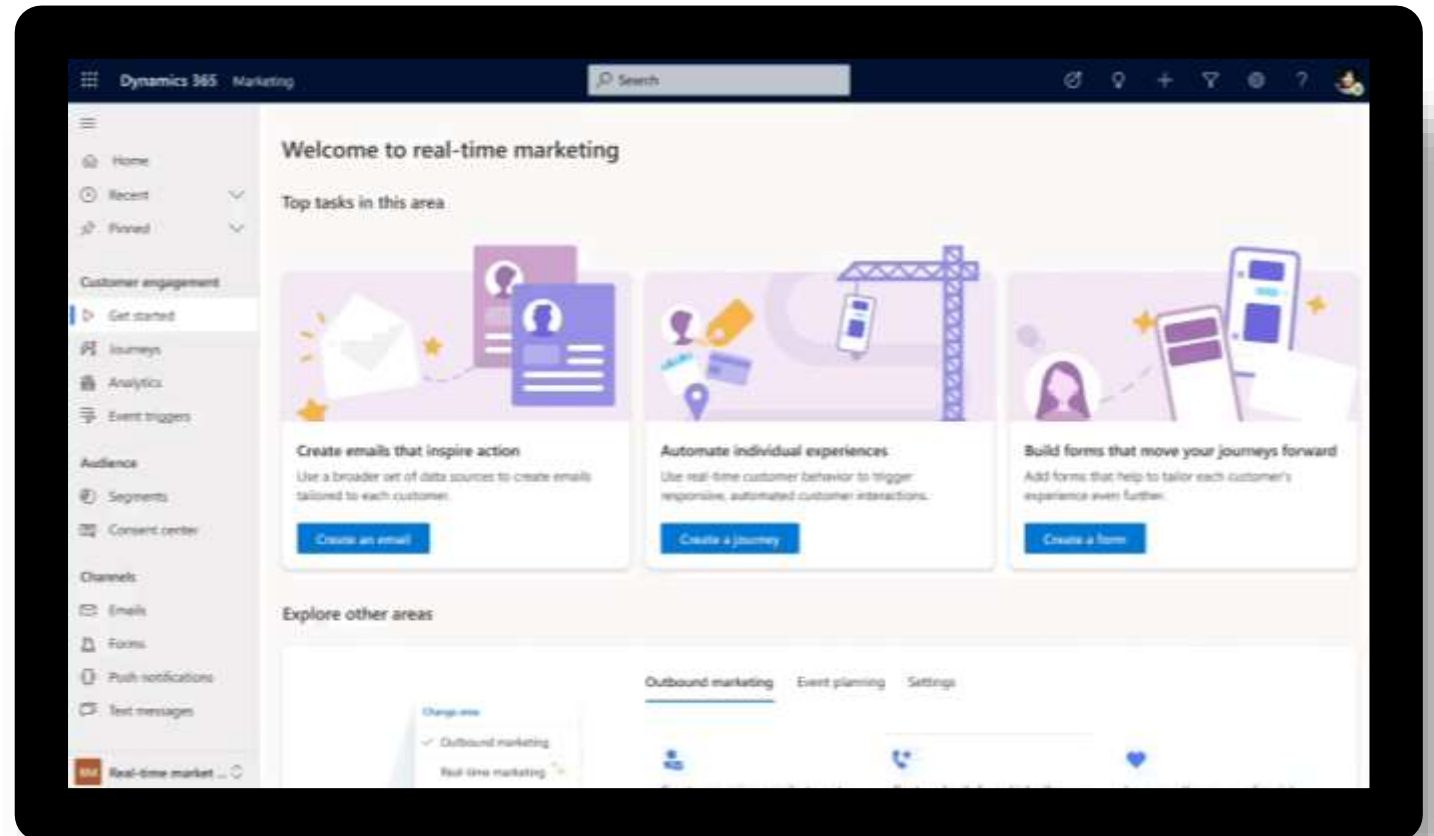




# Create lead capture forms that convert visitors to customers

Effortlessly create smart forms to place on your websites and capture your customers' attention and their details.

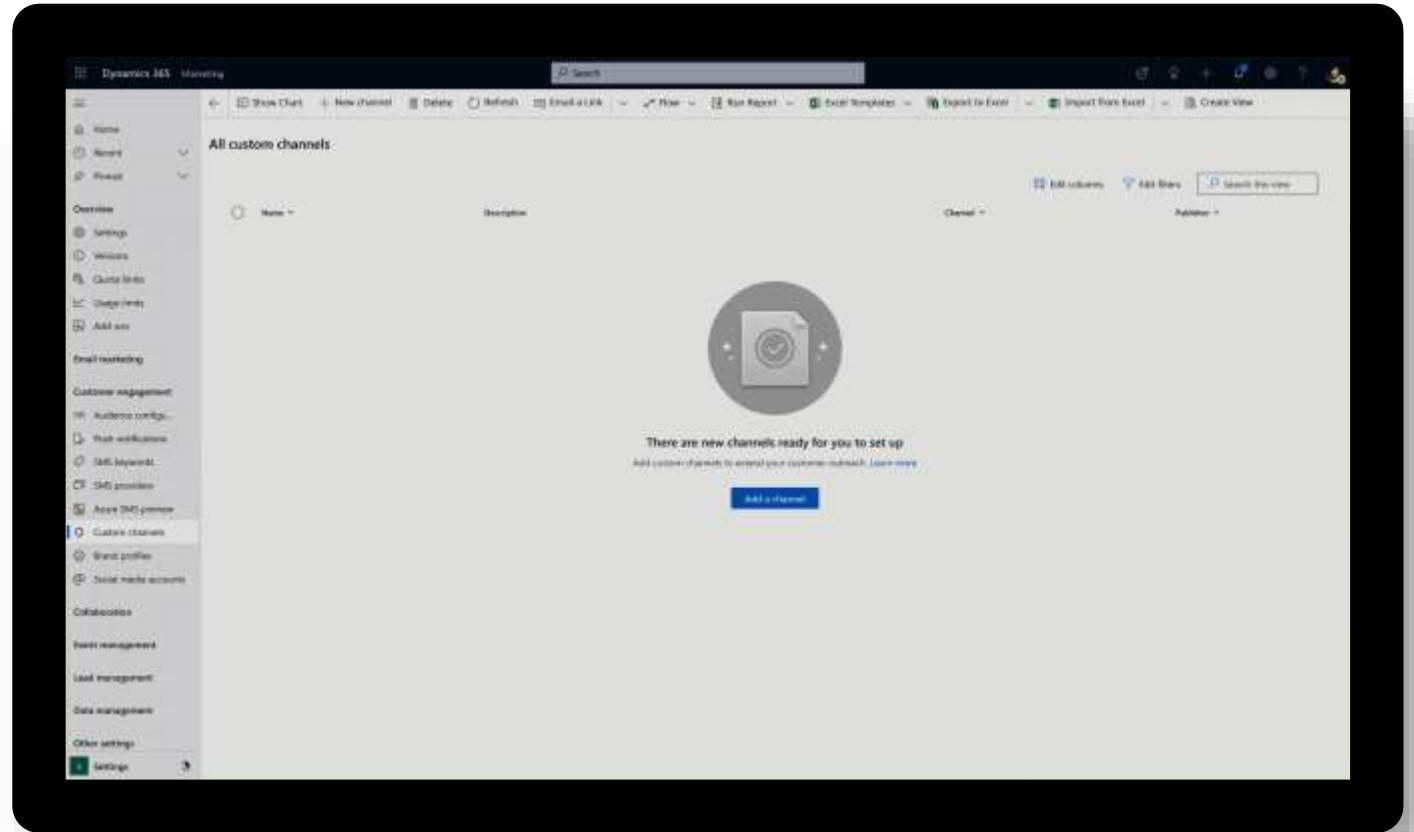
- Use modern drag and drop editor that guides you through the entire form creation process.
- No longer depend on developers, start creating forms within seconds.
- Instantly publish a form as standalone page or easily embedding the form to your existing page.
- Deliver compelling forms to your customers that match your brand and track conversions.



# Extend your outreach with custom communication channels

Deliver personalized experiences through specific channels you want to engage your customers on as part of a journey.

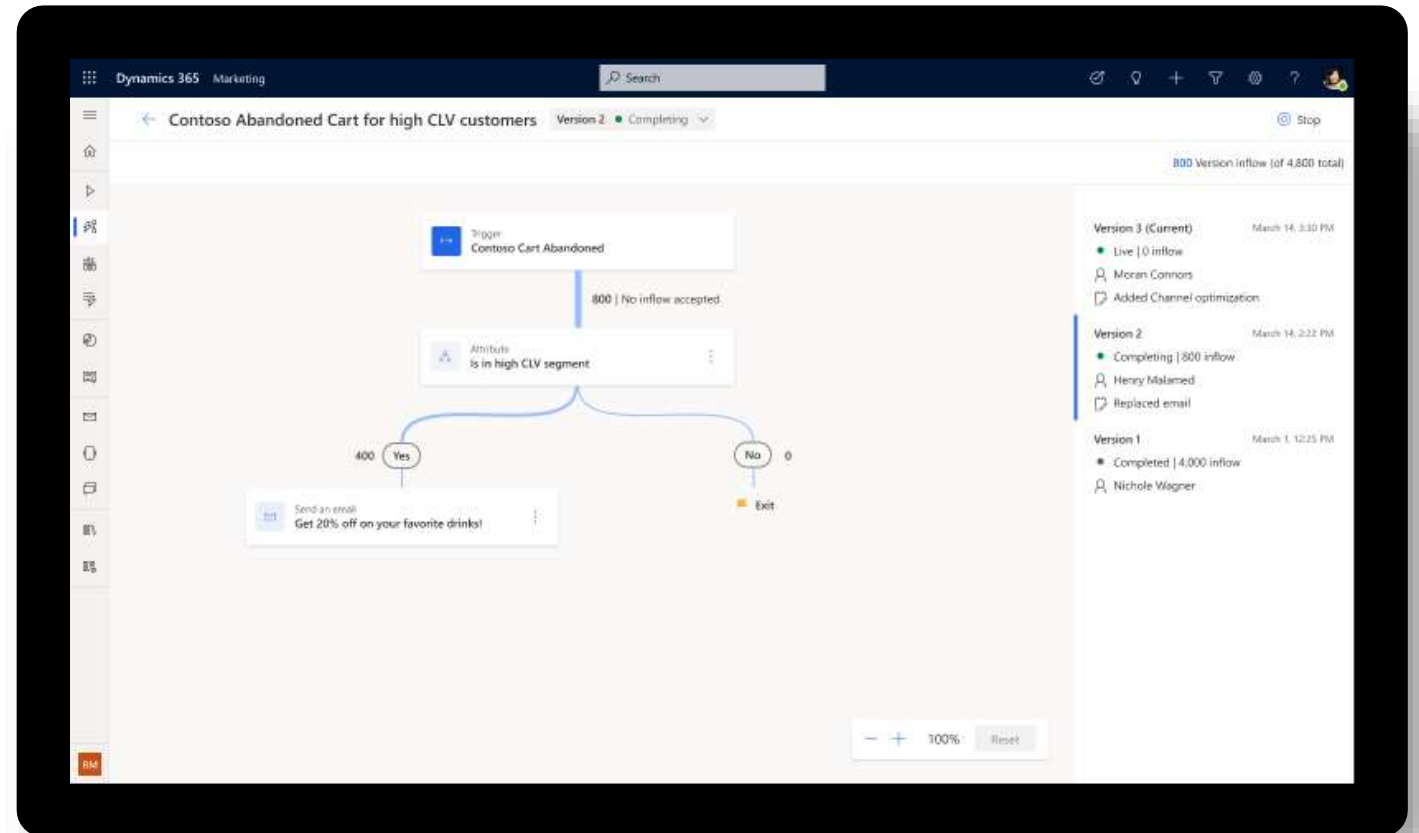
- Install and configure a new custom channel of your choice such as a local SMS provider or a particular email provider.
- Create content for your custom channels using Dynamics 365 Marketing editors and use them in your customer journey.
- Optimize your custom channels with first-class capabilities such as personalization, consent, and deliverability analytics.



# Easily optimize live journeys with incremental updates

Editing live journeys with ease by making iterative improvement without impacting customers already in the journey and track each update to optimize your business outcome.

- Make in-line safe edits to live journeys.
- Consult automatic version control and compare it to all past journeys versions analytics results.
- Collaborate easily amongst your team through change tracking and notes.





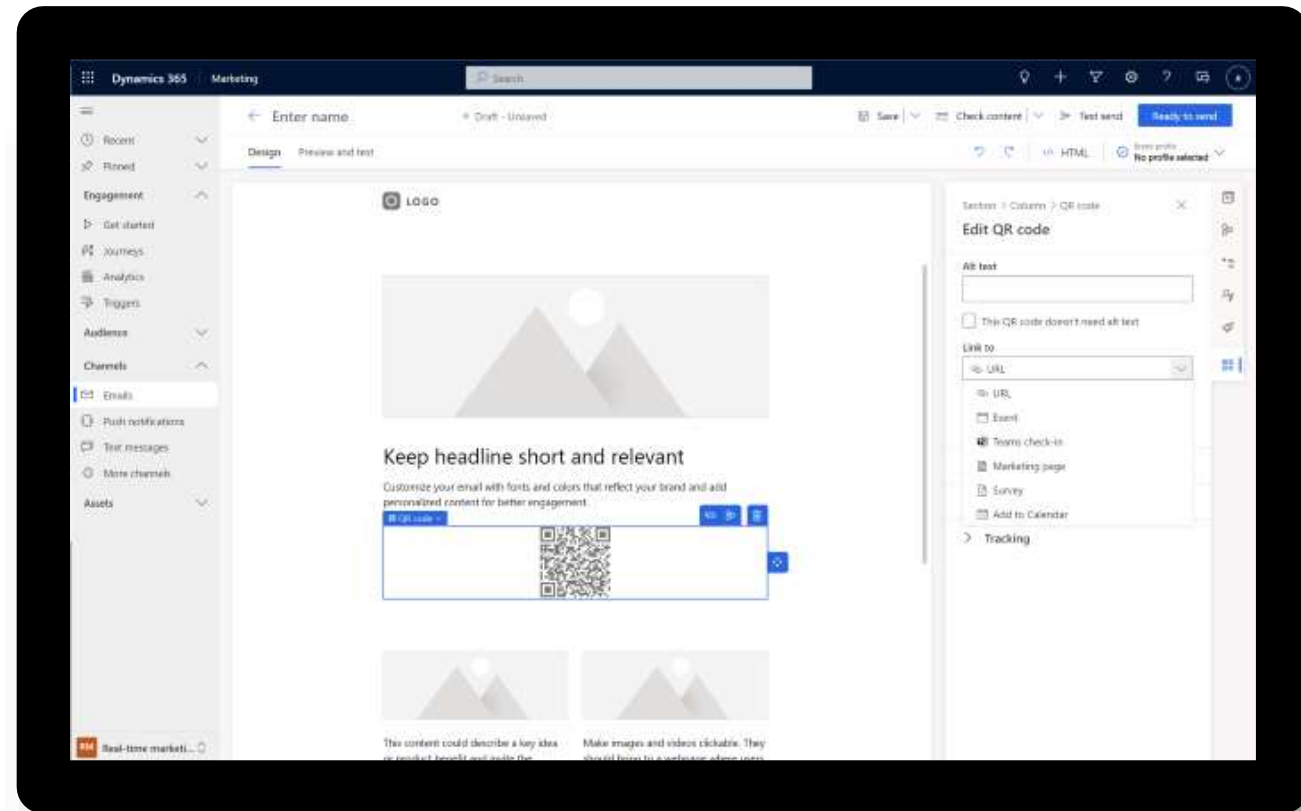
# Maximize email engagement with feature-rich text links and QR codes

Use feature-rich text links and QR codes within your email campaigns and get more customers to engage, click and convert.

Improve customer response by giving them direct access to your digital content:

- Increase your online traffic with links redirecting your customers to your websites, surveys, events, marketing pages.
- Boost event attendance, add links that allow recipients to join a Microsoft Teams event or create a new calendar item with a click of a button.
- Promote your business using QR codes to increase app downloads, invite customers to events and share coupons with a simple scan!

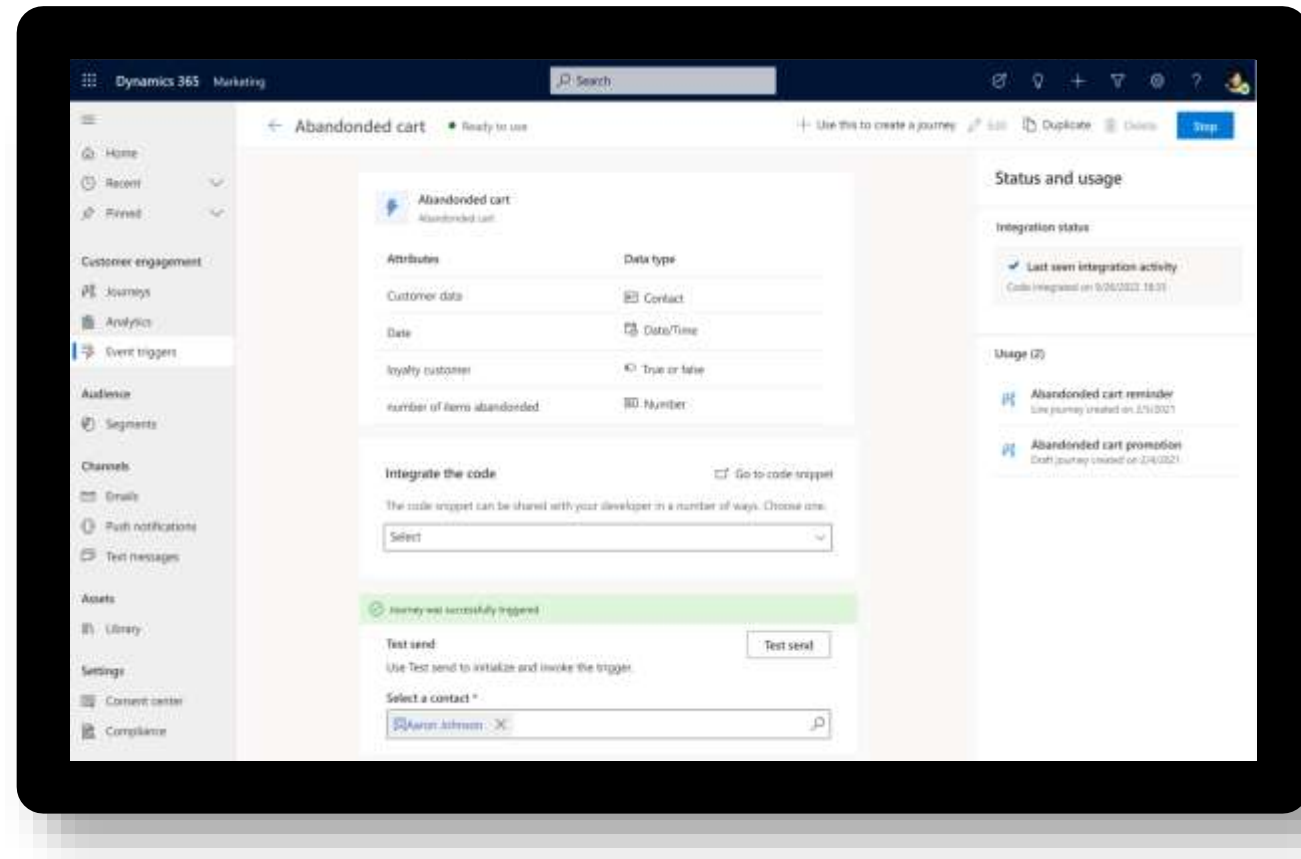
*NOTE: new QR code feature is only in Real time marketing, whereas text links are in both Real time marketing and Outbound marketing.*



# Test all paths customers will take before publishing journeys

Testing custom triggers before running a journey gives you reassurance in the quality and behavior of your custom triggers. By running internal users through the journey, you can easily determine if your triggers work correctly and validate the path your audience will take.

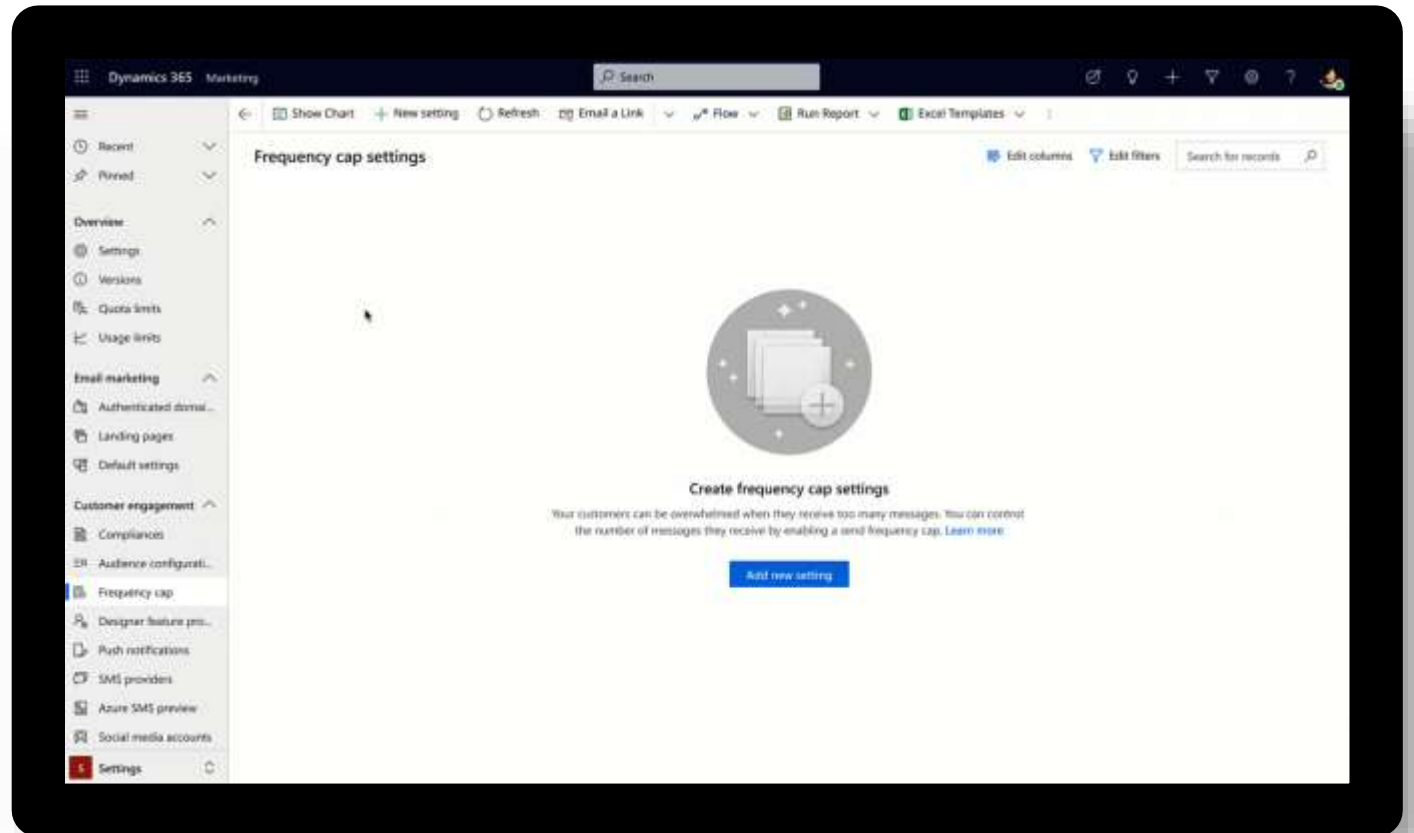
- Test your journey on internal users to determine if your triggers work correctly
- Validate the path that your customers will take in the journey.
- Analyze the flow of your journey triggers and troubleshoot before publication.



# Limit number of messages sent to prevent message fatigue

Ensure that your customers not only receive the right message at the right moment, but also at the right frequency to prevent fatigue, avoid unsubscribes, and to ensure optimal engagement with your key messages.

- Decide which journeys should have the frequency cap enabled or disabled.
- Define a specific cap per channel.
- Enable daily, weekly and monthly frequency cap.
- Check which messages have been sent and which are still pending for each customers.



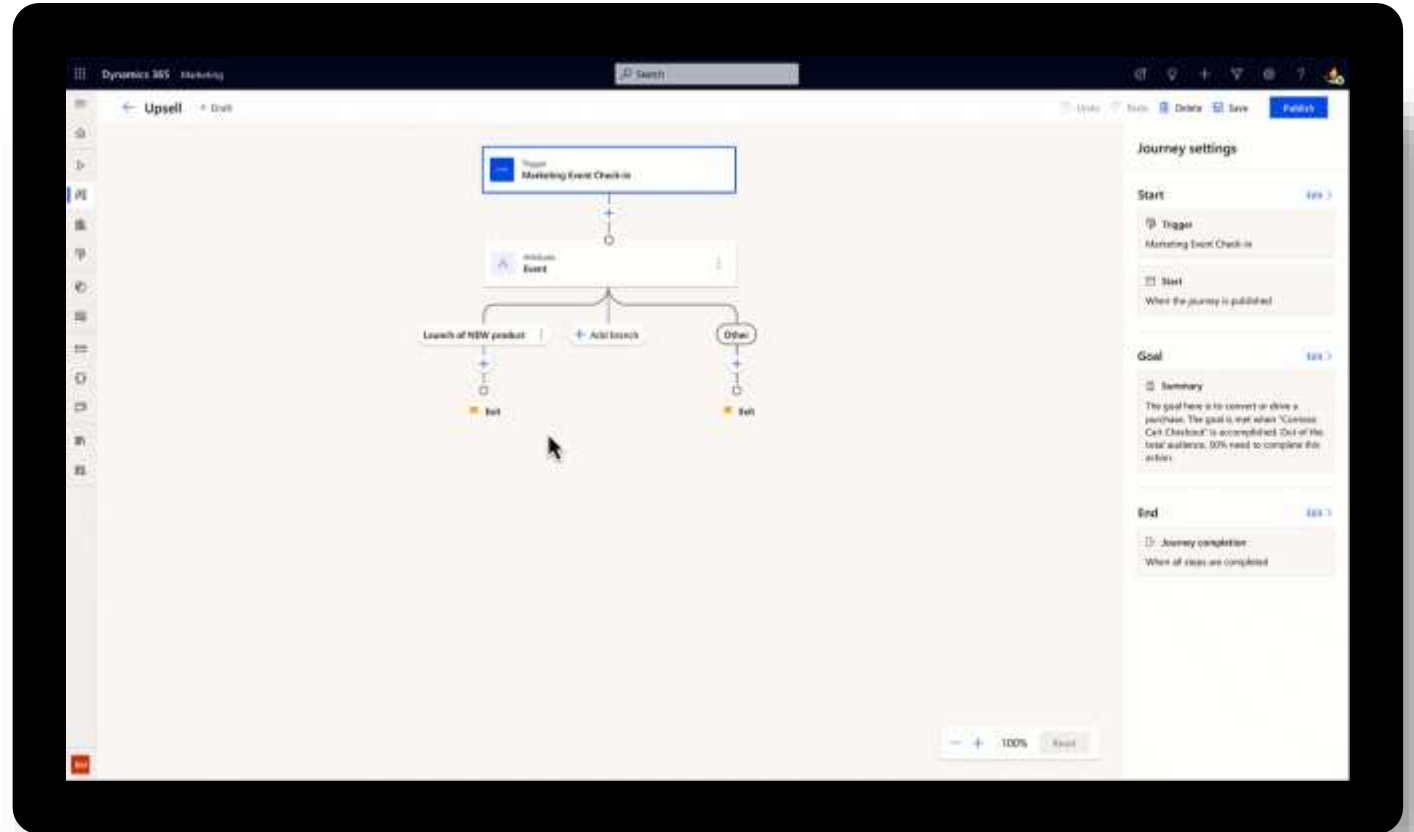
Build  
collaborative  
experiences -  
across people,  
departments,  
and channels for  
meaningful  
engagement



# Close leads fast by automating handoffs with sales

Activate a sales sequence or create sales activities to bring the sales team to engage with the leads at the right time and stage of their journey.

- Respond quickly to incoming leads by routing them directly to sales agents.
- Add sales activities such as phone calls and tasks in your nurture journeys.
- Trigger a sales sequence in Dynamics 365 Sales to surface contextual recommendations for the seller picking up the lead.





Embrace  
personalized  
content - to  
grow your  
audience  
engagement



# Capture consent and preferences to match your business needs

Customize your preference centers, enforce and track consents to meet your business needs across multiple brands and business units.

- Configure real-time marketing preferences centers that represent your brand's look and feel with new logo, style, and color options.
- Create and manage topics that align with your brands and business for customers to opt-in to marketing subscriptions.
- Leverage Customer Insights to manage multi brand consent.

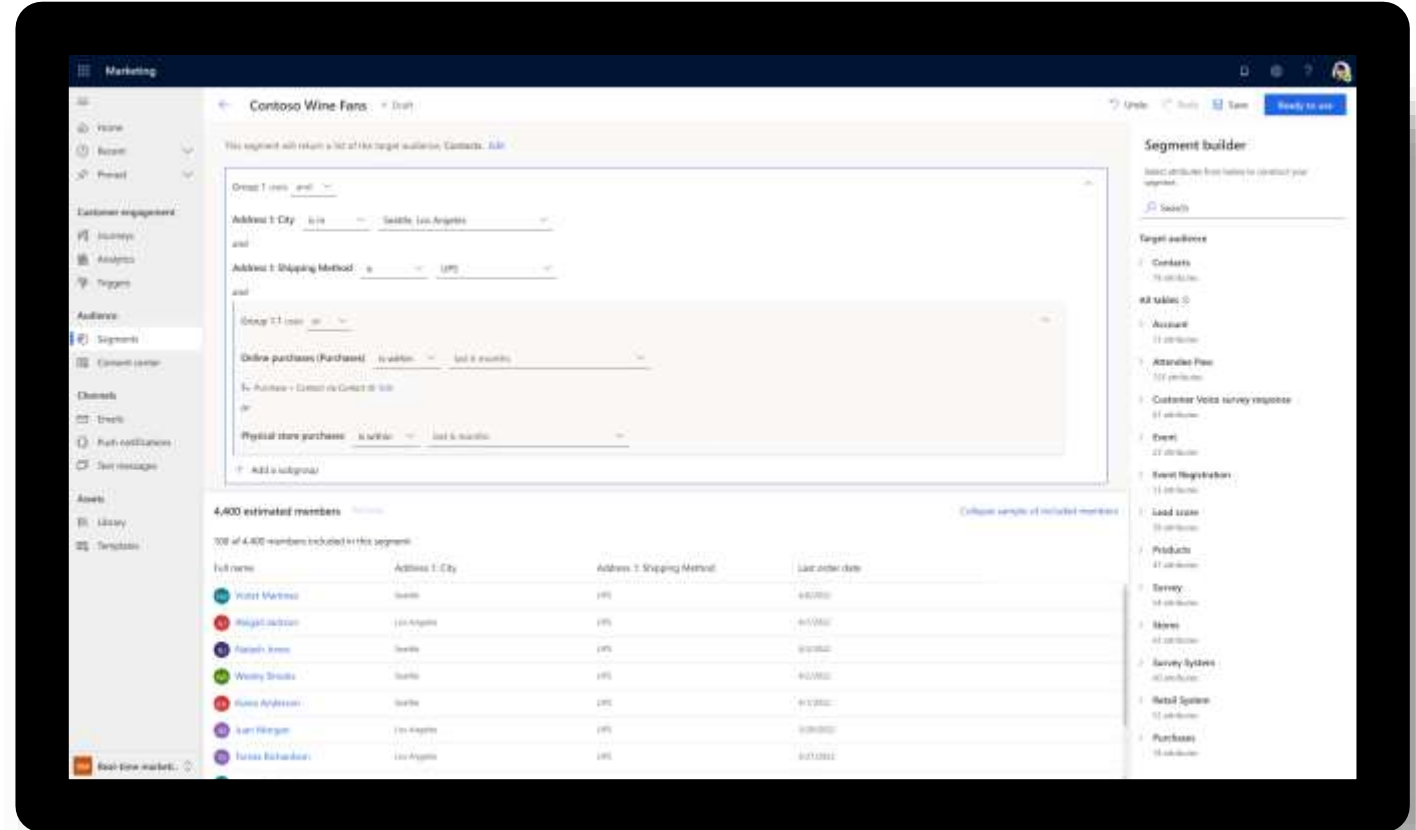




# Increase your reach using the new segment builder

Improve your productivity by intuitively creating segments for contacts and leads in the new segmentation builder

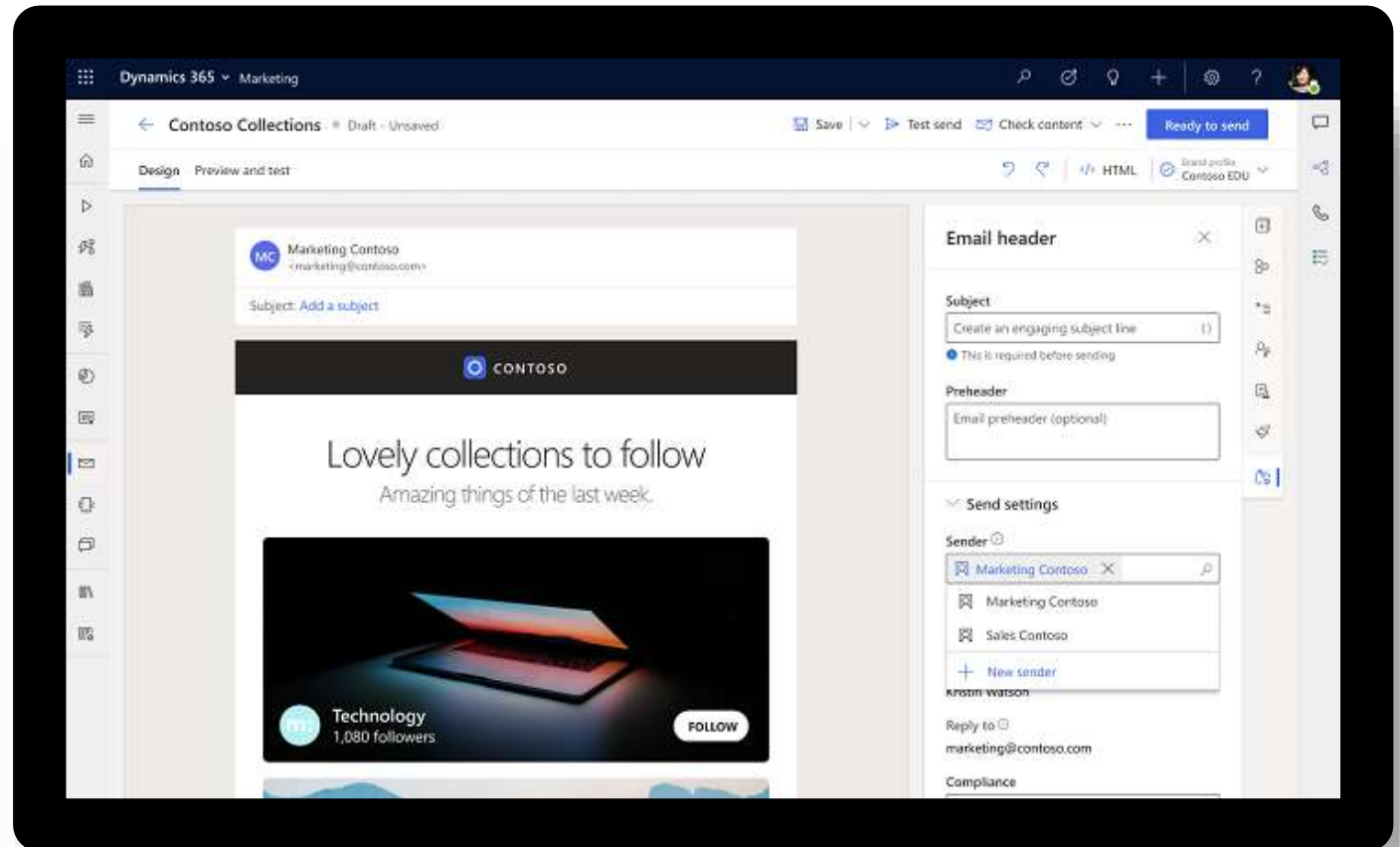
- Segment your audience more precisely by directly creating segments based on attribute data for both contacts and leads.
- Market to these leads directly using customer journeys.
- Use Natural Language to intelligently assist and ease your segment creation experience.
- Preview and estimate the number of segment members as part of your segment creation process.
- Create a static snapshot of your segment membership, define refresh rate and add contact and leads individually.



# Easily manage content across multiple brands

Manage different brands easily, create consistent emails, and reduce content-related errors by creating brand profiles following your business structure.

- Create multiple brand profiles for your organization or for each of your business units.
- Define default email senders and social links.
- Extend your brand profile entity with custom values that you can use when creating content.



Leverage the  
power of data  
and AI - to  
market at scale  
and achieve  
higher levels of  
marketing  
maturity



# Trust your email analytics' results thanks to improved bot detection

New updates to bot detection can filter up to 78% of bot generated clicks, giving you more accurate insights on the real email engagement rates.

- Communicate, build on and optimize your email marketing campaigns based on more accurate analytics results, rely on your email metrics for A/B testing results, and clickthrough rate.
- Prevent bot clicks to trigger unsolicited journeys and marketing automation.
- Understand what your customers are interested in with reliable click analysis.

*\*compared to previous 61%*



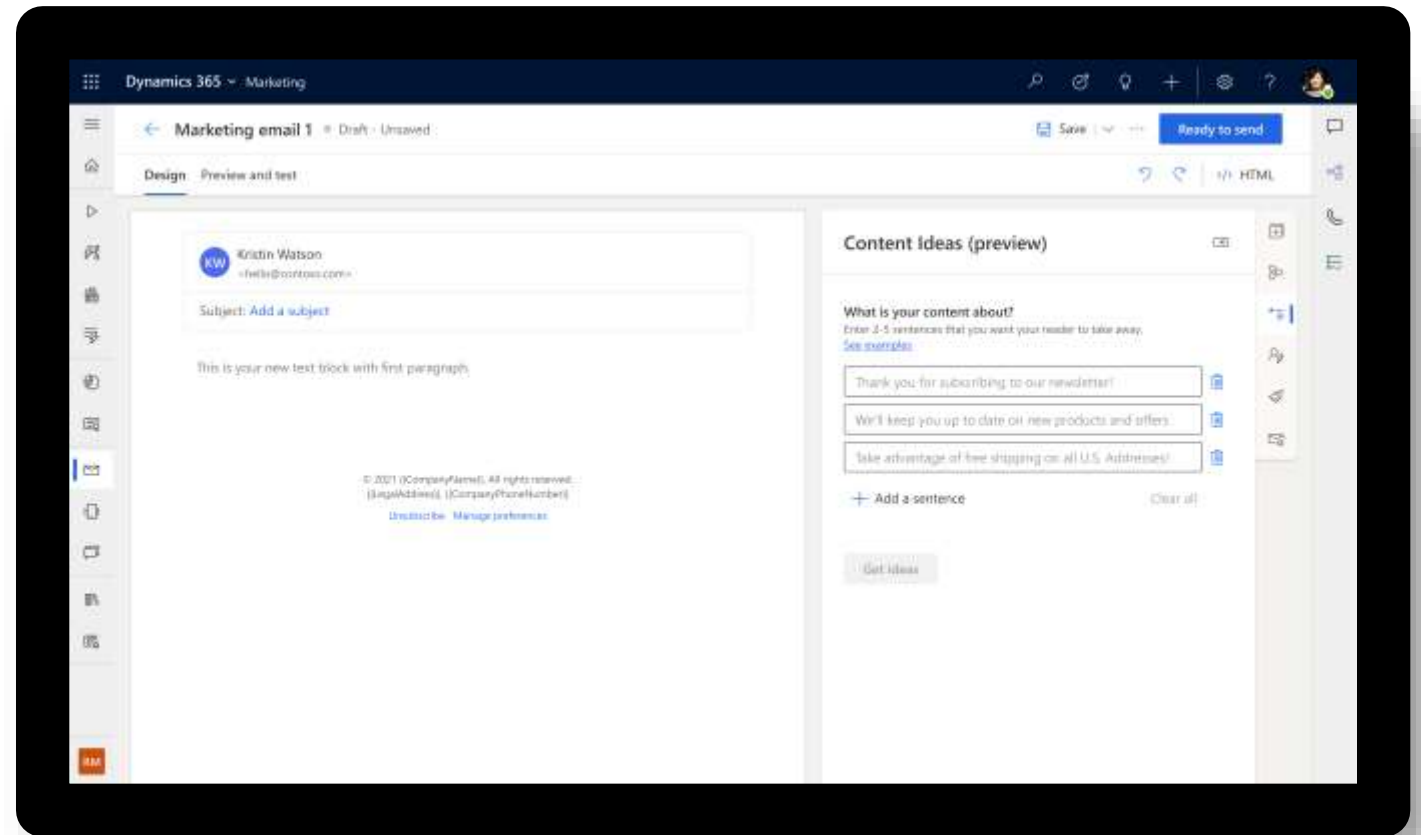


# Boost your creativity with AI-powered email content ideas

Leverage machine learning technology to receive relevant content ideas and create engaging emails instantly.

- Kickstart email creation with generic content suggestion based on key messaging points you want to convey in your email and edit them accordingly.
- Gain time by using generated text in English that looks and sounds like text that was written by a person.
- Upon collecting significant data, receive personalized content suggestions from our machine learning based on your latest commercial emails.

*NOTE: This feature will be available in the United States and in English language environments only. Availability in other geographies and for other languages will be communicated later.*



# Gain productivity by defining access and visibility of marketing assets to match your business structure

Implement marketing strategies across brands, geos, regions, and product lines to align with your business structure and gain visibility into your brand performance.

- Organize your marketing journeys, digital assets, content and customer preferences to support your multi-brand strategy needs.
- Review marketing analytics at individual brand, region and organization level.
- Define reusable marketing assets at the enterprise level; allow individual brands or line of businesses to leverage, extend or customize them.



# Scale your business with confidence with 300M maximum monthly interactions



Send up to **300M messages monthly**

Reach up to **100M contacts**

Public preview Feb 2023

[Link to feature release detail and availability dates](#)



## Why Microsoft

### Drive operational excellence

Reduce complexity and cost with open, extensible solutions

### Deliver exceptional customer experiences

Improve time-to-value with unprecedented personalization, unified data, and AI-driven insights

### Culture of growth and agility

Empower employees by bringing together people, data, and processes