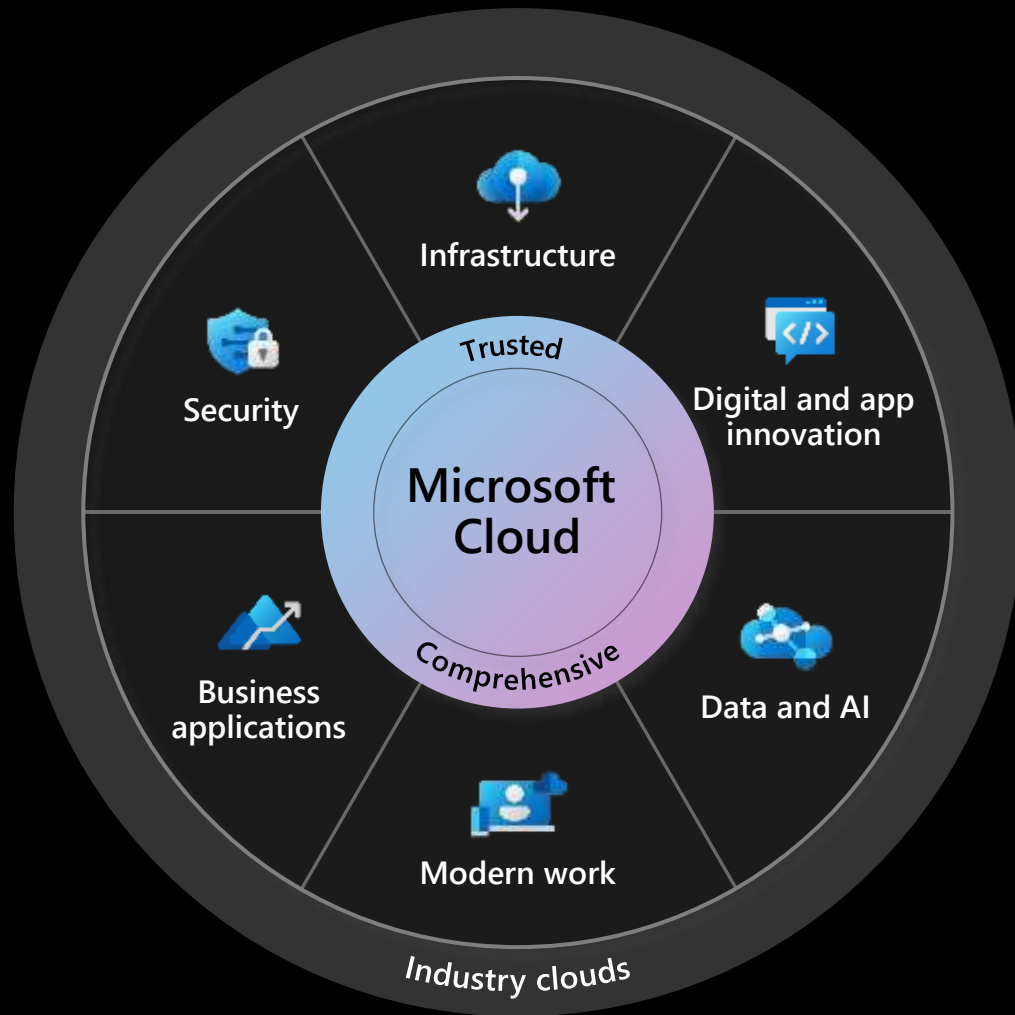




Our mission

Empower every person and
every organization on the
planet to achieve more



Microsoft Cloud in the era of AI

Radically accelerate your organization's productivity with a copilot for everyone

Differentiate from the competition with intelligent apps using AI

Trust your data to a responsible cloud provider

A copilot for every Microsoft Cloud experience

Microsoft 365 Copilot

Works alongside
you in the apps you
use every day

[Learn more](#)

Dynamics 365 Copilot

Turbocharge your
workforce with a
copilot for every
job role

[Learn more](#)

Copilot in Power Platform

Imagine it, describe
it, and Power
Platform builds it

[Learn more](#)

Microsoft Security Copilot

Defend at machine
speed with
Microsoft Security
Copilot

[Learn more](#)

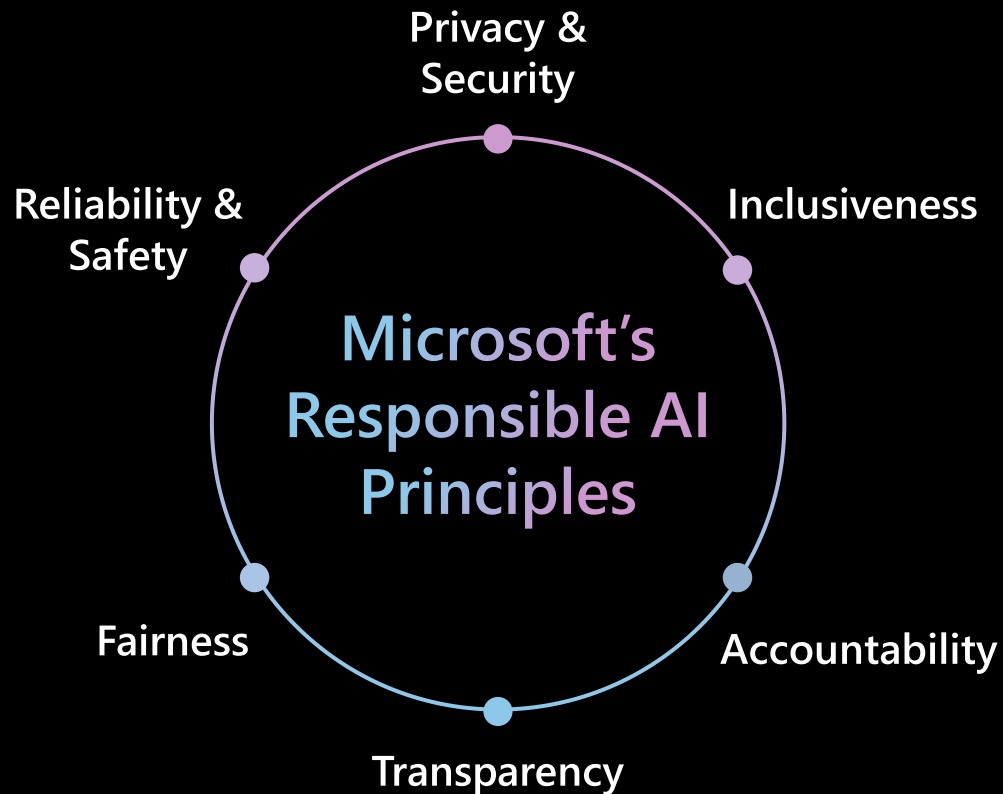
GitHub Copilot

Increase developer
productivity to
accelerate
innovation

[Learn more](#)

Microsoft Cloud

Runs on trust



Your data is your data

Your data from any fine-tuning is not used to train the foundational AI models

Your data is protected by the most comprehensive enterprise compliance and security controls

Customer experience is the sum of all interactions between the customer and the business **over the lifetime of the relationship**



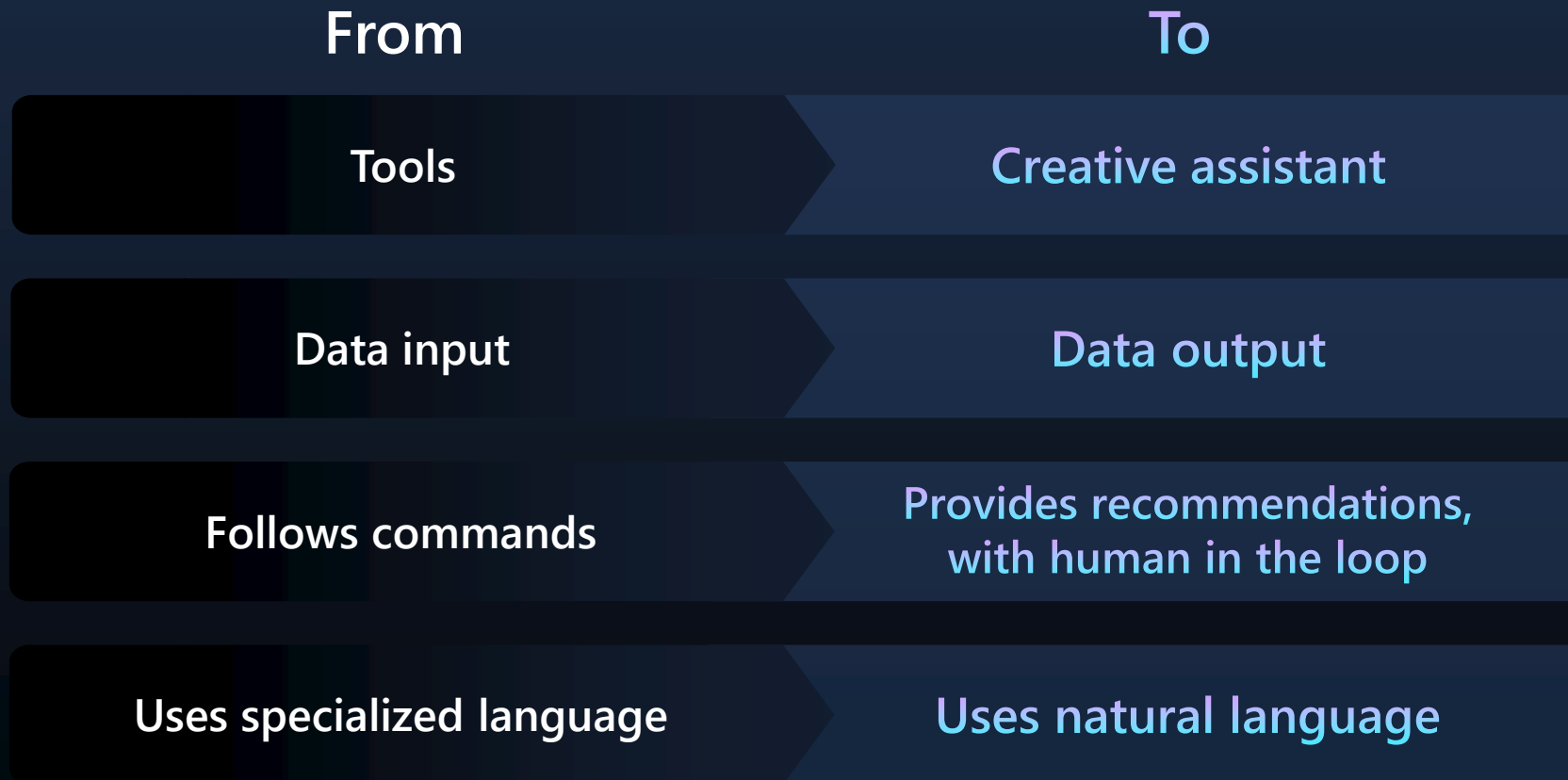


Turbocharge your workforce with Dynamics 365 Copilot

DynUg May 2023

Era of the AI Copilot

The role of technology



Dynamics 365 Copilot

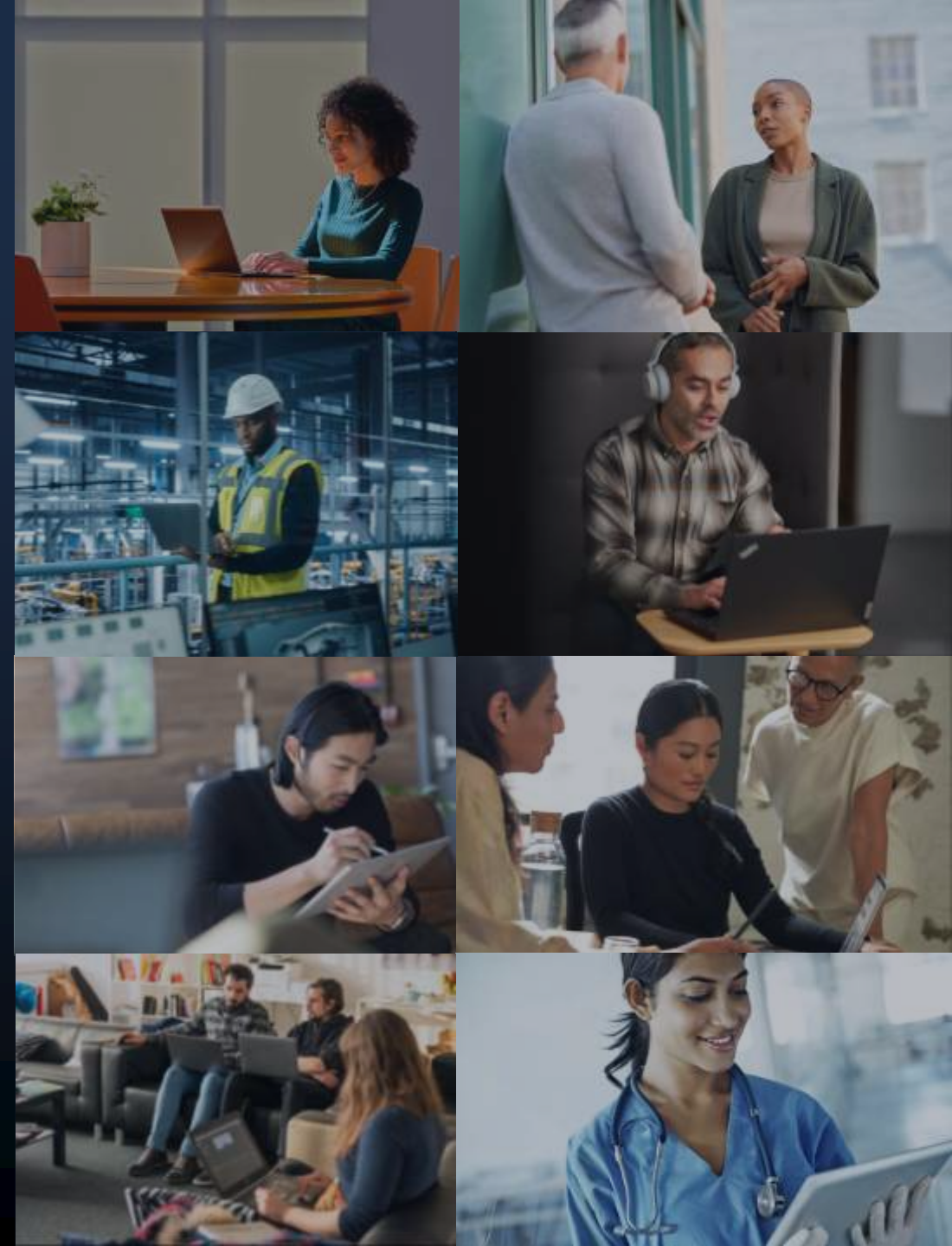
AI-powered assistance that helps business professionals

- Generate ideas and content faster
- Perform and automate task faster
- Get insights and next best actions

All using natural language

Key differentiation:

- GPT-powered Copilot for every job role
- Copilot features natively built in Dynamics 365
- Secure enterprise data – your data is your data
- Powered by Azure OpenAI Service
- Empowering impactful responsible AI practices



Sales



Save time creating engaging customer emails



Move deals forward faster with AI-assisted email replies, from information requests to proposals.

Challenges

- +66% of sellers' day devoted to managing email
- Repetitive email responses composed from scratch
- Time spent searching email, chat, documents for account-specific details

With Copilot in Microsoft Viva Sales

- AI-generated email content modeled after proprietary email styles, messages, and tone
- Integrates custom details, from pricing to promotions
- Choose pre-defined response categories or custom text based on keywords and topics

Recap sales meetings in moments



Automatically generate detailed summaries and actionable steps after sales calls and meetings

Challenges

- Hours each day devoted to recapping customer and internal meeting notes and action items
- Inaccurate meeting summaries due to content-heavy meetings and multiple participants

With Copilot in Microsoft Viva Sales

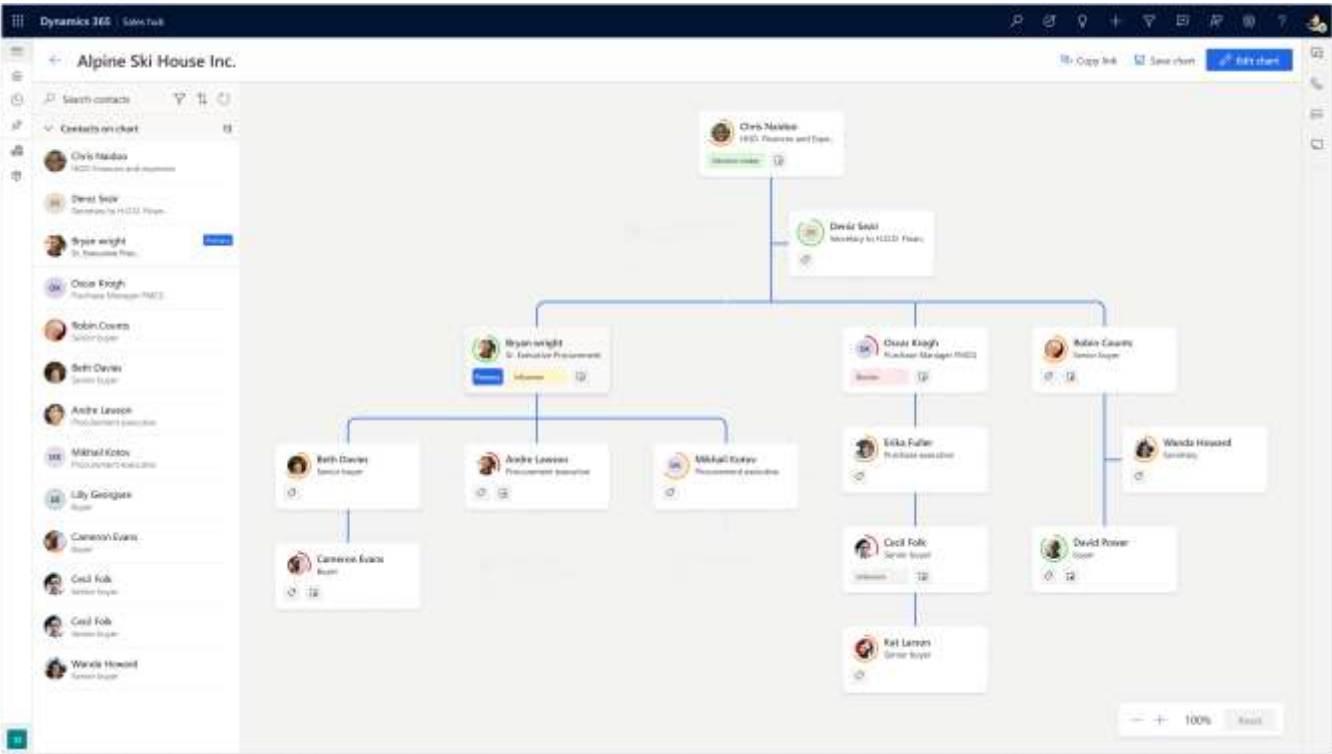
- Automated summaries of key topics, issues, concerns; as well as related CRM information
- Generate summaries for a range of meeting types in Teams, including multi-participant and one-on-one meetings
- Reclaim time to focus on more impactful activities

Visualize key stakeholders and take action with the smart organization chart

Sellers can map their customer organization within Dynamics 365 and maintain their buying roles by viewing a relationship map to know the customer better.

This new feature will have the following capabilities:

- Sellers/account managers can quickly create their customer org chart to understand the various stakeholders for an account.
- Maintain a relationship map to identify, engage, and grow your network of customer contacts.
- Activity view of the contacts/stakeholders will enable you to understand your customer better.



Manage opportunities more effectively using the new pipeline view

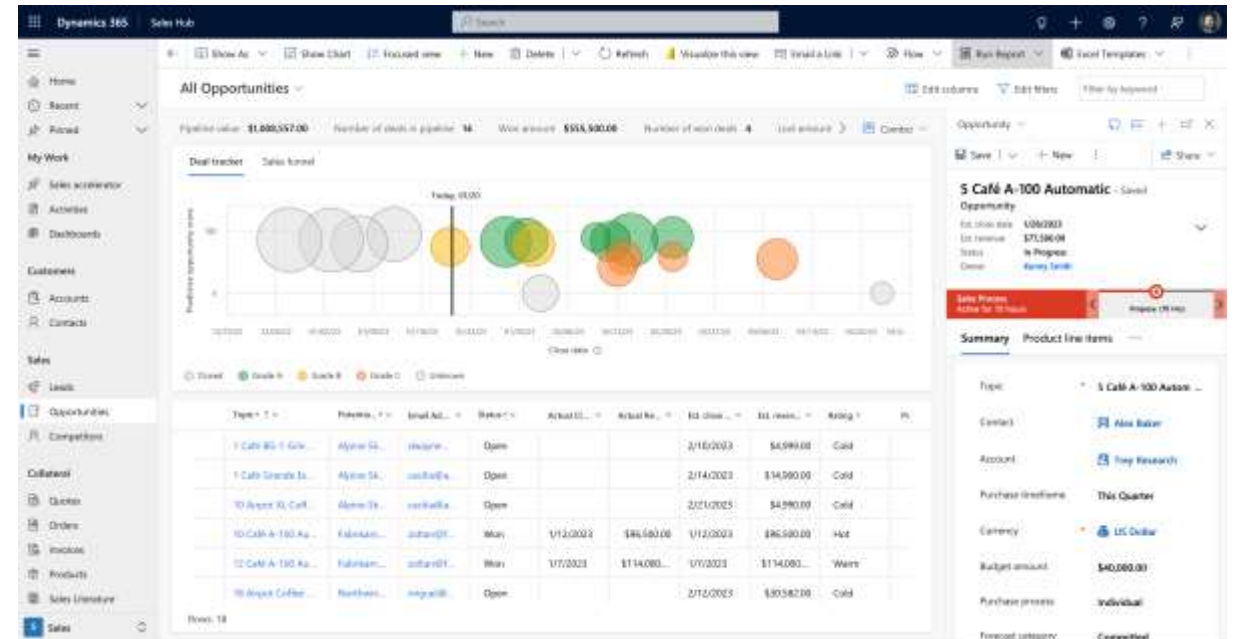
The new opportunity workspace environment will transform how sellers engage with their opportunities, enabling them to work more productively and, ultimately, close deals more successfully.

As a seller, you can:

- Organize opportunities in a way that works for you.
- Personalize your views.
- Update information on the fly using an editable grid and side-panel.
- Add notes, tasks, and much more.
- See aggregations for pipeline value, number of deals in the pipeline, and other metrics.

As an administrator, you can:

- Customize the record side panel forms with custom attributes.
- Add support for business rules.
- Configure the charts.



A group of four business professionals are seated around a conference table in a modern office. Large windows in the background offer a view of a city and green hills. The scene is overlaid with a semi-transparent blue and purple gradient. The word "Marketing" is written in white, bold, sans-serif font on the left side of the image.

Marketing

Create pitch-perfect email campaigns



Elevate email marketing with AI-assisted content suggestions

Challenges

- Marketing emails generated from scratch, requiring extra production time and cost
- Content misaligned to brand standards

With Copilot in Dynamics 365 Marketing

- Generate content ideas, reducing production time
- Ideas generated from your best-of-breed campaigns to boost conversions
- Content ideas that reduce production time
- Saves marketers hours of time brainstorming and editing, while keeping content fresh and engaging

Use natural language to generate audience segments



Simply type the traits of audiences you want to engage with to produce an optimized list of contacts.

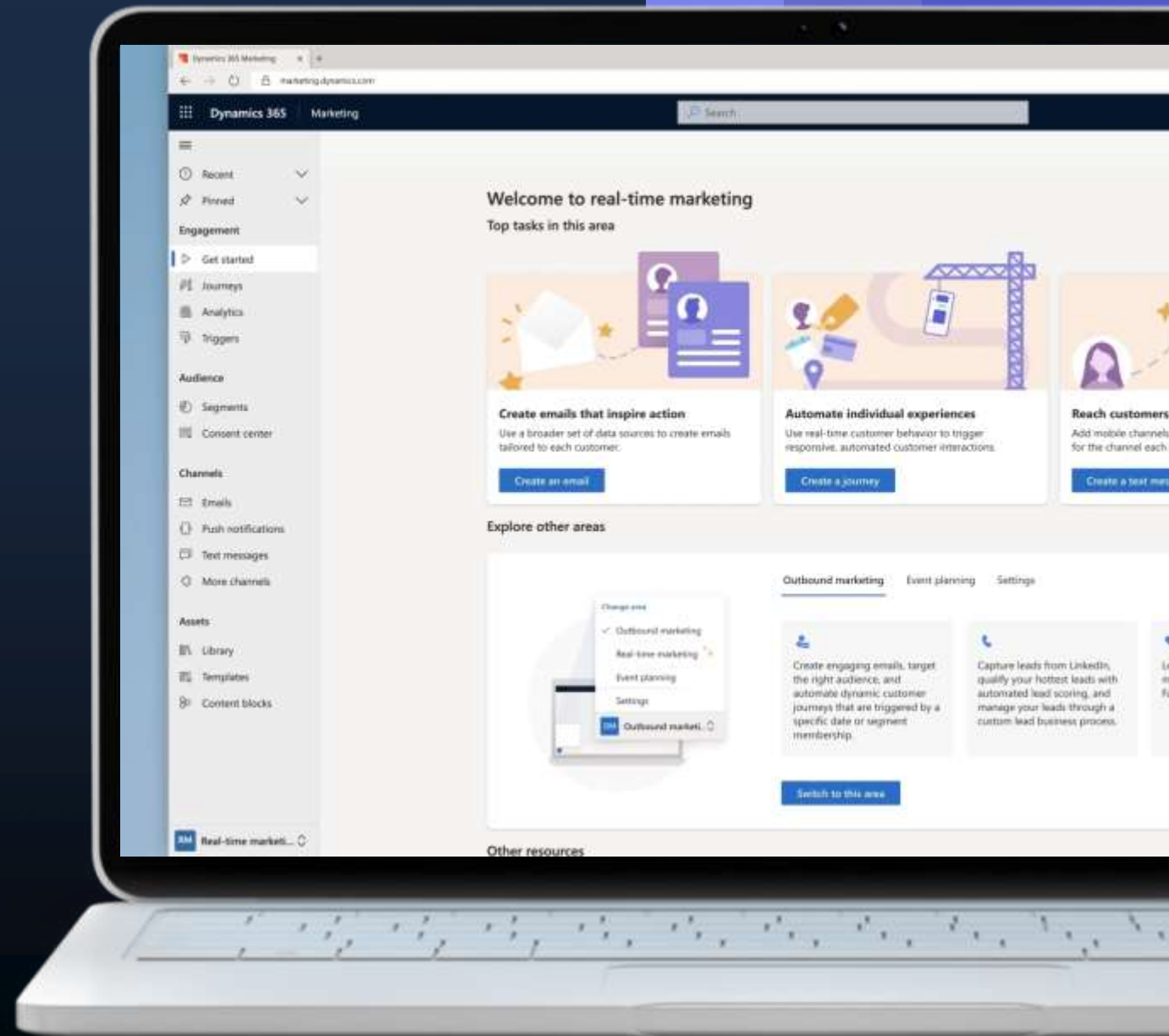
Challenges

- Segmenting audiences is time-consuming and resource-intensive

With Copilot in Dynamics 365 Marketing

- Use Open AI's GPT-3.5 to save time creating or enhancing segments
- Simply type a description of target audience characteristics to generate segments
- No need for expertise in data science or back-end data sources

Copilot in Dynamics 365 Marketing



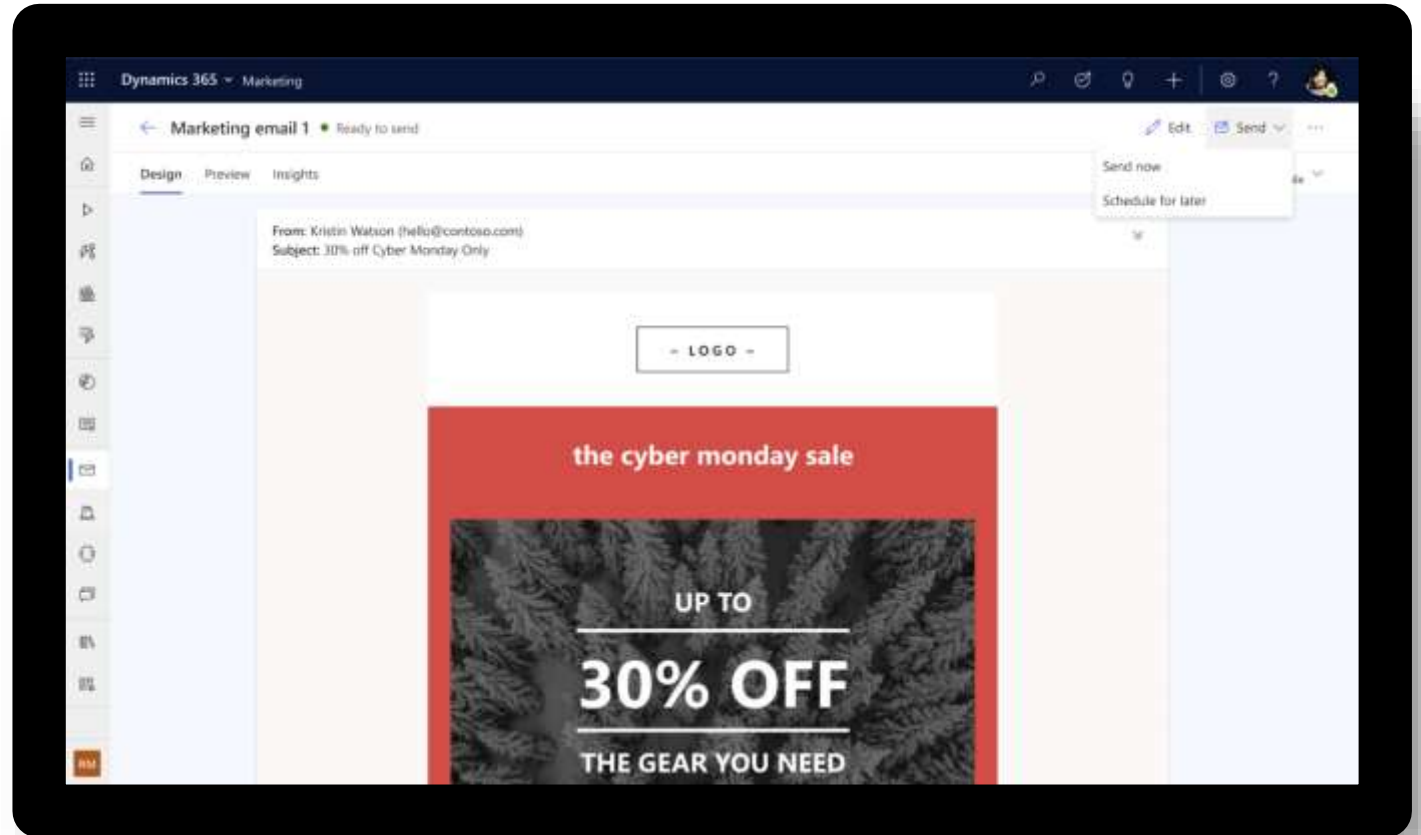
Engage your customers in moments that matter across all customer touchpoints to build end-to-end, holistic experiences.



Send segment-based emails quickly without having to build a journey

Leverage the power of email templates, personalization, analytics, and CRM to send an email within minutes without using the more advanced segment and journey builders.

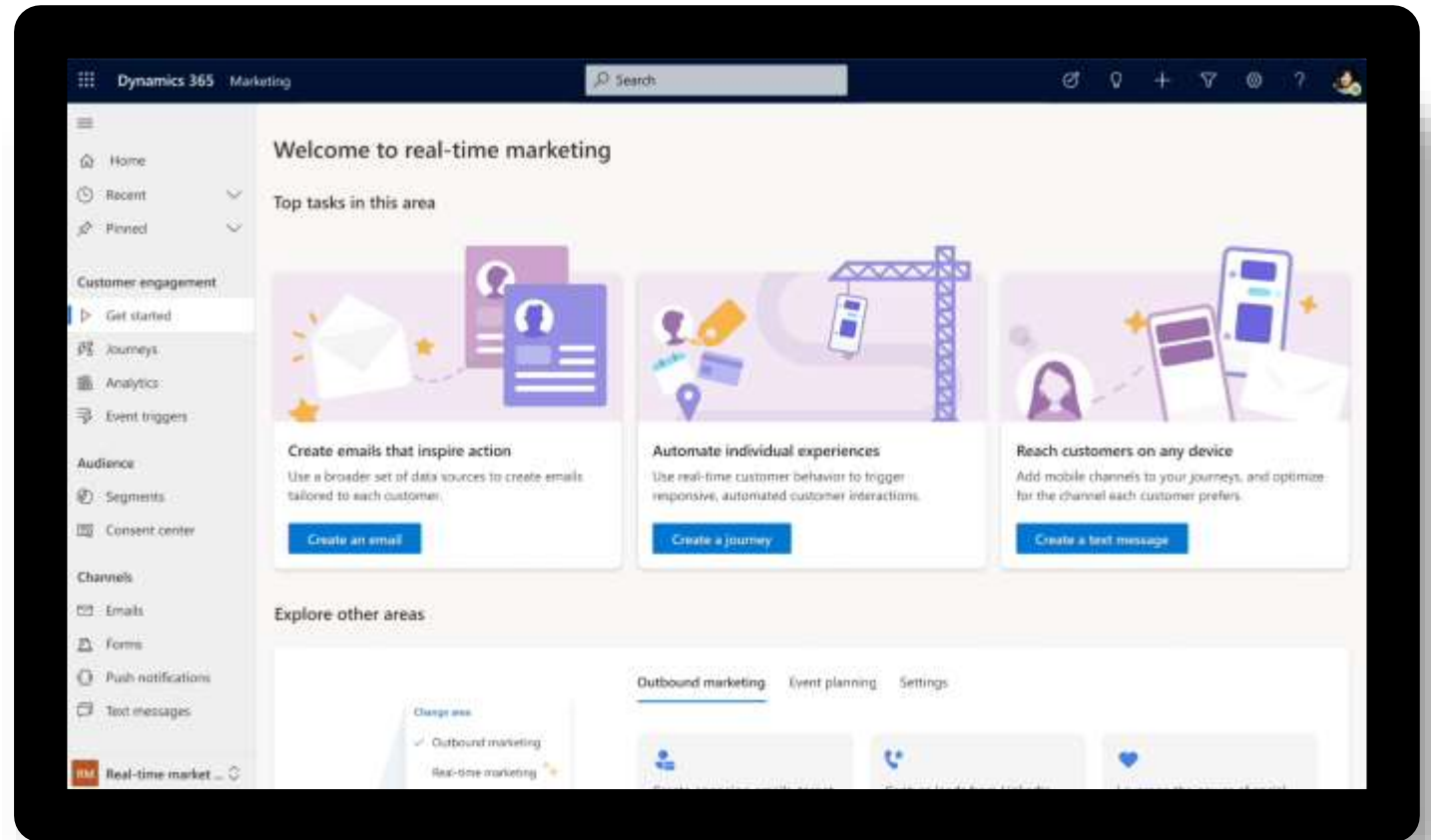
- Select email templates, preview, test send and send from the email editor.
- Select existing segments, preview the segment and send an email, a journey is created for them.
- Add new contacts or leads, create a simple static segment and send an email without going to the segment or journey builders.



Easily create modern forms using the new intuitive form experience

Effortlessly create forms in real-time to place on your websites and capture your customers' attention while allowing them to input their details.

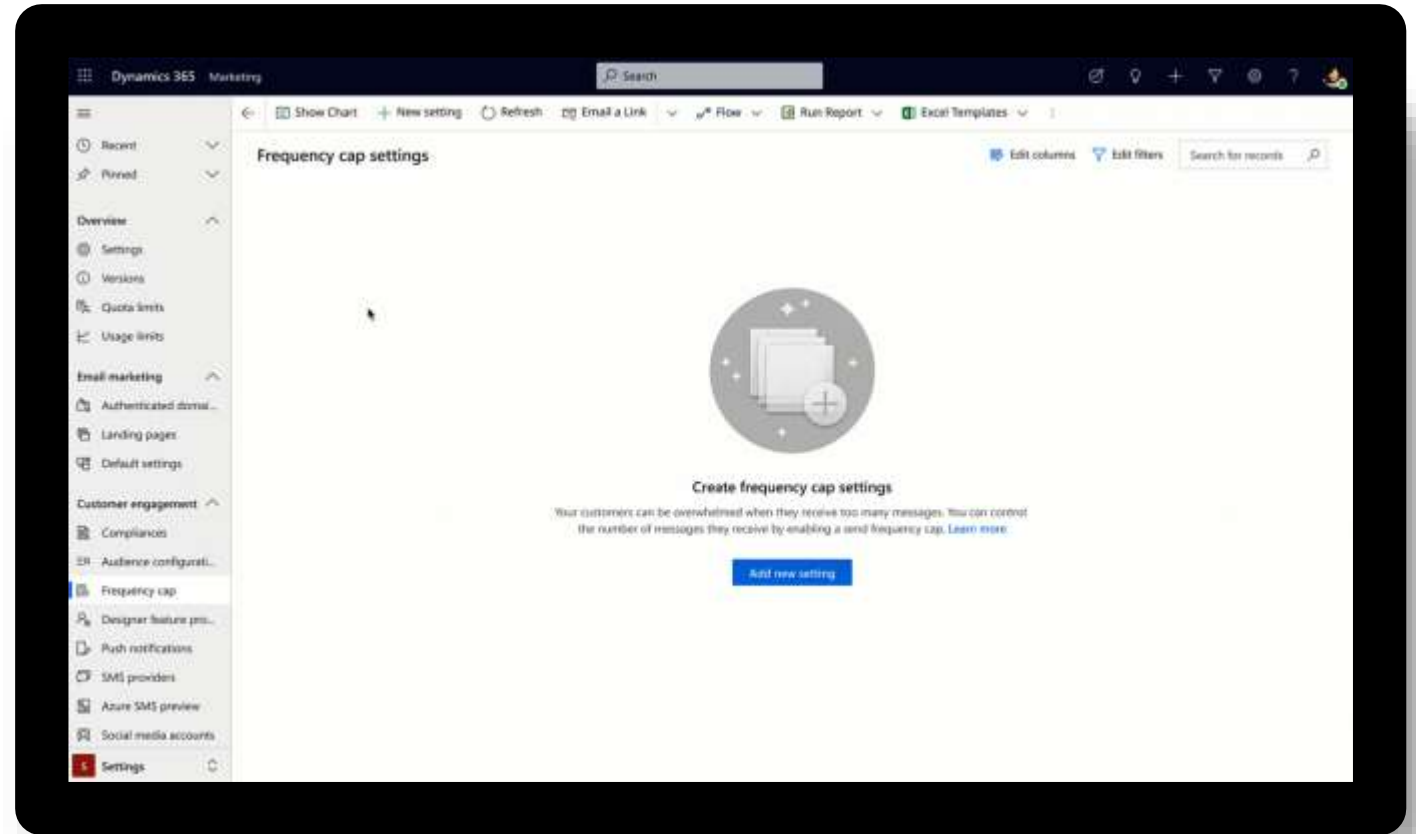
- Use a modern drag-and-drop editor that guides you through the entire form creation process.
- No longer depend on developers; start creating forms within seconds.
- Instantly publish a form as a standalone page or easily embed the form in your existing page.
- Deliver compelling forms to your customers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



Limit the number of messages sent to a customer in a specific period 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.

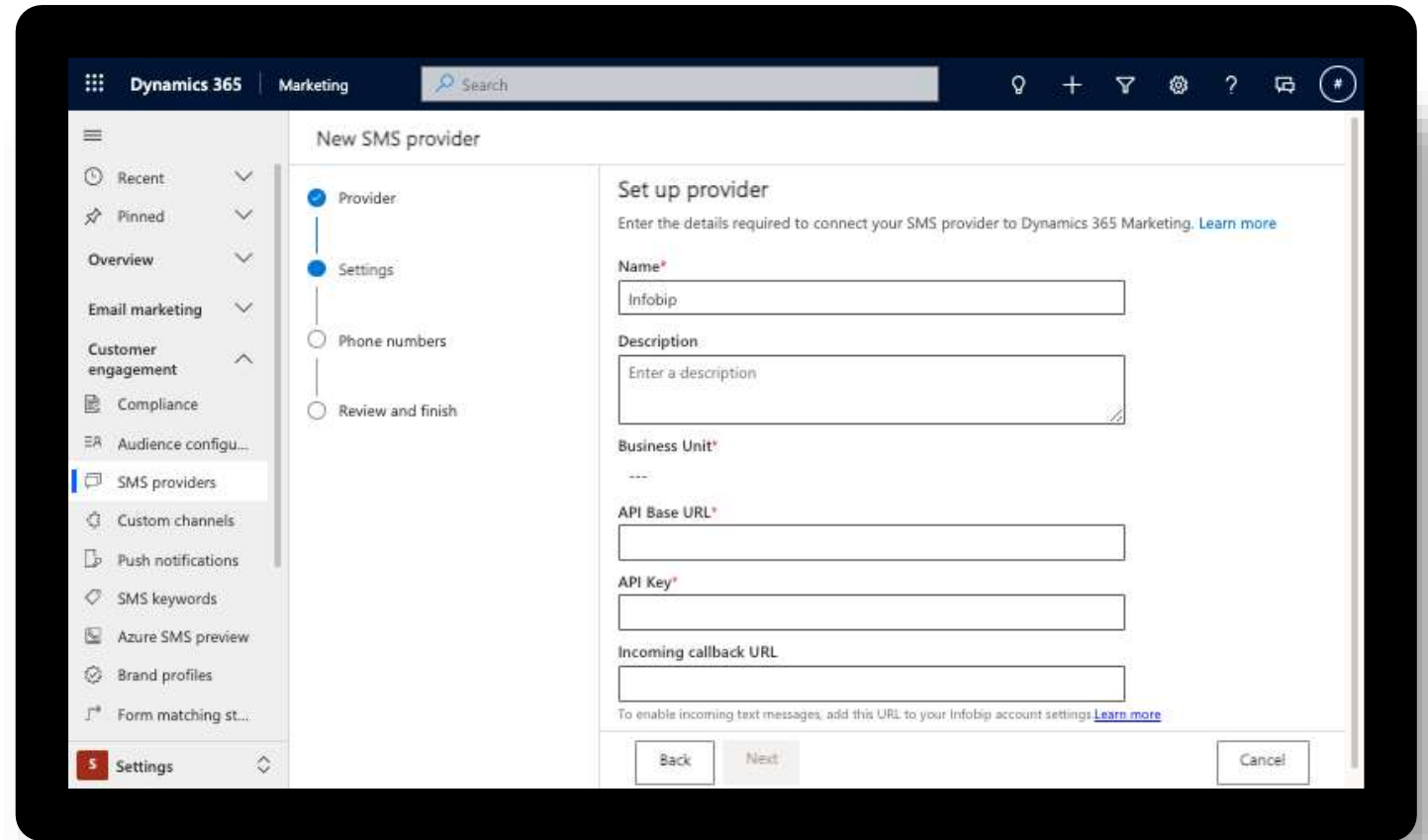
- Decide which journeys should have the frequency cap enabled or disabled.
- Define a specific cap per channel.
- Enable daily, weekly and monthly frequency cap.
- Transactional messages will always be excluded.
- Check which messages have been sent and which are still pending for each customer.



Engage your customers with text messages sent via Infobip and LINK Mobility

Connect your existing Infobip or LINK Mobility account and phone numbers to reach out to your customers through text messages.

- Connect your existing Infobip or LINK Mobility account and add the phone numbers you're already using.
- Create messages using the Dynamics 365 Marketing SMS editor.
- Build and optimize your customer journeys using the full suite of Marketing text messages features: personalization, 2-way communication, interactions and analytics.



The screenshot shows the Dynamics 365 Marketing interface for setting up a new SMS provider. The page is titled "New SMS provider" and features a progress indicator with four steps: "Provider" (selected), "Settings", "Phone numbers", and "Review and finish". The "Set up provider" section includes the following fields:

- Name***: A text input field containing "Infobip".
- Description**: A text area with the placeholder "Enter a description".
- Business Unit***: A dropdown menu currently showing "----".
- API Base URL***: A text input field.
- API Key***: A text input field.
- Incoming callback URL**: A text input field.

At the bottom of the form, there are "Back", "Next", and "Cancel" buttons. A note at the bottom states: "To enable incoming text messages, add this URL to your Infobip account settings. [Learn more](#)".

Enable
collaboration
across your
organization
connect sales
and marketing
to transform
customer
experiences

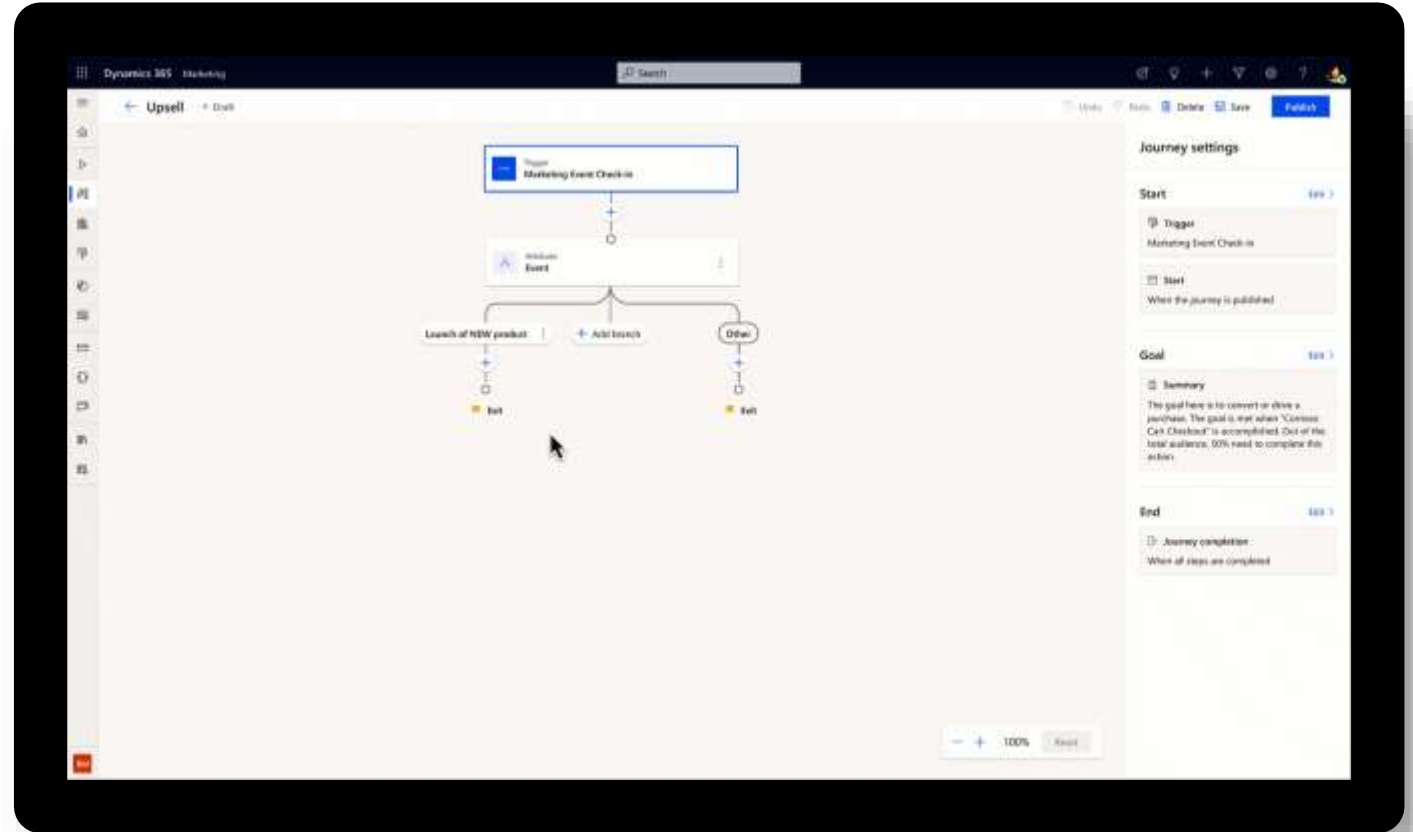




Optimize your lead management process by engaging your sellers right away

Activate a sales sequence or create sales activities directly from your journeys 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.



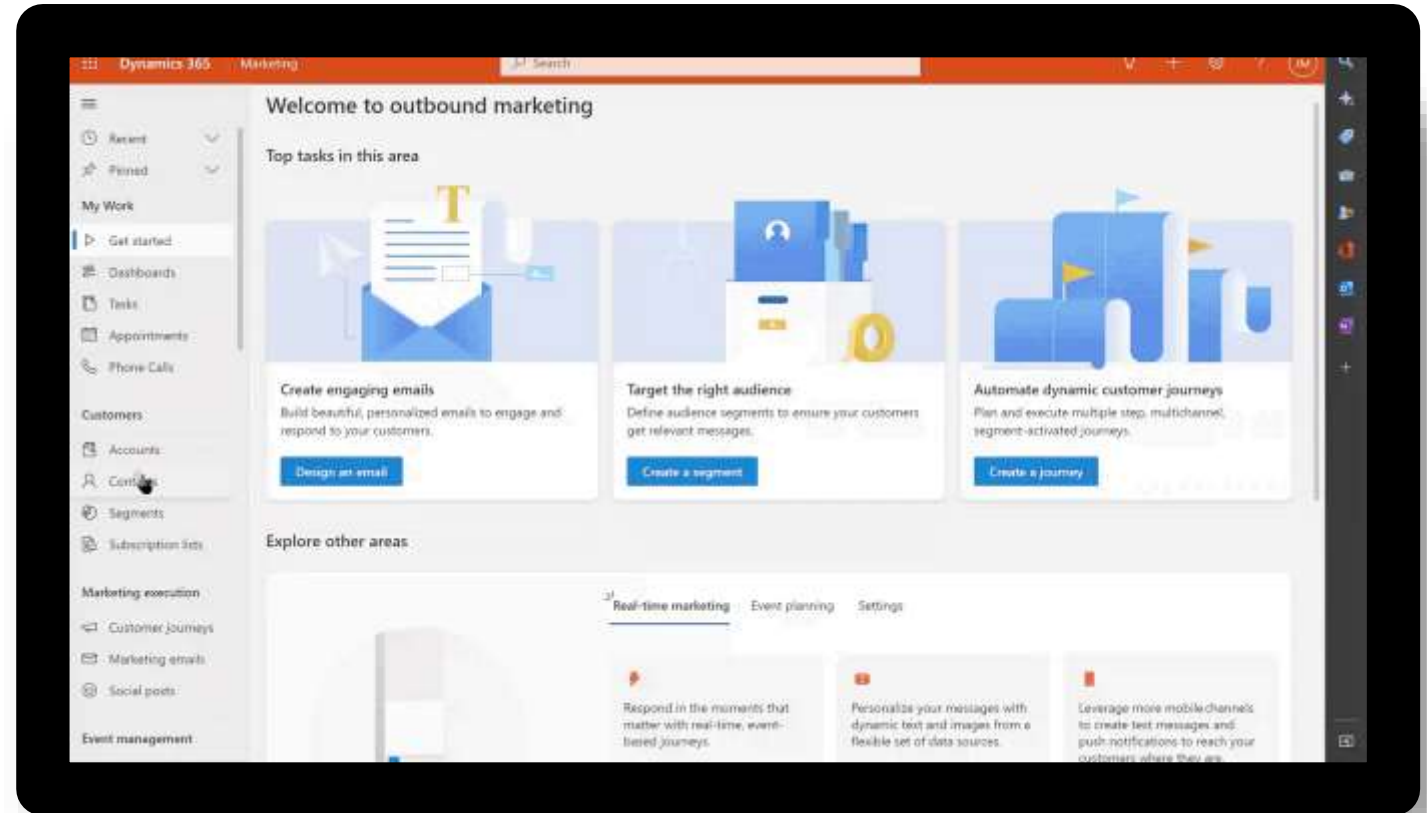
**Embrace
personalized
content - to
grow your
audience
engagement**



Easily reference a copy of previously sent emails in the interaction timeline

See the exact copies of sent emails on the contact timeline to stay accurate and provide seamless follow-up. Review what was sent to improve your overall visibility, compliance, and auditing.

- See an exact copy of the email sent in the Contact and lead timeline.
- Know the output generated by advanced personalization features such as conditional content.
- Adjust storage of archived emails to meet your business needs.



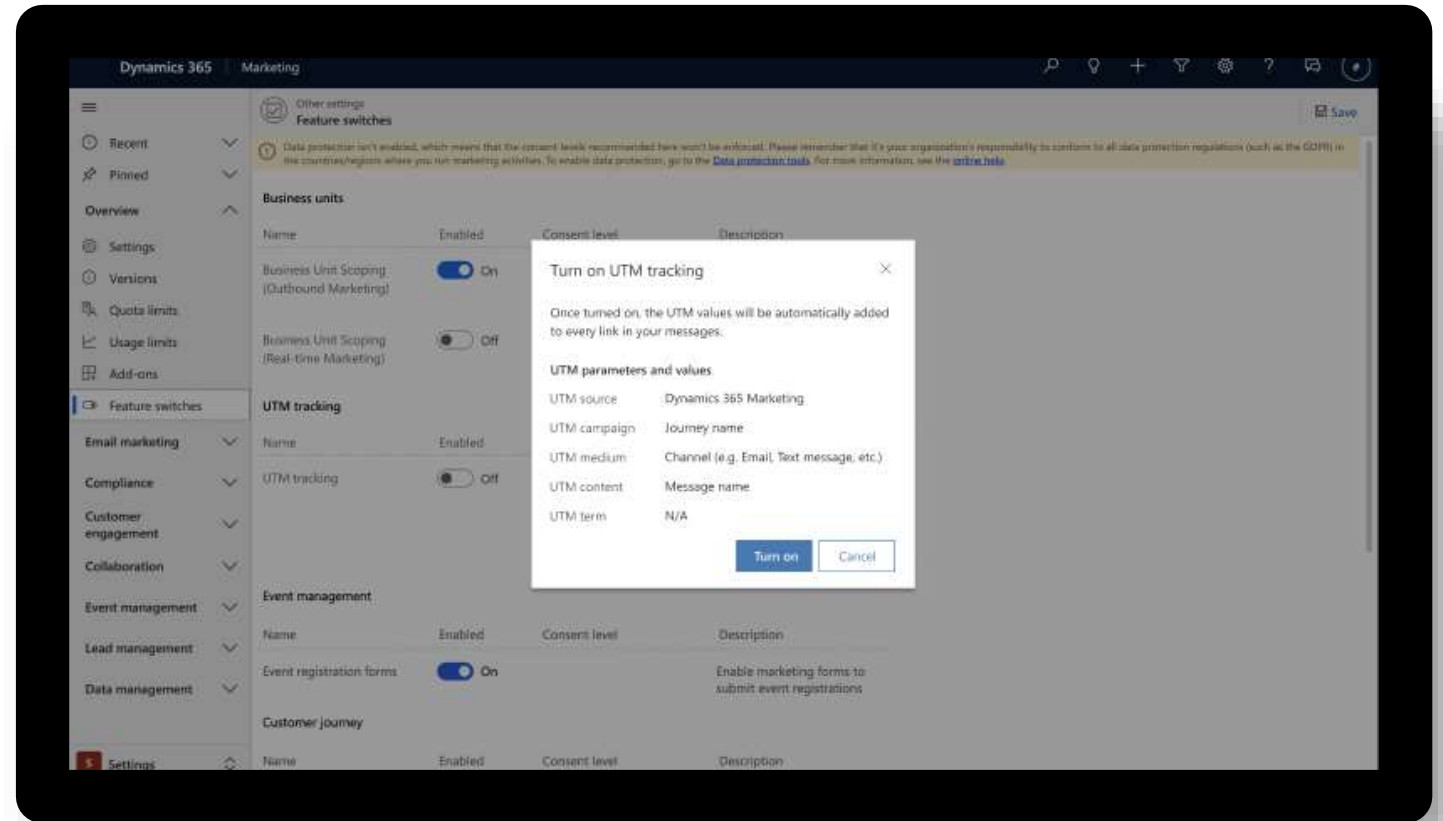
Leverage the power of data and AI - to market at scale and achieve higher levels of marketing maturity



Measure marketing activity, web traffic, and conversion goals using automatic UTM tagging

Get full visibility of your marketing contributions to web traffic and attribute conversions to the right source, thanks to the automatic UTM tagging of all your messages.

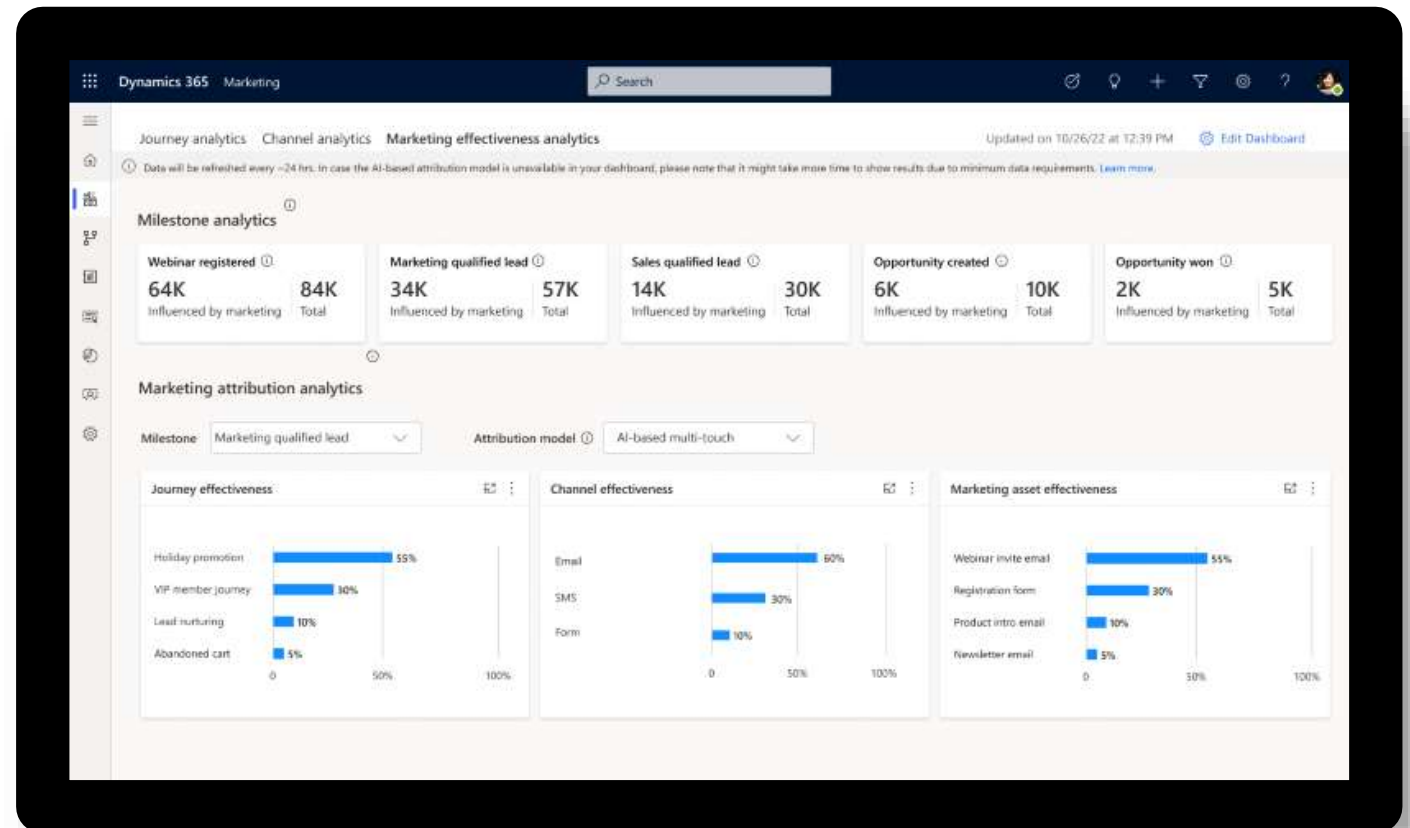
- Every link in all your outbound messages is automatically appended with default UTM parameters following a consistent taxonomy.
- Optionally override the default UTM campaign parameters and insert your own custom parameters.



Understand how your marketing activities contribute to your defined milestones using AI

Identify and continuously improve performing activities by measuring which channels and messages have the greatest impact on your journey milestones.

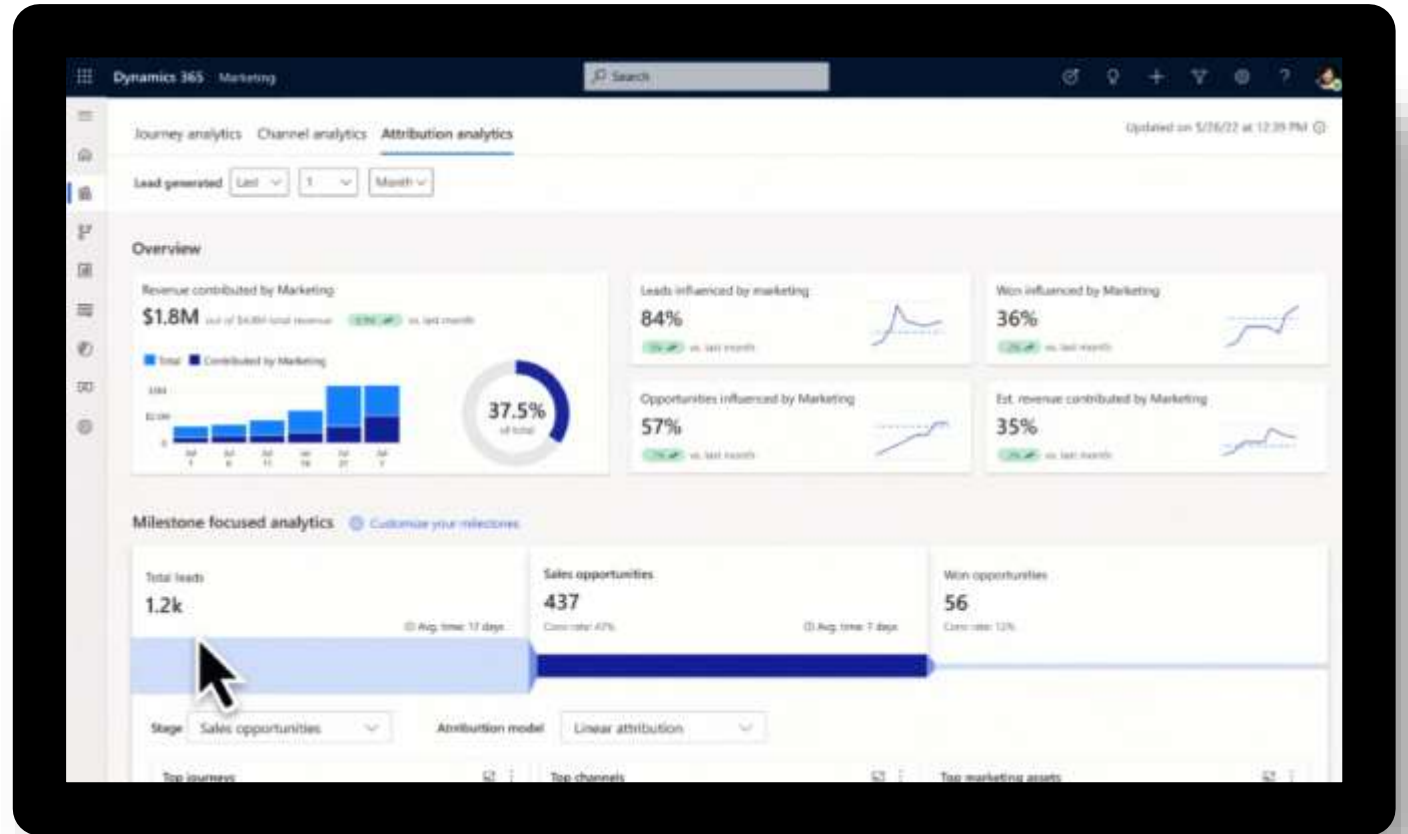
- Define milestones based on key customer moments in your buyer's journey.
- Track the number of customers reaching these milestones over time.
- Analyze the contribution of your journeys and messages in driving your customers to milestones through AI-powered and rules-based attribution models.



Optimize your B2B marketing programs and accelerate pipeline through OOB analytics dashboards

Speed up your pipeline and funnel, by sharing with sales analysis on how different marketing activities drive key goals such as lead qualification, opportunity creation and revenue generation.

- OOB funnel to track accounts moving through the pipeline (from prospects and lead to won opportunities).
- Analyze marketing's impact and contribution to the pipeline in terms of lead generation and qualification, opportunity creation and revenue generation.
- Learn about your most effective lead sources that produce high quality leads.
- Seamless integration with Dynamics 365 Sales.



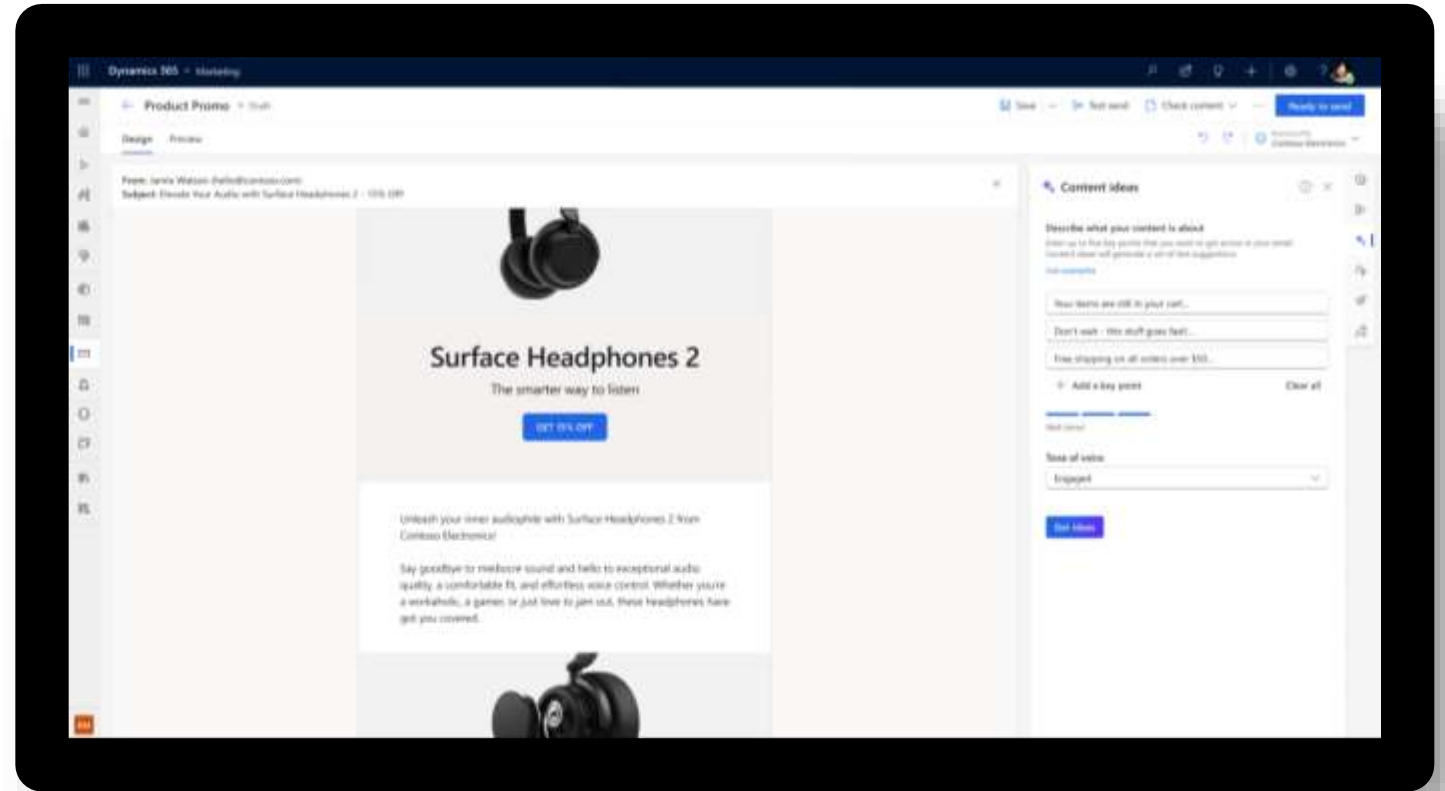


Generate engaging emails easily and efficiently by chatting with Copilot

Significantly improve your productivity and create new, highly-engaging emails in minutes instead of hours with Content assist. Interactively chat with Copilot just as you would talk to a colleague when brainstorming on the best content for your email.

- New chat-like interactive experience available throughout the email creation process.
- Generate new or modify existing text content using free text instructions.
- Easily make basic text modifications.

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.

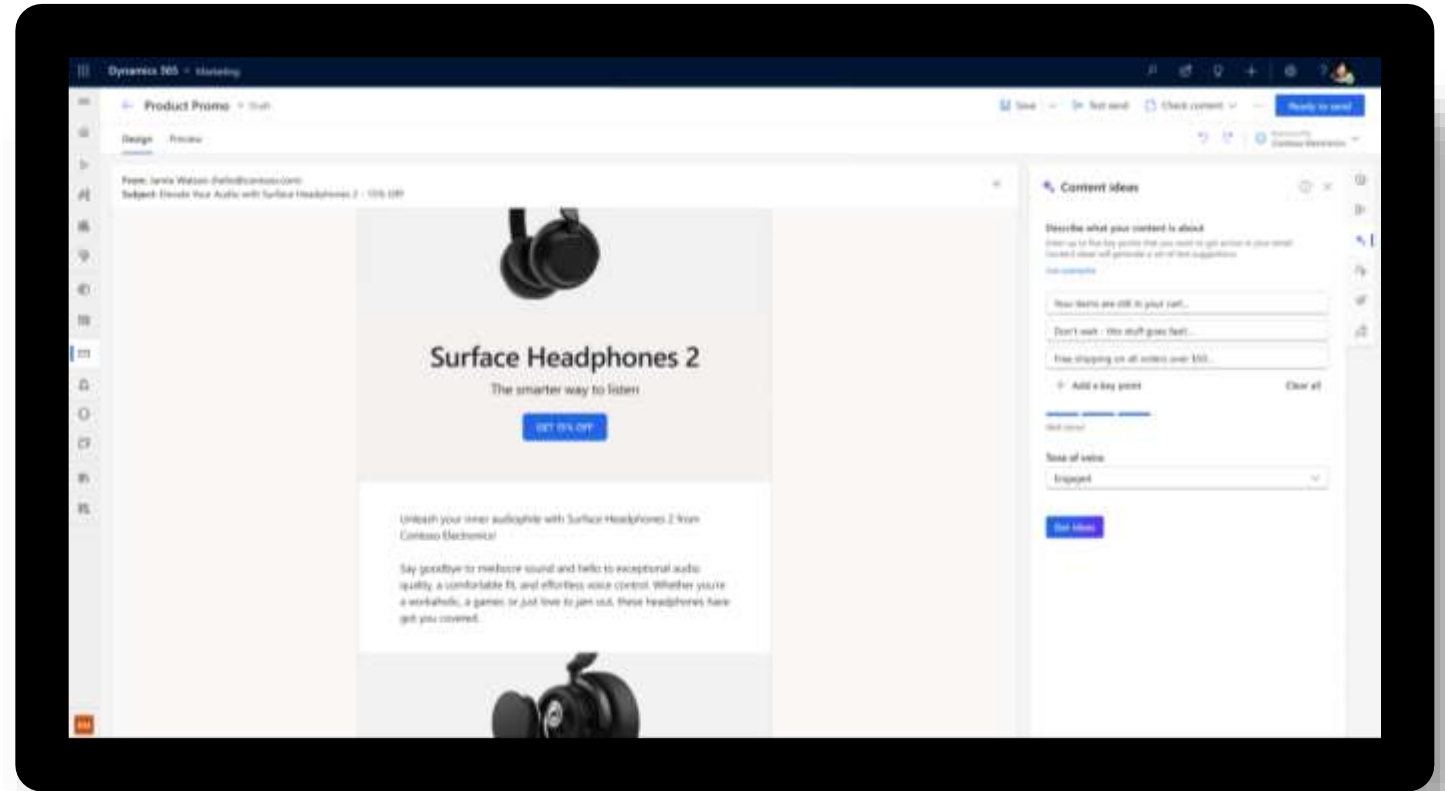




Find inspiration with relevant content ideas using Copilot

Create engaging emails instantly by leveraging Copilot technology to receive relevant content ideas.

- Enjoy higher quality generated content thanks to AI and a refreshed look and feel.
- Select the tone of voice that best fits your brand and audience: engaged, adventurous, casual, luxury, or formal.
- Use sample key points for typical email types, such as an abandoned cart, a referral, or an event invitation, to get inspired and easily kick off the creation process.
- Generate engaging text snippets out of a few short key points.
- Easily access and get inspired by generative AI when adding or editing text.



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.





Accurately target customers using improved AI-powered natural language segments

Use conversational, everyday language to quickly build targeted segments with Query Assist a Copilot feature in real-time marketing.

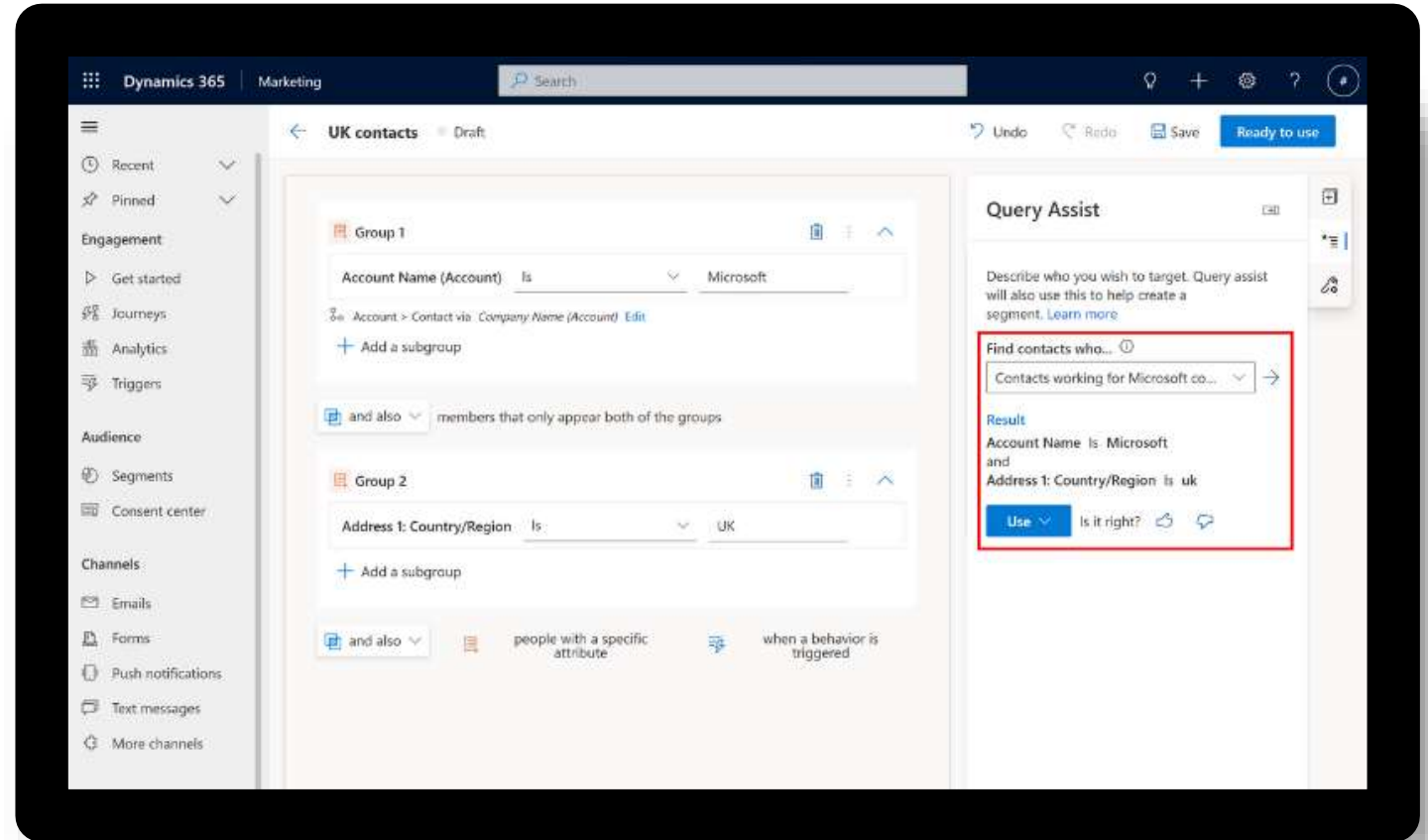
- The upgraded query assist feature enables you to build real-time segments using ChatGPT, providing more accurate results for your query.
- Use conversational language to build your segment.

Before (without ChatGPT)

- contacts in account Microsoft who live in the UK

Now (with ChatGPT)

- I work at Microsoft. Can you show me my active colleagues who live in the UK?



Scale your business with confidence with 300M maximum monthly interactions



Send up to **300M messages monthly**

Reach up to **100M contacts**



Get to data insights faster and easier with natural language



Have a dialogue with data to validate and discover information for more personalized marketing campaigns.

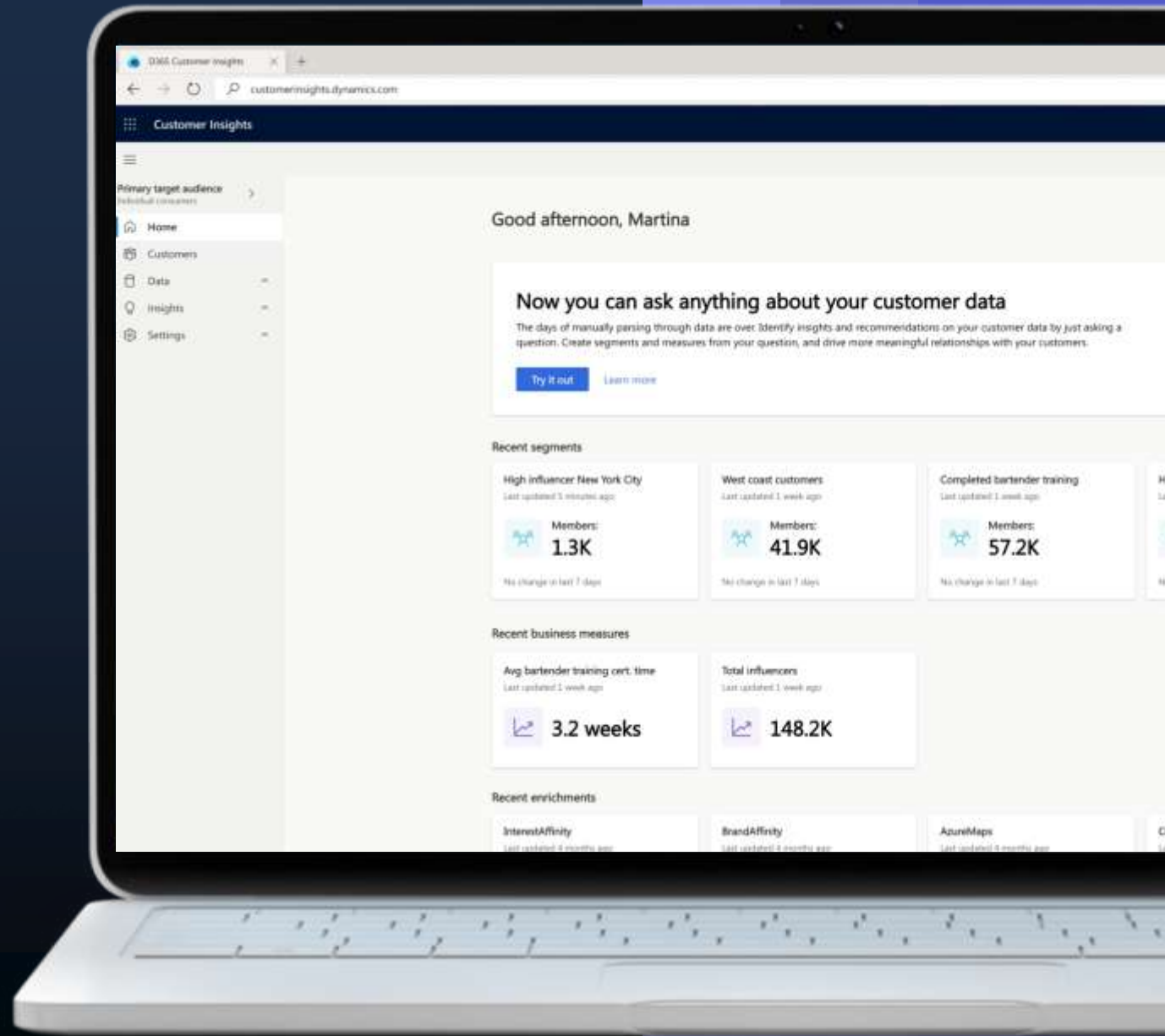
Challenges

- Marketers rely on data analysts and scientists to write queries in SQL, often taking weeks
- Difficult to extract insights from customer data

With Copilot in Dynamics 365 Customer Insights

- Democratize access to insights in customer data
- Use simple prompts to explore, understand and predict customer needs
- Ask questions about customers, receive answers in moments

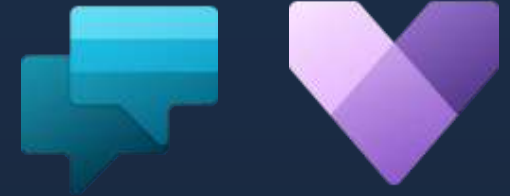
Copilot in Dynamics 365 Customer Insights



A woman with dark hair tied back, wearing a blue blazer over a light-colored button-down shirt and a headset with a microphone, is smiling and looking upwards and to the right. She is sitting at a desk with a computer monitor. The background is a blurred office setting with another person working at a desk. The image has a blue tint and a large, semi-transparent blue circle on the right side.

Service

Enrich self-service with conversational AI



Enable customers to self-service with intelligent, conversational bots trained on trusted support content.

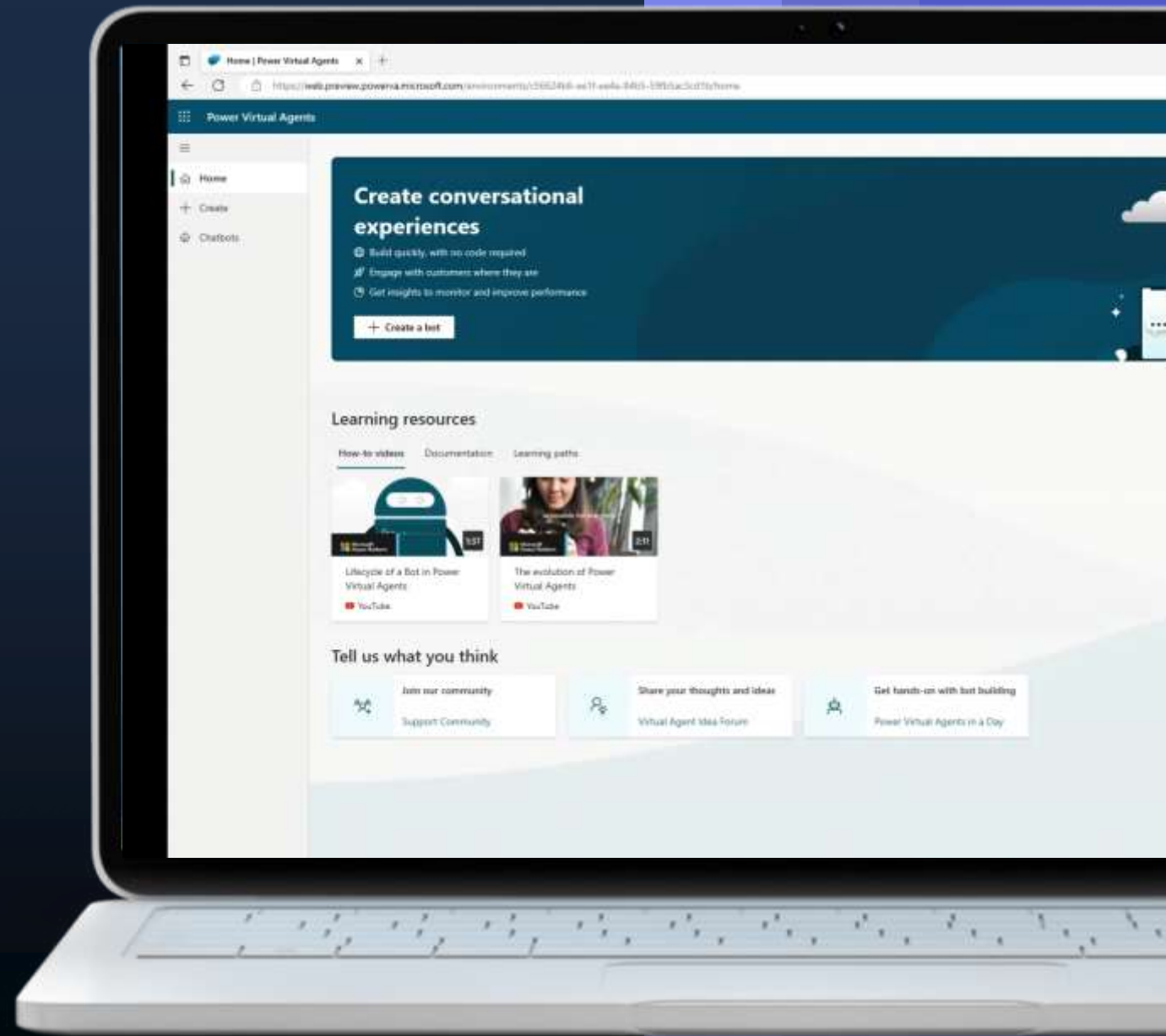
Challenges

- Difficult to scale personalized service
- Agents under pressure to resolve multiple cases quickly

With Copilot in Power Virtual Agents

- Provide human-like conversational support
- Resolve cases efficiently with trusted websites, knowledgebase articles, internal resources
- Resolve high volumes of cases thoroughly and efficiently
- Improve CSAT and reduce human fallback

Microsoft Power Virtual Agents



Resolve service cases faster with AI-assisted responses



Resolve customer issues faster, with more relevant and personalized recommendations.

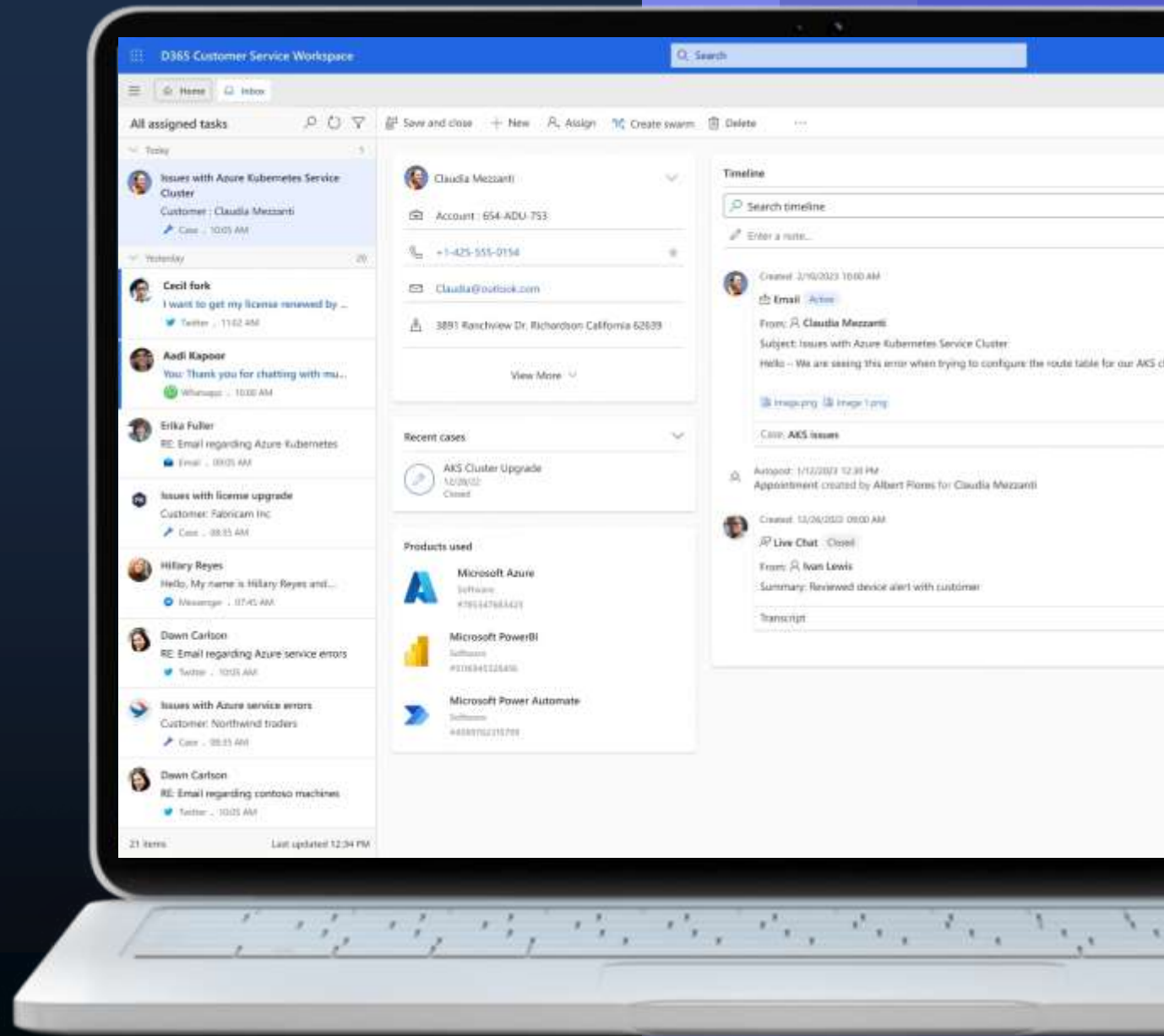
Challenges

- Difficult to scale personalized service
- Agents under pressure to resolve multiple cases quickly

With Copilot in Dynamics 365 Customer Service

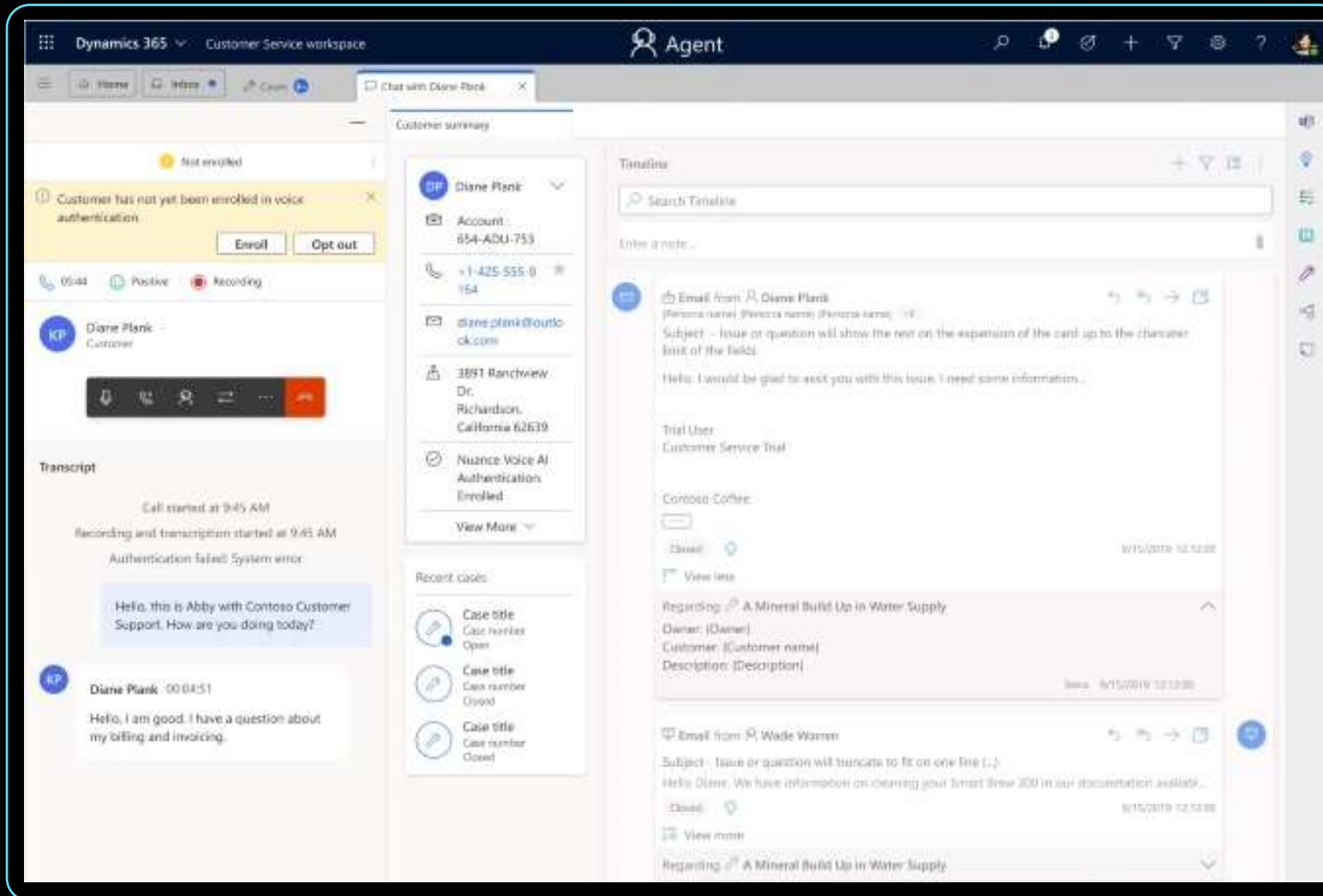
- Draft messages with one click, from emails to chat responses
- Generate content in context with live conversation and trusted support resources
- Resolve high volumes of cases thoroughly and efficiently
- Improve CSAT and agent productivity

Copilot in Dynamics 365 Customer Service



Omnichannel

Integrate Nuance Gatekeeper with Customer Service



Supervisor Experiences

Customize visualization of Omnichannel real-time analytics dashboards

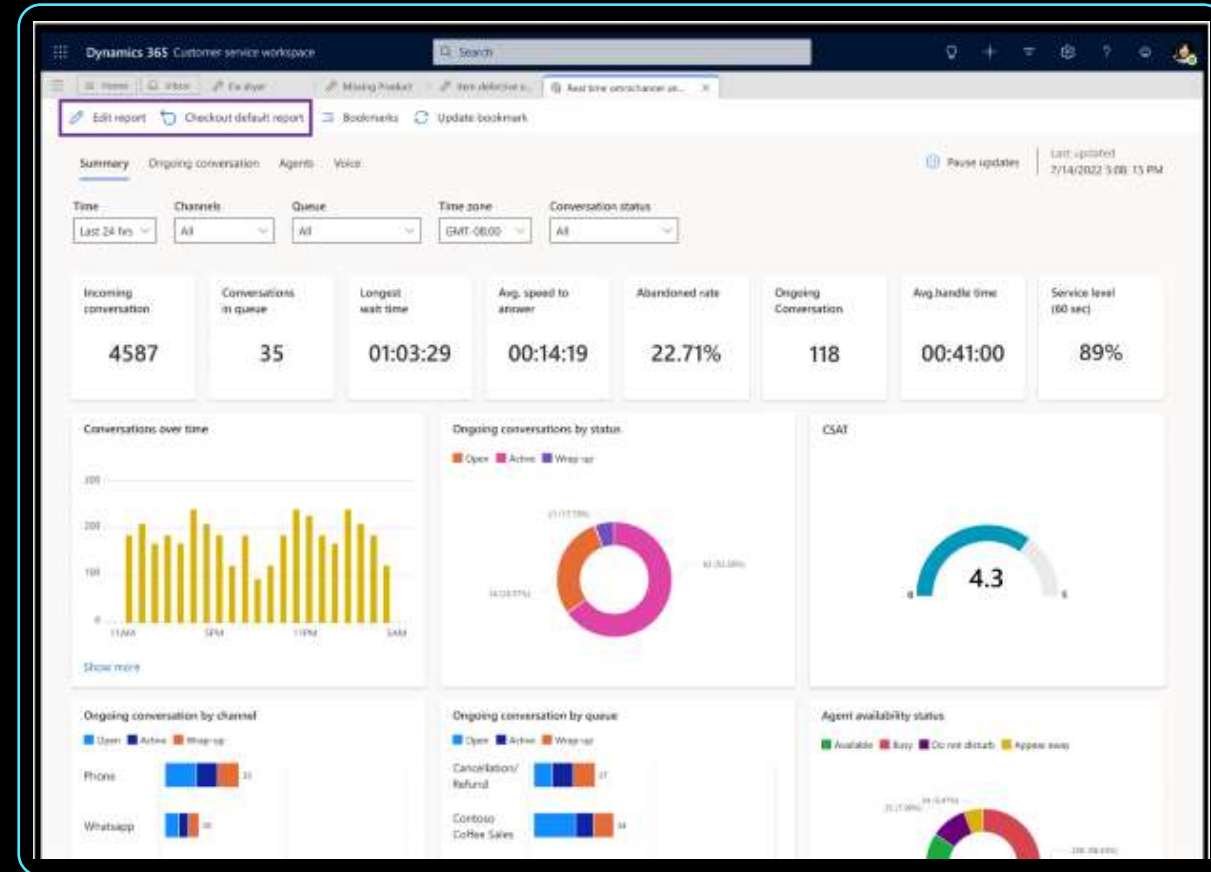
Business value

Out-of-the-box real-time analytics incorporate industry-standard metrics that are critical in helping supervisors to get started with real-time monitoring of their contact centers. However, each supervisor has unique reporting needs based on the nature of their business. With this feature, you, as administrators can customize out-of-the-box reports to meet your organizational requirements by leveraging the out-of-the-box real-time Power BI embedded data model.

Feature details

Key capabilities of this feature include the following:

- Rearrange the out-of-the-box report layout on Omnichannel real-time analytics.
- Modify the graphical rendering of data. For example, you can have a graphic with the trend of a metric over time rather than a tabular view of the metric.
- Create visuals using metrics in the data model that aren't exposed directly in the out-of-the-box Power BI reports.



Agent Experiences

Forecast agent demand to handle customer conversations daily and at 15-minute intervals

Business value

In October 2022, we previewed daily agent forecast, enabling customer service managers to make hiring decisions and staff adjustments for the year. Daily agent forecasts vary based on conversation volume forecasts and business goals that managers configure such as SLAs, average handling time, shrinkage, and concurrency.

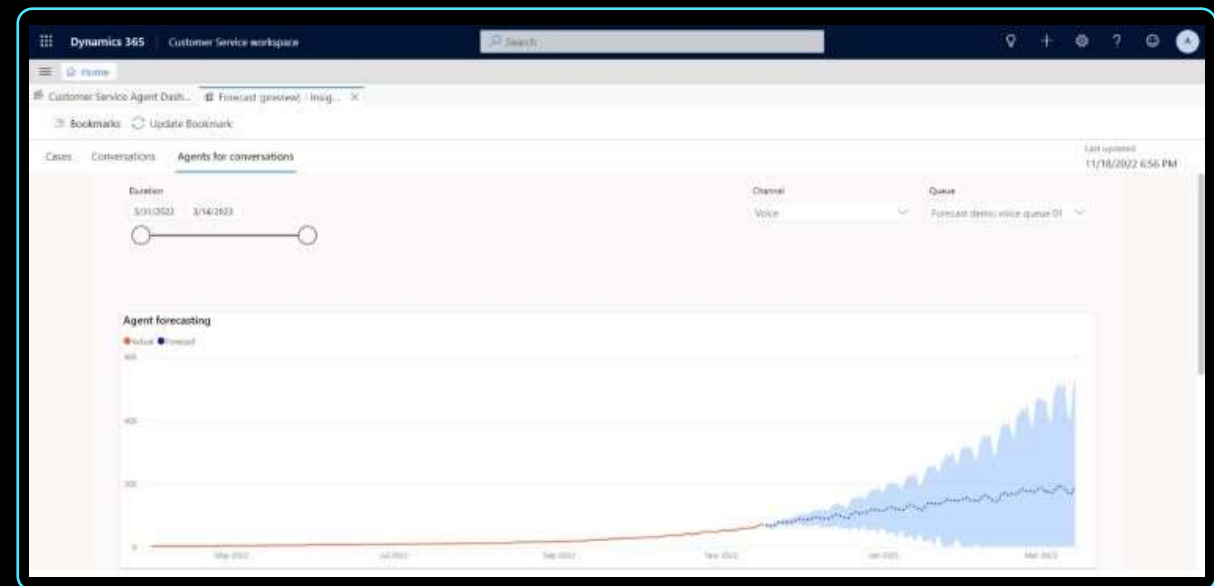
We now provide more granular agent forecasts at 15-minute intervals that customer service managers can use to create agent schedules for voice and digital channels.

Feature details

Agent forecasting for conversations (voice and digital channels) was released as a preview in October 2022 with the following set of capabilities:

- Forecast conversation volumes daily
- Automatically detect seasonality from historical traffic
- Forecast agent demand to handle forecasted conversation volumes daily
- Visualize volume and agent forecasts daily, weekly, and monthly, for up to 6 months
- Slice volume and agent forecasts by any combination of channels and queues

As part of 2023 release wave 1, customer service managers can also forecast the number of agents needed to handle forecasted conversation volumes at 15-minute intervals.



Agent Experiences

Accelerate time to resolution with AI-suggested replies

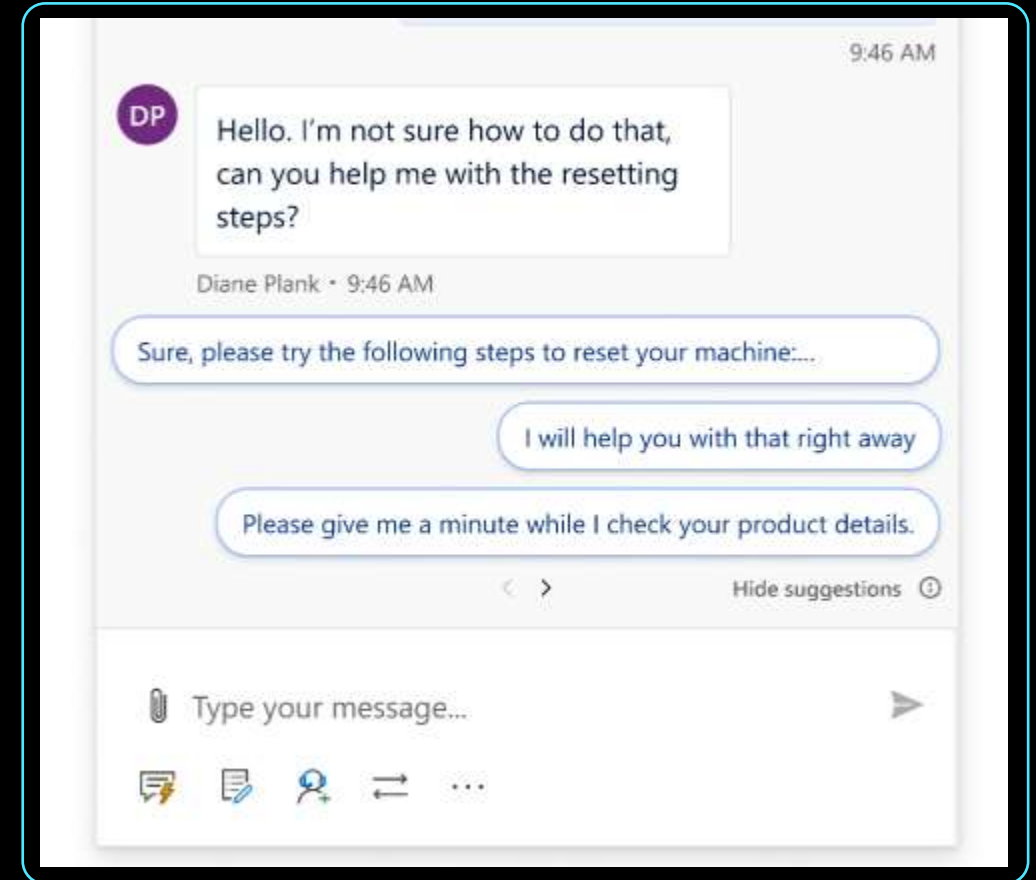
Business value

Support advocates today face challenges in finding the right response to send to customers. Suggested replies provide agents with multi-line prompts and response suggestions in the chat control based on the context of an ongoing conversation. The model learns from the organization's chat history and adapts over time so that response suggestions are always relevant and of high quality. This will drive significant improvements in key contact center metrics including handle time, throughput and agent satisfaction.

Feature details

Suggested replies in Dynamics Customer Service will be powered by the same state-of-the-art natural language processing technology used in the Nuance Agent Coach product today. Highlights of the feature include:

- Intuitive, real-time suggested replies for agents directly in the digital messaging experience
- Automated named entity recognition and population provides personalized responses for each user
- Simple admin data configuration experience to curate the reply set
- Robust reply management experience for admins provides visibility into the discovered responses and the ability to edit or consolidate responses
- On-demand model retraining to ensure the model is always up to date and accurate
- Unique models for each organization trained on historical conversation data



Teams Integration

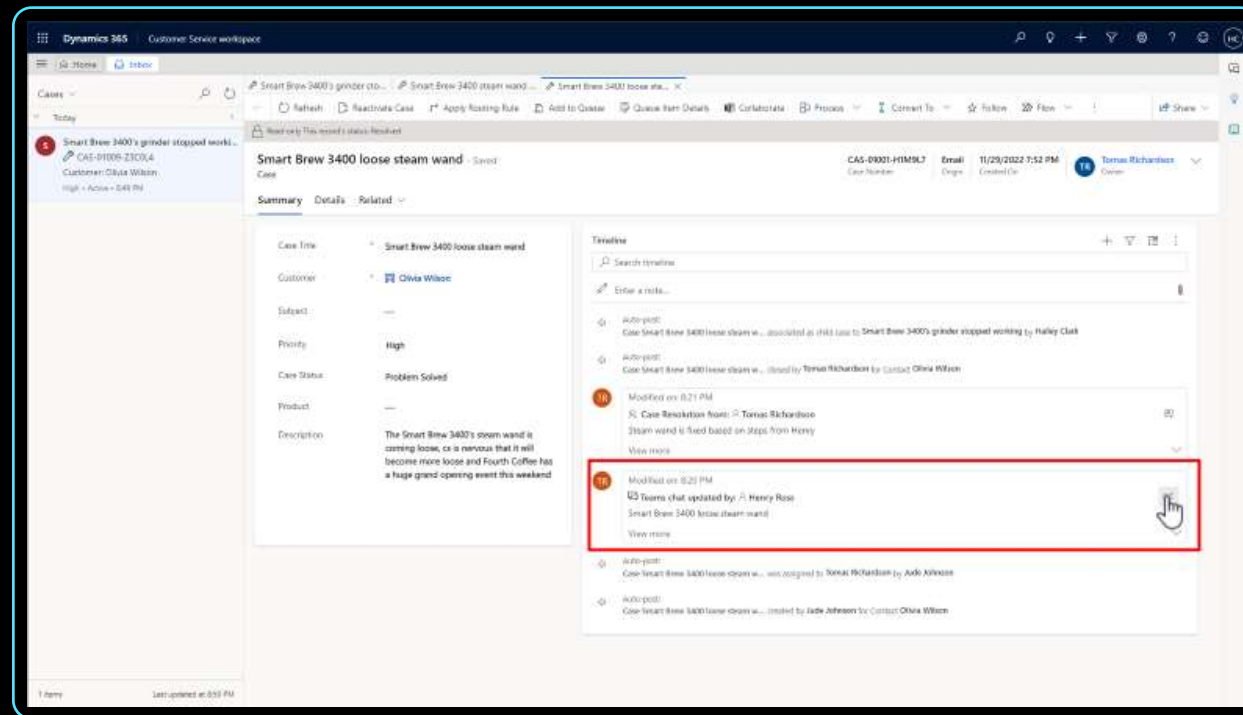
View Teams chat on the connected record's timeline

Business value

Make it easy for agents to get the full case 360 view by allowing them to see any chats related to the case (or any record) directly on the timeline.

Feature details

The chat will appear as a new activity on the timeline, with the details of who connected to the chat and when, as well as the last person to send a message in the chat and when. Additionally, if there has been an agent hand-off, the new agent, who may not have been a part of the chat originally, can see the chat on the timeline. The new agent can also directly join the chat (and added as a chat participant) to see the full chat exchange. This feature is enabled when the admin has turned on the Join chat toggle from the Customer Service admin center, giving those with Read and Write privileges the ability to join a connected chat.





Thank you