



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







# AI Transformation

# AI Transformation

## Opportunities



Enrich employee  
experiences



Reinvent customer  
engagement







Reshape business  
processes



Bend the curve on  
innovation




# AI Transformation

## Opportunities

-  Enrich employee experiences
-  Reinvent customer engagement
-  Reshape business processes
-  Bend the curve on innovation



## Approach

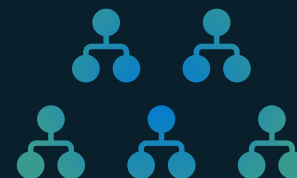
-  Copilot + Agent empowerment
-  Differentiated AI solutions
-  Cybersecurity foundation



Copilot

Everyone has a  
Copilot

+

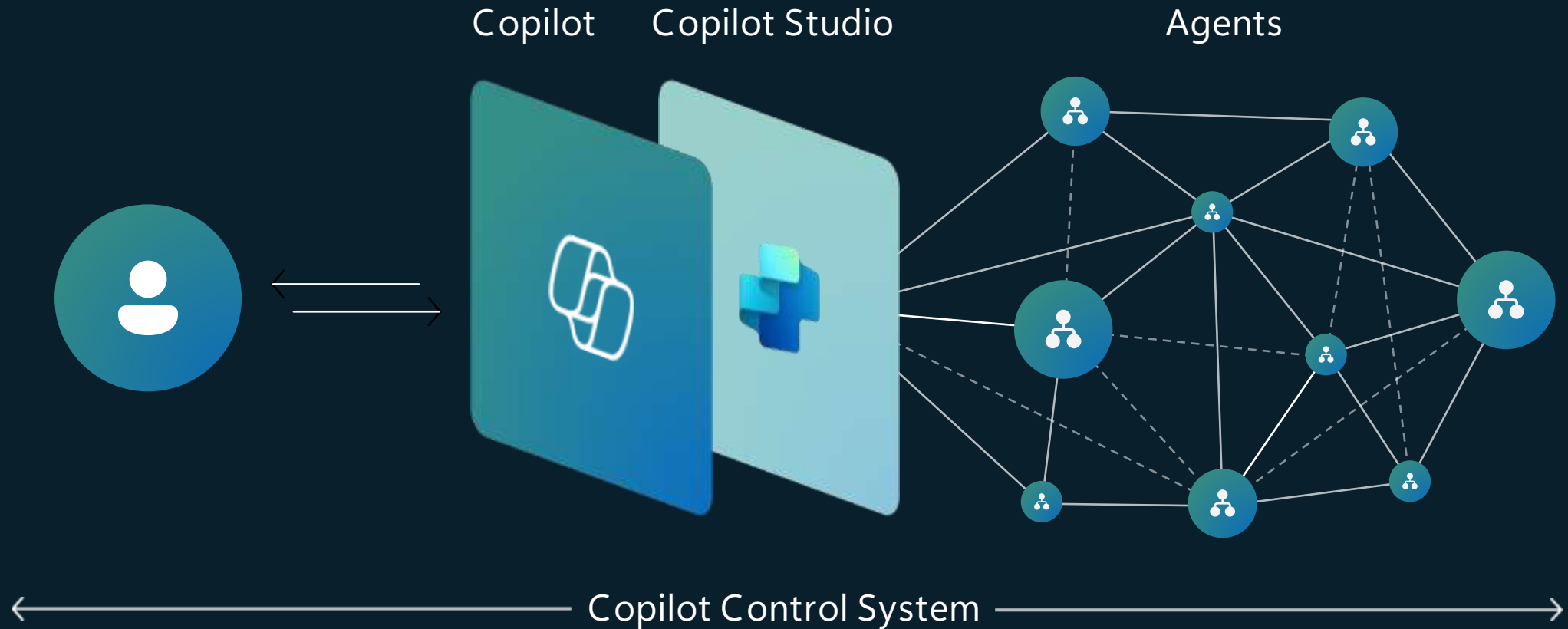


Agents

Every business process  
transformed by agents



# Copilot is the UI for AI



# Stages of AI transformation



# Can you transform like this?



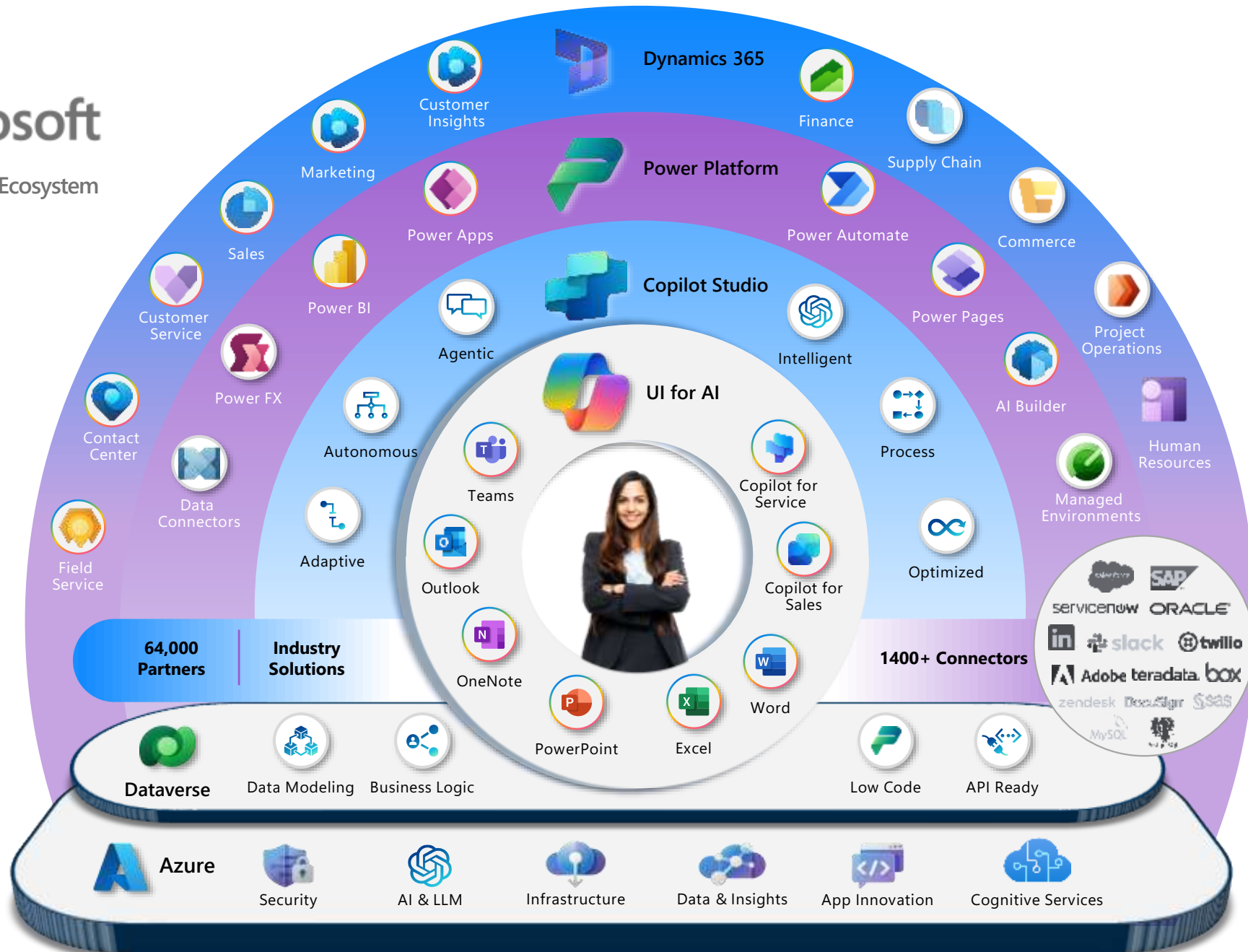


# Wouldn't it be easier to do it like this?





## Business Applications Ecosystem



# Release planner

The screenshot shows the Microsoft Dynamics 365 Release Planner web application. The top navigation bar includes the Microsoft logo, 'Release Planner', and links for Products, Solutions, Pricing, Partners, Platform, Resources, Support, and Community. The user is logged in as 'Ege in' with the language set to 'English'. The main header displays 'Dynamics 365 and Microsoft Power Platform Release planner' with 'Share icon' and 'Feedback' buttons. Below the header, there are tabs for 'All release plans' and 'My release plans', and a search bar labeled 'Search by feature name or keyword'. The left sidebar lists various Dynamics 365 modules: Sales, Customer Service, Contact Center, Field Service, Finance, Supply Chain Management, Project Operations, Human Resources, Commerce, Business Central, and Customer Insights - Data. The 'Dynamics 365 Customer Insights - Journeys' module is selected. The main content area features a 'Watch the new highlights!' section with a video thumbnail titled 'Dynamics 365 Customer Insights - Journeys 2025 release wave 1'. Below this, there are links for 'For previous release wave highlight videos' (2024 release wave 2, 2024 release wave 1) and 'For archived plans' (Release Plans Dynamics 365 and Power Platform - Dynamics 365 | Microsoft Learn). A filter bar at the bottom of the main content area shows 'All features included in release plans: 14', 'Planned upcoming features included in release plans: 12', 'Coming soon upcoming features available this month: 1', and 'Try now features released to market: 0'. The bottom section, 'Moments that matter', lists three key updates: 'Understand customer inflows and exits at every journey step' (Updated May 2025), 'Get insights on email engagement with heatmap analytics' (Coming availability Jan 2025), and 'Pause and resume journeys to handle unplanned events' (Ready for review Jan 2025).

Microsoft | Release Planner | Products | Solutions | Pricing | Partners | Platform | Resources | Support | Community | Ege in | English

Dynamics 365 and Microsoft Power Platform Release planner | Share icon | Feedback

All release plans | My release plans | Search by feature name or keyword

Dynamics 365

- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Contact Center
- Dynamics 365 Field Service
- Dynamics 365 Finance
- Finance and operations cross-app capabilities
- Dynamics 365 Supply Chain Management
- Dynamics 365 Project Operations
- Dynamics 365 Human Resources
- Dynamics 365 Commerce
- Dynamics 365 Business Central
- Dynamics 365 Customer Insights - Data
- Dynamics 365 Customer Insights - Journeys**

Watch the new highlights!

Dynamics 365 Customer Insights - Journeys 2025 release wave 1

View data AI to reach customers through new channels

Microsoft Dynamics 365

For previous release wave highlight videos:

- 2024 release wave 2
- 2024 release wave 1

For archived plans:

- Release Plans Dynamics 365 and Power Platform - Dynamics 365 | Microsoft Learn

All features included in release plans: 14 | Planned upcoming features included in release plans: 12 | Coming soon upcoming features available this month: 1 | Try now features released to market: 0

Moments that matter

Understand customer inflows and exits at every journey step	Updated	Planned availability May 2025	+	▼
Get insights on email engagement with heatmap analytics	Upcoming	Coming availability Jan 2025	+	▼
Pause and resume journeys to handle unplanned events	Upcoming	Ready for review Jan 2025	+	▼

Microsoft Dynamics 365 - Release Plans





# Copilot Studio

Copilot Studio is your tool for **building agents** and **extending Microsoft 365 Copilot**.



Meet your users where they already are



Access everything in one place



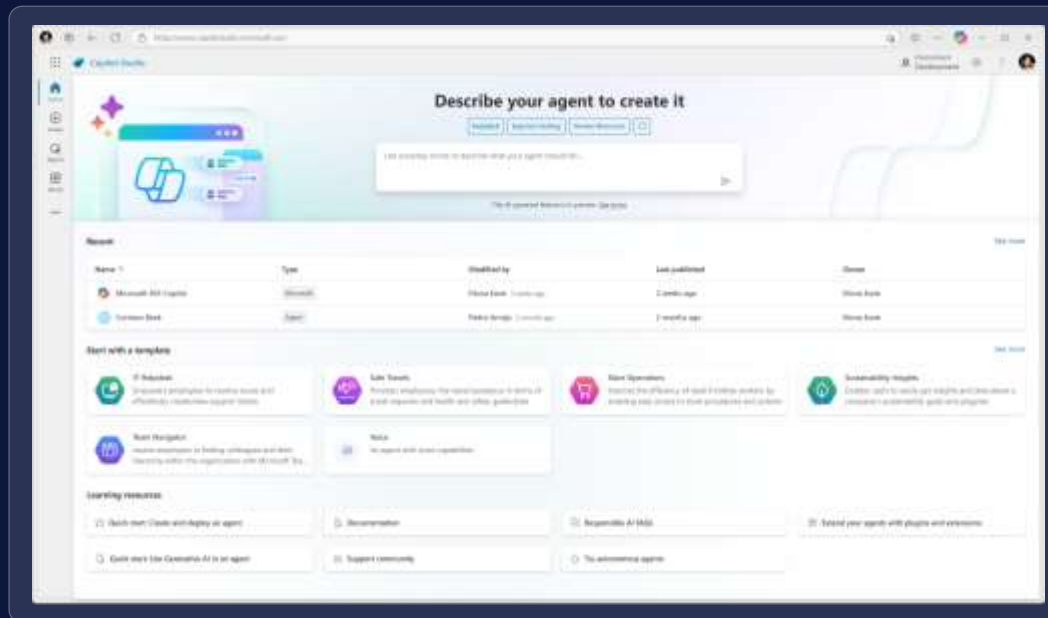
Automate your workflows



Integrate with your external apps



Connect to your data in Microsoft 365



Building enterprise agents to transform business processes



Enhancing MS Copilot to improve information workers productivity



Works with Azure Foundry to build custom AI solutions

Microsoft 365

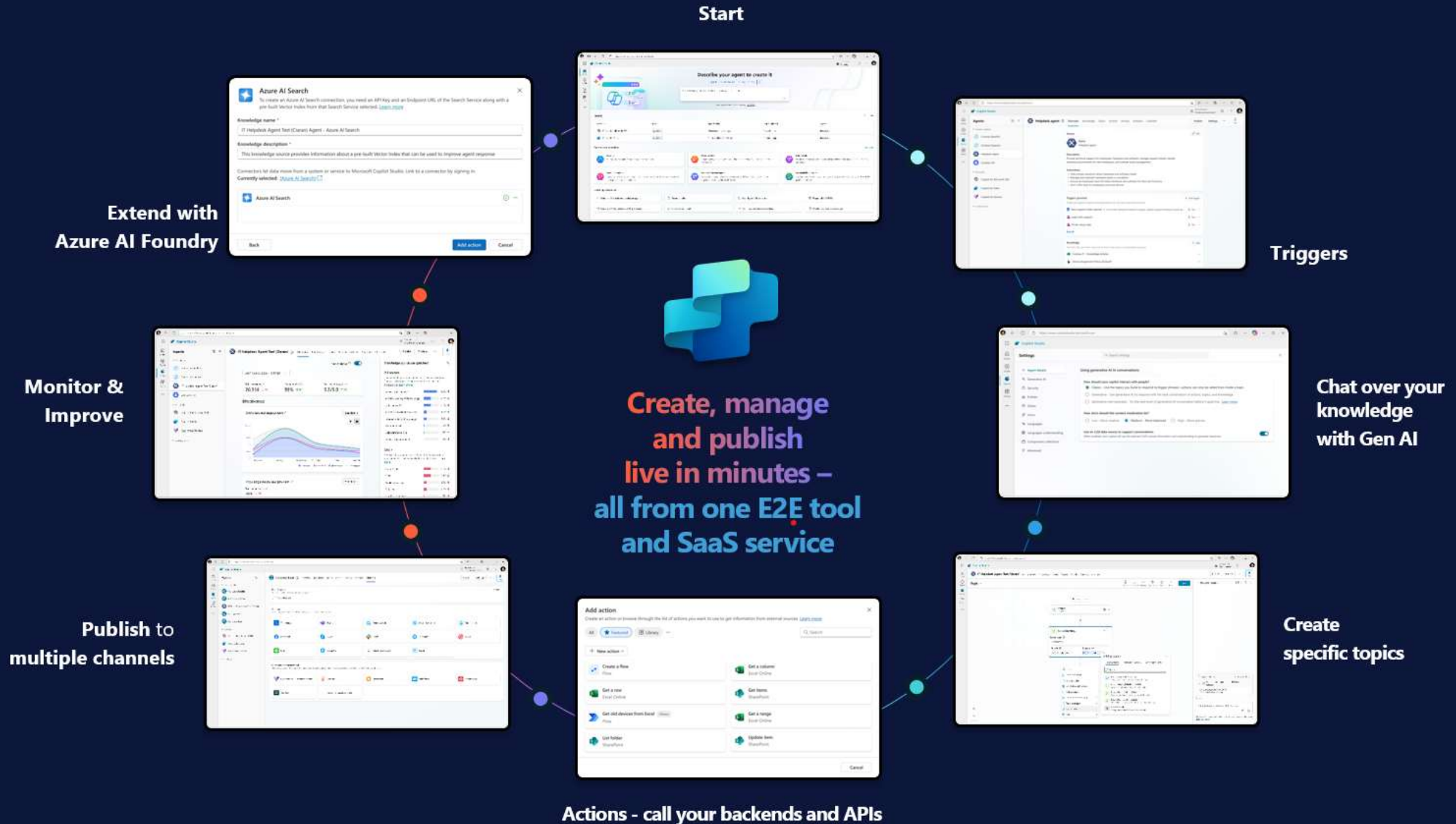
# Copilot Studio



Microsoft



# Transforming Enterprise Business Processes with MCS







Knowledge

AI  
Enhancements

Autonomous  
Agents

Multi-Agents

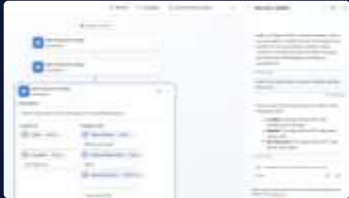
Channel  
Improvements

Testing  
Capabilities

Analytics

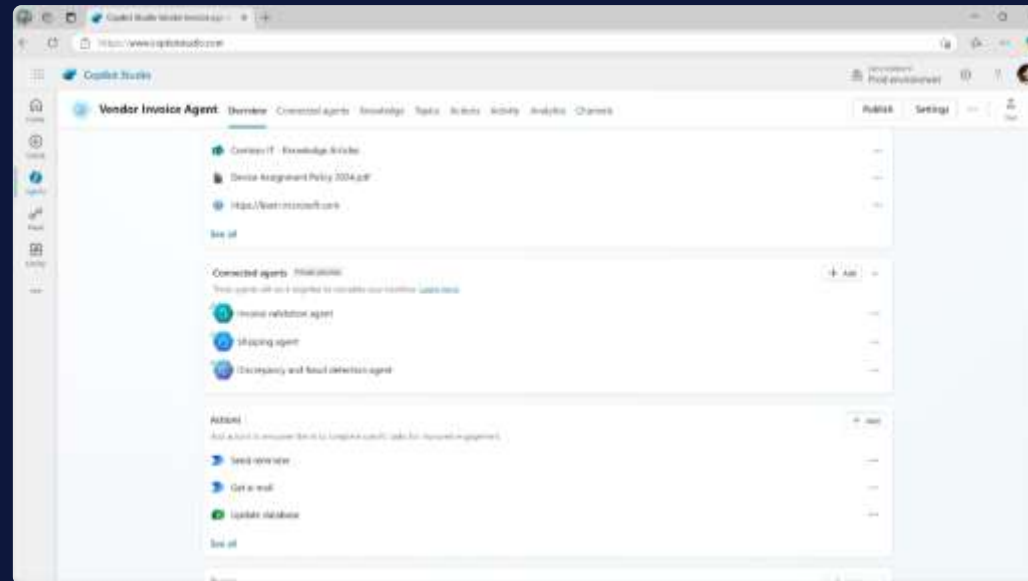
## Generative Actions and Orchestration

GA of Generative orchestration  
and Actions



## Multi-Agent Support

Agents can now call other agents to handle specific user queries



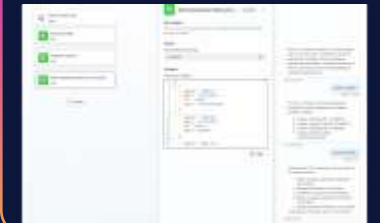
## Enhanced testing for multi agent scenarios

See which agents your agent  
calls upon to achieve its goals,  
with visibility into which tools  
and knowledge are used by  
each agent

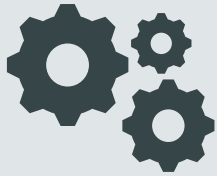


## Multi-lingual Support in the orchestrator

Now easily build and  
configure your actions in one  
language and test it in a  
language of your choice



# Two approaches for automation



## Rules-based

### When you need predictability

**Objective** is specific

**Inputs** are structured and static

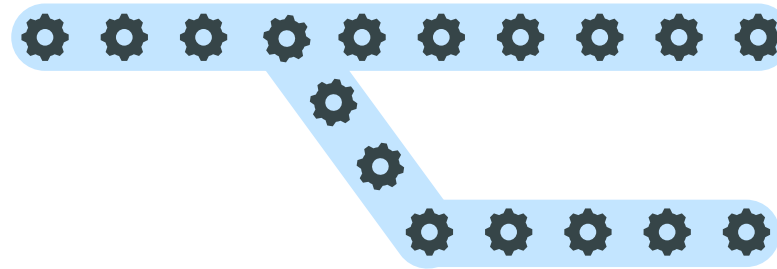
**Task** is clearly defined

#### How it works

**Steps** are prescribed in advance

**Paths** are fixed

*"assembly line"*



## Outcome-based

### When you need flexibility

**Objective** is broad

**Inputs** are unstructured and may change

**Tasks** are numerous or ambiguous

#### How it works

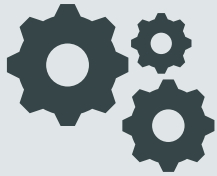
**Steps** are assembled by AI in real-time

**Paths** may vary

*"reasoning"*



# Add intelligence or structure where needed



## Rules-based

### Add intelligent steps

to optimize structured processes with **strategic use** of traditional and generative AI for

- decision making
- unstructured inputs
- data / document processing
- simplification of complex steps



## Outcome-based

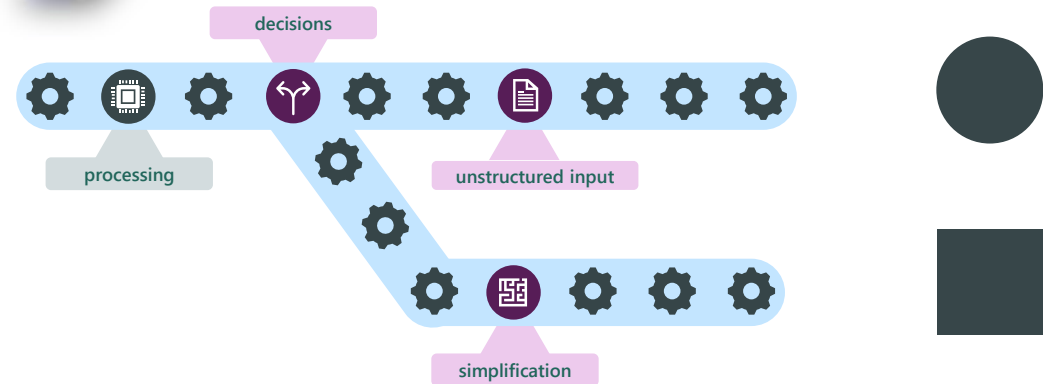
### Add rules based workflows

to **enhance an agent's skill** with prescriptive actions for scenarios requiring

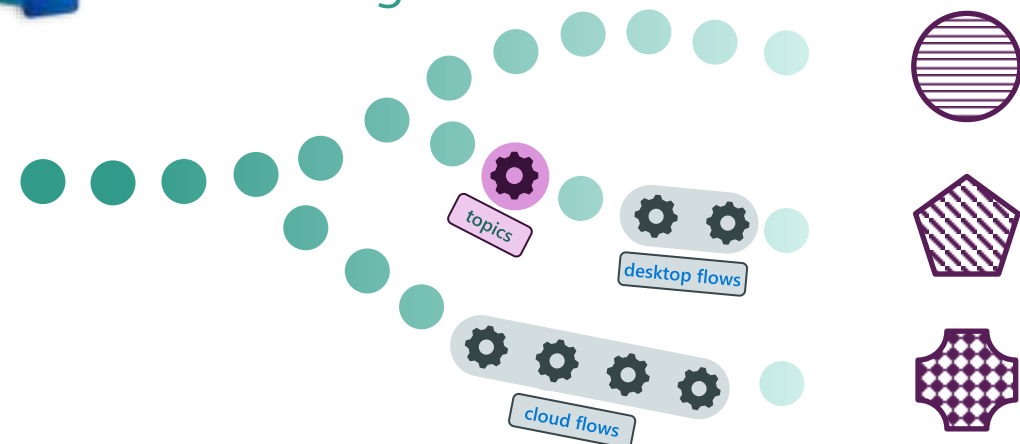
- consistency
- predictability
- compliance and audit



## Agent flows



## Custom agents

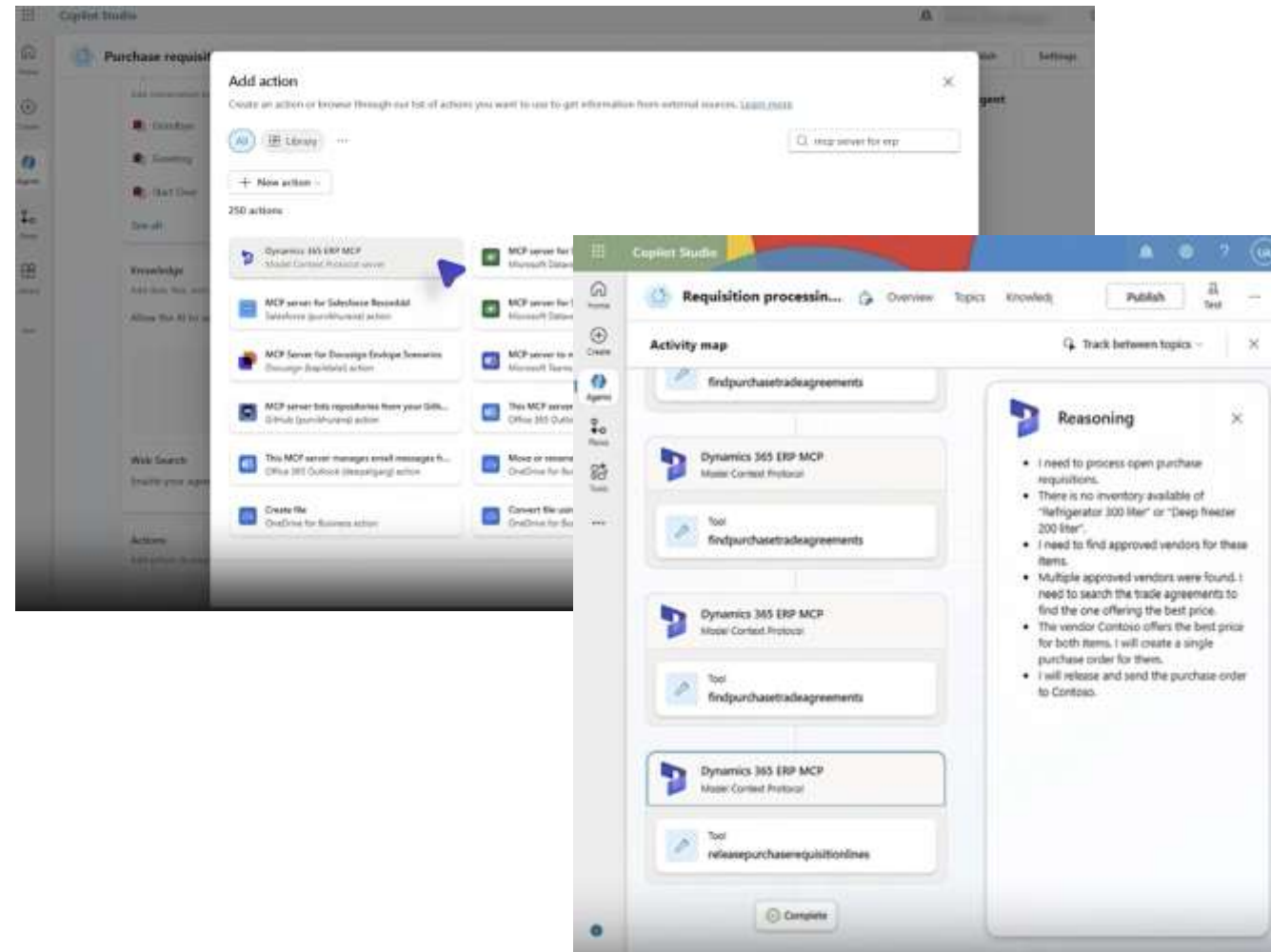




# Model-Context Protocol (MCP) servers for Dynamics 365

Accelerate your journey to the Frontier Firm with the most agent-ready business applications

- **Enhance agent intelligence:** Make agents more context aware with access to knowledge, actions and tools from Dynamics 365 Business applications (ERP, Sales, Service and Business Central)
- **Faster time to value:** Enable customers and partners to rapidly build MCP compliant agents to execute processes autonomously with minimal API and integration efforts
- **Secure, consistent and reliable:** Employ enterprise security and governance while making MCP servers available in MCS using the connector infrastructure.

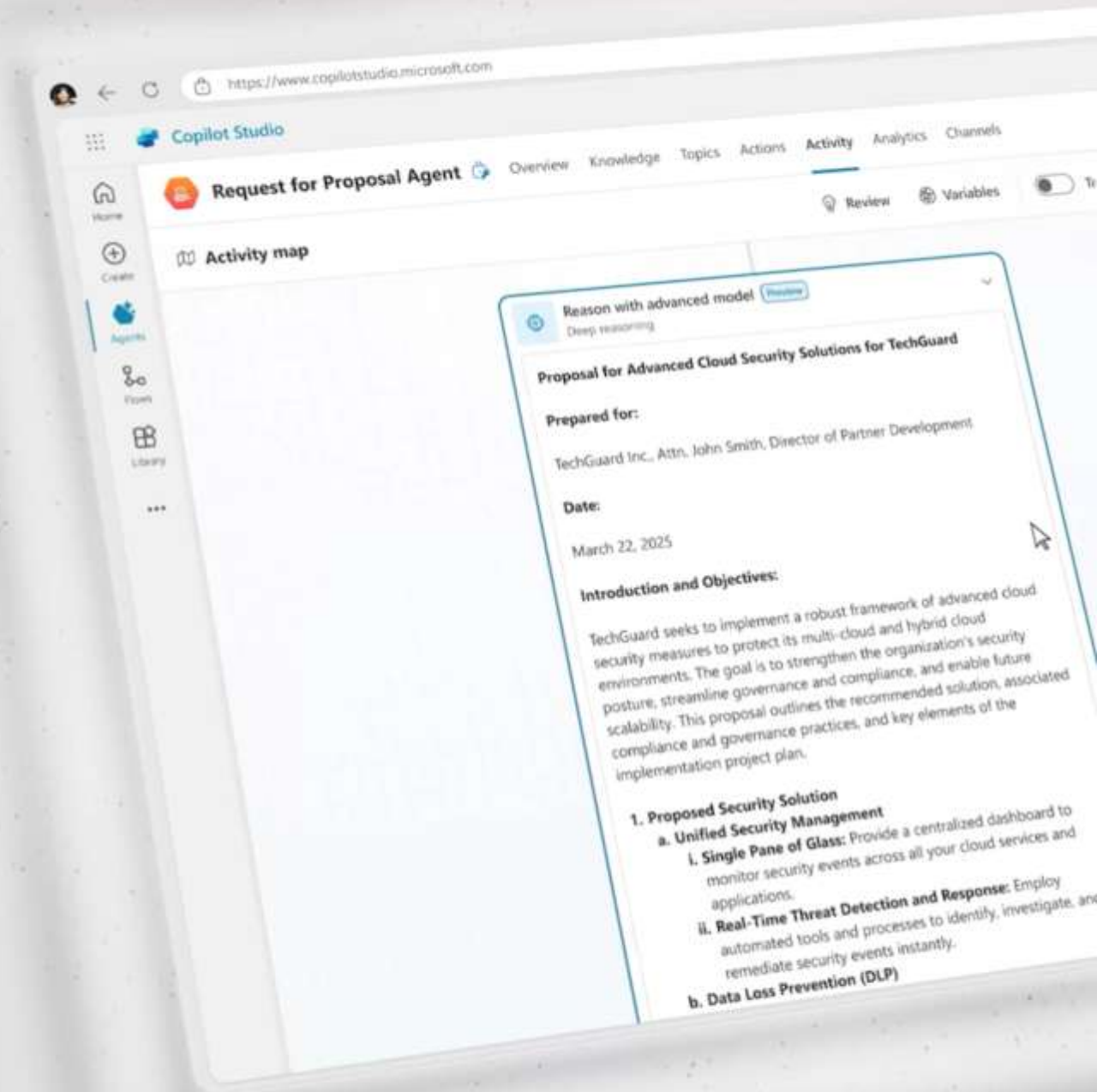


**AVAILABILITY:** Public preview at Build.

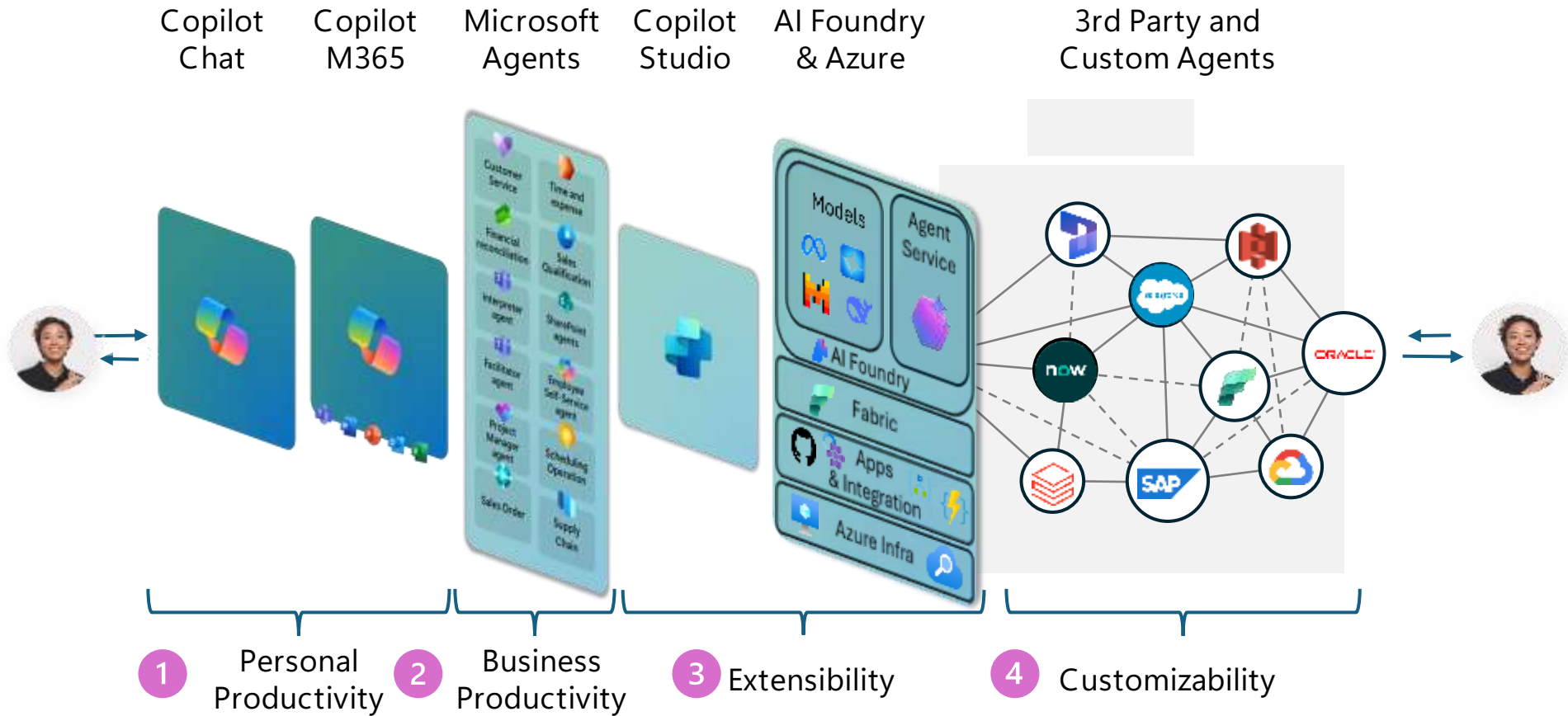
**Read the blog (5/20):** <https://aka.ms/BUILDMCP>

# Microsoft Copilot Studio

## Deep Reasoning



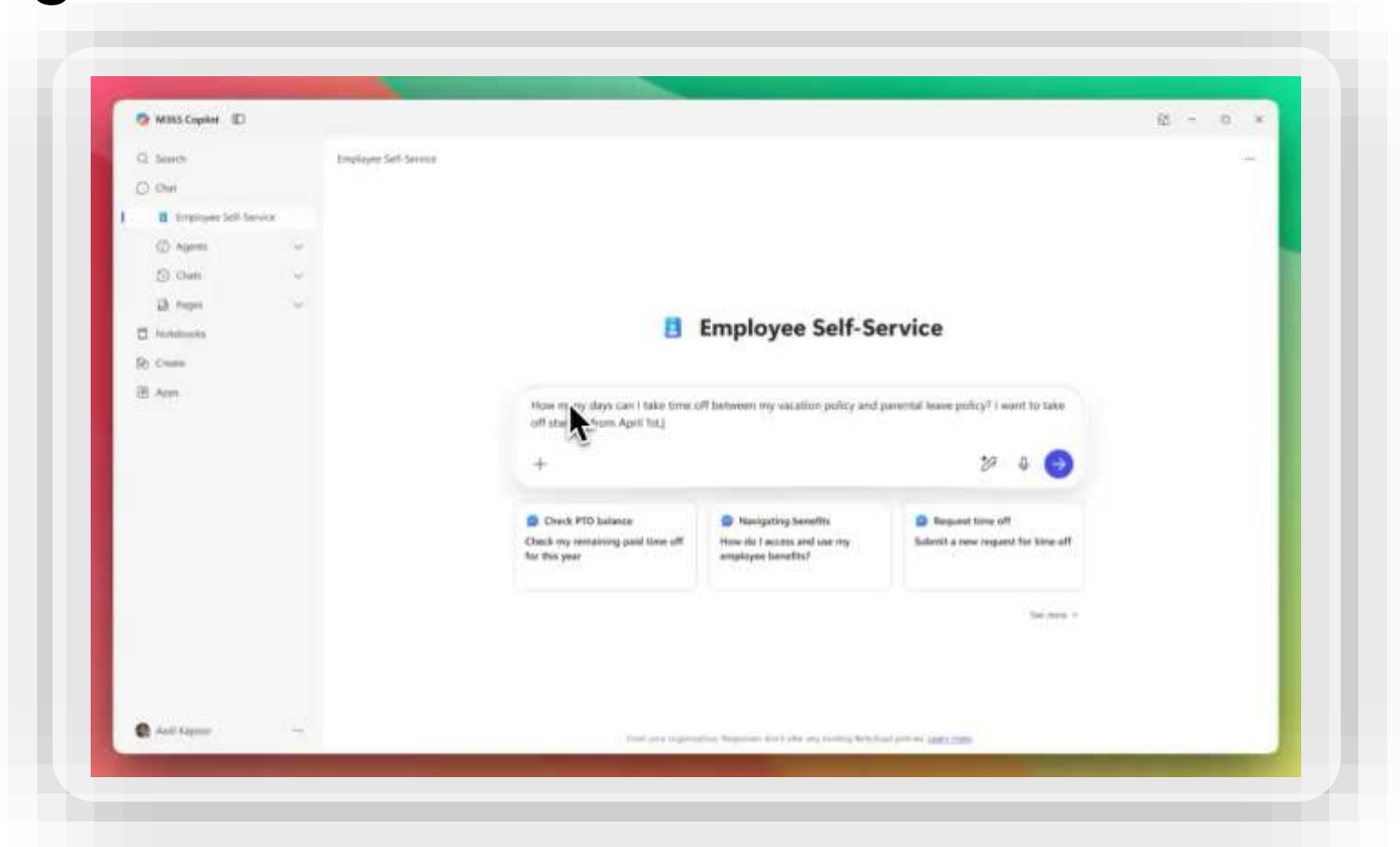
# AI Powered Organisations





# Employee Self-Service Agent

- **Employee Self-Service** can help you find personalized, official answers to workplace policy questions based on employee data (*ex: location, role type*)
- With this agent, you can update information and create tickets connected to third-party systems like ServiceNow, Workday, and SAP SuccessFactors for completeness. It also seamlessly connects with 3P agents like the ServiceNow Now Assist live agent and Workday Agent to continue work.
- **Employee Self-Service** can help organizations reduce inquiries to Service teams, including HR, IT, facilities, and beyond.



**AVAILABILITY: General Availability June 2025**

## Employee Self-Service

Check your PTO balance

How many vacation days do I have left this year?

Ask about policies

Get answers about company rules

Look up payroll details

Check my direct deposit

Access company resources

How do I get company resources or information about?

View my training opportunities

How can I get training to grow my skills?

Review opportunities

Check the status of my pending request

Quick Links

Home

My Profile

Employee Self-Service

Tools

My Profile

Security

Service

My Profile

Self-Service options

Quick options

Item

Item name

Microsoft 365 E3 License

1000000

Microsoft 365 E3 License

1000000

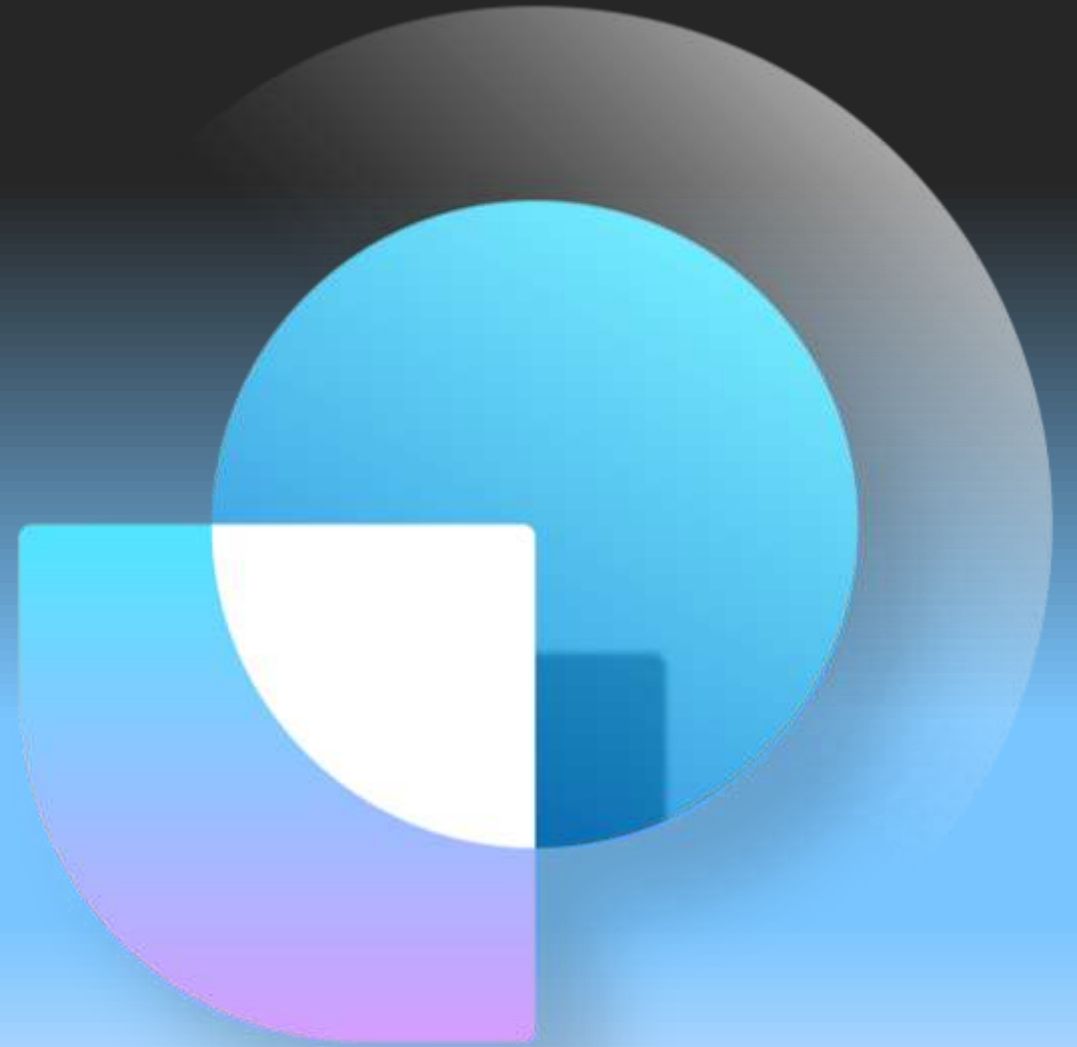
Microsoft 365 E3 License

1000000

Service



# Customer Insights



# Customer Data Platform

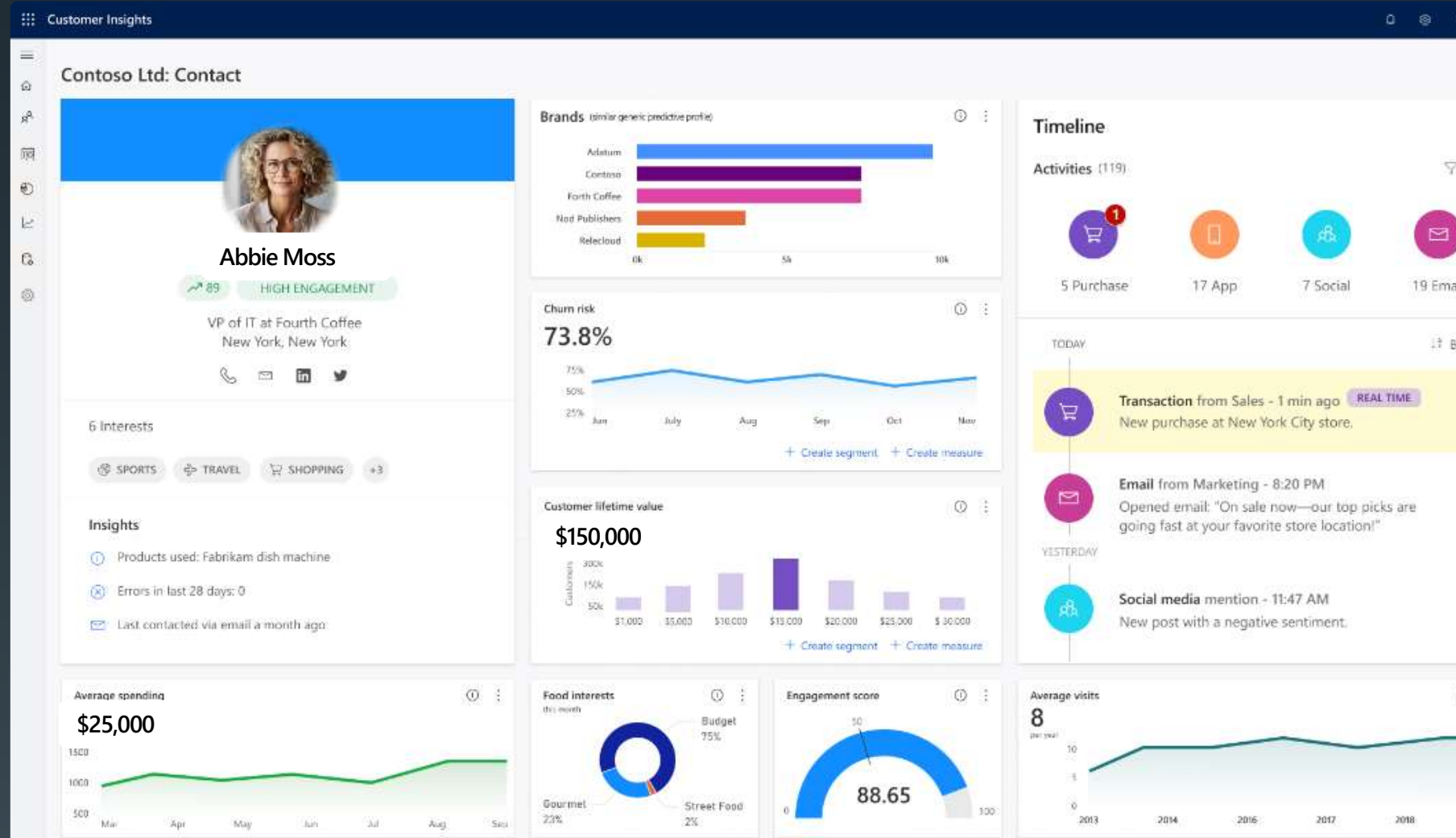
Unified customer understanding

Expand your perspective

Predict with AI

AI-generated segments

Multi channel activation



Dynamics 365  
Customer Insights

Deeply understand your customers and gain a comprehensive view across touchpoints—including transactions, campaign responses, in-store or web visits, mobile app, loyalty redemptions, customer service encounters, social interactions, sentiment, or IoT signals. With Dynamics 365 Customer Insights, import the data or connect to an online service using pre-built connectors for myriad first- and third-party data sources to create this view.

# Get responses grounded in customer insights when chatting with Copilot

Preview – Apr 2025  
GA – July 2025

Sales reps, service agents, and chat bots can access unified customer insights when chatting with Copilot, boosting team efficiency and fostering customer loyalty through personalized, impactful experiences.

- Simply ask Copilot for information about specific customers directly in the flow your work.
- Effortlessly access rich insights about a lead or contact from Customer Insights - Data like predicted lifetime value, propensity to buy, recent transactions, and interactions.
- Insights are seamlessly integrated into your team's workflow, giving them a 360-degree view of the customer.



👤 A sales rep preparing for a meeting with a lead, Mark. He asks Copilot for Mark's predicted lifetime value and propensity to buy. Copilot provides insights from Customer Insights - Data, including Mark's predicted lifetime value, recent purchases, interactions, and highlights his high propensity to buy but also inform about a medium risk of churn due to recent inactivity.



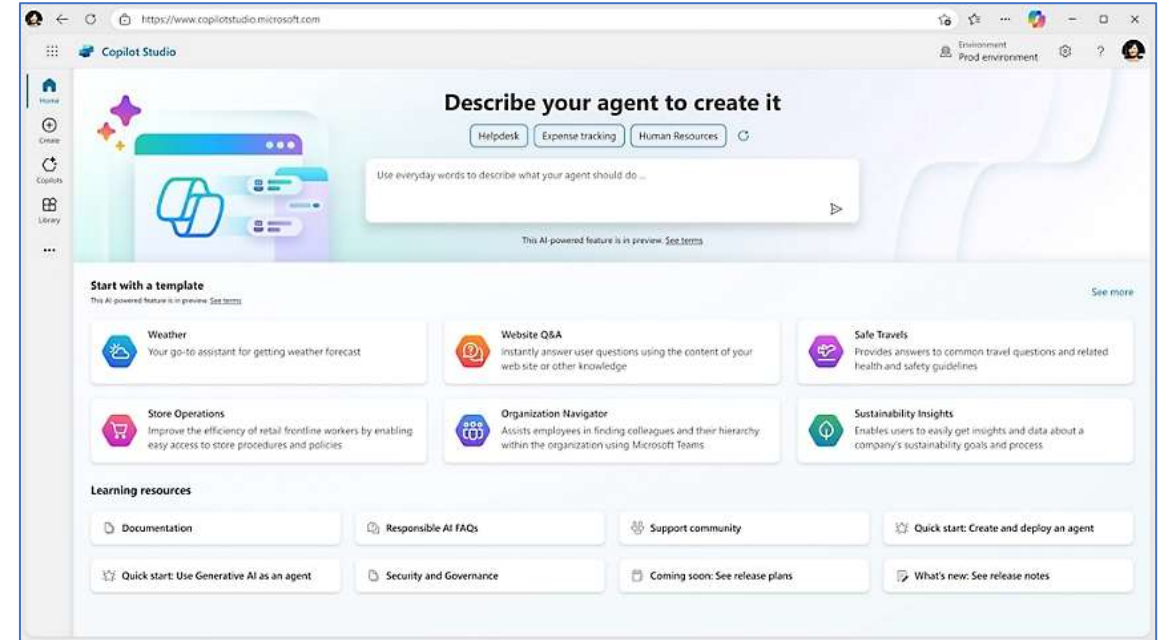


# Increase accuracy of autonomous agents by grounding them in Customer Insights

Preview – Sep 2025  
GA – Dec 2025

Empower your marketing, sales, and service teams with Copilots and autonomous agents that can understand, analyze, and act on insights. Use CI-D as a knowledge source in Microsoft Copilot Studio to transform your rich customer data into a powerful business asset.

- In Microsoft Copilot Studio, you can now add customer profiles, segments, measures, and other insights from Dataverse as knowledge sources for any custom or customizable autonomous agents.
- Every user of the agent instantly gets access to your key customer insights to get their job done.
- Create agents that can perform autonomous actions or respond to changes in your unified customer insights.



🚀 A seller is evaluating a promising new lead named Joe, who recently attended a new product launch event and has an existing relationship with the company. Using data from Customer Insights grounded in the agent in Dynamics 365 Sales, he can now access information about Joe's total spend, his VIP status, and his recent interactions across other touchpoints.



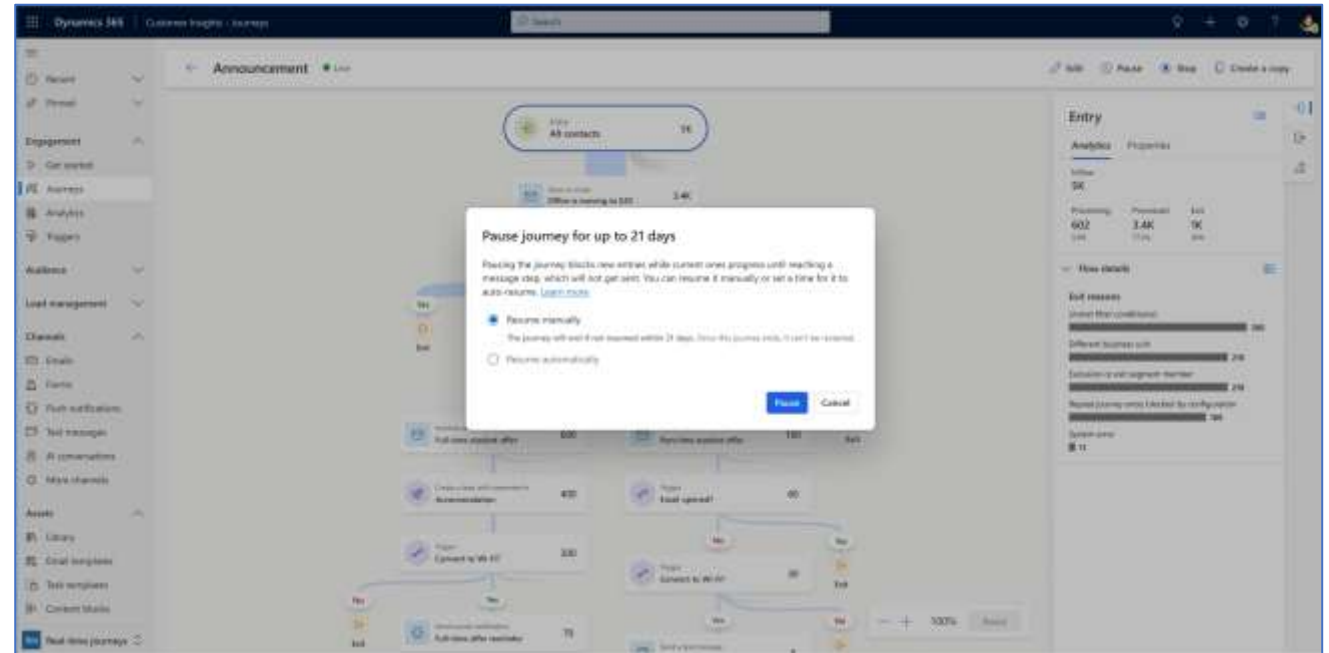
# Customer Journeys



# Easily pause and resume journeys to handle unforeseen or unplanned events

Protect your brand's reputation and maintain control over the customer experience by pausing your journeys during unexpected events.

- Pause a journey manually to prevent new customers from entering.
- Resume a journey manually so new customers can enter.
- If needed, paused journey can be stopped.



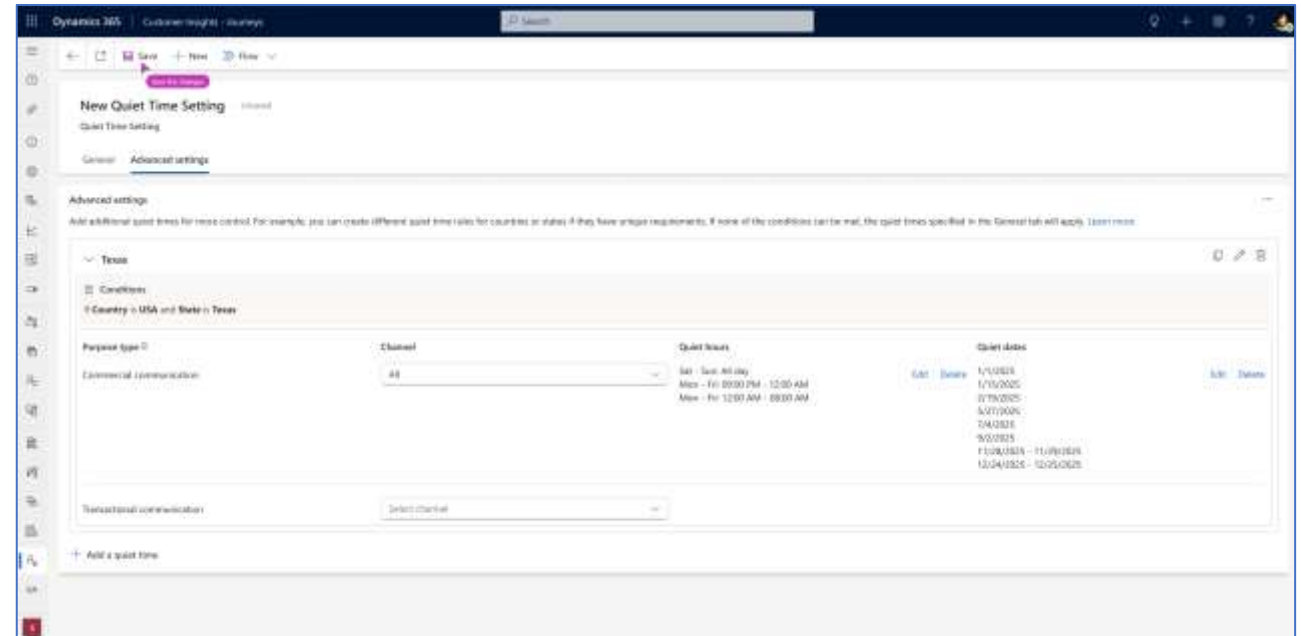
🌸 A bank conducts a campaign to contacts borrowers who are behind on their mortgage payments. When a natural disaster strikes, the bank can effortlessly pause the outreach and resume it once conditions allow.



# Respect customers' quiet time by engaging them based on their geo and time zones

In addition to setting quiet times based on your journey's time zone, set quiet times based on your customers' time zone and region, to make sure customers only receive messages and calls during suitable hours.

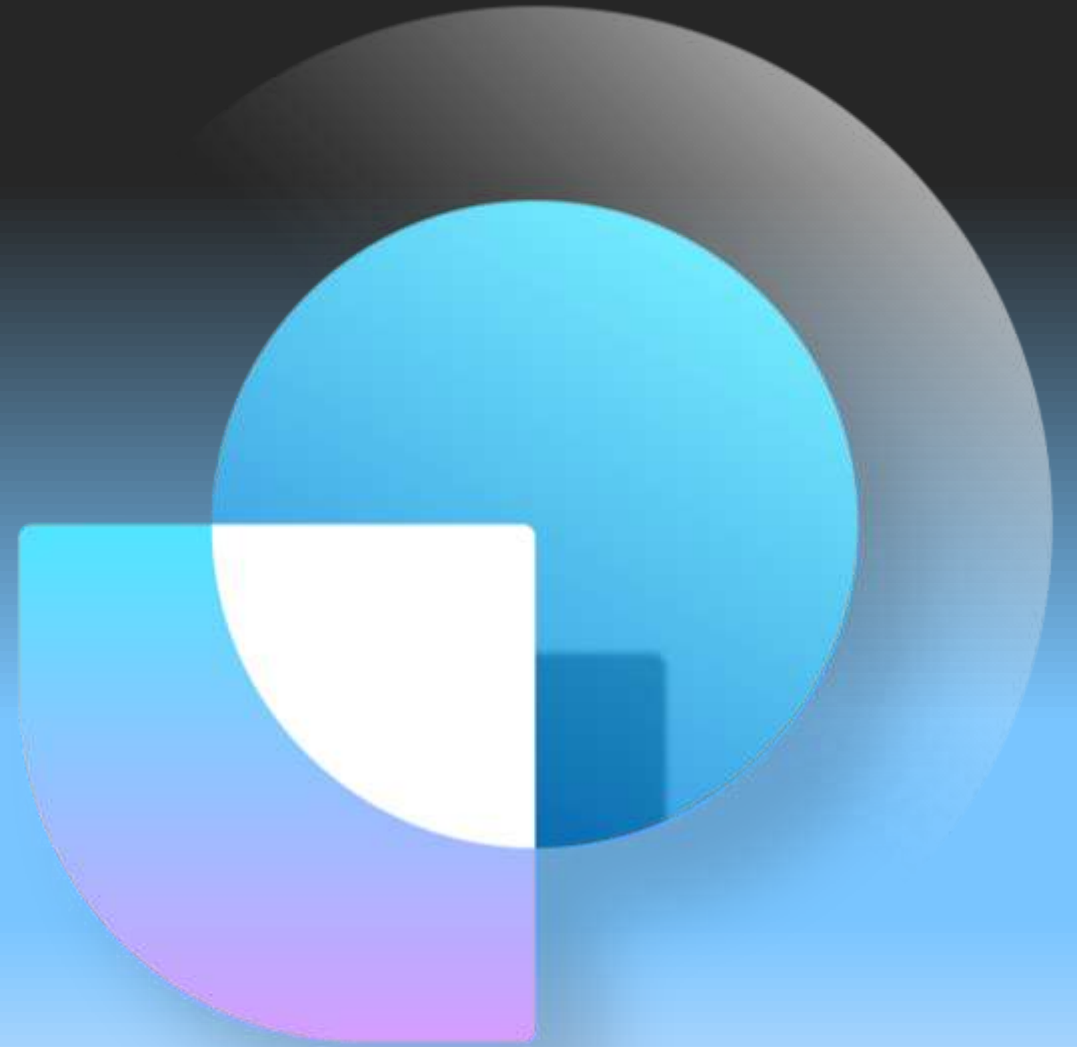
- Ensure adherence to various regulations by establishing quiet time rules and conditions for different geos.
- Set the times, days and dates when customers shouldn't be contacted.
- Upon activation of the journey, interactions are either initiated or queued in accordance with the pre-set rules and the identified customer's time zone or location.



🌐 A global e-commerce has customers spread across multiple countries. In order to respect their customers' time, they set up different quiet rules for customers in the US, Europe, and Asia, ensuring they comply with each region's specific communication regulations.



# Sales





# Smart Grids

←

Opportunities where estimated revenue is ...

Show As

Show Chart

Edit columns

Edit filters

Share

Start typing to add to your query

Reset all

Owner: Me

Status: Open

Est. revenue: 10,000

Visualize

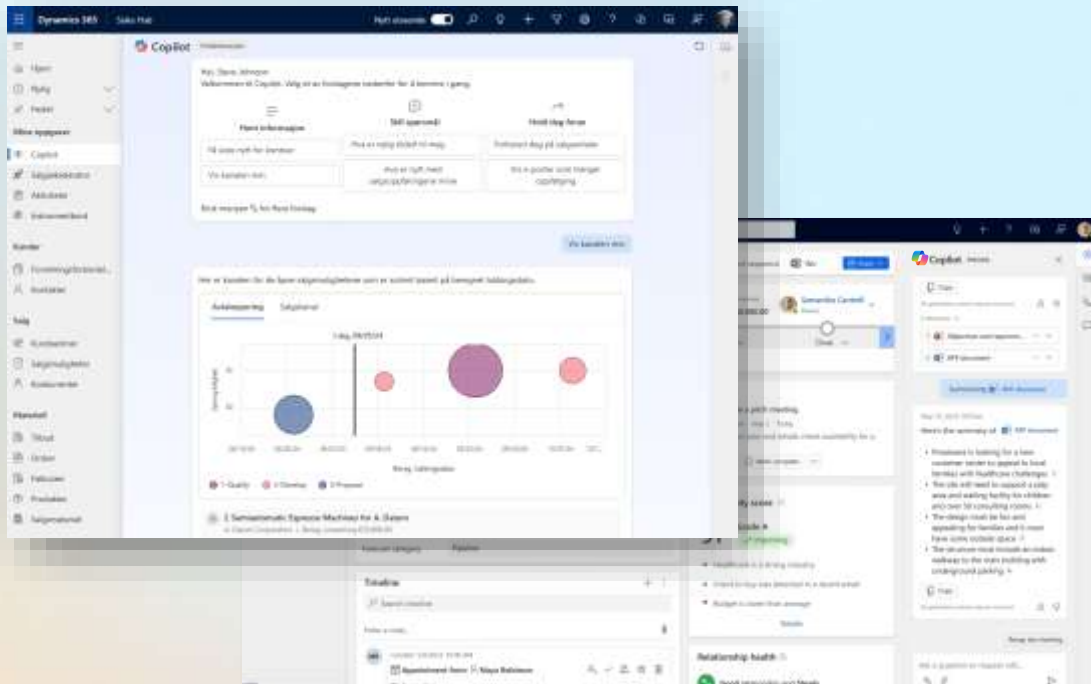
Review AI-generated results for accuracy. Privacy Statement | Feedback to Microsoft

<input type="checkbox"/>	Topic	Potentia...	Est. close ... ↑	Est. reven...	Contact	Account	Probabil...	Rating	Email (Potential
<input type="checkbox"/>	XL Coffee Machines	BrightEdg...	6/30/2025	\$10,000.00	Maria Oliva	BrightEdg...		Warm	



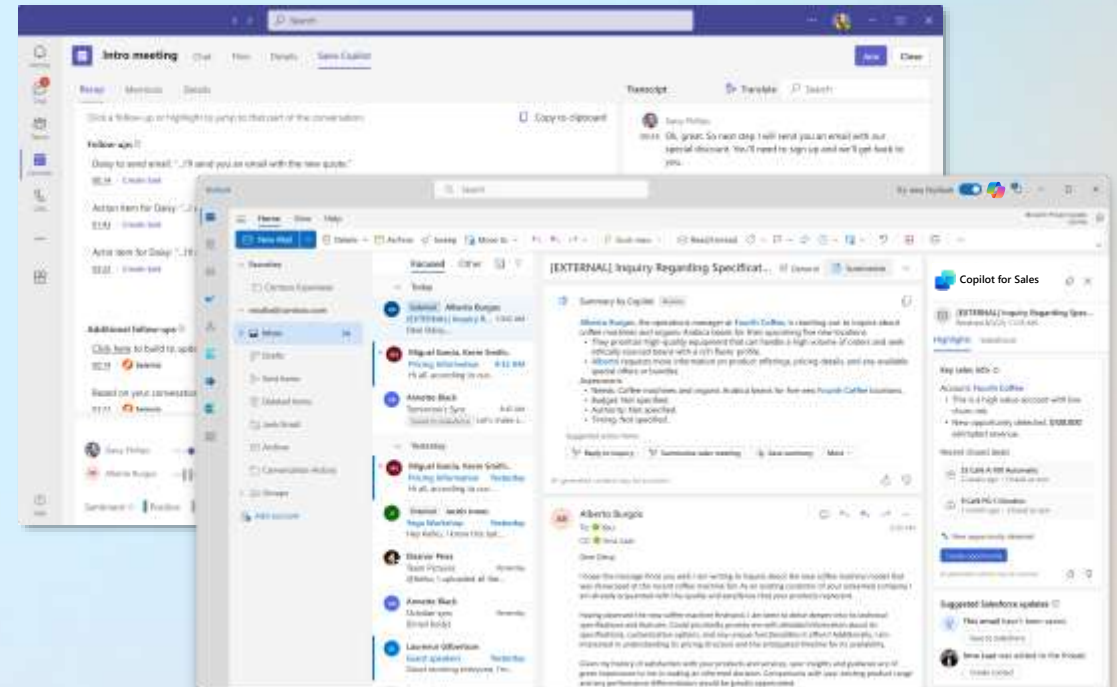
# Copilot in Dynamics 365

**Copilot in Dynamics 365** is available directly in the Dynamics 365 application, providing AI-powered experiences across the solution.



# Microsoft 365 Copilot for Sales

AI-powered assistant designed to provide insights, recommendations, actions, and up-to-date **Dynamics data directly from M365 applications.**



# Copilot Applications Agents



Relationship Managers



Velocity Sellers

Assistive

Autonomous



## Sales Chat

Retrieve business insight and actions with a prompt and natural language experience



## Copilot for Sales

Effortlessly **handle sales meetings and sales email communications, keep CRM up to date** while working in Microsoft 365 Outlook and Teams



## Sales Agent

### Assistive

Take actions when asked, automate workflows, and replace repetitive tasks for users



### Autonomous

Operate independently, dynamically learn, engage and drive leads and enquiries to a close (SDR)



Extensibility



Copilot Studio

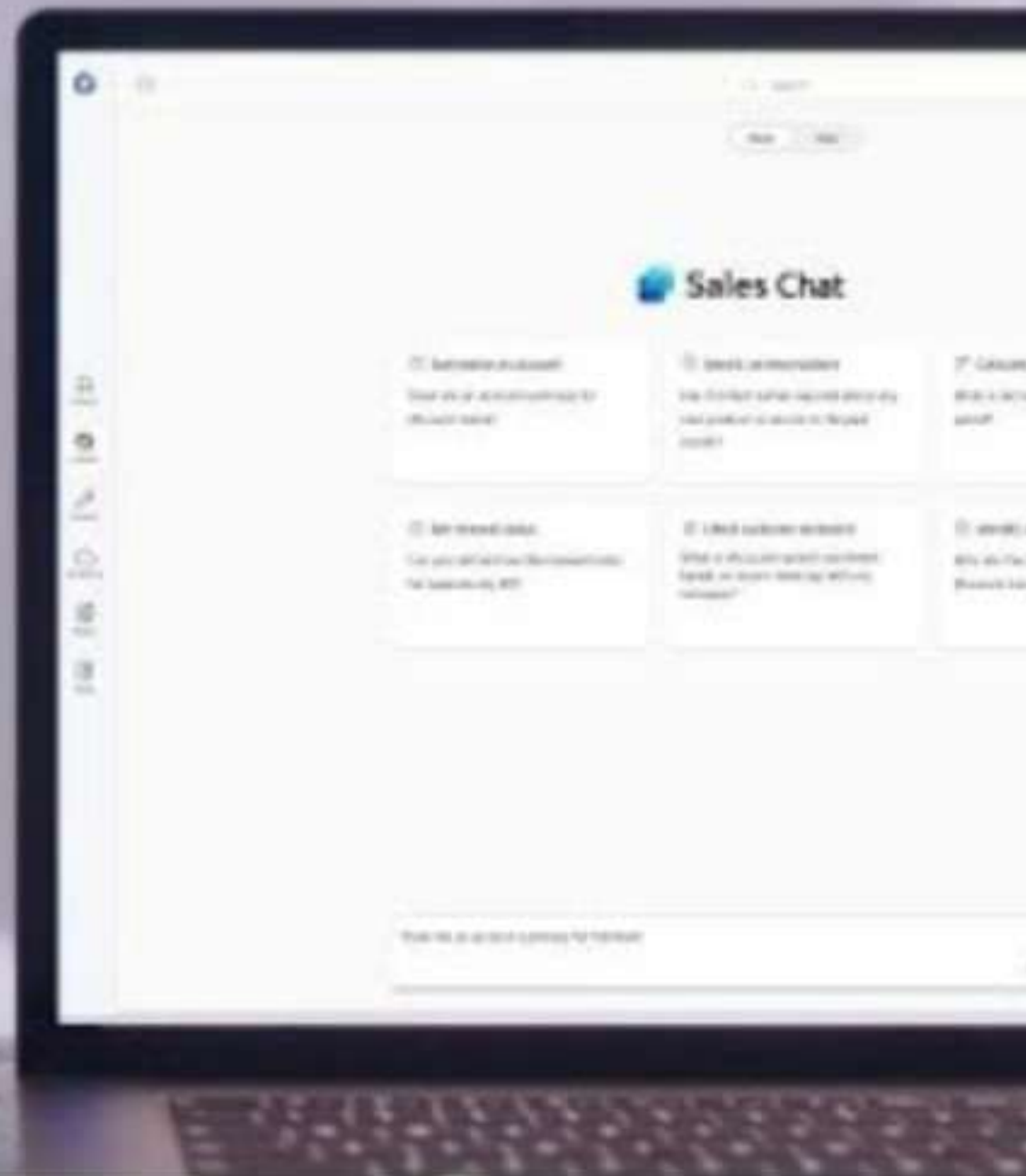


Microsoft 365

# Sales Chat



Microsoft

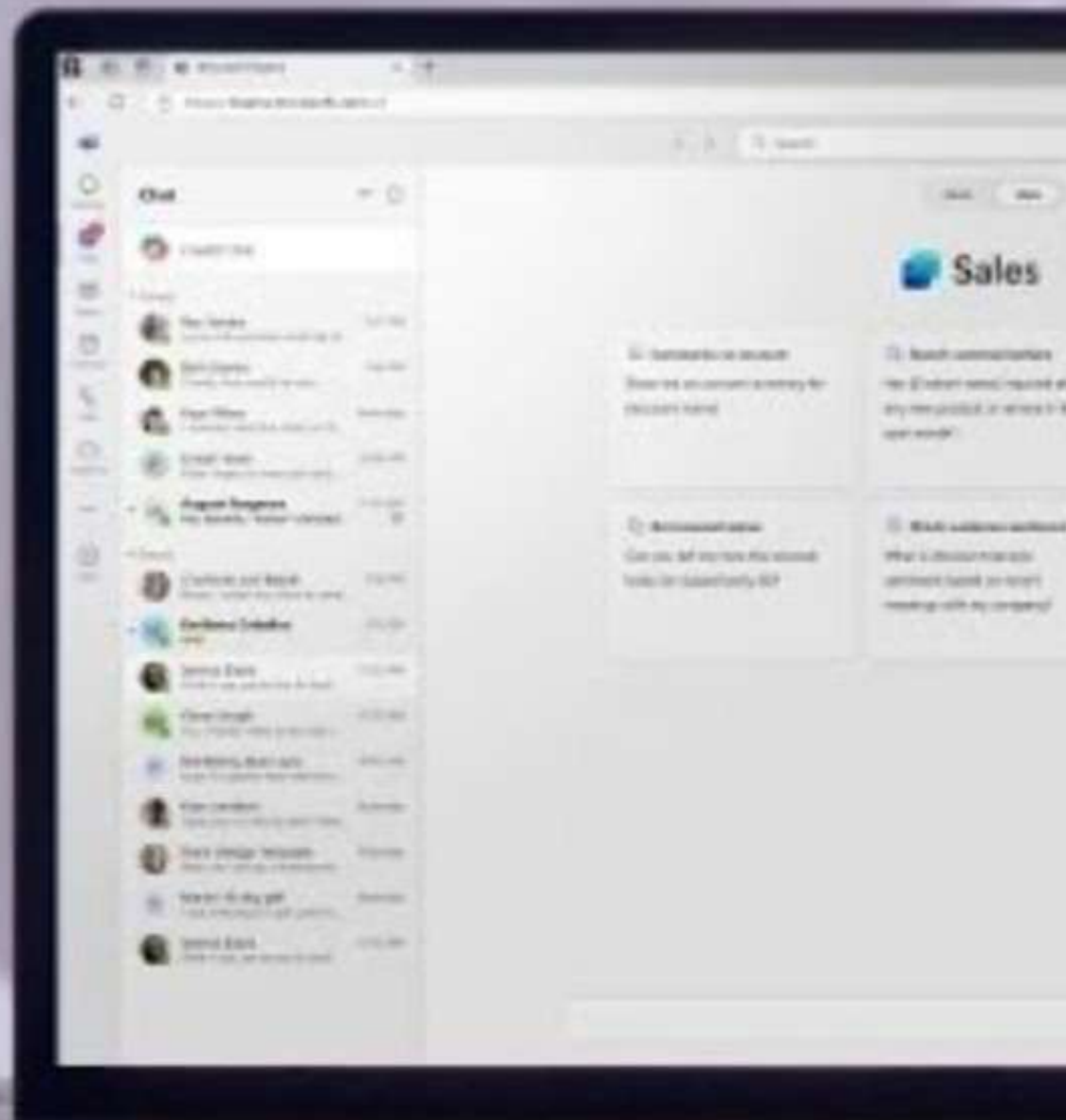


Microsoft 365

# Sales Agent



Microsoft



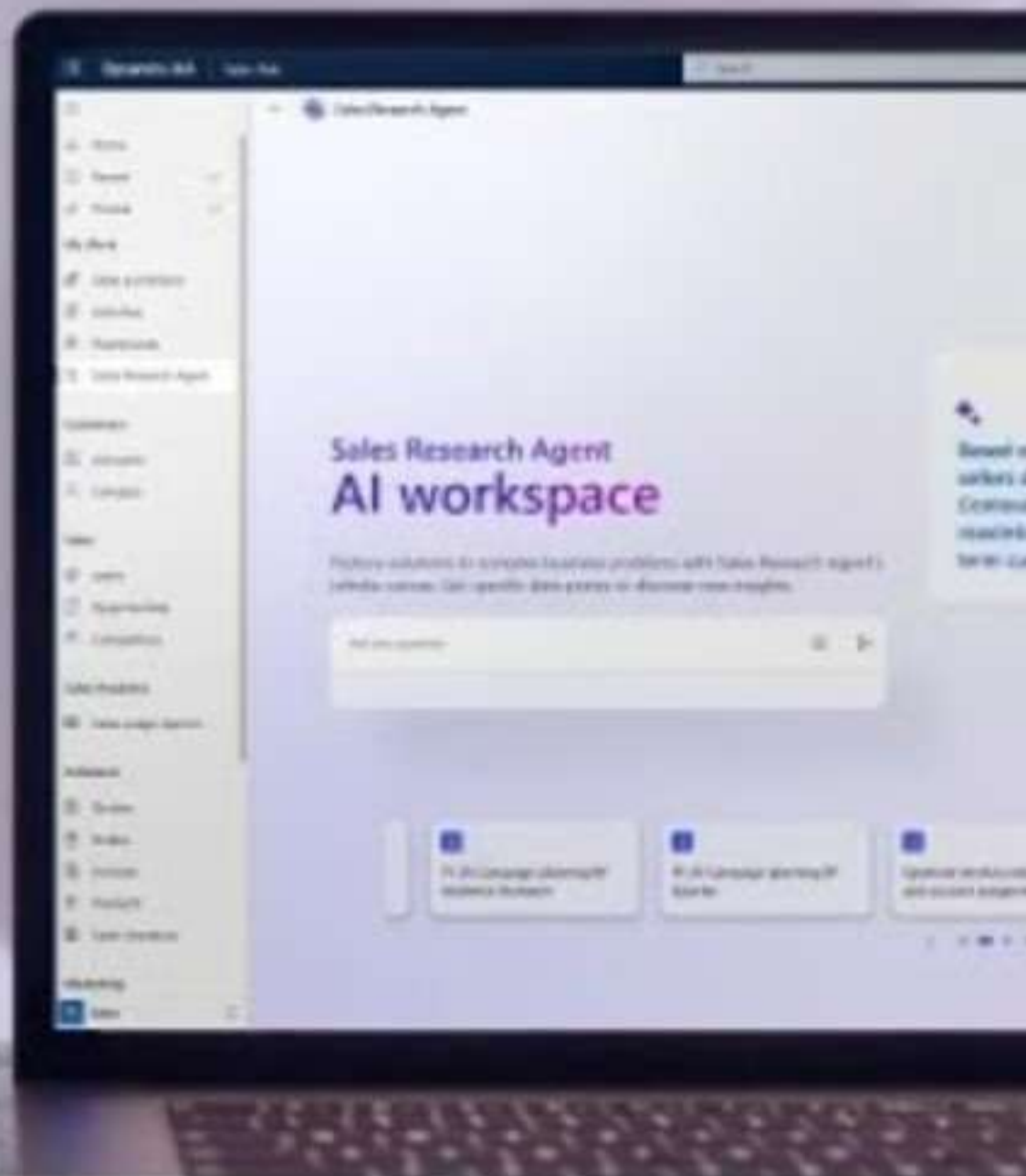


Dynamics 365

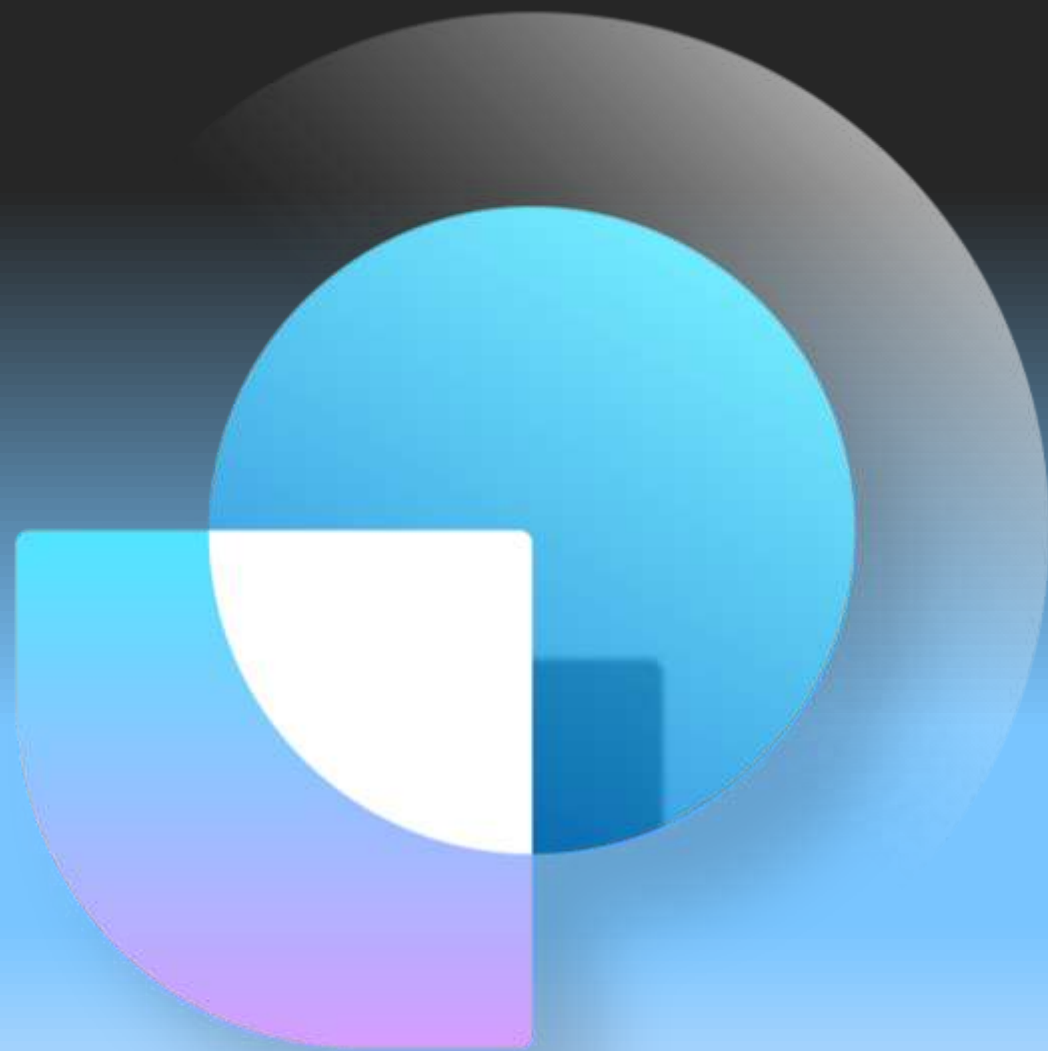
# Sales Research Agent



Microsoft  
Dynamics 365

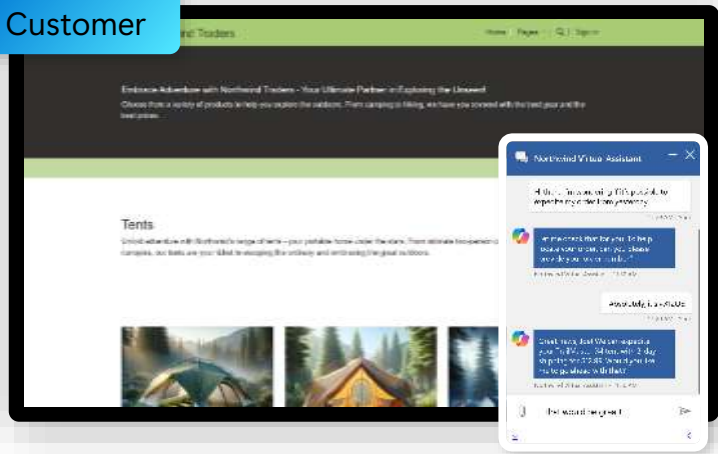


# Customer Service & Contact Center



# Microsoft Dynamics 365 Contact Center

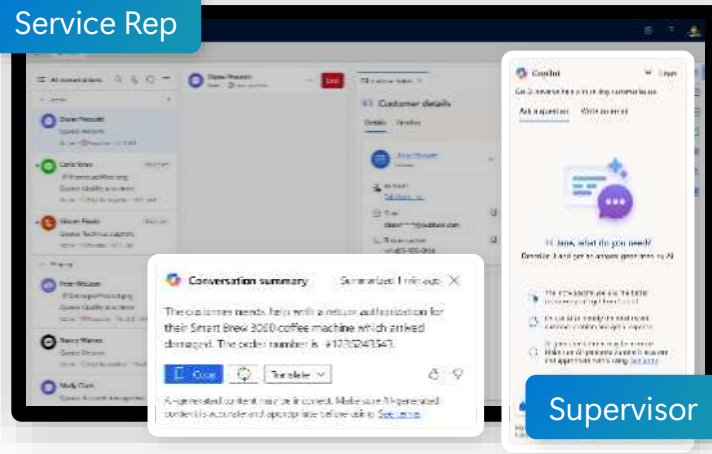
Customer



**Deliver effortless  
self-service**

Engage customers in their channel of choice and reduce contact center volume through rich self-service experiences powered by generative AI

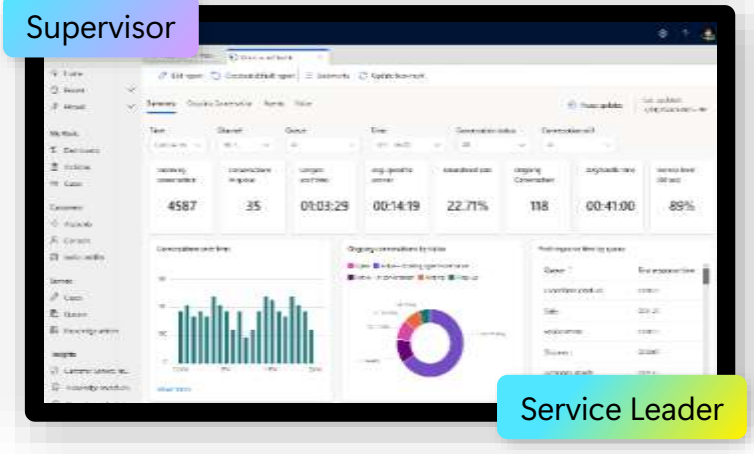
Service Rep



**Accelerate  
assisted service**

Reimagine service representative productivity with embedded Copilot capabilities, proactive tools for supervisors, and a 360-degree view of each customer

Supervisor



**Drive efficiency  
and reduce costs**

Gain a single view of truth across disparate data and support channels, plus the tools you need to optimize contact center operations

# Drive efficiency and reduce costs on voice calling

Deploy cost efficient calling experience on a global scale with Teams + Dynamics 365

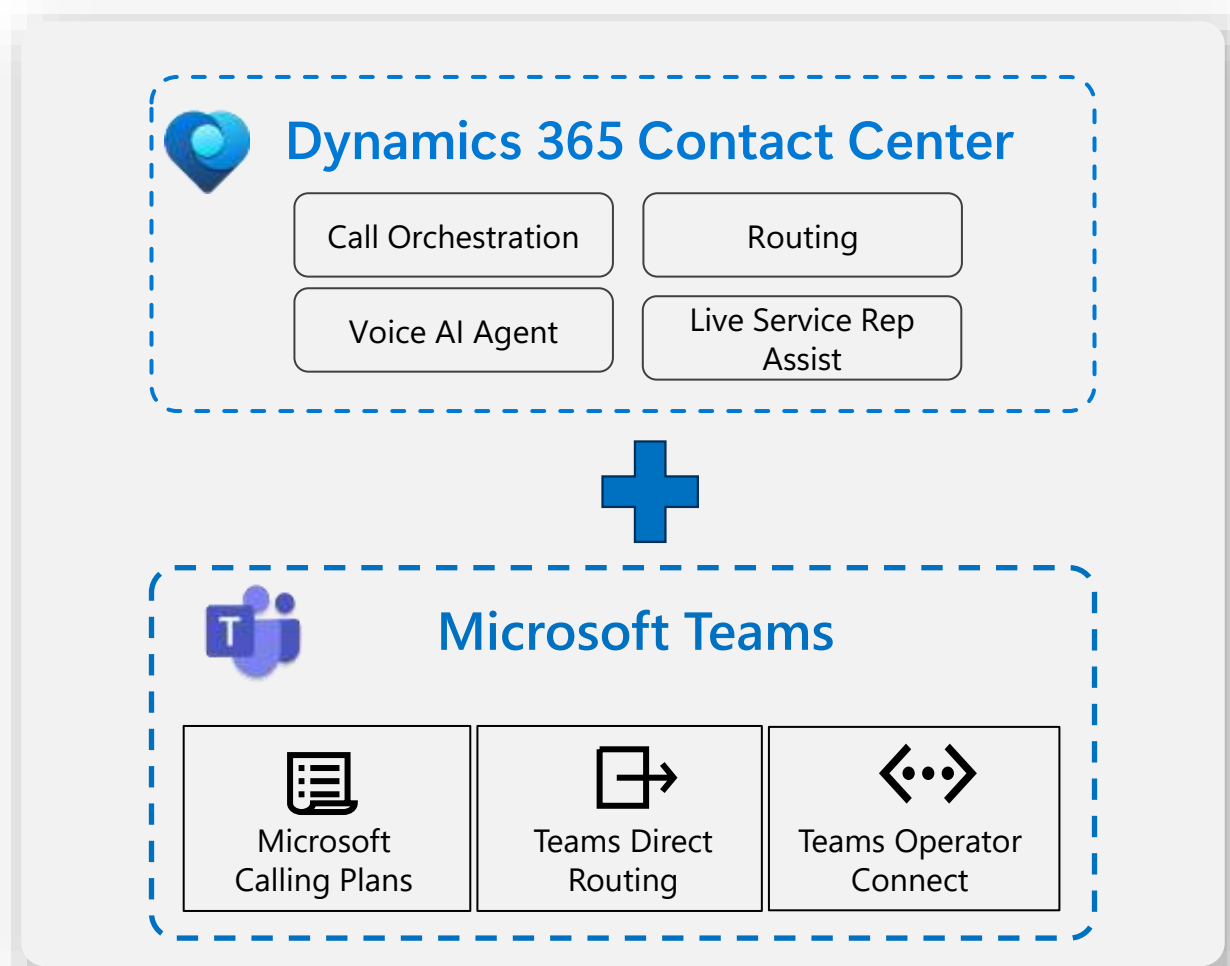
Use Microsoft Teams Phone for telephony in Dynamics 365 Contact Center

Alleviate the need to configure and administer a separate phone system for contact center deployments

Apply Teams Phone licenses to enable telephony for Dynamics 365 Contact Center users

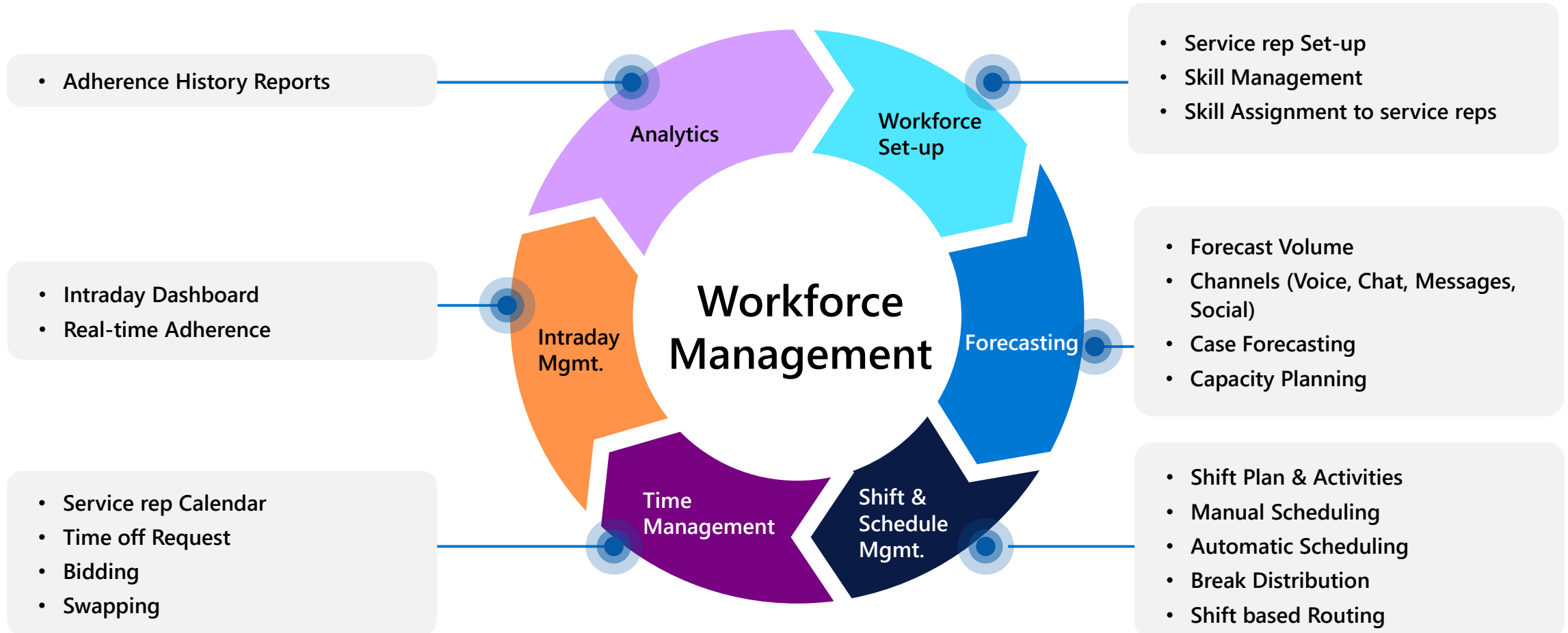
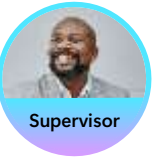
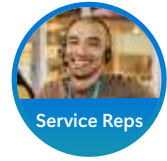
Take advantage of the broad geographic availability of Teams Phone, Calling Plans, Direct Routing, or Operator Connect to configure based on your scenario

Take advantage of Teams Phone enterprise features, including the familiar Teams management interface



# Drive efficiency and reduce costs

With capabilities to manage your workforce







# AI agents pre-built for service

## Customer Intent Agent

Autonomously mine intents from past and current customer conversations across channels to power dynamic, evergreen self-service and assisted service

## Customer Knowledge Management Agent

Extract knowledge from human assisted cases and draft new/update existing knowledge articles to solve future cases via self-service & assisted service

## Case Management Agent

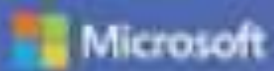
Automate tasks throughout the case lifecycle—creation, updates, collab, resolution, follow up, & closure—to reduce handle time and burden on service reps



Dynamics 365 Contact Center



Dynamics 365 Customer Service



# Transform customer experience with AI agents!



[Transform customer experience with AI agents!](#)



# Thank you

