

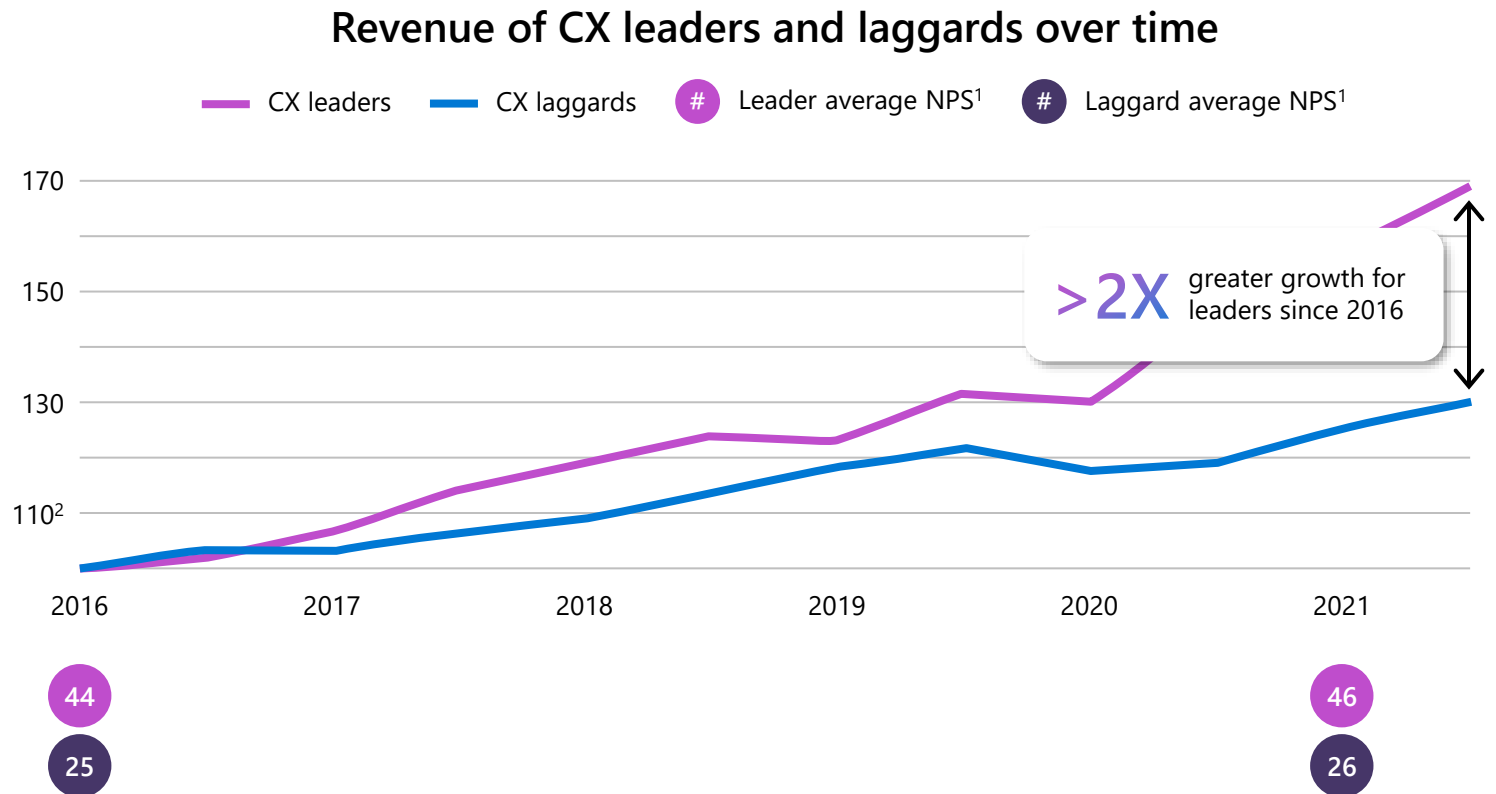


Transforming customer experience with Dynamics 365 and next-generation AI

Tim Ervik, Sr Specialist
Business Applications and platforms

Delivering great customer experiences matters to the bottom line

Customer experience (CX) leaders achieved more than double the revenue growth of CX laggards



¹Net promoter score. ²Index, starting at 100 in 2016.

Source: McKinsey & Company. [Experience-led growth: A new way to create value](#). March 23, 2023.

Note: Matched the NPS of 75 companies to their financial performance; leaders defined as top 50% of companies within same industry.

But customer expectations are higher than ever..

54%

of customers say the customer experience at most companies needs improvement¹

64%

of customers wish companies would respond faster to their changing needs²



87%

of customers increasingly expect relevant, personalized information based on their decision journey³

32%

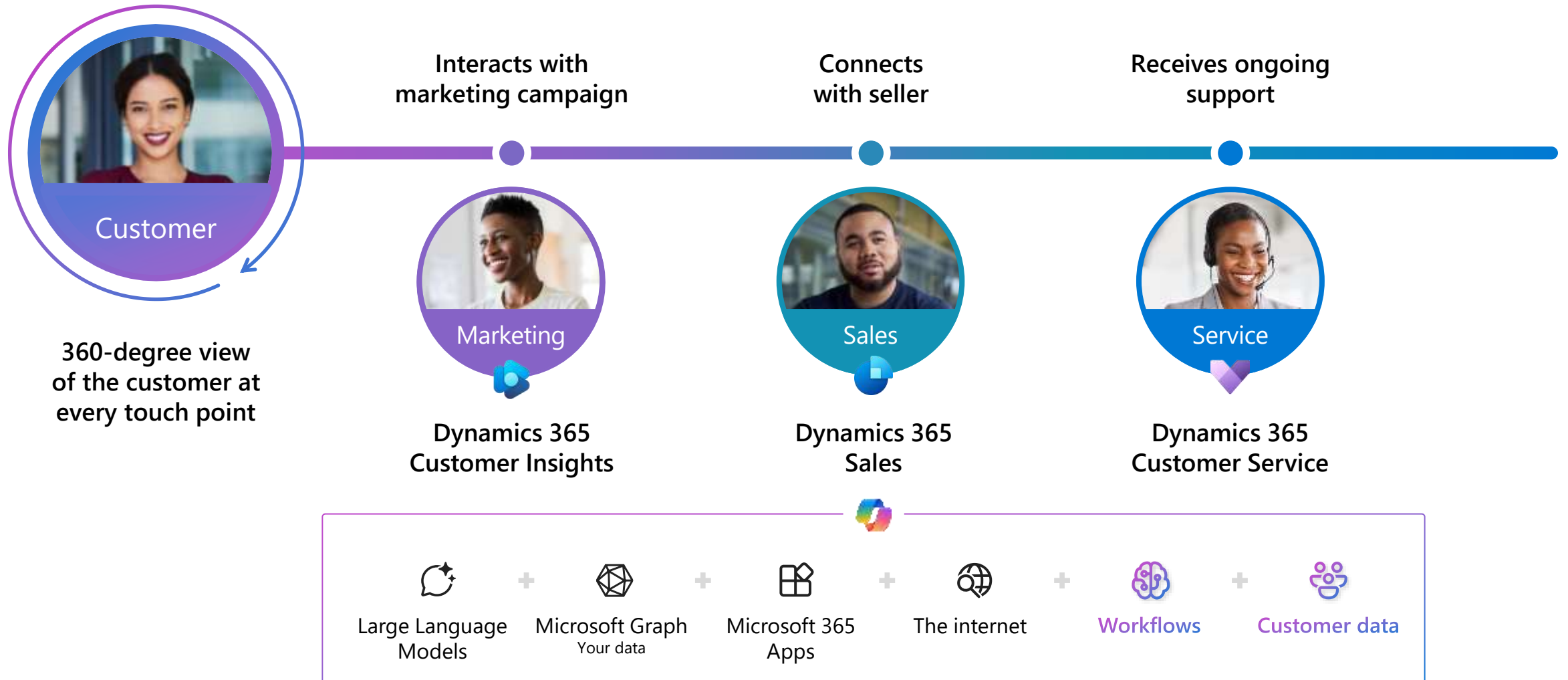
of customers would walk away from a brand they love after just one bad experience¹

¹PwC. [Experience is everything: Here's how to get it right](#). 2018.

²Accenture. [The human paradox: From customer centricity to life centricity](#). July 2022.

³Deloitte. [Want to pull ahead of the pack? Ramp up data-driven capabilities](#). March 2022.

A connected experience for every role to deliver a seamless customer journey



How we help customers deliver great experiences

Deeply understand customers



Dynamics 365
Customer Insights

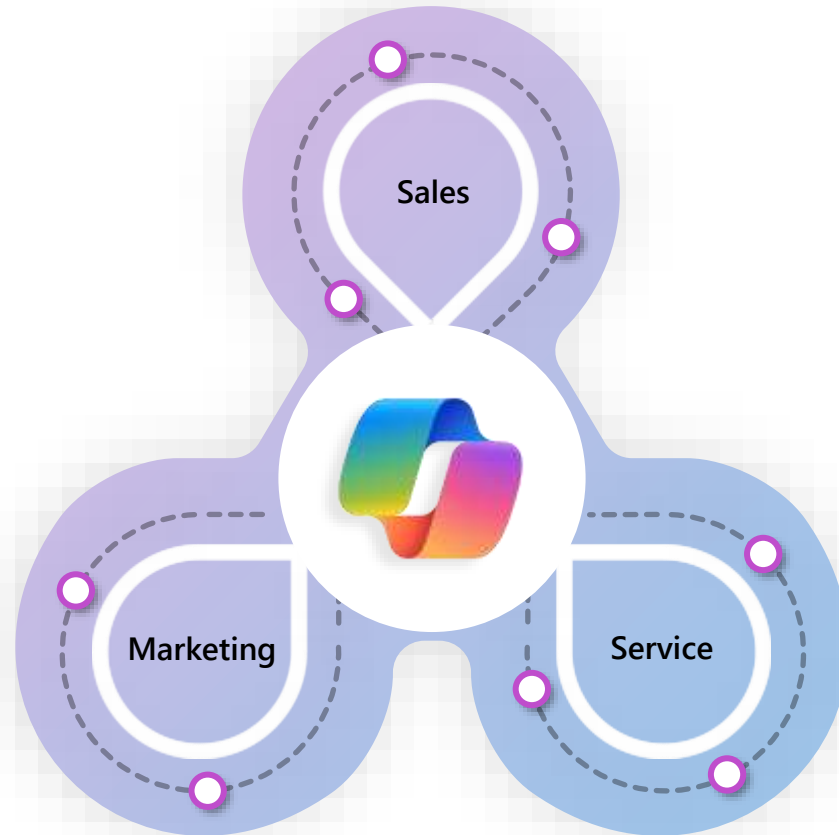


Dynamics 365
Sales



Dynamics 365
Customer Service

Personalize every interaction



Leverage data and AI

Unifies customer data on the
Customer Data Platform (CDP)

Connects to 1st and 3rd party
data sources

Delivers real-time Customer
Journey Orchestration (CJO)

Microsoft Cloud

AI you can trust

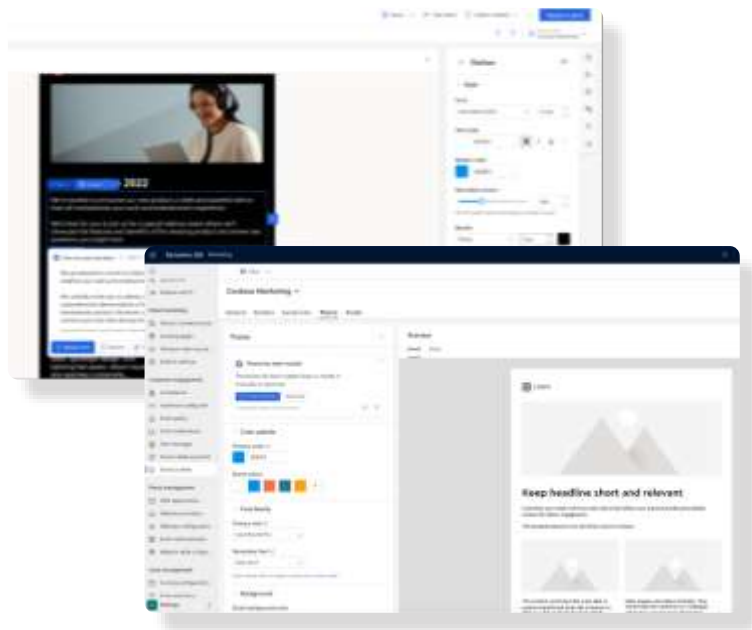
Your data is your data

Your data is not used to train the OpenAI foundation models without permission

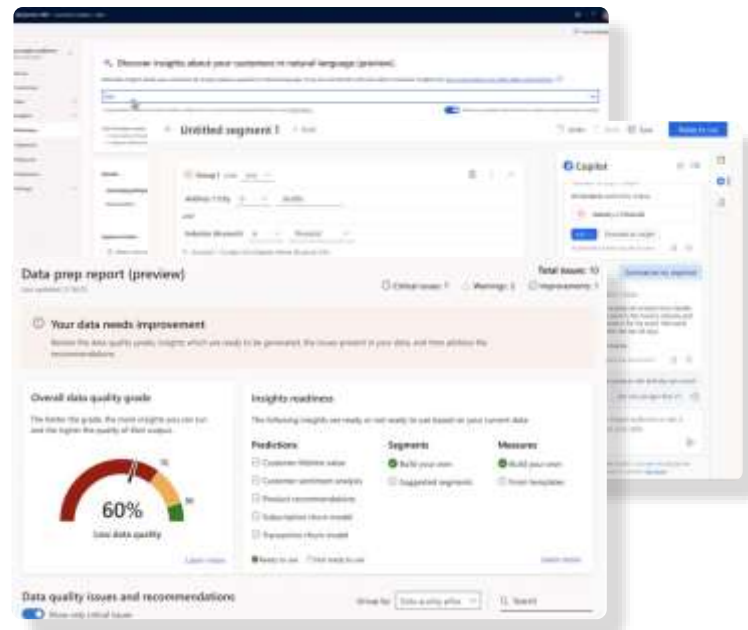
Your data is protected by the most comprehensive enterprise compliance and security controls

We have over 10 copilot features publicly available today in Customer Insights

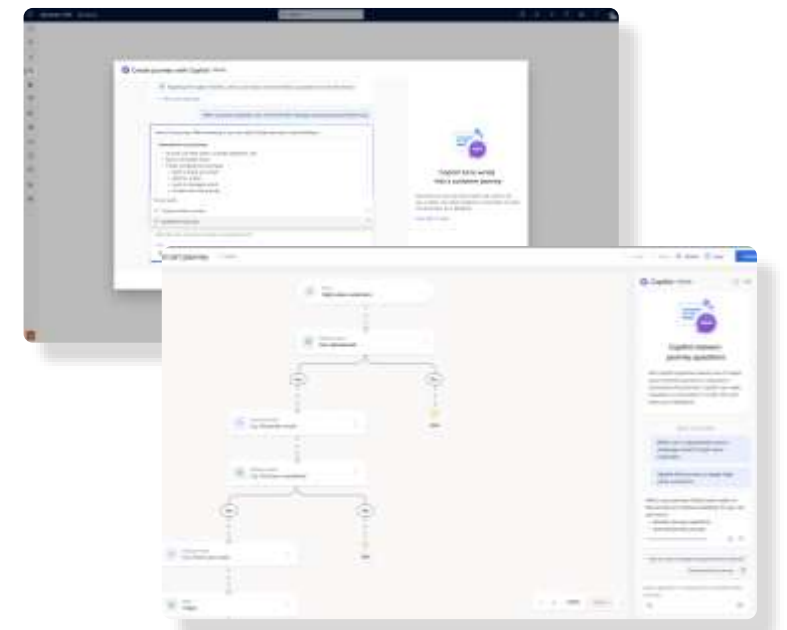
Content Creation



Insights & Segmentation



Journey Creation



+ capabilities to optimize setup, operations, analytics, and more...

Receive task assistance from copilot based on Docs

The screenshot shows the Dynamics 365 Customer Insights interface. The main content area is titled "Add a data source" and lists several options: Azure Data Lake Storage Gen2 (selected), Azure Synapse Analytics (Preview), Microsoft Dataverse, Microsoft Power Query, and Customer Insights data library. The "Azure Data Lake Storage Gen2" option is expanded, showing a form with the following fields: "Data source name *", "Description (optional)", "Connect your storage using *" (set to "Azure subscription"), "Subscription *", "Resource group *", "Storage account *", and "Container *". There is also a checkbox for "Enable Azure Private Link".

On the right side, the "Copilot" sidebar is open, displaying a list of help prompts: "Want help adding data? Try one of these to get started...", "How do I connect to Azure Data Lake Storage?", "How do I choose the right data source?", "What do I need to get started?", and "You can always use the prompt guide for suggestions by selecting this button". At the bottom of the sidebar, there is a text input field with the placeholder "Ask a question about how to set up your customer data" and a "Next" button.

At the bottom of the main form, there are "Cancel" and "Next" buttons.

Identify and eliminate data quality issues effortlessly with copilot

Data prep report (preview)

Last updated: 2/16/23

Total issues: 🔴 Critical issues: 7 🟡 Warnings: 2 🟢 Improvements: 1

🔴 Your data needs improvement
Review the data quality grade, insights which are ready to be generated, the issues present in your data, and then address the recommendations.

Overall data quality grade

The better the grade, the more insights you can run and the higher the quality of their output.

60%
Low data quality

[Learn more](#)

Insights readiness

The following insights are ready or not ready to use based on your current data:

Predictions	Segments	Measures
<input type="radio"/> Customer lifetime value	<input checked="" type="checkbox"/> Build your own	<input checked="" type="checkbox"/> Build your own
<input type="radio"/> Customer sentiment analysis	<input type="radio"/> Suggested segments	<input type="radio"/> From templates
<input type="radio"/> Product recommendations		
<input type="radio"/> Subscription churn model		
<input type="radio"/> Transaction churn model		

Ready to use Not ready to use

[Learn more](#)

Data quality issues and recommendations

Show only critical issues

Group by: Data quality pillar

Dialogue with Data in Dynamics 365 Customer Insights - Data

Dynamics 365 | Customer Insights - Data

Send feedback

Primary target audience
Individual consumers

Home

Customers

Data

Insights

Discovery

Segments

Measures

Predictions

Settings

Discover insights about your customers in natural language (preview)

Generate insights about your customers by simply asking a question in natural language. If you are not familiar with your data in Customer Insights yet, [learn more about your data tables and columns.](#)

Get

AI-generated content can have mistakes. Make sure it is accurate and appropriate before using. [Read terms.](#) Share my questions with Customer Insights to optimize answer quality.

Tips for better results:

- Use names of specific columns and data. For example, "How many subscriptions were activated last year? Use the ActivateDate column in the ServiceSubscription data table."
- Append additional or clarifying information. For example, "Which customers live in GA? GA is referring to the state Georgia in the United States."

Results

ActivityTypeDisplay	ActivityCount
Subscription	524,512

Verify your results with this SQL query

```
SELECT TOP 1 ActivityTypeDisplay, COUNT(*) AS ActivityCount  
FROM UnifiedActivity GROUP BY ActivityTypeDisplay ORDER BY  
ActivityCount DESC
```

Explore further

What is the total number of activity types associated with Customers?

What is the breakdown of activity types by Customer gender?

What is the average duration of the most common activity type associated with Customers?

[See more examples](#)

Leverage customer insights in other business applications

The screenshot displays the Microsoft Dynamics 365 interface for a customer named Alex Baker. The interface is divided into several sections:

- Header:** Shows the Dynamics 365 logo, a search bar, and navigation icons. The user's name, Mona Kane, is visible in the top right.
- Lead Information:** Displays "Alex Baker" as a lead in the "Customer Insights" segment. Key metrics include "West Coast Leads" (1), "Amount Revenue" (\$42,000.00), and "Number of employees" (2,000).
- Summary and Navigation:** Includes tabs for "Summary", "Relationship Analytics", "Details", "Opportunities", and "Related".
- Product Recommendation:** A "Product Recommendation: XLY Generation" card with an estimated revenue of \$1,500. It lists insights: 73% of customers in the segment have purchased, 1,294 transactions in the last 30 days, and it's recommended due to transaction history. There are "Accept" and "Not relevant" buttons.
- Customer Lifetime Value:** A card showing a value of \$232.78 (marked as "Warning"). It lists: 4 products purchased, \$78.18 average transaction value, and 29 days since last activity.
- Churn Risk:** A card showing a risk of 22% (marked as "Warning"). It lists: 3 transactions in the last 60 days, 12 days since last transaction, and 29 days since last activity.
- Loyalty Points Earned:** A card showing 3,462 points. It lists: 257 points redeemed, 3,225 points balance, and 14 days since last activity.
- Timeline:** A section for tracking activities, including:
 - Email activity:** A message from support@contoso.com regarding a product issue and warranty.
 - Loyalty points redemption:** 100 points redeemed via mobile app.
 - Warranty registration:** Freeform support registration activated for the XLY Generation.
- Key details:** A table of customer information:

Lead Source	Loyalty program
Est. Revenue	\$630
First Name	Alex
Last Name	Baker
Last Activity Date	11/15/2022
Total Purchases (YTD)	\$189.76
Total Purchases (LRF)	\$189.76
Warranties Purchased	1 year warranty - Active
Warranty Claims	16/11/2022

Announcing Profile summaries for the seller

Announcing Public Preview (Dec 2023)

The screenshot displays the Microsoft Customer Insights - Data interface for a customer profile. The profile is for Maya Robinson, located in Barcelona, Spain, who has been a customer since February 2021 and last active on November 1, 2023. The interface is divided into several sections:

- Customer Profile:** Includes a profile picture (GG), name (Maya Robinson), location (Barcelona, Spain), customer since date (Feb 2021), and last activity (11/1/2023). Below this is a table of data sources (4).
- Data Sources Table:**

Field	Value
CustomerId	002d2b899ffc96145455484828a513a4
FirstName	Maya
LastName	Robinson
Gender	Female
DateOfBirth	10/28/1977
Telephone	+349-35211922
Email	mayarobinson@contoso.com
Address	871 Price Tunnel, Barcelona, Spain
- Activity Timeline:** A vertical timeline showing customer activities. Recent activities include:
 - Oct 2023:** Email (10/27/2023) - Opted into email campaign - "Refer a Friend, Get Rewards"; Website (10/12/2023) - Engages with product pricing slider, adjusting plan features and pricing options.
 - Jun 2023:** Email (06/23/2023) - Opted into email campaign - "Use welcome code WELCOME20".
 - Oct 2022:** Event (10/14/2022) - Attended event "Exclusive launch event"; Website (10/02/2022) - Followed our social media account.
- Summary Metrics (Right Column):**
 - CLV:** 5.8K (Last updated 3 hours ago)
 - Total Spend Online:** 1.4K (Last updated 3 hours ago)
 - Churn Score:** 0.05 (Last updated 3 hours ago)
 - Average Spend InStore:** 188.33 (Last updated 3 hours ago)
 - Average review rating:** 125 (Last updated 3 hours ago)
 - Average Spend Online:** 114 (Last updated 3 hours ago)
- Interest SoV for customers like Maya Robinson:** A horizontal bar chart showing interest in various products. The x-axis ranges from 0% to 50%. The bars represent: Tea (~10%), Non-Alcohol (~45%), Coffee (~10%), Sports Drink (~10%), and Juice (~10%).
- Brand SoV for customers like Maya Robinson:** A section for brand share of voice, currently empty.

Optimize the web experience

Announcing partnership

Optimizely + Customer Insights

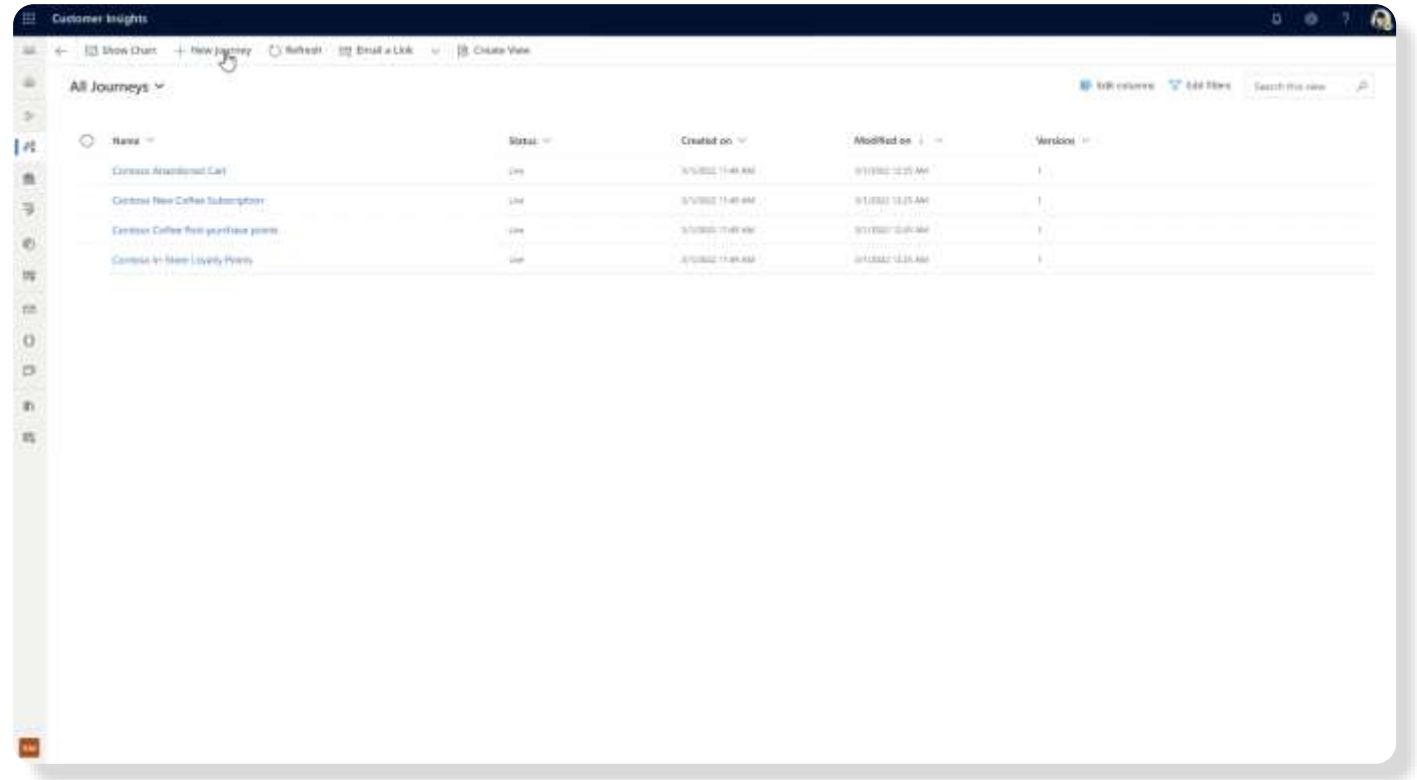
Optimizely extends copilot

Engage customers across the entire journey with rapid productivity and faster time-to-value, made possible with genAI and no code required



Announcing Worldwide GA (Dec 2023)

Journey Creator in Dynamics 365 Customer Insights Journeys



Dynamics 365 Sales

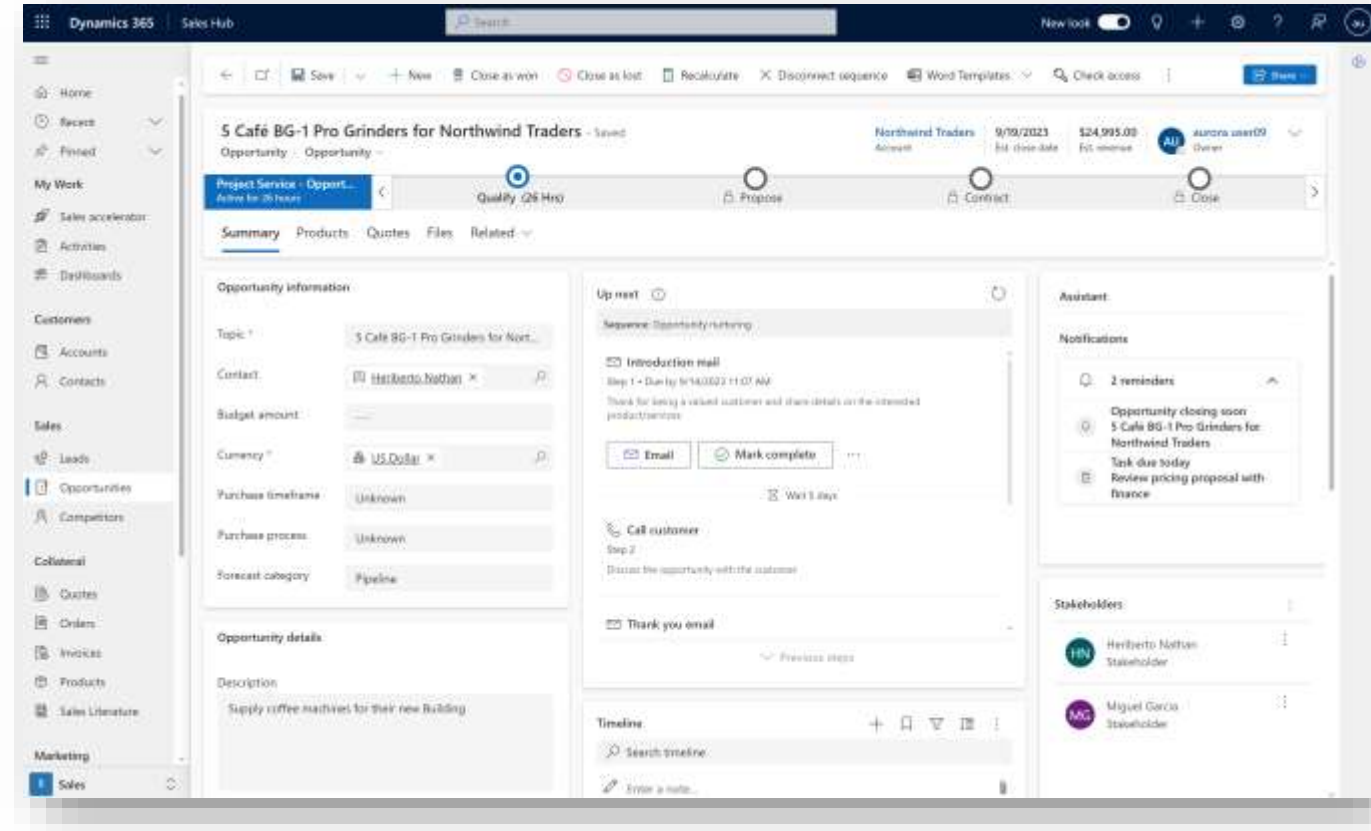
The image features a dark blue background with a large, light blue semi-circle on the right side. In the lower right, there is a white rounded rectangle that overlaps the semi-circle. The text 'Dynamics 365 Sales' is positioned on the left side of the image.

Modern and refreshed user experience with updated styling and controls

Modern and refreshed user experience with updated styling and controls.

With this feature, sellers will be able to:

- New styling with drop shadows and brighter background colors for a more visually appealing and elevated appearance.
- Field controls such as text input, action input, lookup, and check box controls built and designed using fluent components for a more modern look and feel.
- New fluent-based controls in forms, business process flows, and dialogs for a modern and consistent experience across the platform.
- Command bar with consistent spacing, rounded corners, and elevation for a more intuitive and familiar experience.
- Refreshed headers, tabs, sections, and business process flows in form pages for easier navigation and improved user experience.
- Refreshed input and error message styling.

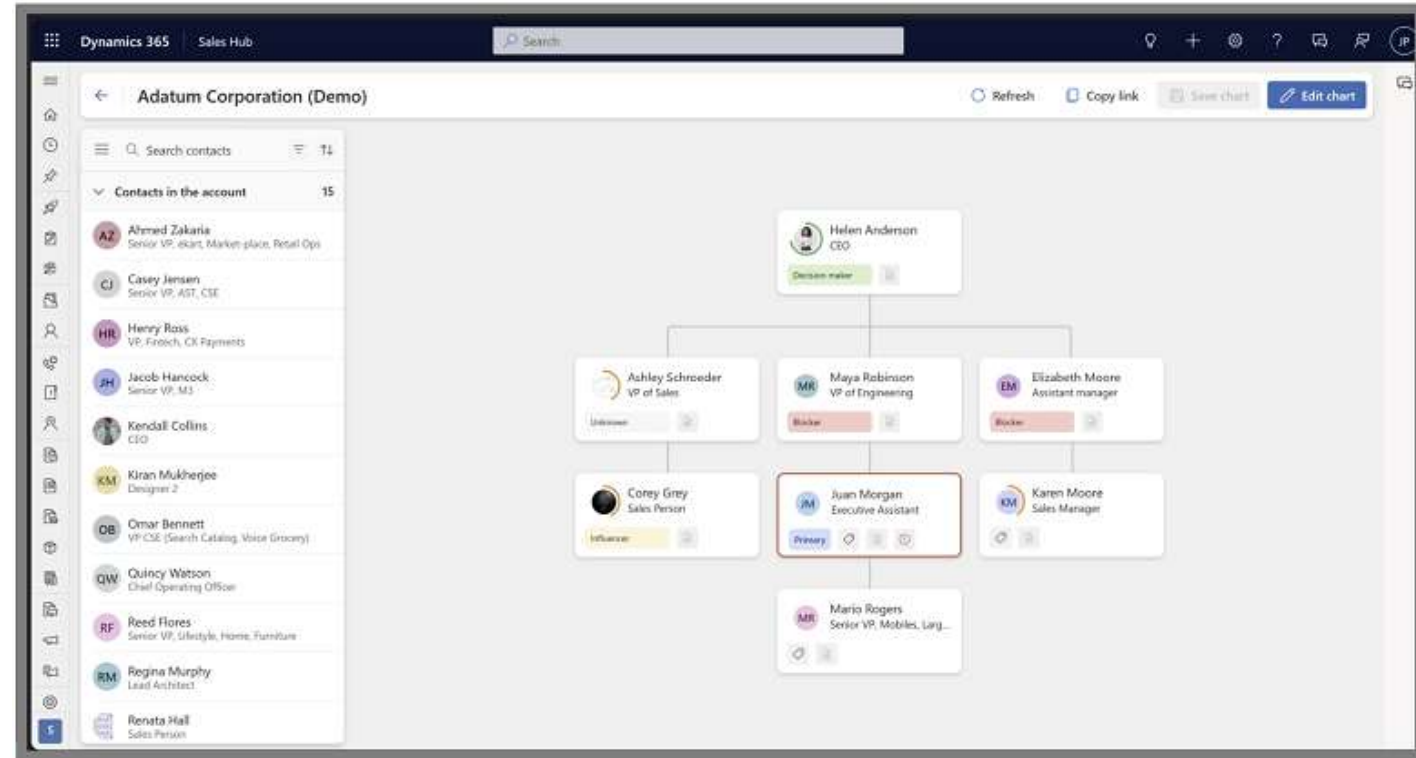


Visualize key stakeholders and take action with the smart organization chart

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

The smart organization charts offer the following capabilities:

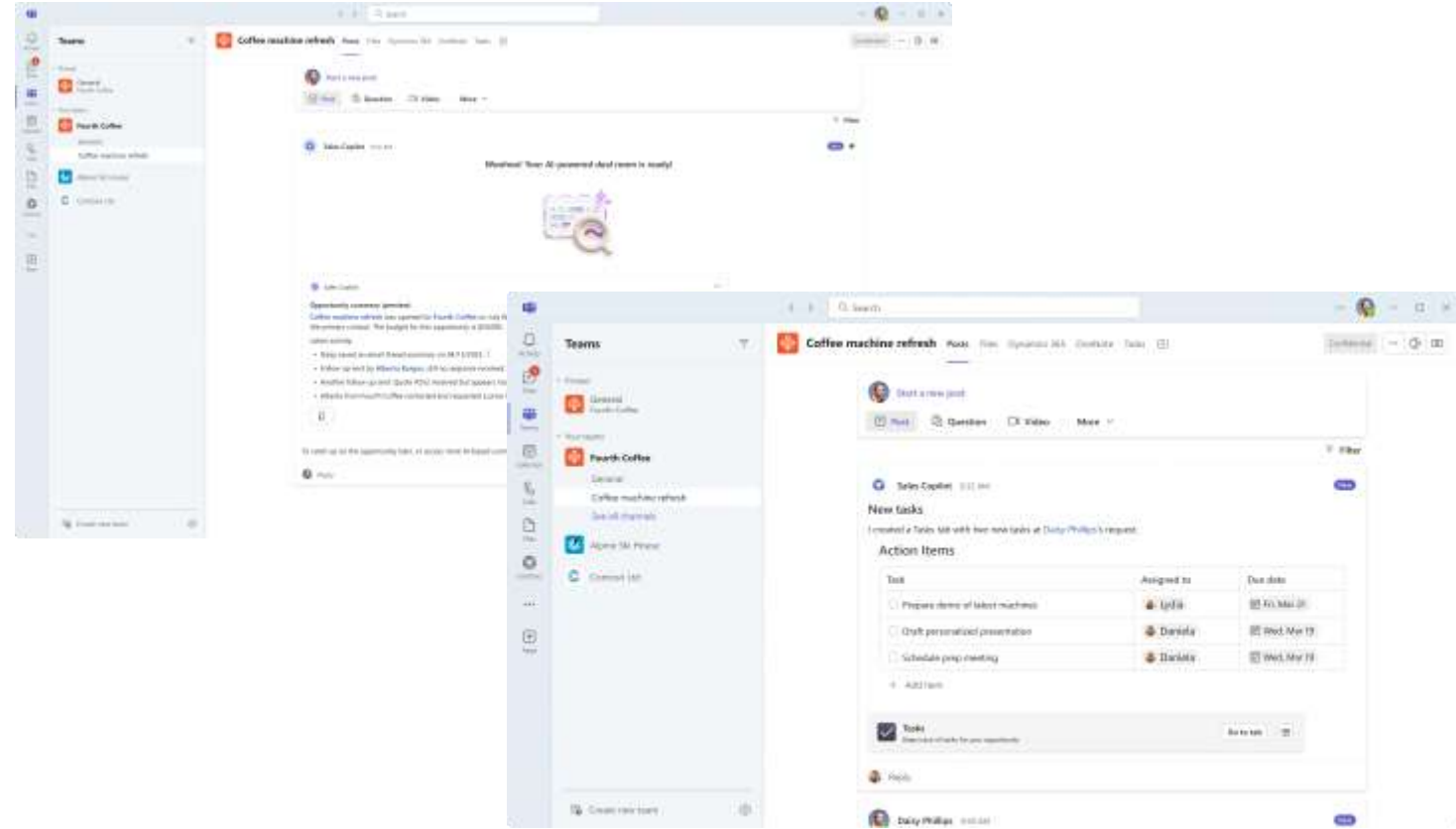
- Build the entire org chart via simple drag-and-drop action.
- Leverage tags to indicate key players and decision-makers.
- Create Assistant cards to include executive assistants in the organization chart.
- Capture notes directly from org charts on the go.
- Access your organization chart directly from the Contacts form as well.
- Monitor the health and risks of the customer relationships using relationship health embedded in organization charts.
- Get notified when contacts leave the organization with LinkedIn Sales Navigator License.



Collaborate with AI-powered planner tasks in collaboration spaces

Empower sales teams to collaborate effectively with AI-powered planner tasks.

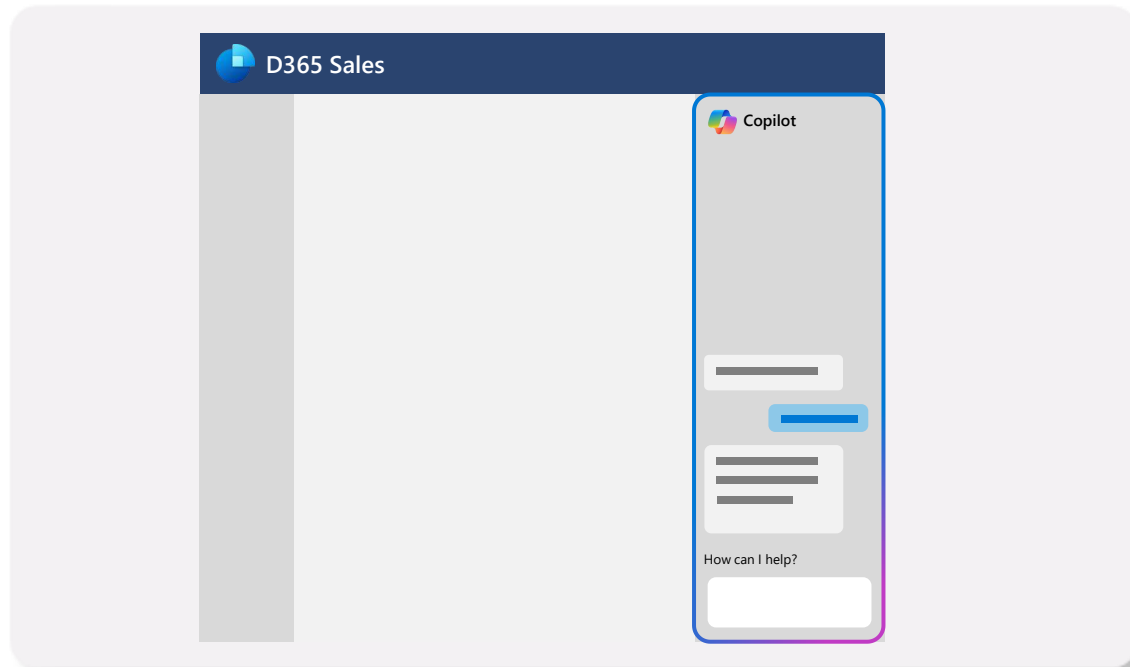
- The Sales Copilot bot monitors conversations in the deal room and suggests relevant tasks from discussions.
- If user agrees to create suggested tasks, tasks are automatically generated with assigned owners.
- A **Tasks** tab is created in the deal room channel to access these tasks and stay on top of the latest updates.
- This feature works for both Dynamics 365 and Salesforce CRM users.



Copilot in Dynamics 365 Sales

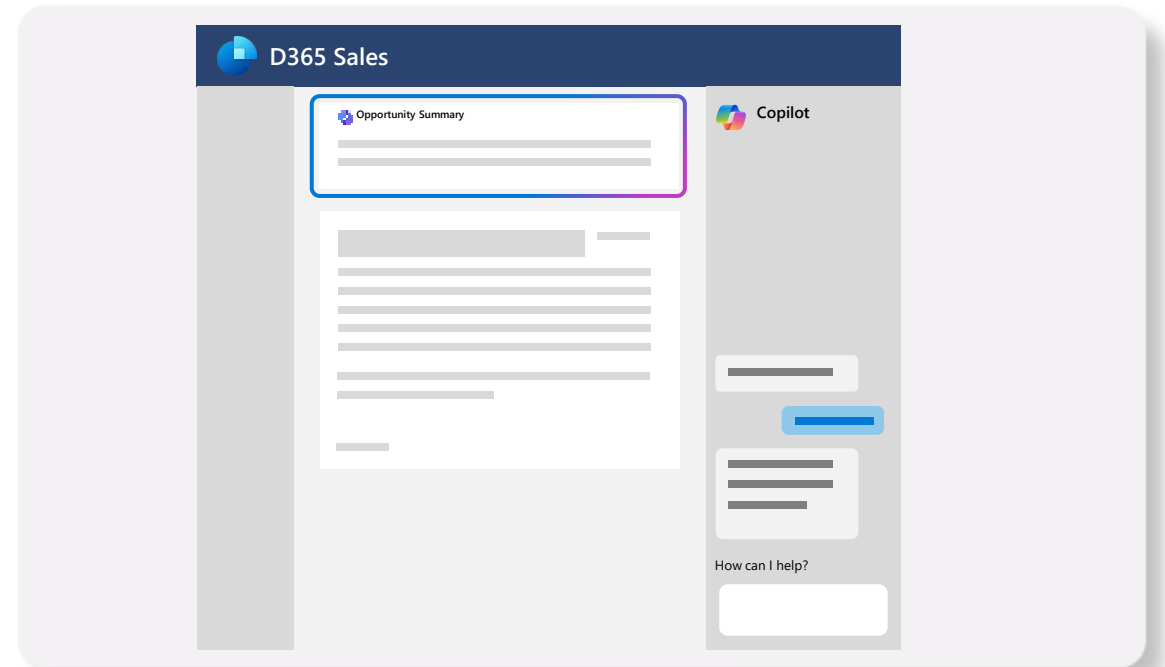
Deeply integrated AI capabilities embedded in your core sales application. Manage Leads, prepare for meetings, and let Copilot help ensure you're getting the most out of your CRM data.

Chat / Natural Language



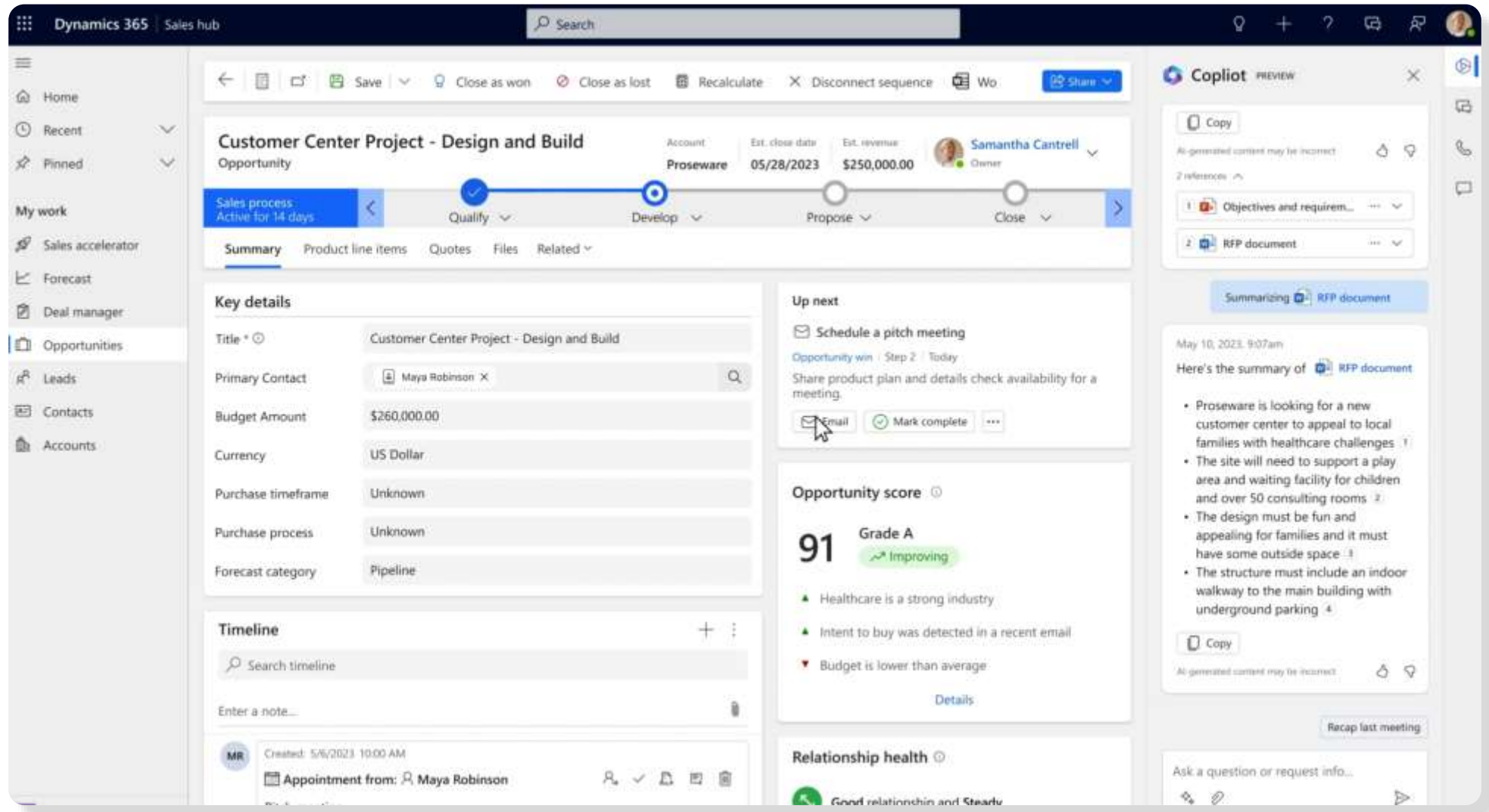
Ask questions of your CRM data directly from within your core Sales application.

Embedded AI



Deeply integrated UI in new and existing workflows in the Dynamics 365 shell.

Copilot in Dynamics 365 Sales



The screenshot displays the Dynamics 365 Sales Copilot interface for a specific opportunity. The main header shows the opportunity name "Customer Center Project - Design and Build" with a progress bar indicating the current stage is "Develop". Key details include the account "Proseware", estimated close date "05/28/2023", and estimated revenue of "\$250,000.00". The opportunity score is 91 (Grade A), which is improving. The "Up next" section suggests scheduling a pitch meeting. The "Opportunity score" section lists factors like "Healthcare is a strong industry" and "Intent to buy was detected in a recent email". The "Relationship health" section shows a "Good relationship and Steady" status. The right-hand panel features a Copilot chat window with a summary of an RFP document and a list of key requirements.

Customer Center Project - Design and Build
Opportunity

Account: Proseware | Est. close date: 05/28/2023 | Est. revenue: \$250,000.00 | Owner: Samantha Cantrell

Sales process: Active for 14 days
Qualify | **Develop** | Propose | Close

Key details

Title	Customer Center Project - Design and Build
Primary Contact	Maya Robinson
Budget Amount	\$260,000.00
Currency	US Dollar
Purchase timeframe	Unknown
Purchase process	Unknown
Forecast category	Pipeline

Up next

- Schedule a pitch meeting
- Opportunity win | Step 2 | Today
- Share product plan and details check availability for a meeting

Opportunity score

91 Grade A Improving

- Healthcare is a strong industry
- Intent to buy was detected in a recent email
- Budget is lower than average

Relationship health

Good relationship and Steady

Copilot REVIEW

Copy

All generated content may be incorrect

2 references

- Objectives and requirem...
- RFP document

Summarizing RFP document

May 10, 2023, 9:07am

Here's the summary of RFP document

- Proseware is looking for a new customer center to appeal to local families with healthcare challenges
- The site will need to support a play area and waiting facility for children and over 50 consulting rooms
- The design must be fun and appealing for families and it must have some outside space
- The structure must include an indoor walkway to the main building with underground parking

Copy

All generated content may be incorrect

Recap last meeting

Ask a question or request info...

Microsoft Sales Copilot

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. At the top, the navigation bar shows "Dynamics 365 | Sales Hub" and a search bar. Below this is a toolbar with icons for navigation and actions like "Save", "Save & Close", "New", "Delete", "Refresh", "Disqualify", "Qualify", "Disconnect sequence", and "Share".

The main content area features a lead record for "Maya Robinson" (Lead · Lead). The lead is currently in the "Qualify" stage of a "Lead sales process" (Active for 4 days). The process flow includes stages: Qualify (checked), Develop, Propose, and Close. The lead is owned by "Serena Davis".

On the left, a "Contact" card displays the following information:

Topic *	10 Eco Espresso Machines
First name	Maya
Last name *	Robinson
Job title	Operation Executive
City	New York
Mobile phone	842-123-2241

On the right, the "Up next" section shows an "Introduction call" (Conference outreach | Step 1 | Today) with the instruction: "Share product details and check availability for a meeting." Below this, the "Lead score" is displayed as "95 Grade A" with a status of "Improving".

At the bottom right, the "Sales Copilot" chat window is active, showing a "Chat" interface with a "Compose" button and a message: "Get updated lead summary with this from Maya Robinson and Fabrikam is available." Below the chat, a "Lead summary" section provides key insights:

- Maya Robinson is an existing contact from account Fabrikam
- Maya Robinson's role is Operations Executive
- Maya had been in this role at Fabrikam for 6 years
- Top 3 selling products are CoffeeXL, Airport Lite, and Freshbrew Pods
- We've closed 3 opportunities with Fabrikam in the last 6 months

Below the lead summary, "Suggested updates" are listed:

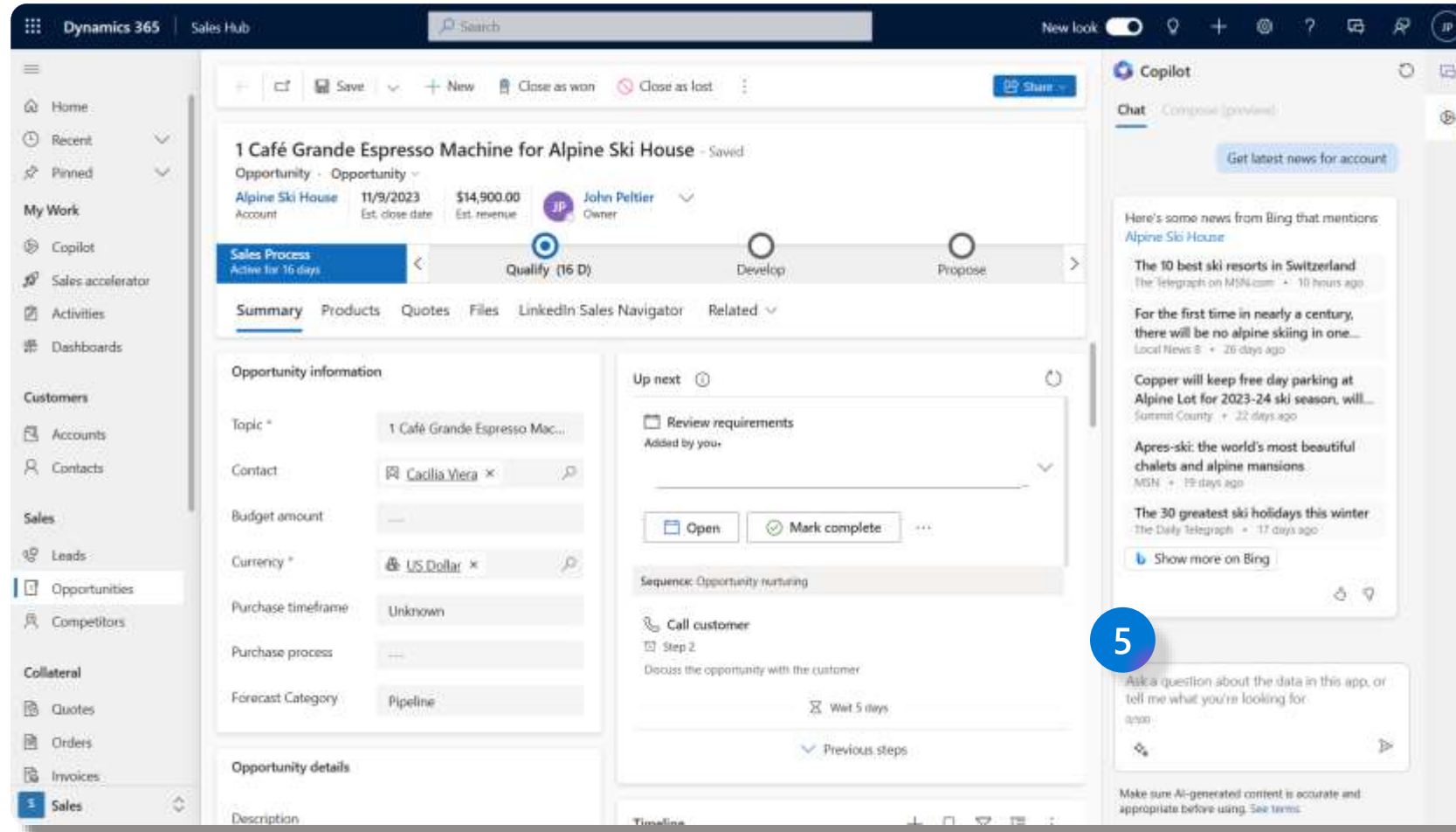
- Job title: Operations executive
- Contact information: 842-123-2241
- City: New York
- Email: m.robinsom@fabrikam.com

The interface also includes a sidebar on the left with navigation icons and a bottom right corner with a "Summarize lead" button and a "Get updated lead summary" button.

Copilot in Dynamics 365 Sales

A new way to navigate and pull insights from Dynamics

- 1 Prompts to guide sellers to contextual insights into their sales data
- 2 Embedded visualizations to quickly assess performance
- 3 Summarize related sales records to stay on top of your deals
- 4 Links to easy access summarized sales records
- 5 Side car experience to get contextual insights such as latest customer news from Bing



The screenshot displays the Dynamics 365 Sales Hub interface. The main window shows an opportunity record for "1 Café Grande Espresso Machine for Alpine Ski House". The record details include the account name "Alpine Ski House", the estimated close date "11/9/2023", the estimated revenue "\$14,900.00", and the owner "John Peltier". The sales process is currently in the "Quality (16 D)" stage. The interface includes a navigation pane on the left with options like Home, Recent, My Work, Customers, Sales, and Collateral. A Copilot chat window is open on the right, showing a "Chat" interface with a "Compose (preview)" button and a "Get latest news for account" button. The chat content displays news from Bing related to the account, such as "The 10 best ski resorts in Switzerland" and "Copper will keep free day parking at Alpine Lot for 2023-24 ski season, will...". A "5" in a blue circle is overlaid on the right side of the chat window.

Personalize the service experience

Connect on customer's terms

Meet the customers where they are with personalized and connected experiences delivered on their preferred channel.

Deliver omnichannel engagement:

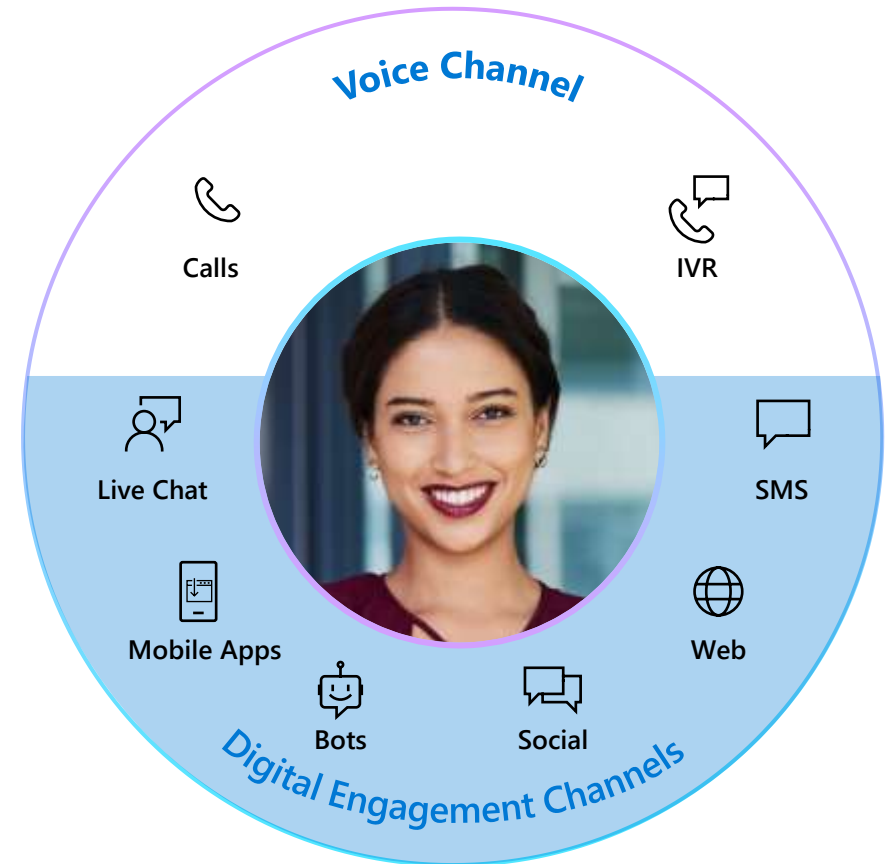
Offer customers the choice and convenience and allow them to engage on their terms through their preferred channel.

Provide easy, integrated voice calling experience

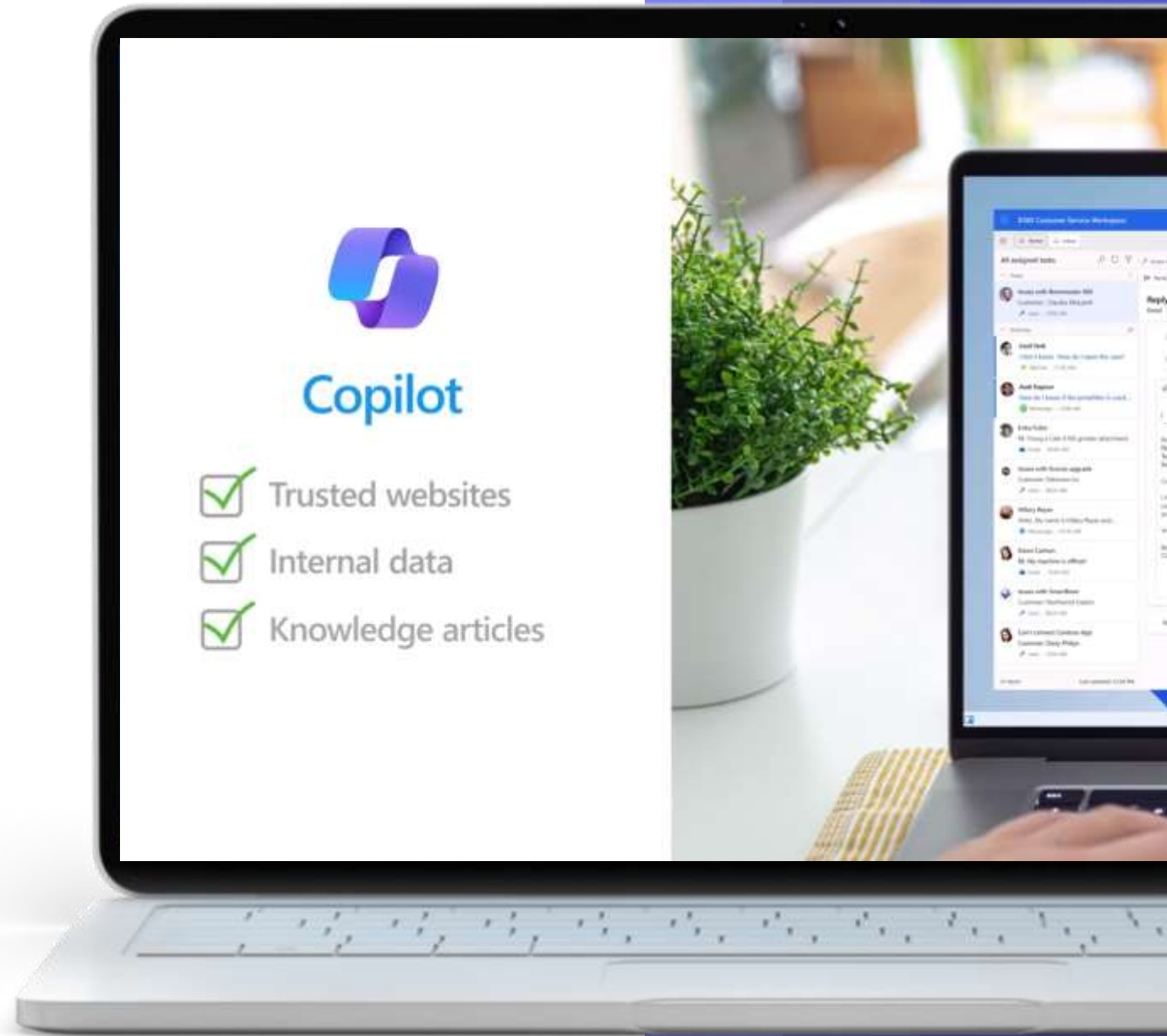
Scale native calling for any size enterprise, with a suite of inbound/outbound voice features and SMS support

Secure interactions with customers

Protect and personalize with Nuance Gatekeeper to analyze a person's unique voice signature and speech patterns



Copilot in Dynamics 365 Customer Service



AI for the frontline




[Introducing Copilot in Microsoft Dynamics 365 Guides - Microsoft Industry Blogs](#)



One more thing

The potential of AI is clear...
the question is what will you build?





Announcing

Microsoft Copilot Studio

Your copilot, your way

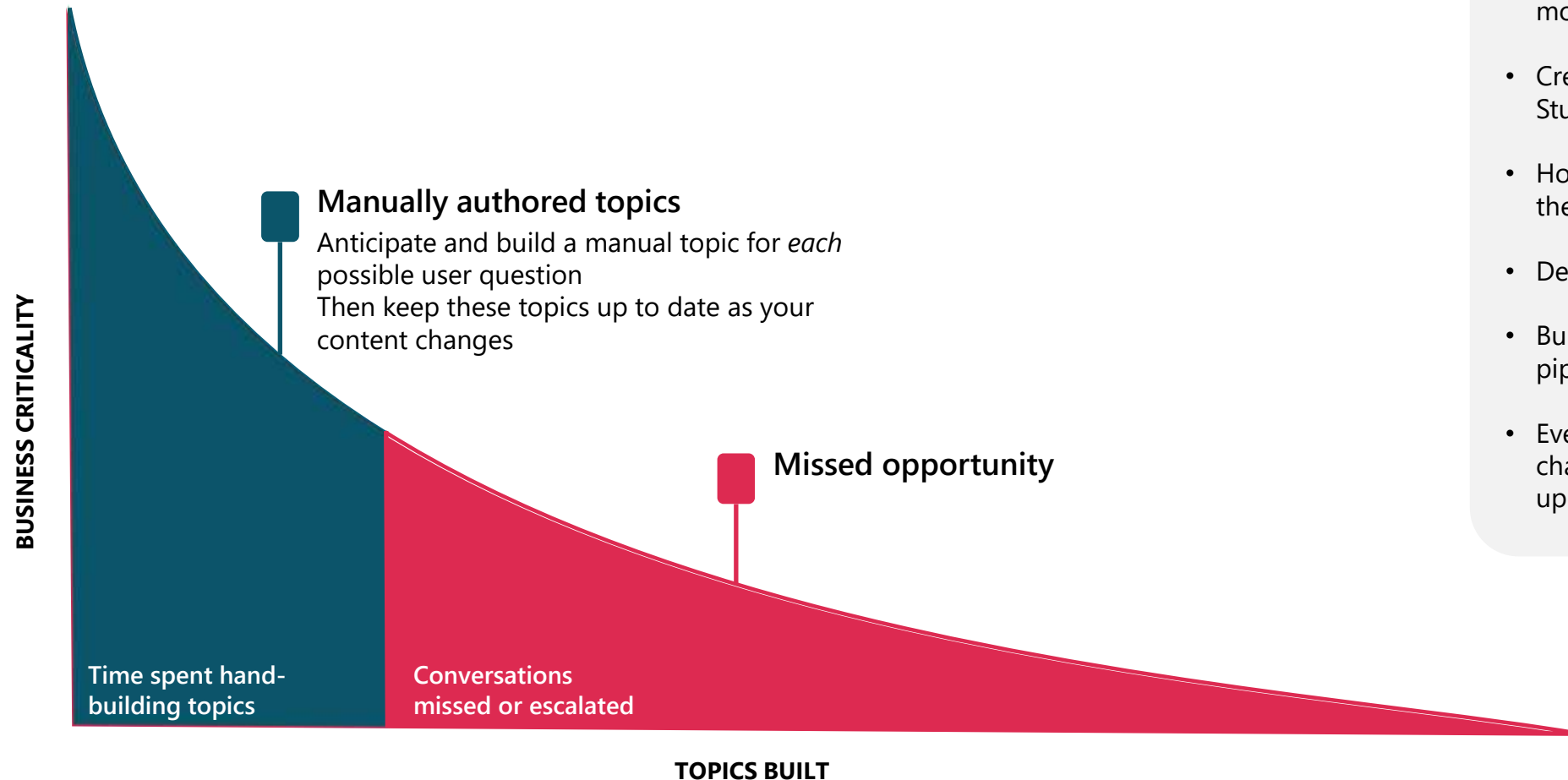
Customize

Build

Manage

aka.ms/copilotstudio

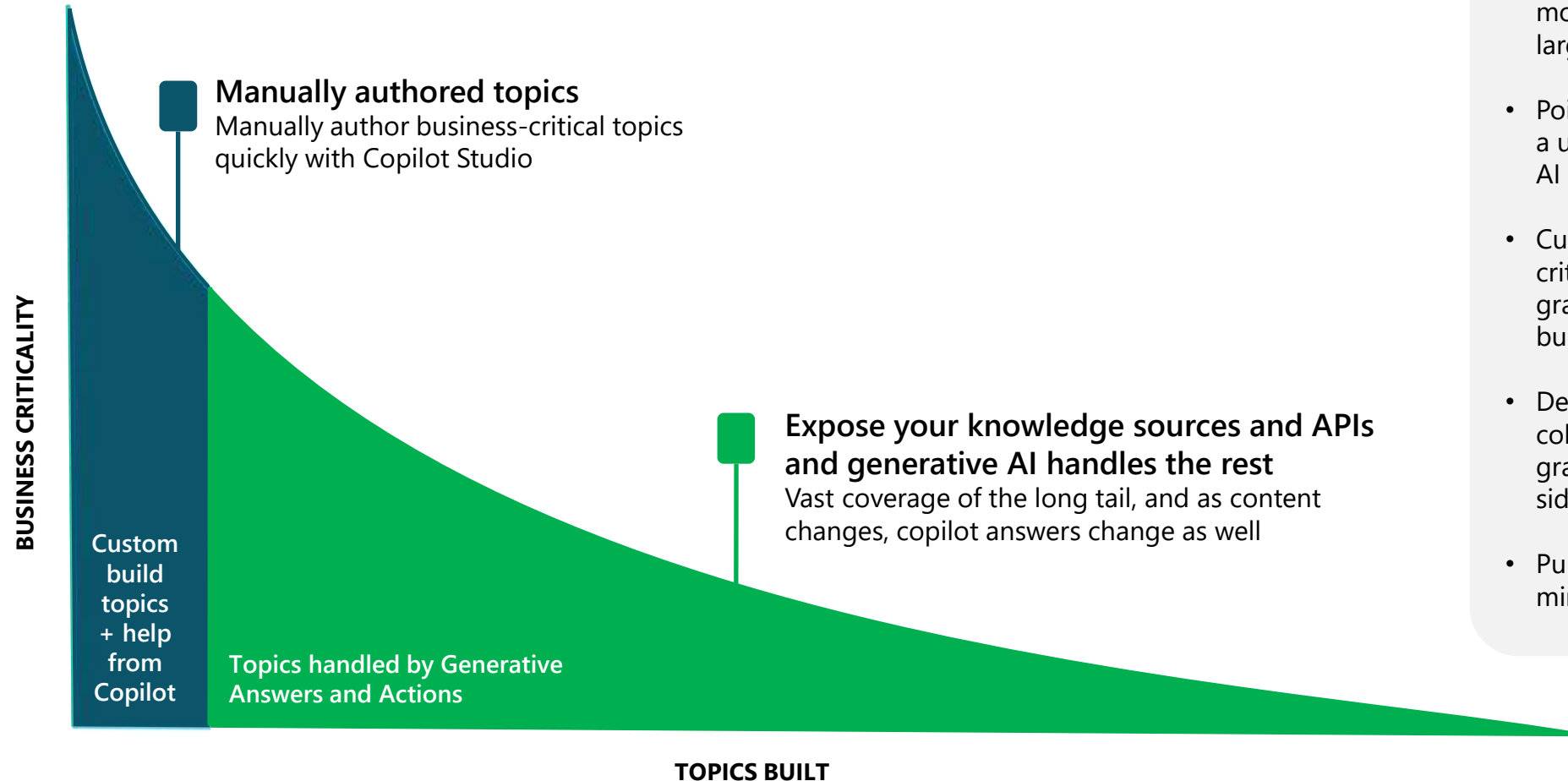
Generative AI is changing building



Traditional (e.g. Azure)

- Create Azure tenant and infra
- Annotate thousands of utterances and conversations to build a custom NL model
- Create topics in code using Visual Studio and BF SDK
- Host Azure Bot Service and instantiate the appropriate channel
- Deploy your copilot to the service
- Build your own custom analytics pipeline
- Every time your knowledge content changes (e.g. different hours) go and update the copilot in code

Generative AI is changing building



- Copilot Studio with Generative AI**
 - Full E2E SaaS – no infra to host or manage
 - No explicit NL training or custom model required, comes with powerful large language model
 - Point to a knowledge sources and have a useful bot in minutes with Generative AI
 - Customize your copilot with business-critical topics using easy to use graphical interface and 1000s of pre-built connectors, or call custom APIs
 - Developers, low-code users can collaborate inside the same canvas with graphical multi-authoring and code side-by-side
 - Publish to the channel of your choice in minutes with a few clicks

Send message to current status

Track the shipment of v

Request a vacation for November 15th



Microsoft Copilot Studio

Your copilot, your way

[Demo](#)

More than **130,000** organizations
have experienced Copilot in
Dynamics 365 and Power Platform

3M

PRADA Group

LYNK&CO

CAMPARI

KraftHeinz

G&J  pepsi

Get started today



aka.ms/trycopilotstudio



Learn more

Copilot Studio website

aka.ms/copilotstudio

Blog

aka.ms/copilotstudioblog

Demo

aka.ms/copilotstudiodemo

Sizzle video

aka.ms/copilotstudiosizzle

Product documentation

aka.ms/copilotstudiodocs

FAQ

aka.ms/copilotstudioFAQ

Pitch deck

aka.ms/copilotstudiopitchdeck

Ignite on-demand session

aka.ms/copilotstudioatignite

Community page

aka.ms/copilotstudiocommunity



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