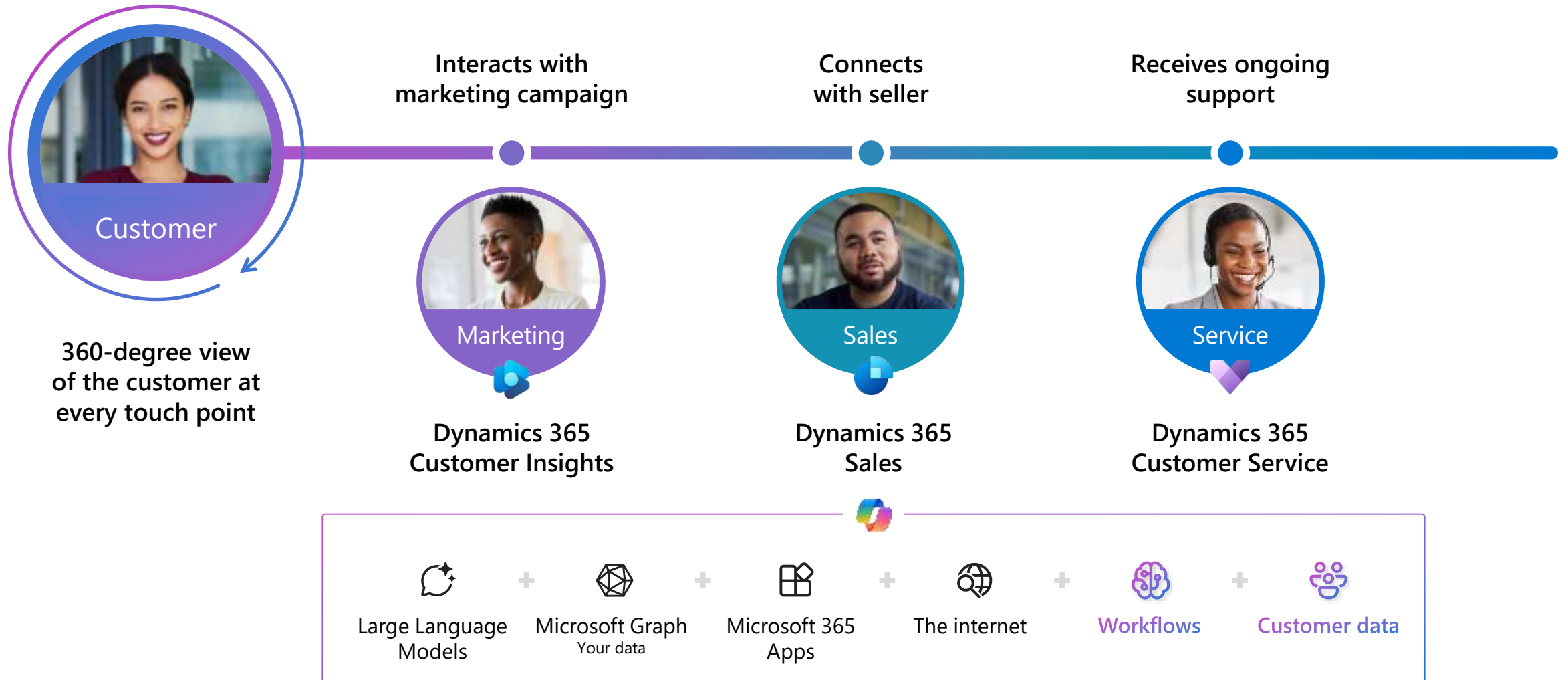




# Transforming customer experience with Dynamics 365 and next-generation AI

Tim Ervik, Sr Specialist "*of enablement*"  
Business Applications and platforms

# 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

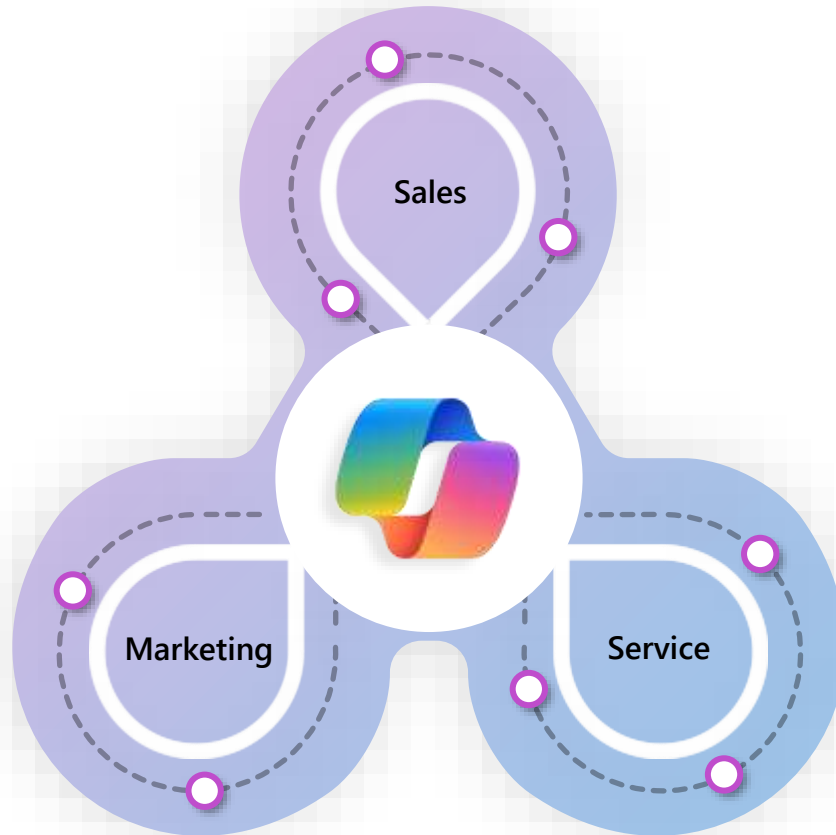


Dynamics 365  
Sales



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)

# Copilot architecture and responsible AI principles in action



 **Dynamics 365**

An AI-powered suite of leading CRM and ERP applications



 **Microsoft  
Dynamics 365**

# Generative AI transforms the customer experience

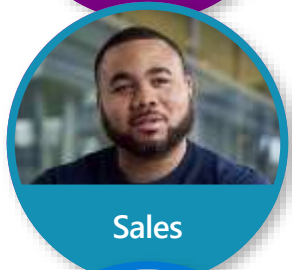


## Unleash creativity and productivity

from starting at square one and doing required busywork



to AI-powered task automation, content suggestions, and summaries that optimize time



## Act on in-the-moment insights

from reactive decision-making and limited or hard-to-reach insights



to proactive decision-making, AI-powered intelligence, and reports infused into your flow of work



## Personalize experiences

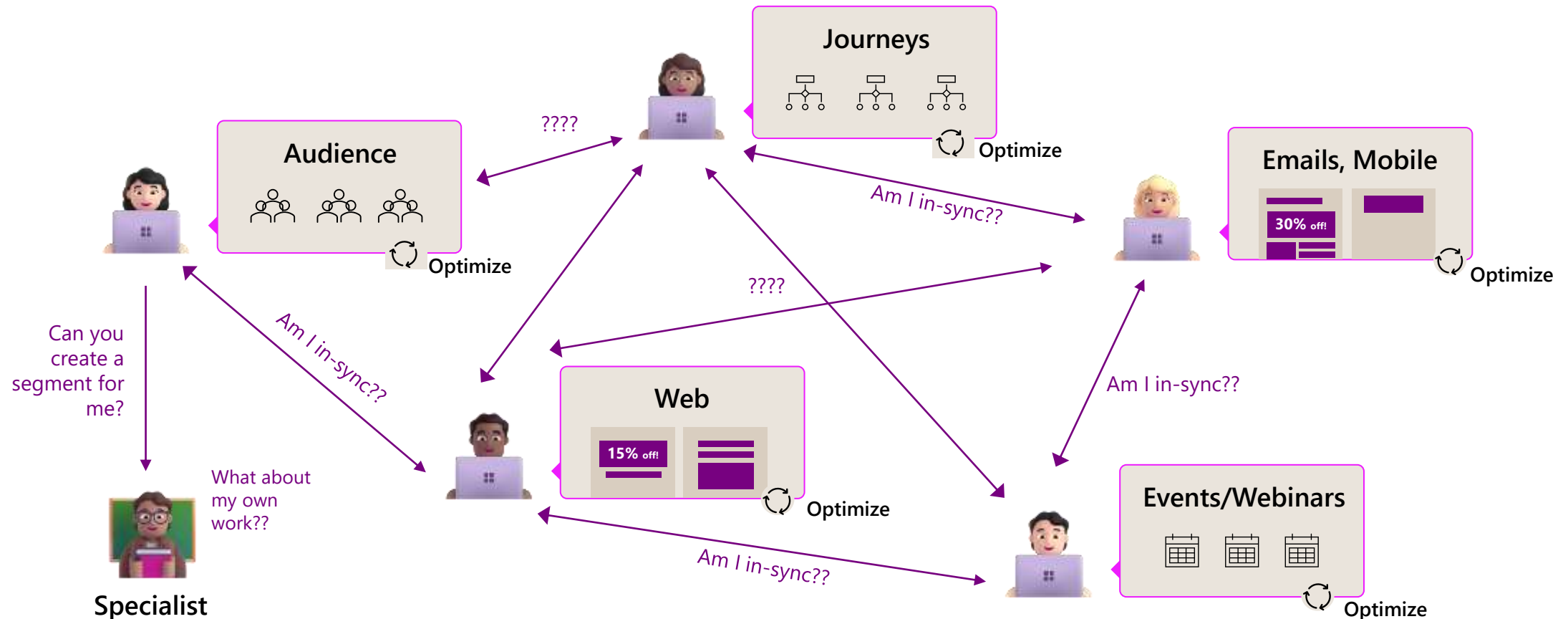
from generic, one-size-fits-all content



to highly personalized content and AI-powered recommendations

Today, delivering **optimized**  
customer experiences at scale is  
**time consuming** and **difficult...**

# Systems are manual, fragmented or locally optimized...



...and this leads to CX that feels **disjointed** or even **broken**

# The evolution of Dynamics 365 Customer Insights

The leader in generative AI innovation for marketing

**2019**  
Launch of Dynamics 365 Customer  
Insights and Marketing



**2021**  
Launch of Real-time  
Marketing



**2022**  
First generative AI capability  
released for content creation



**2023**  
Customer Insights merges CDP  
with marketing automation



**2024**  
A new AI-first marketing  
experience is announced



in just

**two**  
years

=

we launched more than a

**dozen**  
AI features

Faster time to insights	Improved creativity	Increased personalization	Time saved
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What if you could describe the  
outcomes you want,  
and Copilot could take the lead?

# Customer Experience

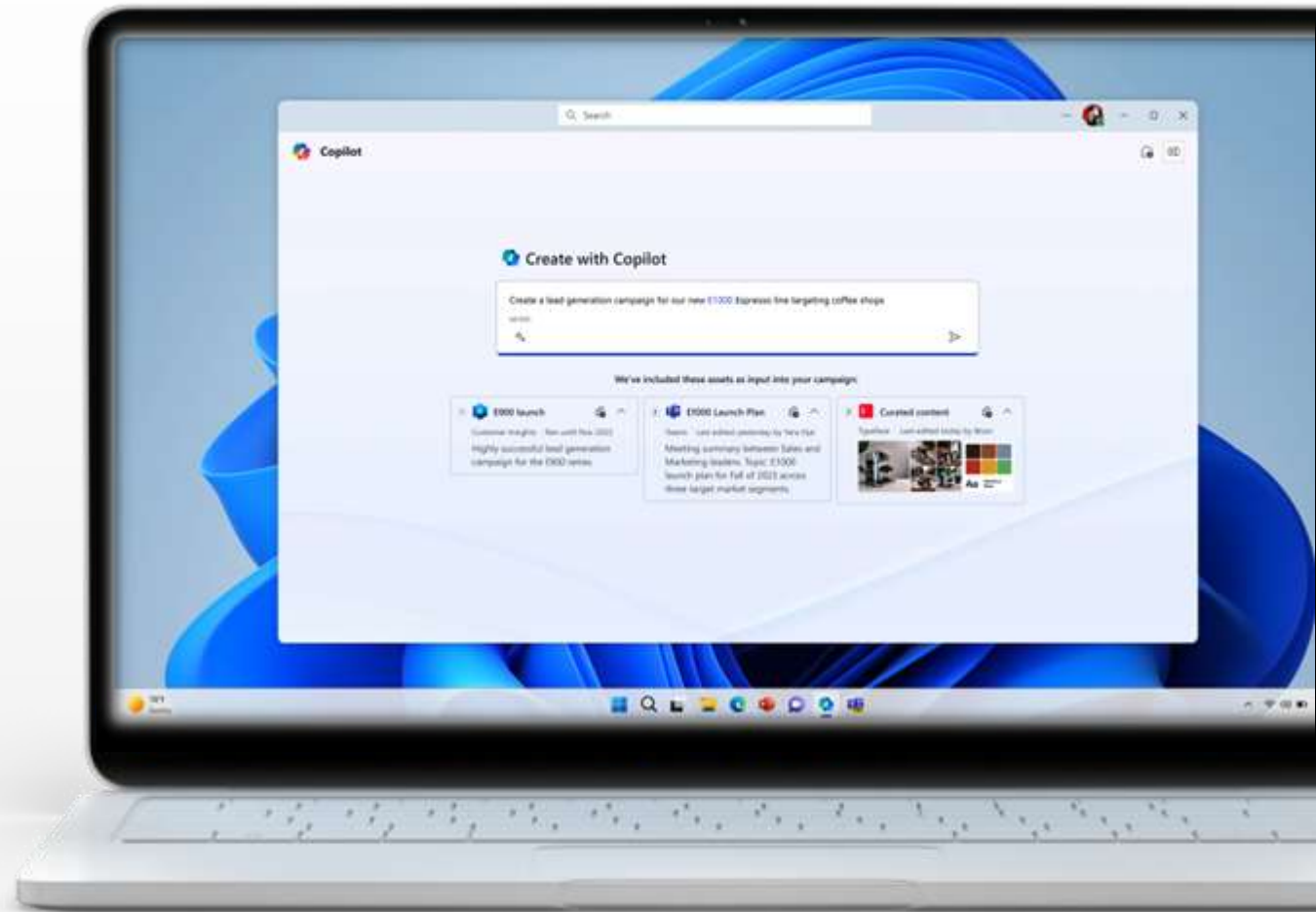
2024 RELEASE WAVE 1



# Copilot in Dynamics 365 Customer Insights

Next-generation AI assists marketers to completely change the workflow starting with data driven recommendations, reviewing and managing copilot work to approving copilot optimizations and recommendations

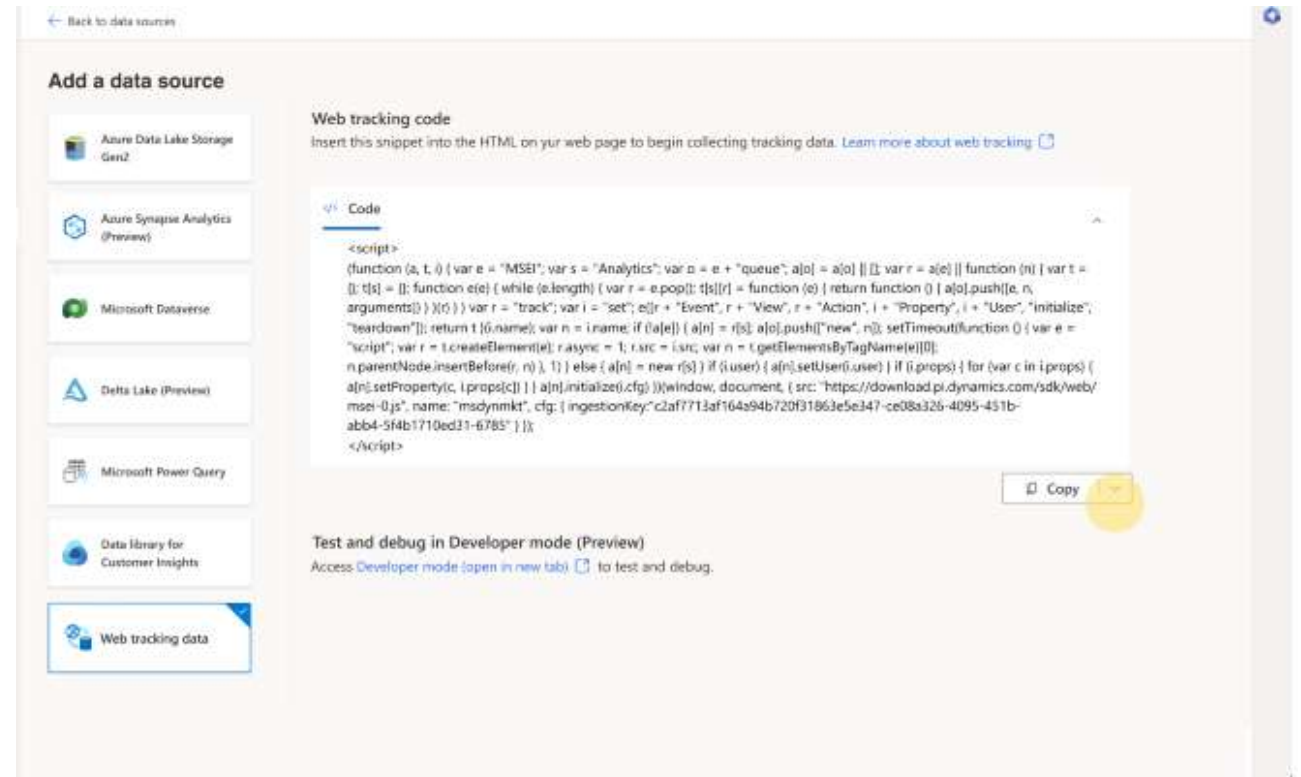
[Official announcement and Blogpost](#)



# Elevate customer experiences in real time

Personalize your customer experiences on web/mobile apps with real-time engagement signals as well as 360 insights you already have about them.

- Capture customer interactions on web/mobile apps and augment their profile or trigger journeys.
- Track even your anonymous visitors' activities and seamlessly graduate them to known visitors when they identify themselves.
- Show the best experience on the web/mobile app to each visitor based on their profile and real-time engagement with your brand.



🚀 React to customer signals such as adding a product to a cart, viewing your pricing quote, or signing up for a trial.

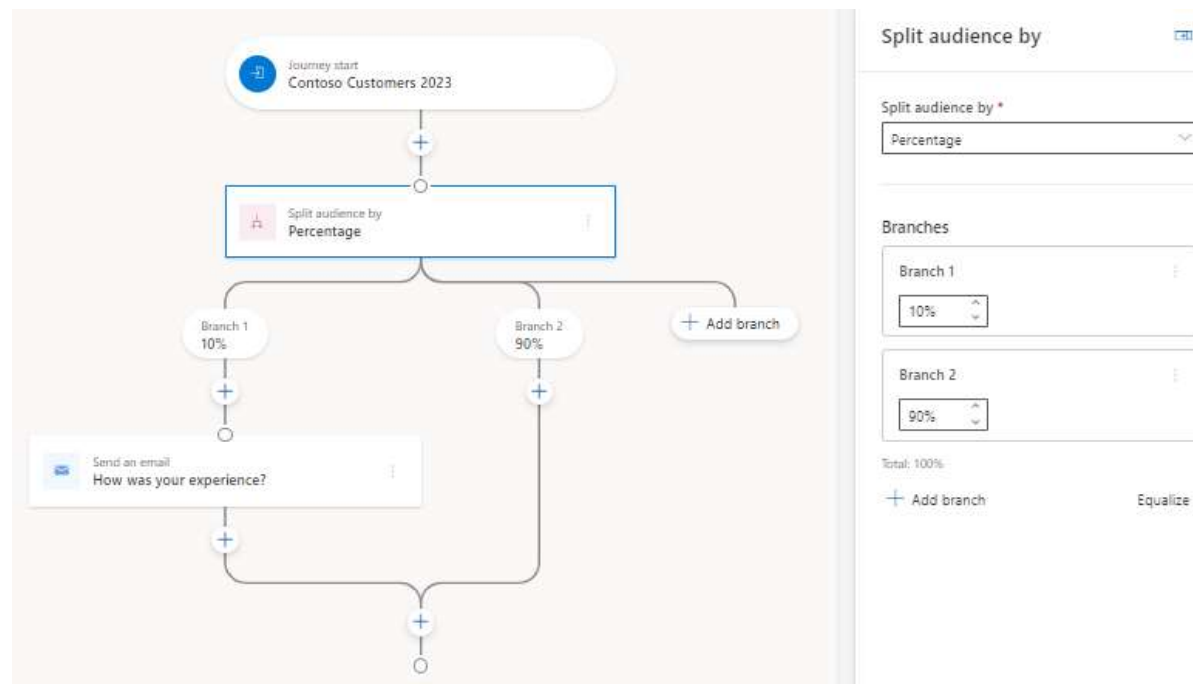


# Provide varied experiences in one journey using journey split tiles

Effortlessly deliver unique experiences to a subset of your audience within one journey by split your audience into branches.

You can split your audience by.

- Split by percentages - for cases where you need randomness. E.g., send an experience survey to a subset of your customers.
- Split by number - for cases where you want to deliver specific experiences to a set number of people. E.g., offer a promotion for the first 1,000 customers to sign up for a newsletter

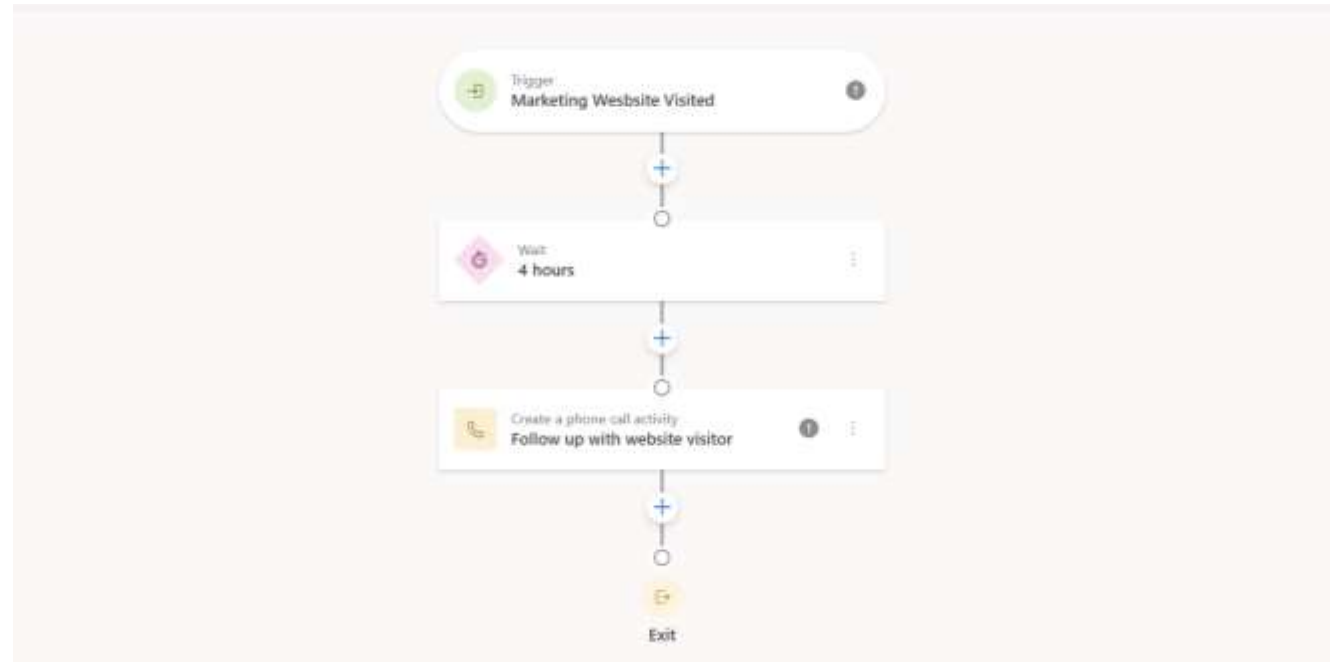



🚀 Send a survey, test a new experience, or offer promotions to a specific number of customers to a random sample of customers.

# Engage customers with personalized messages based on website interactions

Create consistent personalized experiences across your brand's digital touchpoints by triggering journeys and making decisions based on all known user interactions, from messages to web pages.

- Easily generate a tracking script and embed it in your website.
- Use web interaction triggers to build personalized customer journeys.
- Add web interactions such as clicks and page visits as criteria to your scoring models and intent criteria.
- Get a holistic view of your customer engagement leveraging first-party data, protecting your customer privacy, and complying with data privacy regulations.



 engage your customers when they show interest by sending a personalized offer after they visit your website.

# Service experience directly impacts business performance

83%

of customers agree that great service will turn them from one-time into life-time shoppers<sup>1</sup>

96%

will leave your business if you deliver poor customer service<sup>2</sup>

180%

market share growth for customer-obsessed companies<sup>3</sup>

\$7B

in incremental revenue for organizations that resolve customer issues on first contact<sup>4</sup>



<sup>1</sup>Forbes. [Is Customer Service Still Important? On A Scale Of 1 To 10, It's An 11.](#) Jul. 20, 2022

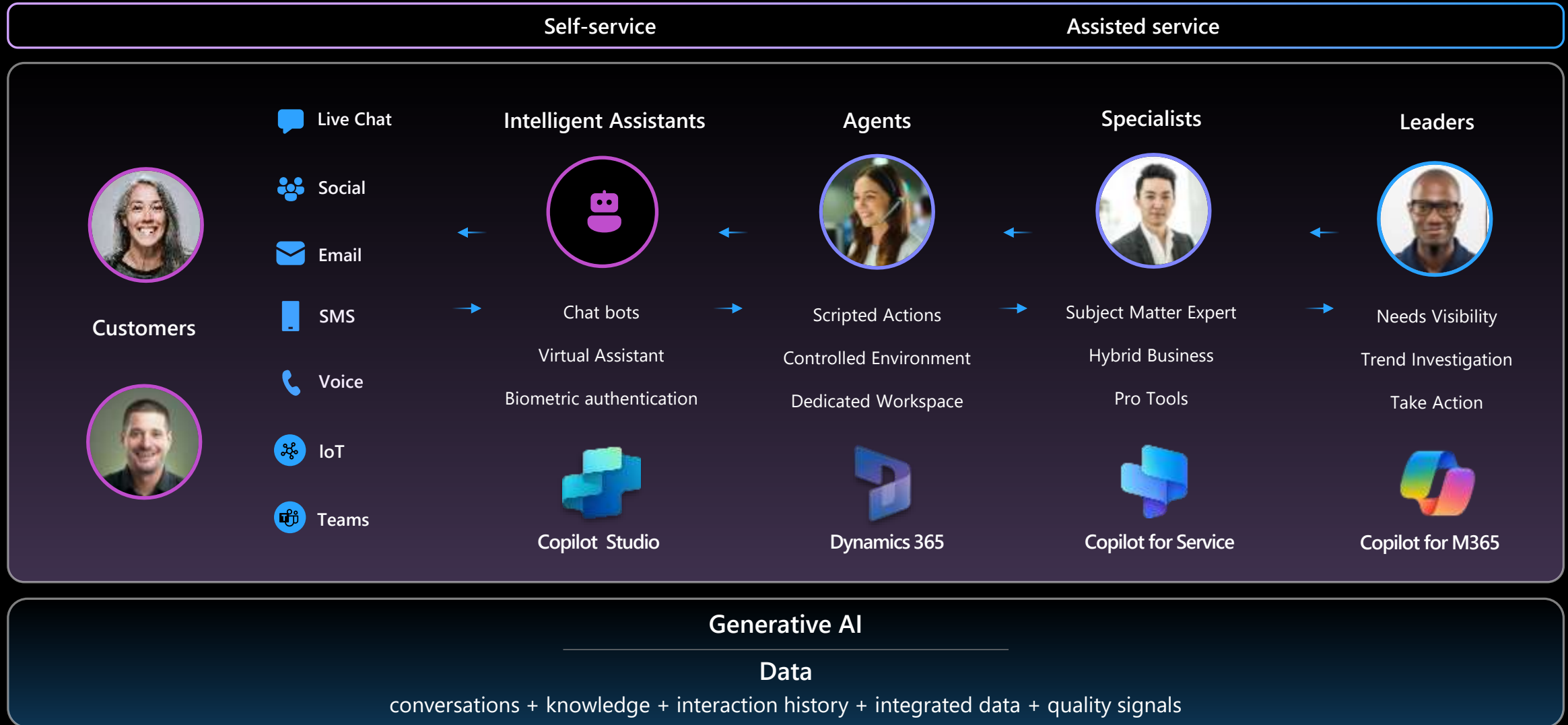
<sup>2</sup>Forbes. [Ninety-Six Percent Of Customers Will Leave You For Bad Customer Service.](#) Jul. 12, 2020.

<sup>3</sup>Forrester. [The State of Customer Obsession, 2023.](#) Oct. 2, 2023.

<sup>4</sup>Forrester. [Money On The Table: Proof That Customer Service Drives Revenue.](#) Jan. 30, 2023. Combined incremental revenue across airline industry (\$705M), auto/home insurance industry (\$1B), and auto industry (\$5B).

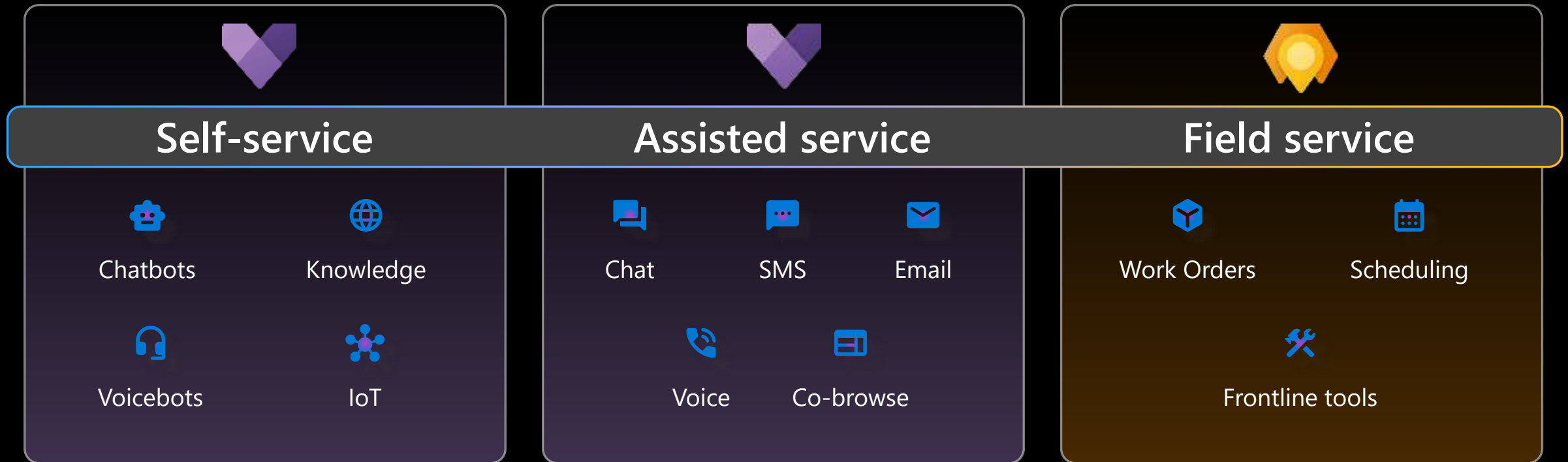


# Deliver on your customer promise with a complete solution



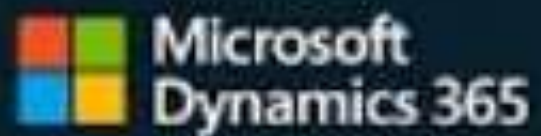


# The spectrum of service



# Service

2024 RELEASE WAVE 1



# Build your own copilot with Microsoft Copilot Studio



# Copilots and Conversational AI

Build and extend across the Microsoft ecosystem

## Custom copilots

**Build** Custom copilots and bots for enterprises and third parties



## Microsoft 365

**Extend** Microsoft 365 Copilot



## Biz Apps & Power Platform

**Extend** Copilot experiences in Dynamics 365 and Power Products



Copilot for Sales



Copilot for Service



Power Platform

## Other Microsoft Copilots

**Extend** other Microsoft Copilot Experiences



## Microsoft Copilot Studio

**Build custom** Copilots | **Extend and customize** 1st party copilots

Bot Framework

Bot Service

Azure

Azure Cognitive

Power Platform

AI Builder



# What's next

# Build Copilot with agent capabilities



# Build the way you want

## Natural language



### Describe to build

The copilot assistant helps build, design and modify copilot topics through natural language

## Graphical approach



### Low code graphical interface

Design your conversation by following the visual canvas

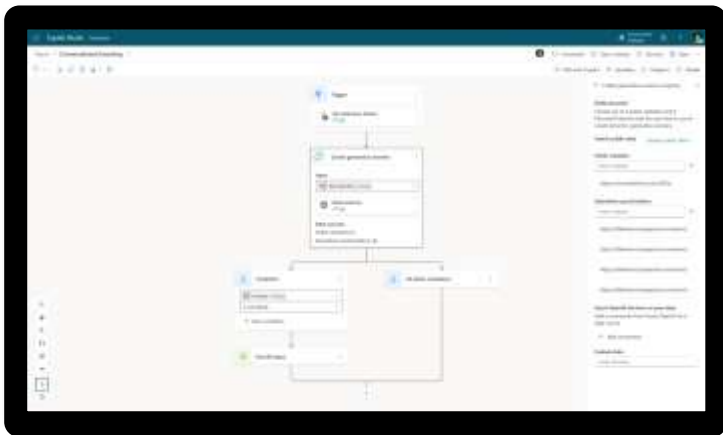
## Declarative code views



### Switch to YAML code views

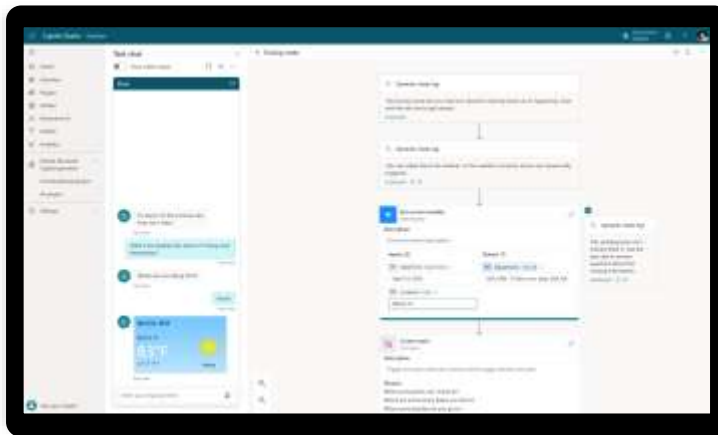
Perfect for sharing and re-using topic logic between developers and copilots

# Generative AI in Copilot Studio



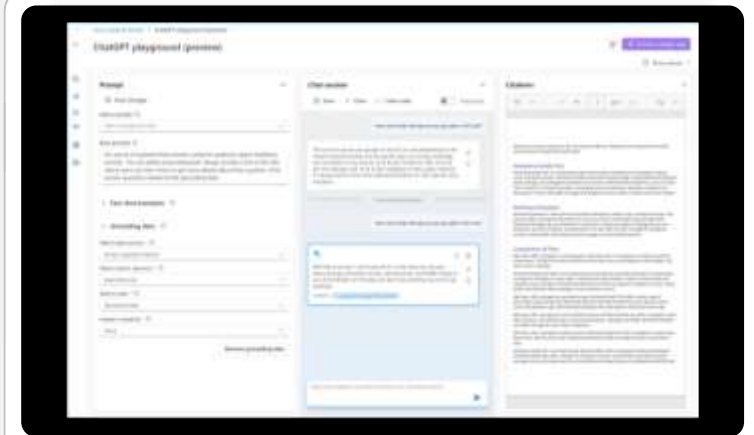
## Generative answers

Dynamically generate multi-turn answers based off an organization's content in real-time.



## Generative actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.



## Bring your own custom Azure OpenAI model

Use Azure OpenAI on your data (ChatGPT, GPT-4...) and connect it to Copilot Studio.



# Integrate with Azure and Azure AI Studio

## AI Search

Azure OpenAI's models enable you to build powerful conversational experiences over your data with Copilot Studio.

## Analytics

Build custom analytics by moving your data into extended data pipelines.

## API Calls

Copilot Studio supports any API / HTTP calls to Azure services.

## Language Services

Connect Conversational Language Understanding, including dialog triggering, interruptions, did-you-mean, and slot filling.



## Bot Framework

Access Bot Framework Composer capabilities natively in Copilot Studio, call Azure Bot Framework skills from existing, and update and extend bots.

## Application Lifecycle Management

Works with Azure DevOps for full ALM and solution management.

## Telemetry

Use Azure app insights for custom telemetry on copilot usage.

## Knowledge Base

Bring Azure Custom Question Answering into your copilot.

# The end-to-end copilot conversation

## 1. Authored Topics

Organizations control their critical topics by designing their own specific processes and workflows.

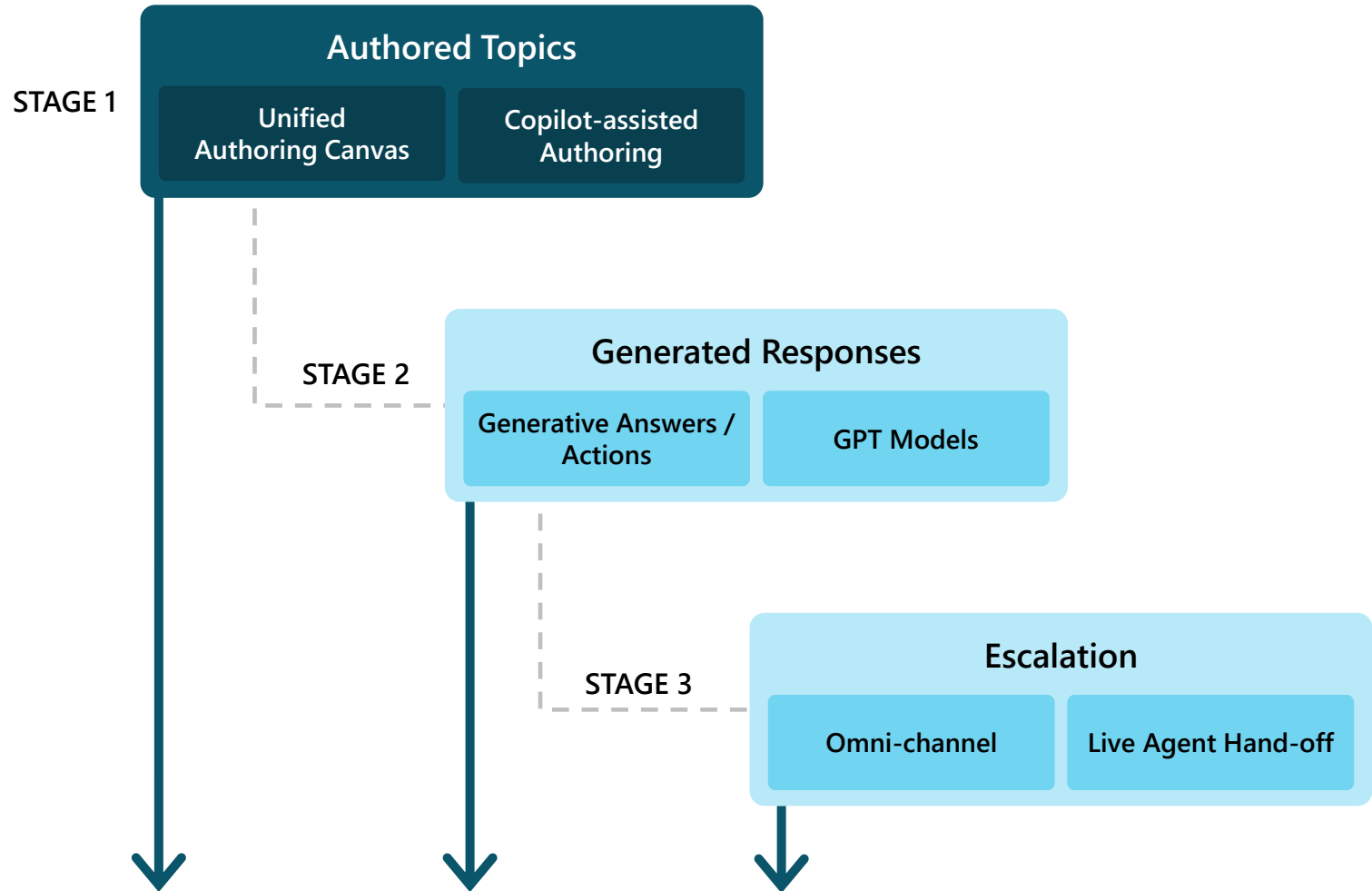
## 2. Generated Responses

Generative AI answers queries at scale that may be duplicative or less complex.

## 3. Escalation

If the copilot can't handle the conversation, it will escalate the conversation to a human assistant.

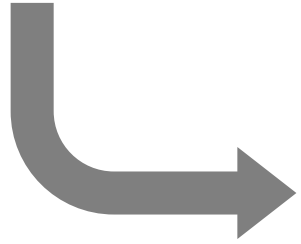
### Copilot Studio Dialog Management



\* Will only move to next stage(s) if necessary

# Hand off to a live agent

If the issue cannot be resolved, the **copilot will hand off the conversation to a live agent** to continue the conversation with **full context** using an **end-to-end customer engagement** platform.



The handoff can coordinate with **1<sup>st</sup> party Microsoft's Digital Contact Center** or **integrate with 3<sup>rd</sup> party contact centers**.

Generic  
engagement  
hub

Dynamics 365  
Customer  
Service

Genesys

Live Person

Salesforce

ServiceNow

# Publish your copilot to multiple channels



# Over 50,000 organizations have used Copilot Studio

These organizations were able to improve performance and efficiency while reducing their costs and risks



**Rabobank**

Reduced escalation to human agent by 50%, chat solutions supporting 80k calls per month



**PayPal**

Built an HR/IT copilot for employees that reduced support costs and workload



**HP**

Built a copilot to help customers find the right products for their specific needs



**Holland America Line®**  
SAVOR THE JOURNEY

Employee copilot that now manages 25-40% of internal IT helpdesk calls



**TATA**

10+ copilots for various Tata brands using Copilot Studio



**CINEPLEX**

Built a copilot that has processed over 5,000 refund requests in just 5 months

# Microsoft Dynamics 365 CRM suite



## Dynamics 365 Customer Insights

360-degree view of the customer

Cohesive customer journeys



## Dynamics 365 Sales

Seamless sales management and optimization



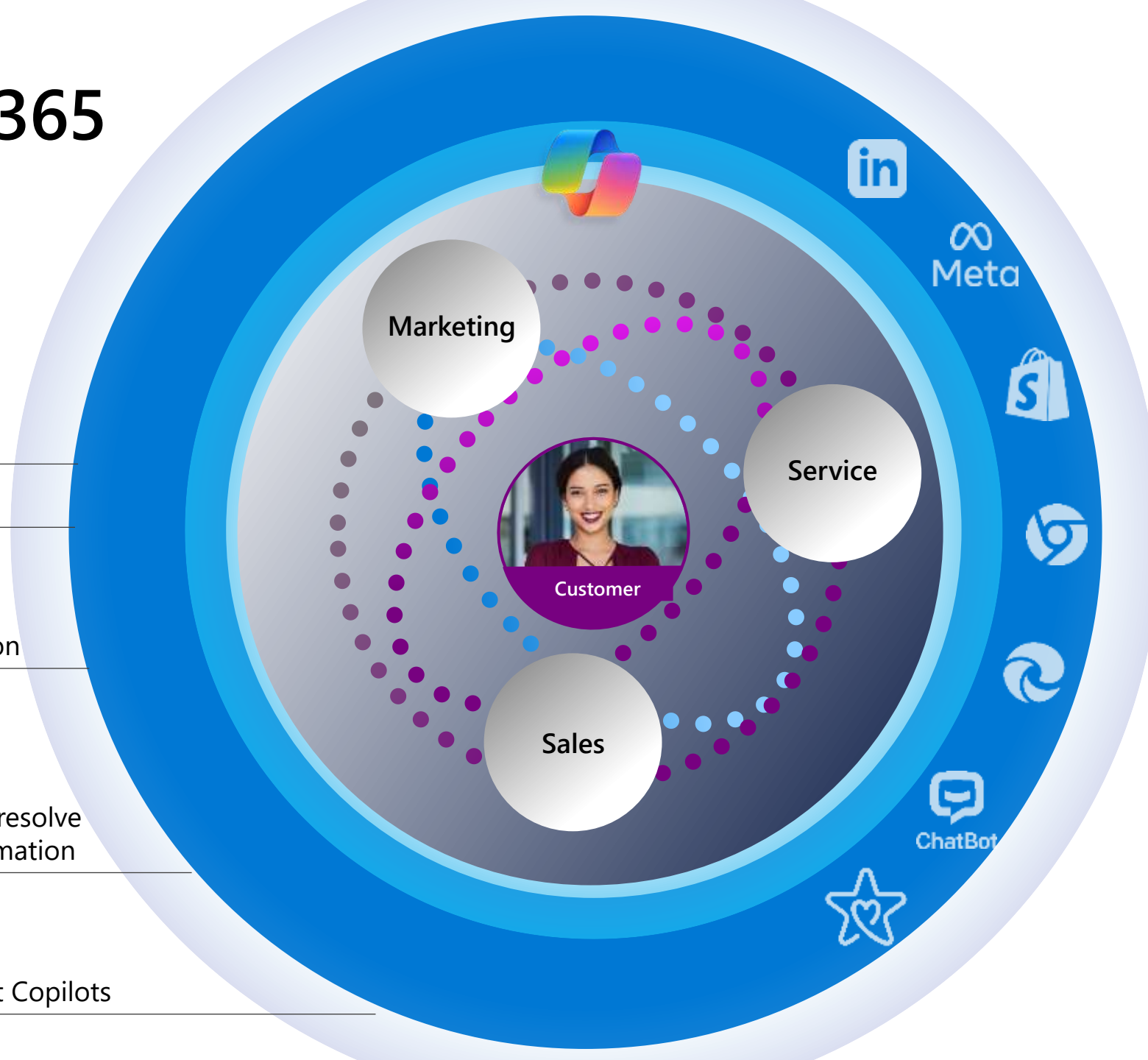
## Dynamics 365 Customer Service

Empower agents(digital and employees) to resolve issues quickly using generative AI and automation

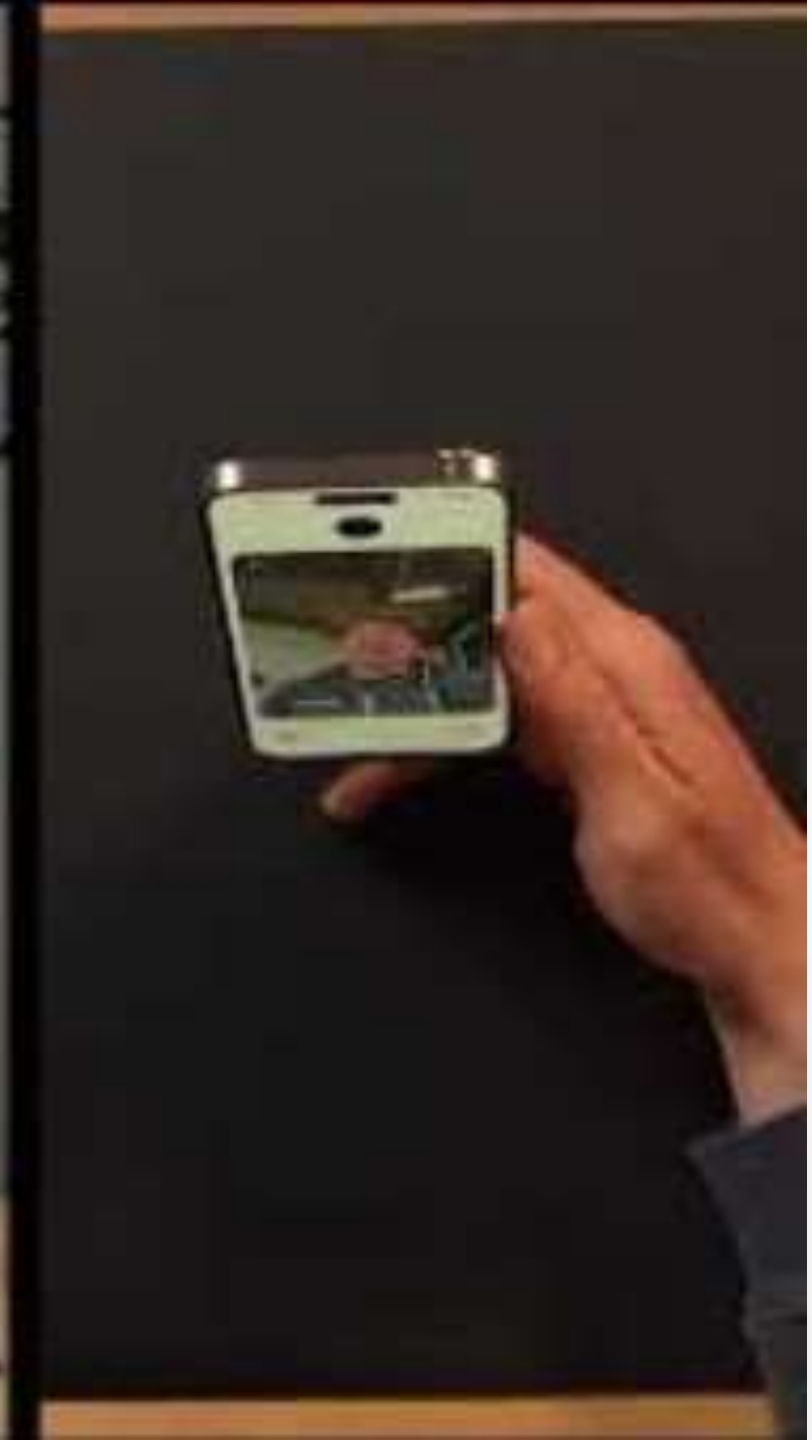


## Copilot Studio

Build Custom Copilots and extend Microsoft Copilots







The potential of AI is clear...  
the question is how you will you utilize it?

