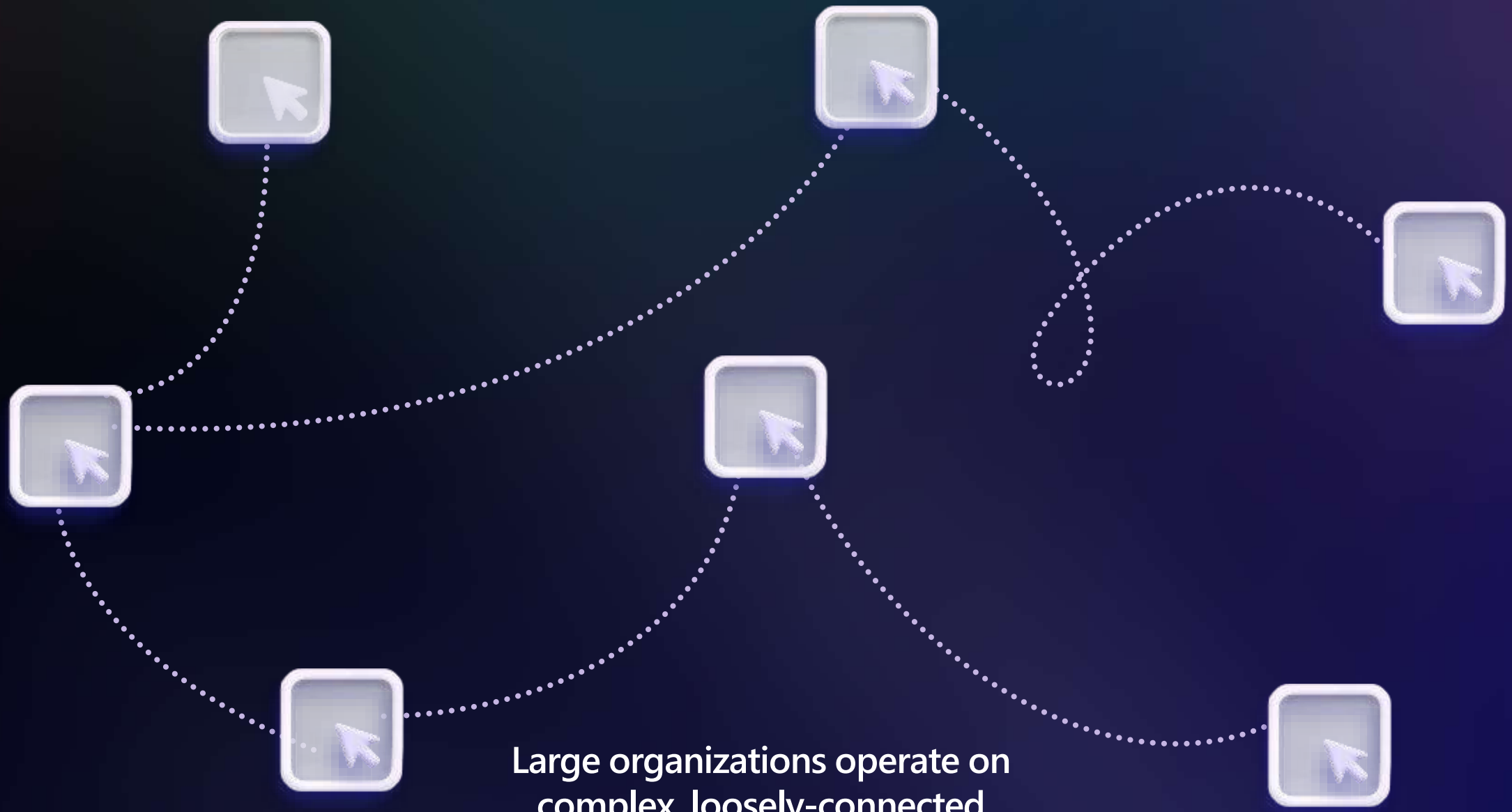
Microsoft

Customer Experience in the era of AI

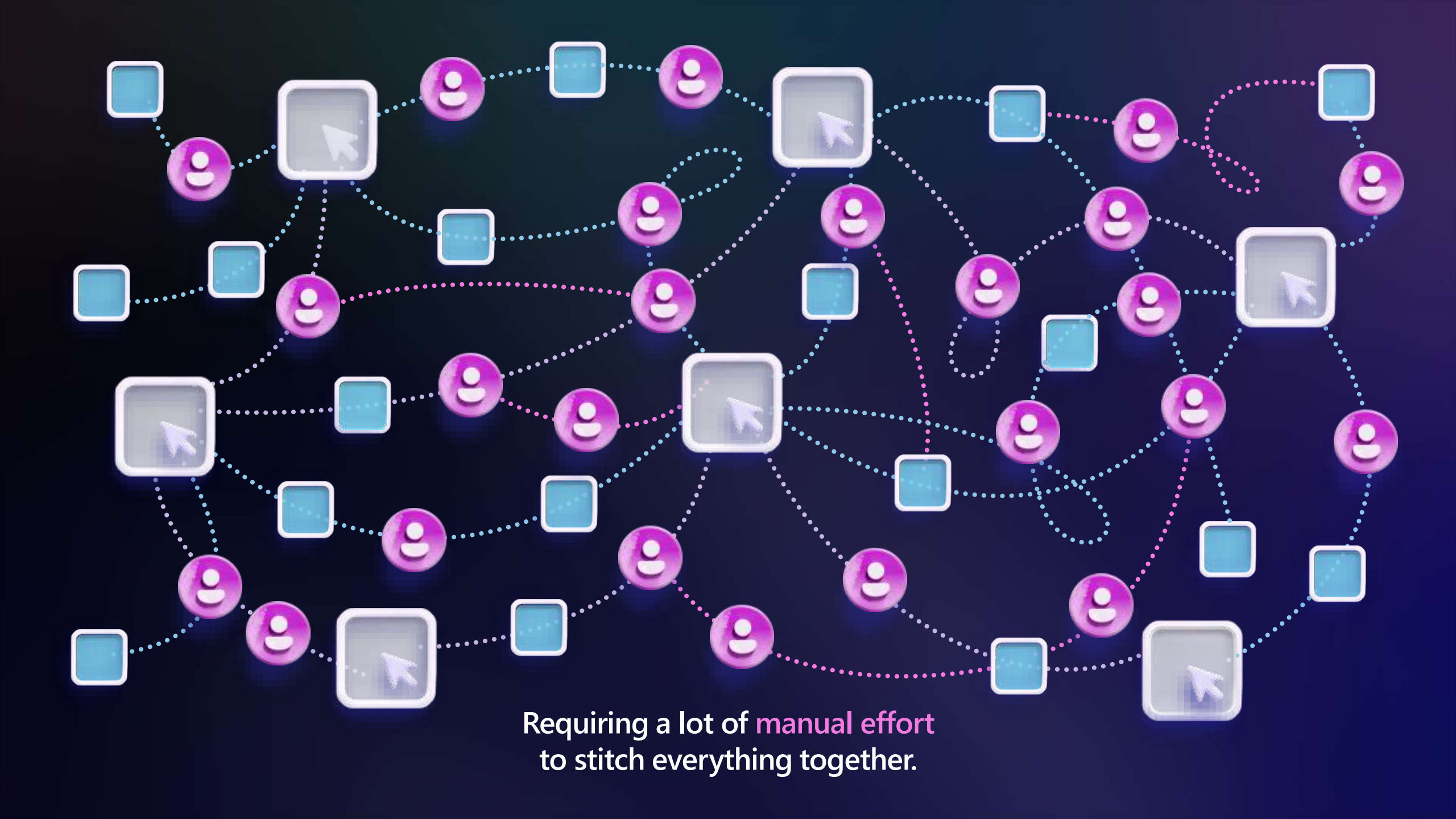
Tim Ervik
AI Business Process lead
Financial Services, Retail, Manufactoring

There is no magic wand for AI transformation



Large organizations operate on complex, loosely-connected patchworks of SaaS products


Augmented by legacy one-off
custom tools built over decades



Requiring a lot of manual effort
to stitch everything together.

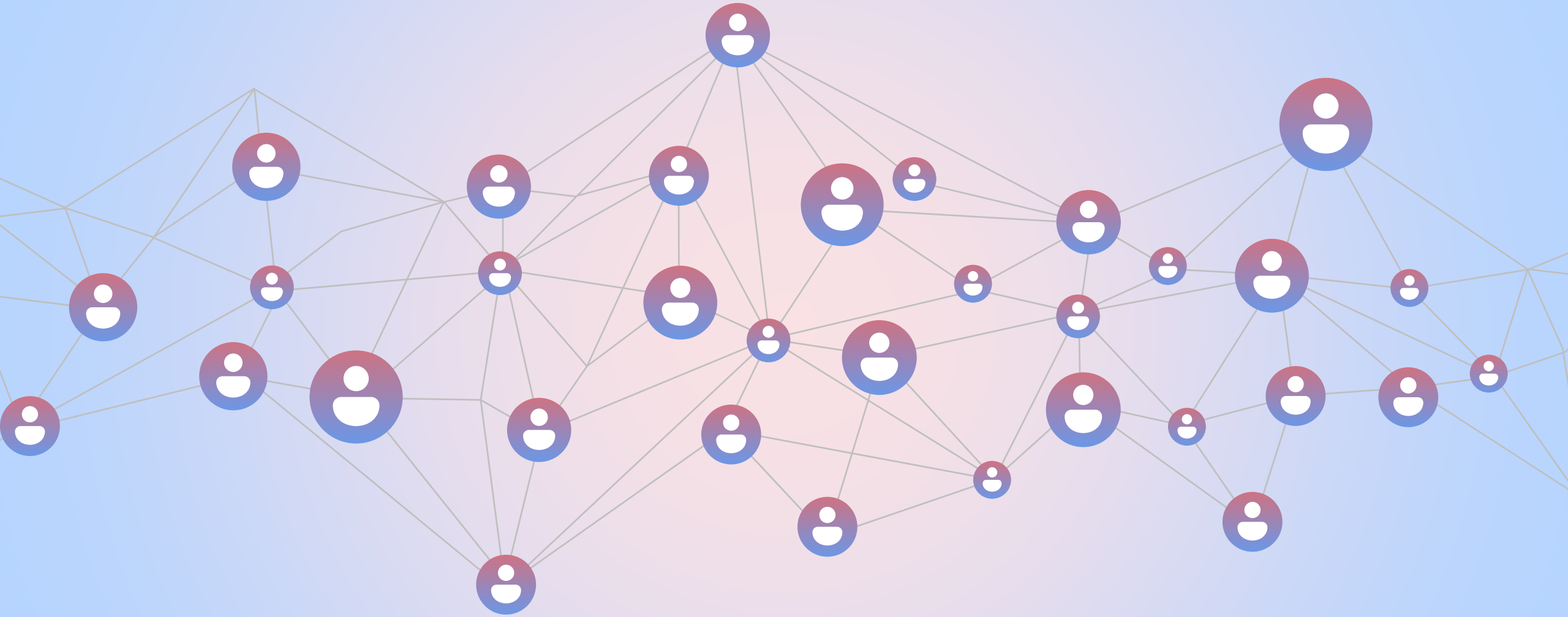
Our operating systems are holding us back.

10%

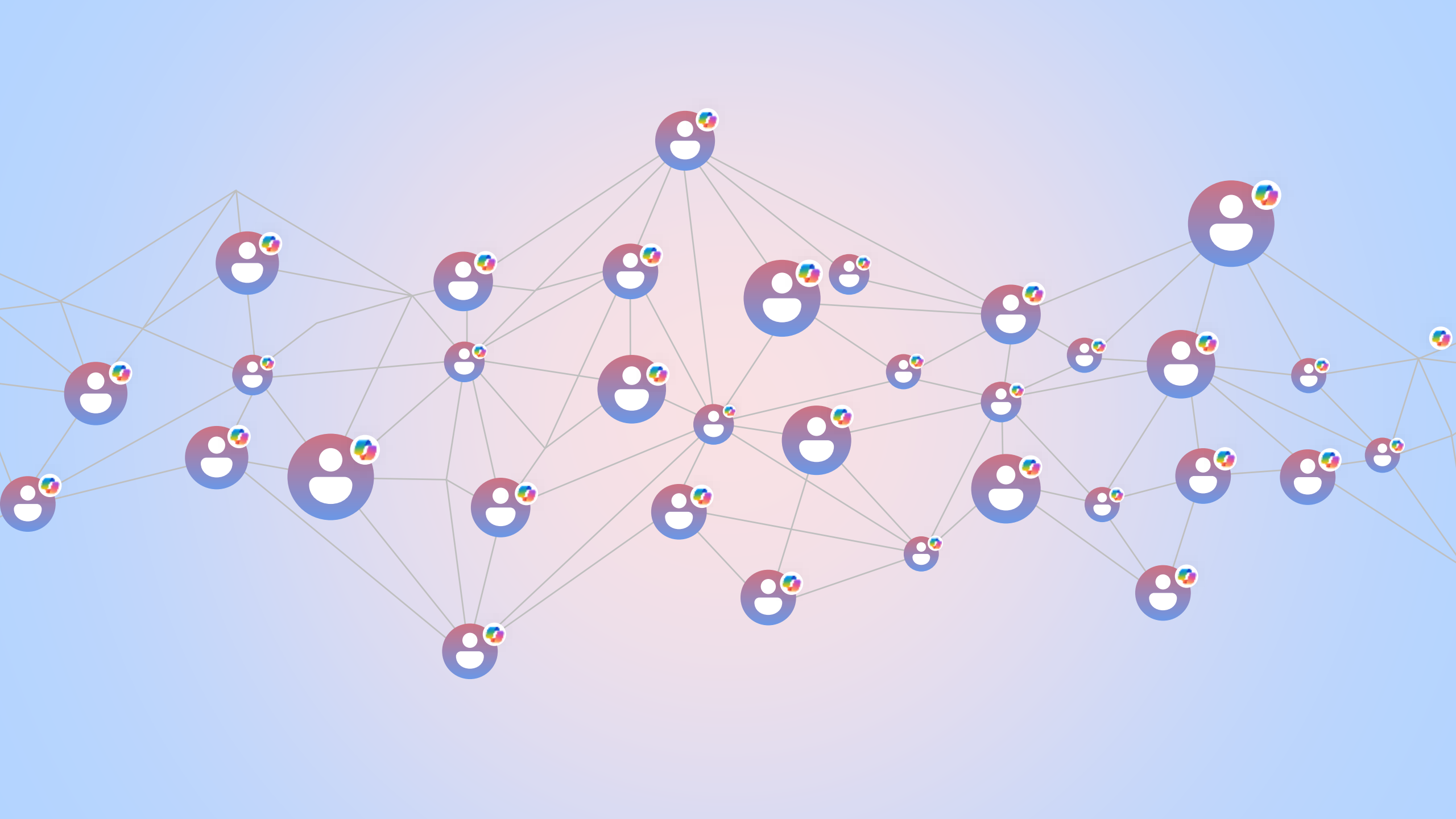
Incremental thinking

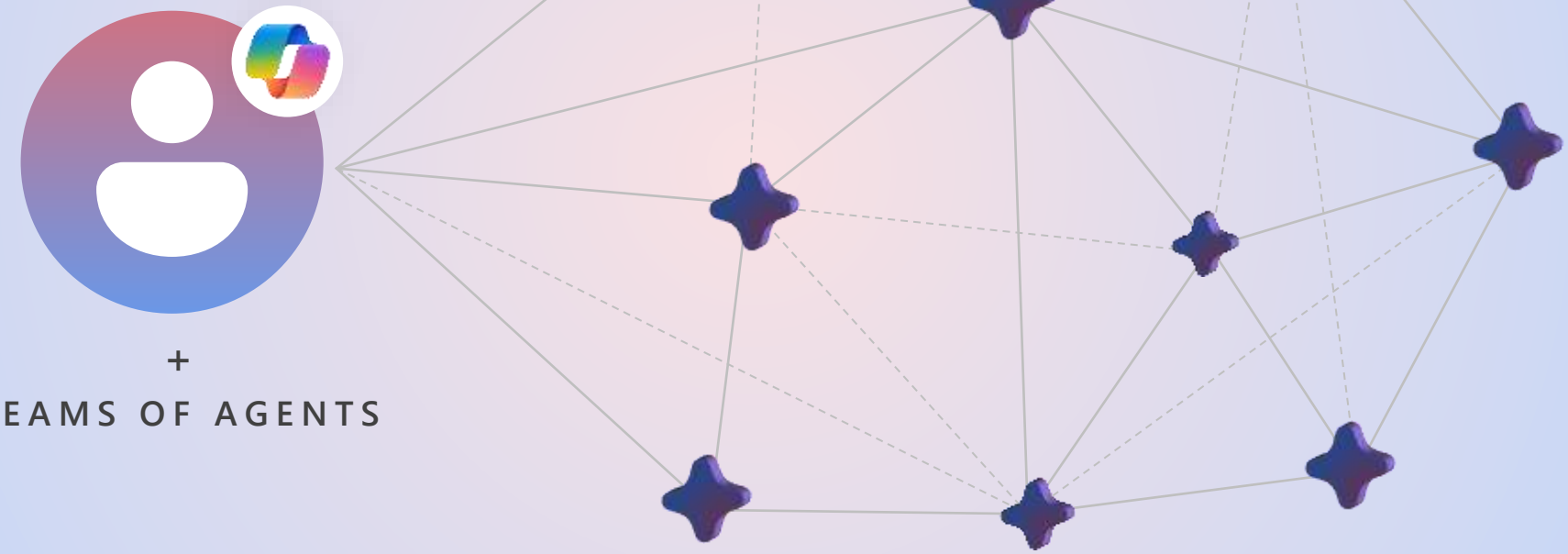
10x

AI-first thinking



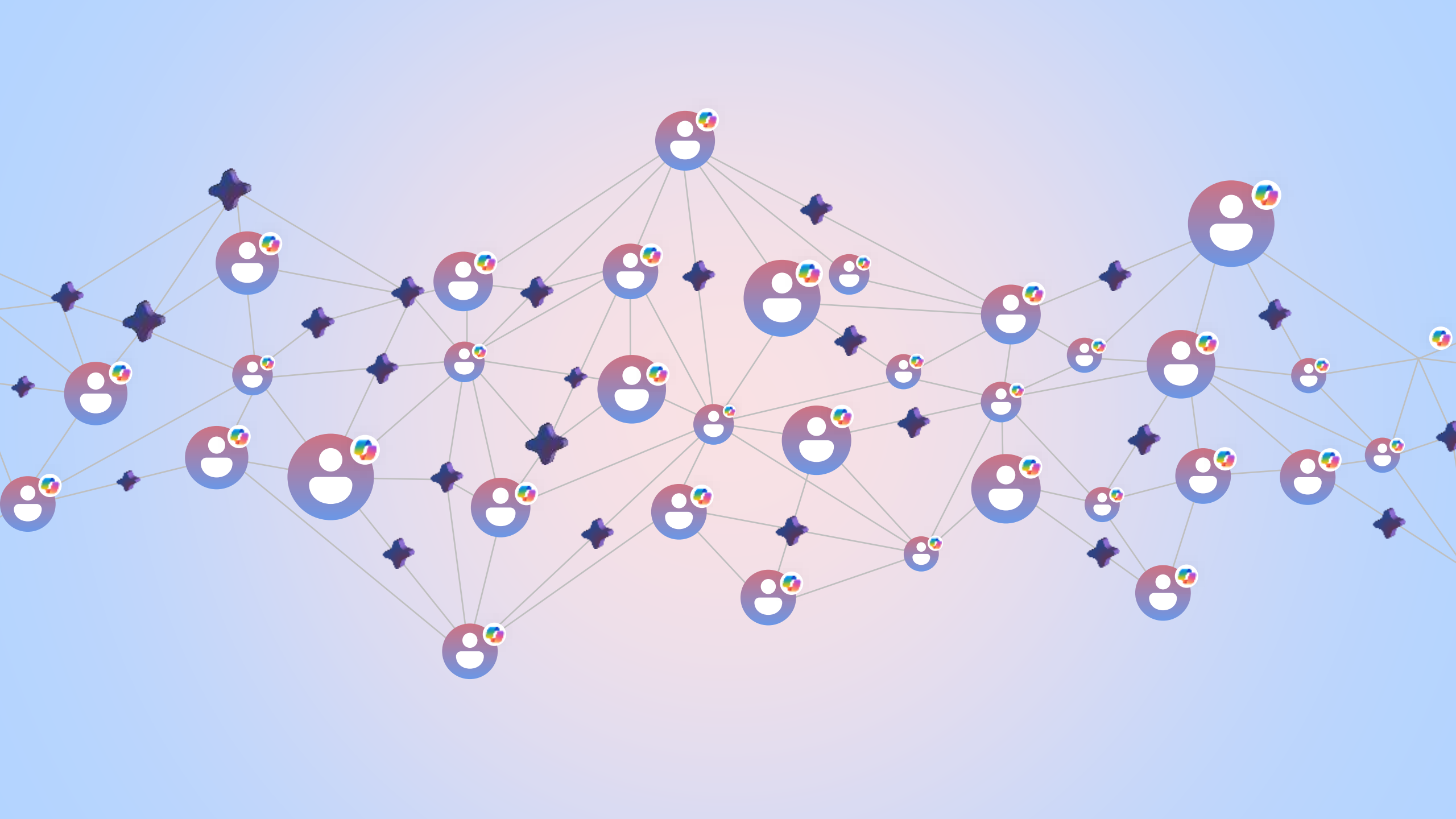
PEOPLE + COPILOT





+

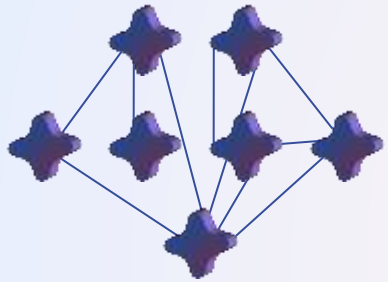
TEAMS OF AGENTS



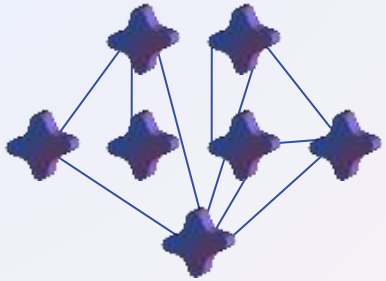
1.3B

AI agents by 2028

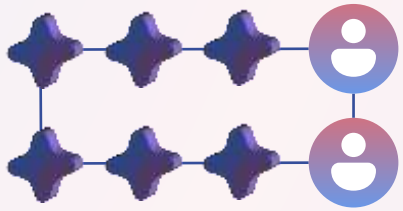
Source: IDC Info Snapshot, 1.3 Billion AI Agents by 2028, doc #US53361825, May 2025



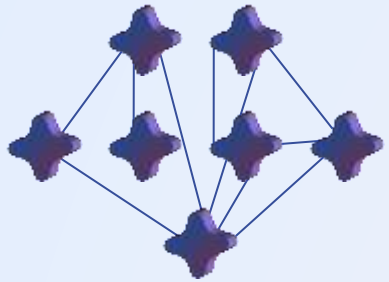
Many agents
working together



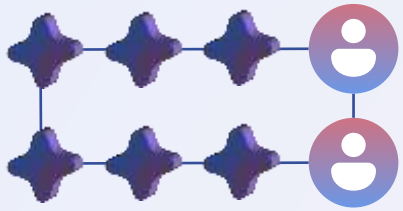
Many agents working together



New interfaces for people + agents



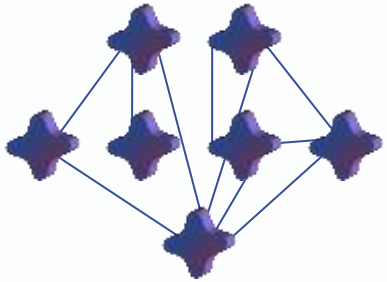
Many agents working together



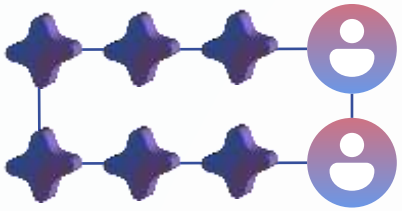
New interfaces for people + agents

Enterprise-grade management

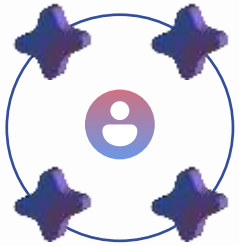
Agentic customer engagement



Many agents working together

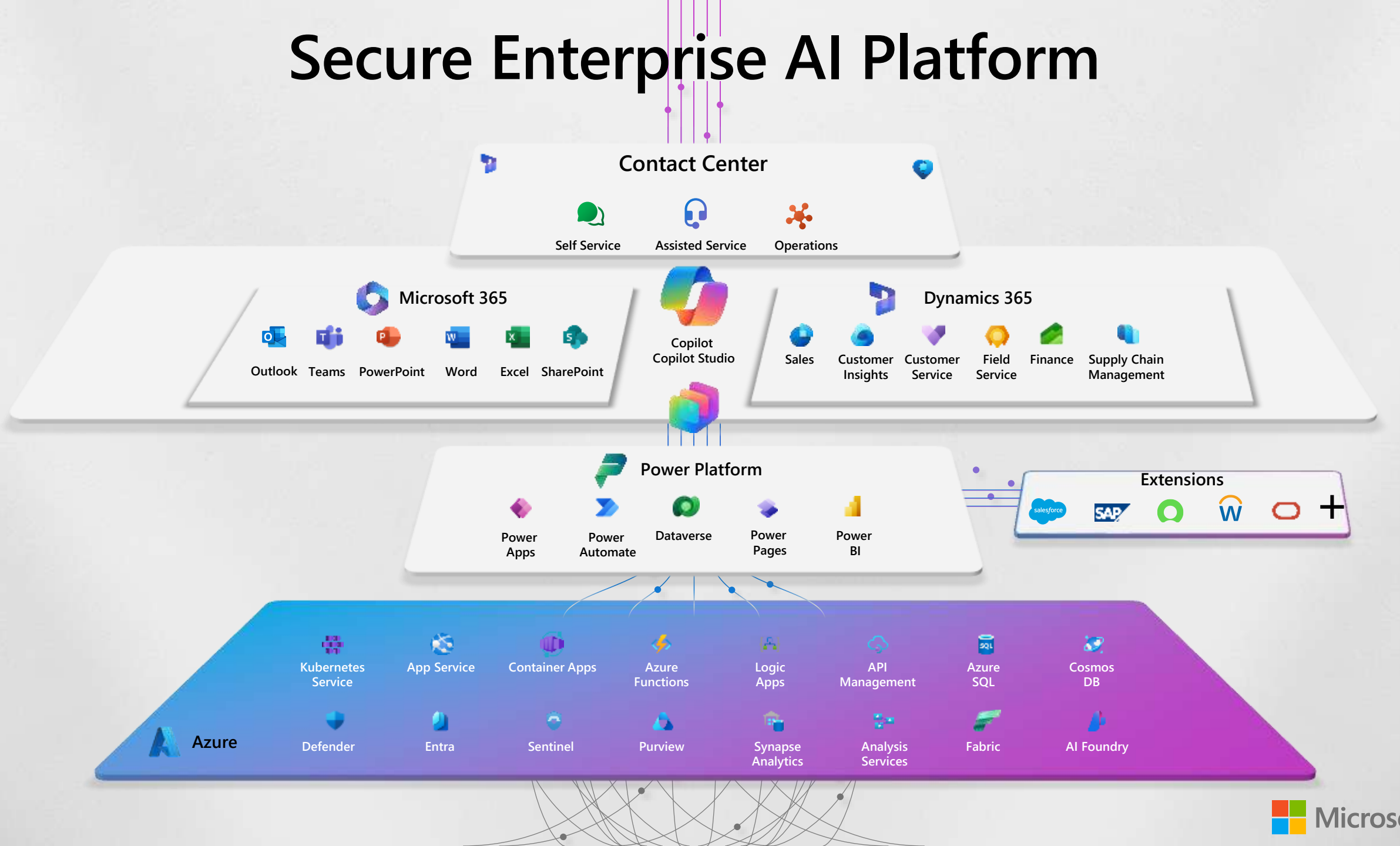


New interfaces for people + agents



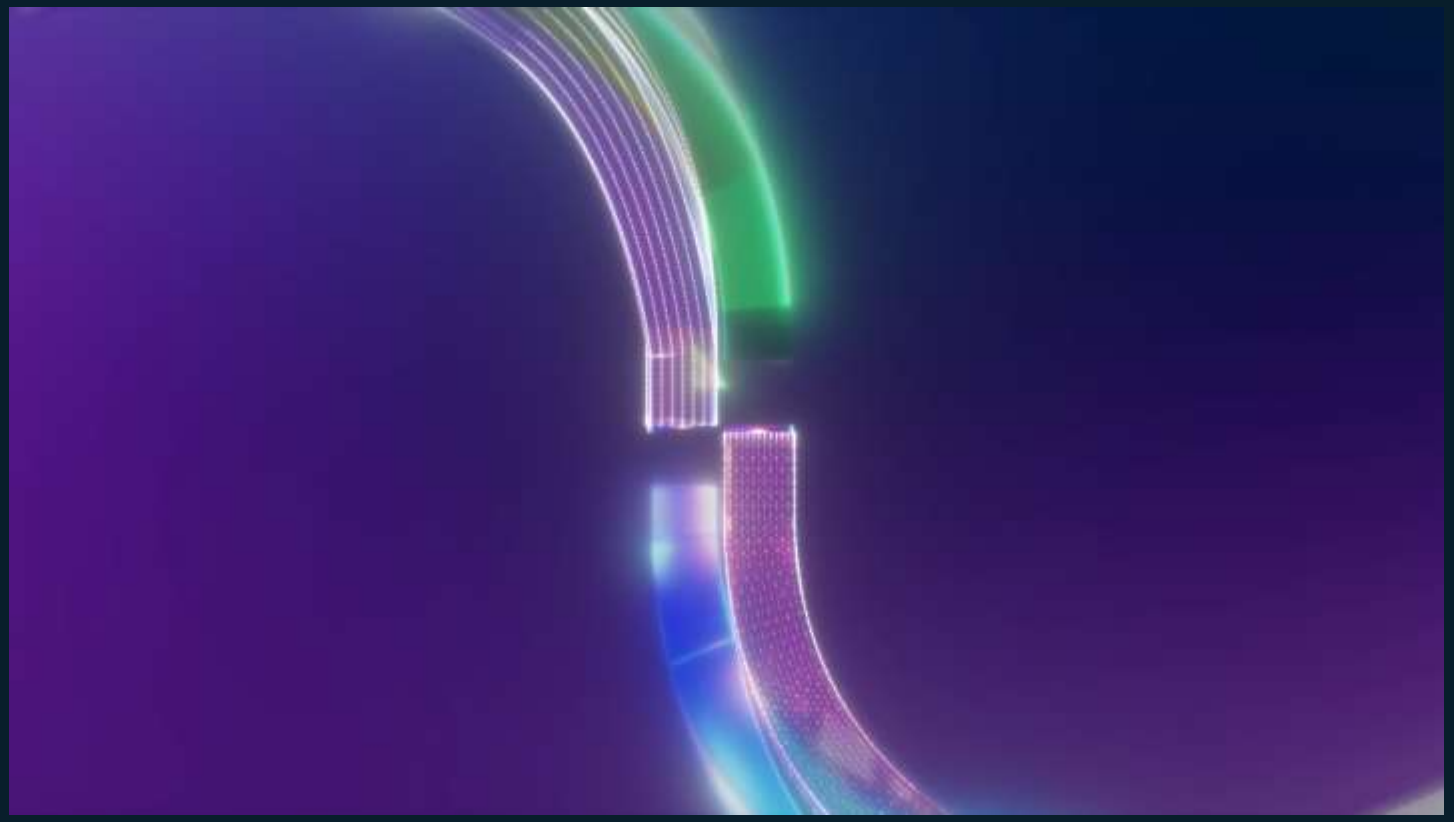
Enterprise-grade management

Secure Enterprise AI Platform



Microsoft

Microsoft Ignite: Opening Keynote



NEW!

Agent 365

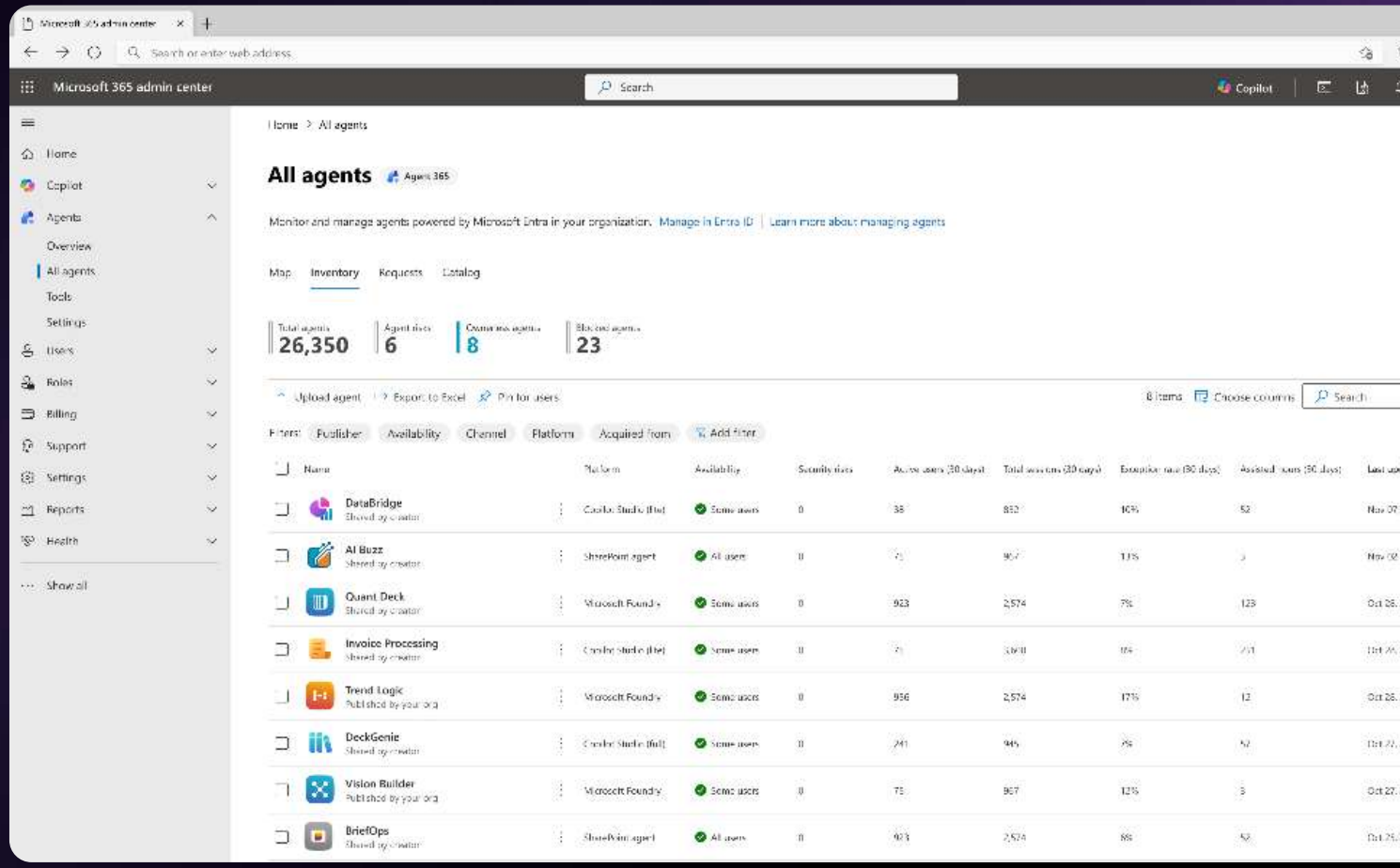
Agents will be able to use the tools people use everyday.

Give **agents their own identity**, email inbox, alias in your organization

Allow agents to **get email**, or **interact with users in chats**, or **even @mention them in files** and allow them to respond

Enable agents to work alongside users to create and edit content in familiar apps.

Review agents activity to optimize performance and outcomes.

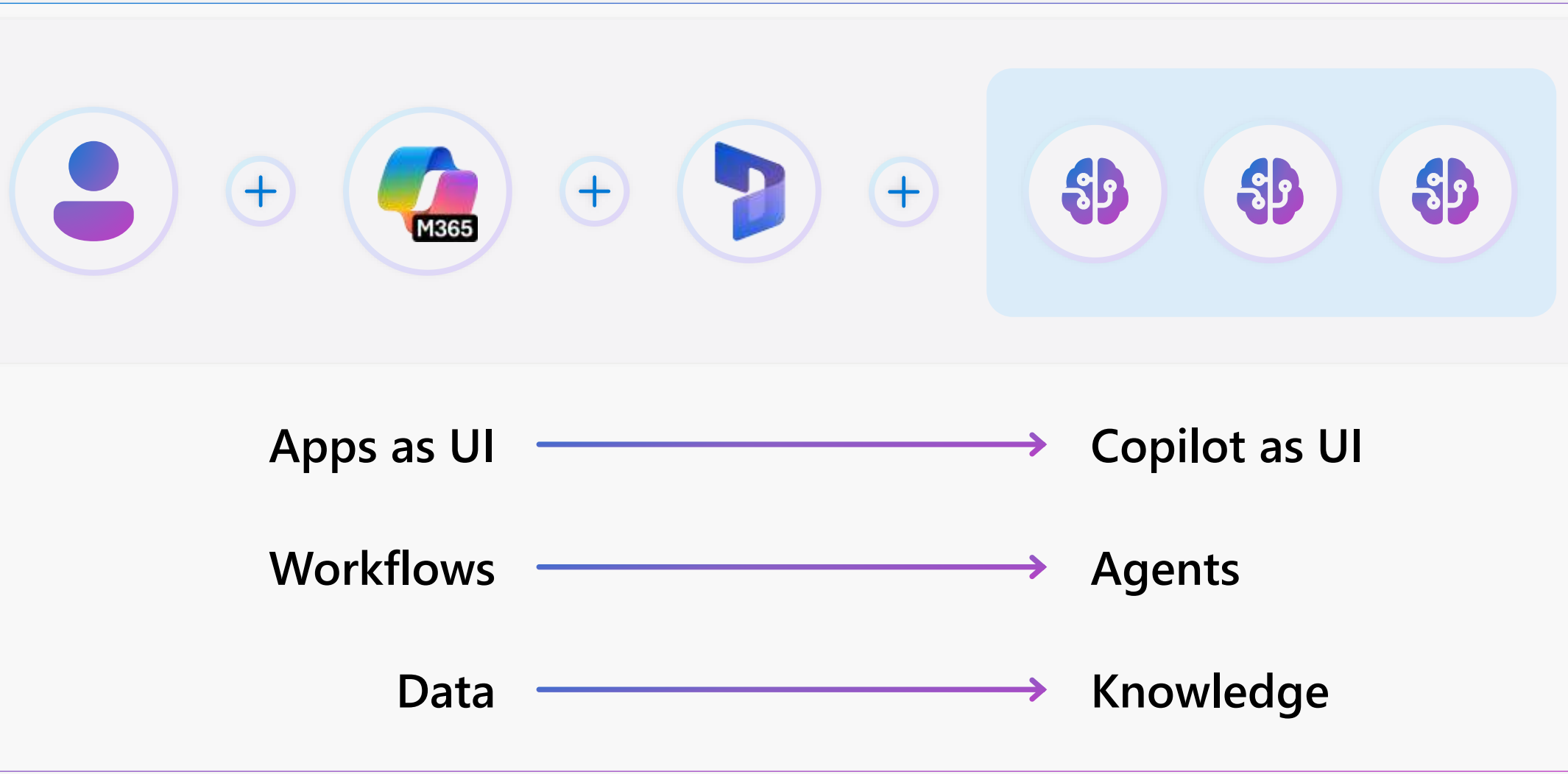


Early Access through Frontier

Dynamics 365

Suite of agentic business applications

System of record → System of action



Dynamics 365

Delivering agentic CX in the new era of business

Marketing

Customer Insights

Sales

Revenue Growth

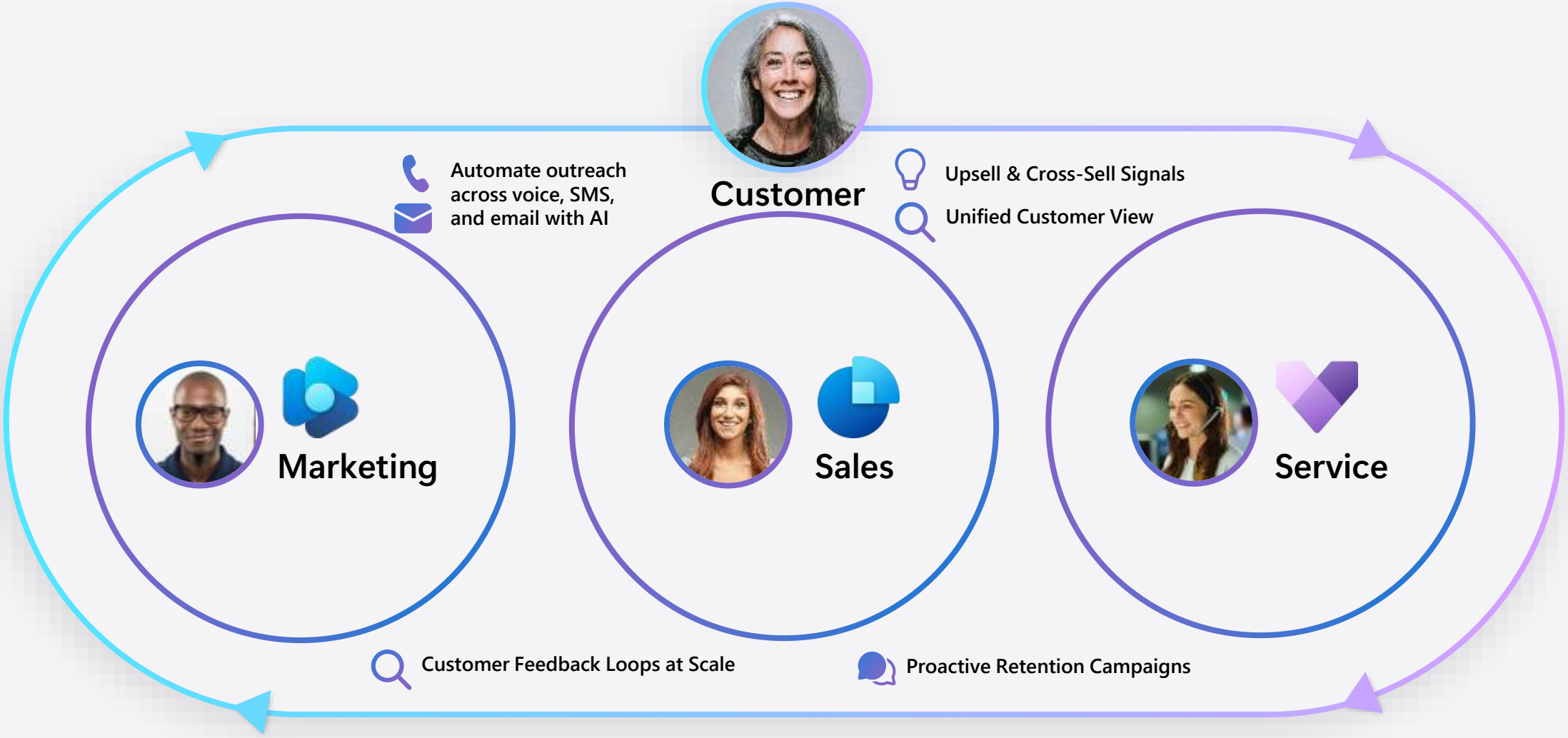
Service

Customer Service

Unified data platform for agents

Continuous learning loops

An AI platform's only real differentiator



Pre-built Agents with Dynamics 365

The **easiest way to get started** are pre-built agents to quickly launch without the need for extensive configuration:

- ✓ Designed to **integrate seamlessly with other Dynamics 365 applications**
- ✓ With predefined functionalities, many of these agents can be **extended using tools like Copilot Studio**.

Generally Available

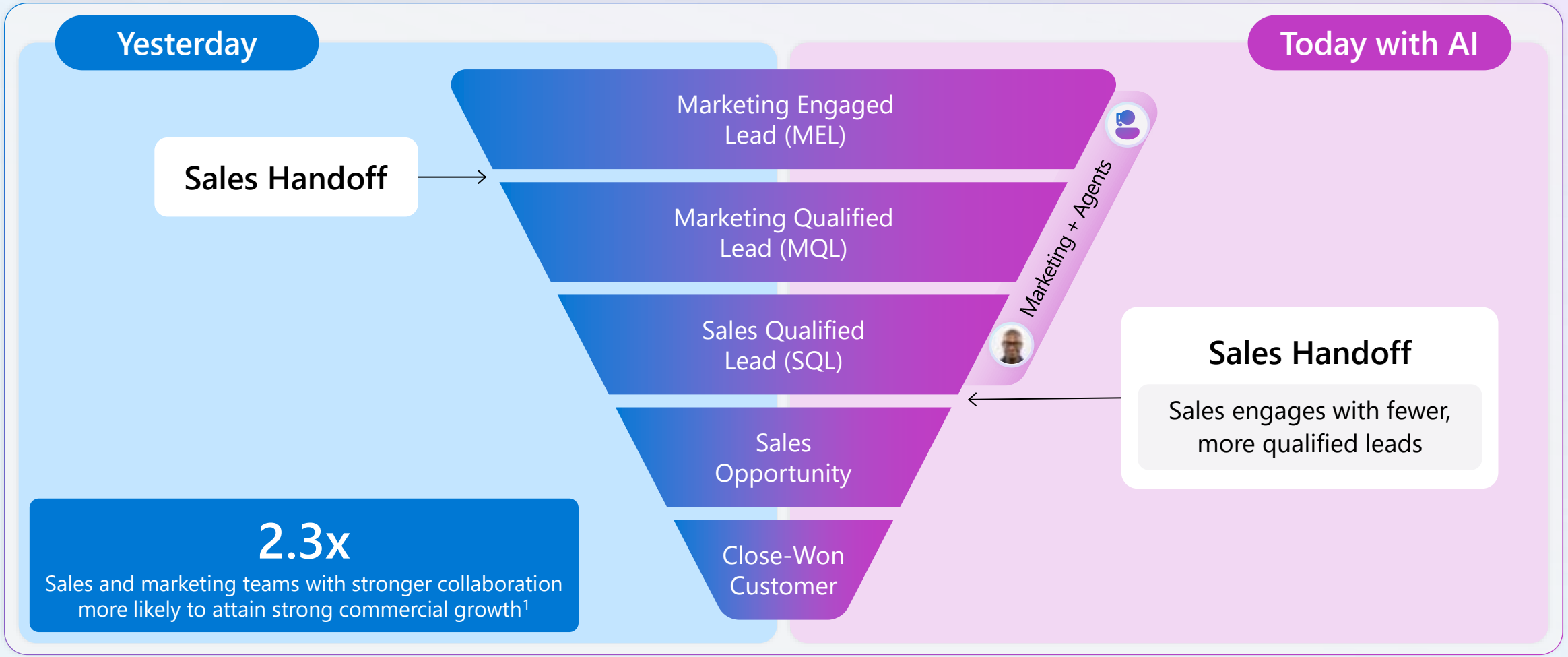
- **Sales**
  Sales Qualification Agent
- **Contact Center & Customer Service**
  Quality Evaluation Agent
- **Contact Center & Customer Service**
  Customer Intent Agent
- **Business Central**
  Sales Order Agent*
- **Contact Center & Customer Service**
  Customer Knowledge Management Agent
- **Business Central**
  Payables Agent*
- **Customer Service**
  Case Management Agent

In Public Preview

- **Sales**
  Sales Research Agent
- **Finance**
  Account Reconciliation Agent
- **Sales**
  Sales Close Agent
- **Field Service**
  Scheduling Operations Agent
- **Supply Chain Management**
  Supplier Communications Agent
- **Project Operations**
  Time Entry Agent
- **Project Operations**
  Expense Agent
- **Project Operations**
  Activity Approvals Agent

* Generally available in November 2025

AI is radically improving seller efficiency & effectiveness



[1]How to Follow Up With Sales-Qualified Leads: 3 Best Practices to Seal the Deal – Gartner, April, 2025

The Era of Agentic Sales

Personal assistant

AI assistant help boost personal productivity. Happens in and outside CRM

Process Transformation

AI Agents helps drive process and app transformation, redefining how work is done in context of CRM

Workforce Augmentation

AI Agents are contacted to augment the sales team by automating key JTBD outside the CRM context

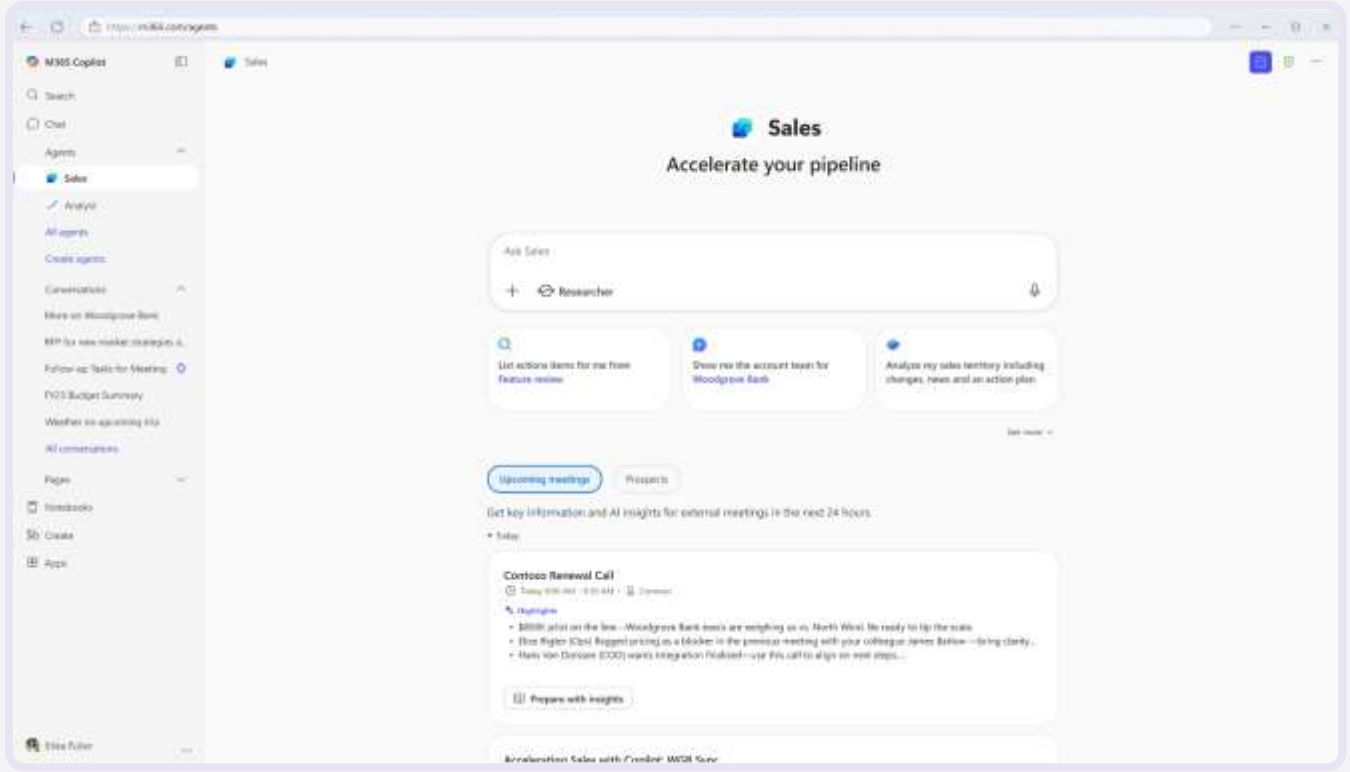
Sales Agent in Microsoft 365 Copilot

Sales in M365 Copilot optimized for key jobs-to-be-done

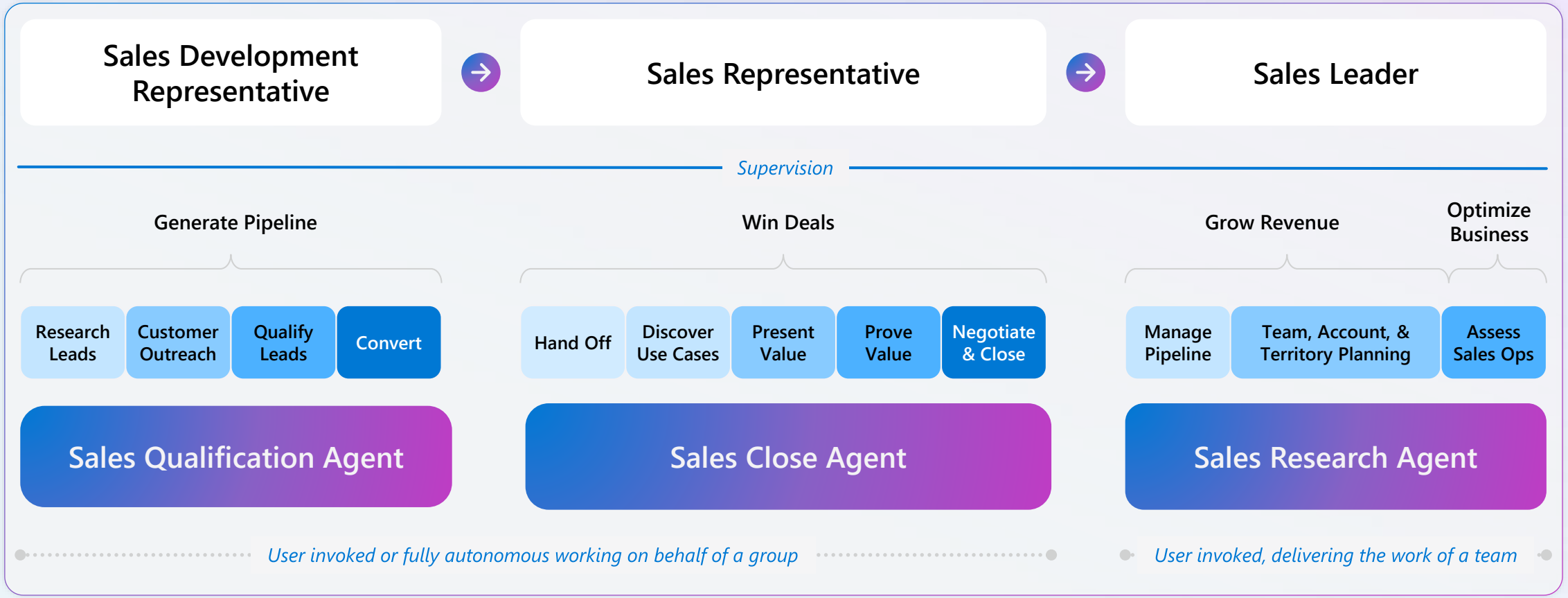
Proactively shares insights on upcoming customer meetings

Deliver deep meeting and customer insights based on data in CRM, emails and meeting notes

Coming to D365 for consistent user experiences, along with consistent chat and researcher functionality



AI Agents in D365 Sales cover the full sales cycle



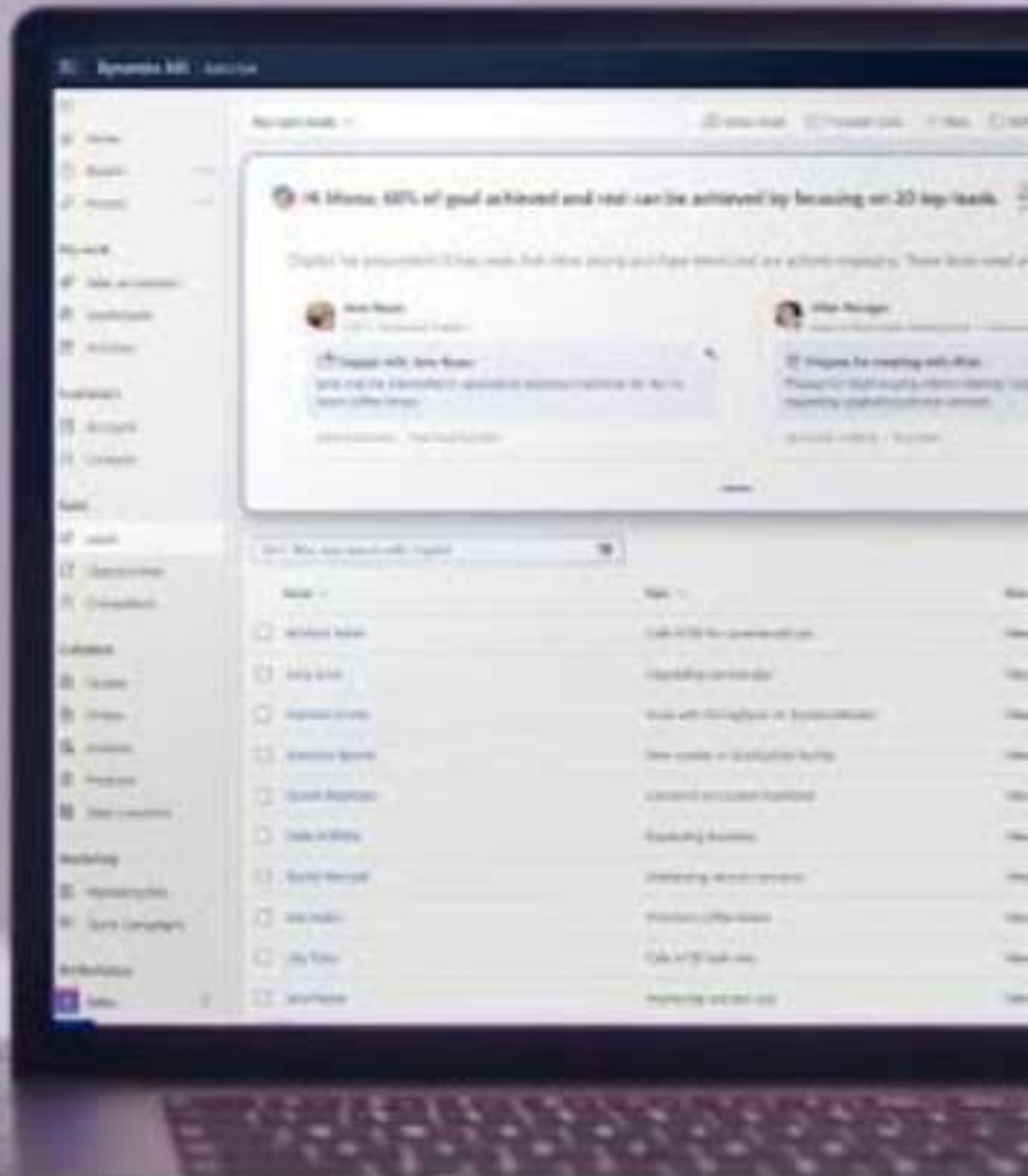
* Jobs to be done

Sequent

Dynamics 365

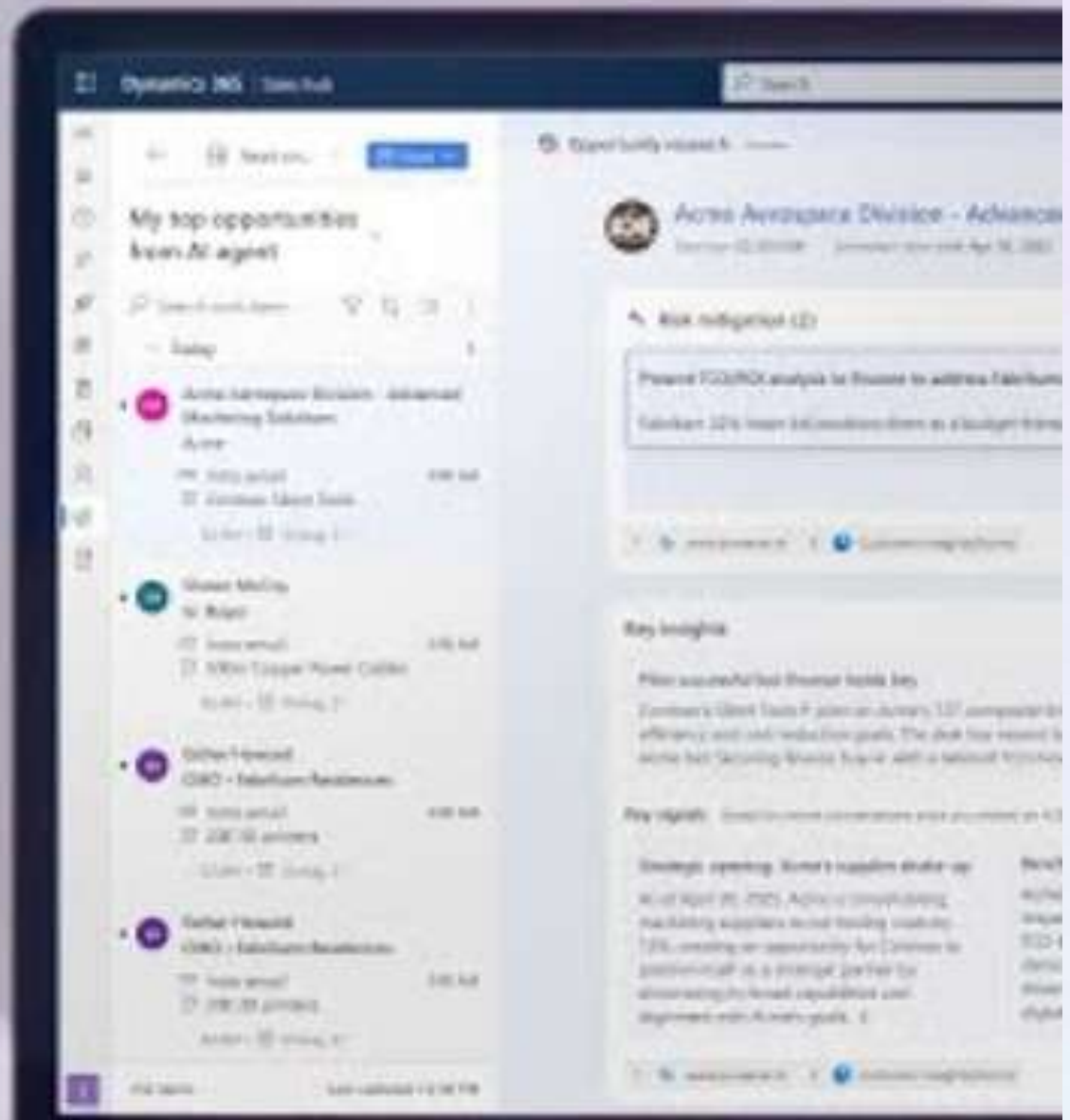
Sales Qualification Agent

Microsoft Dynamics 365



Dynamics 365

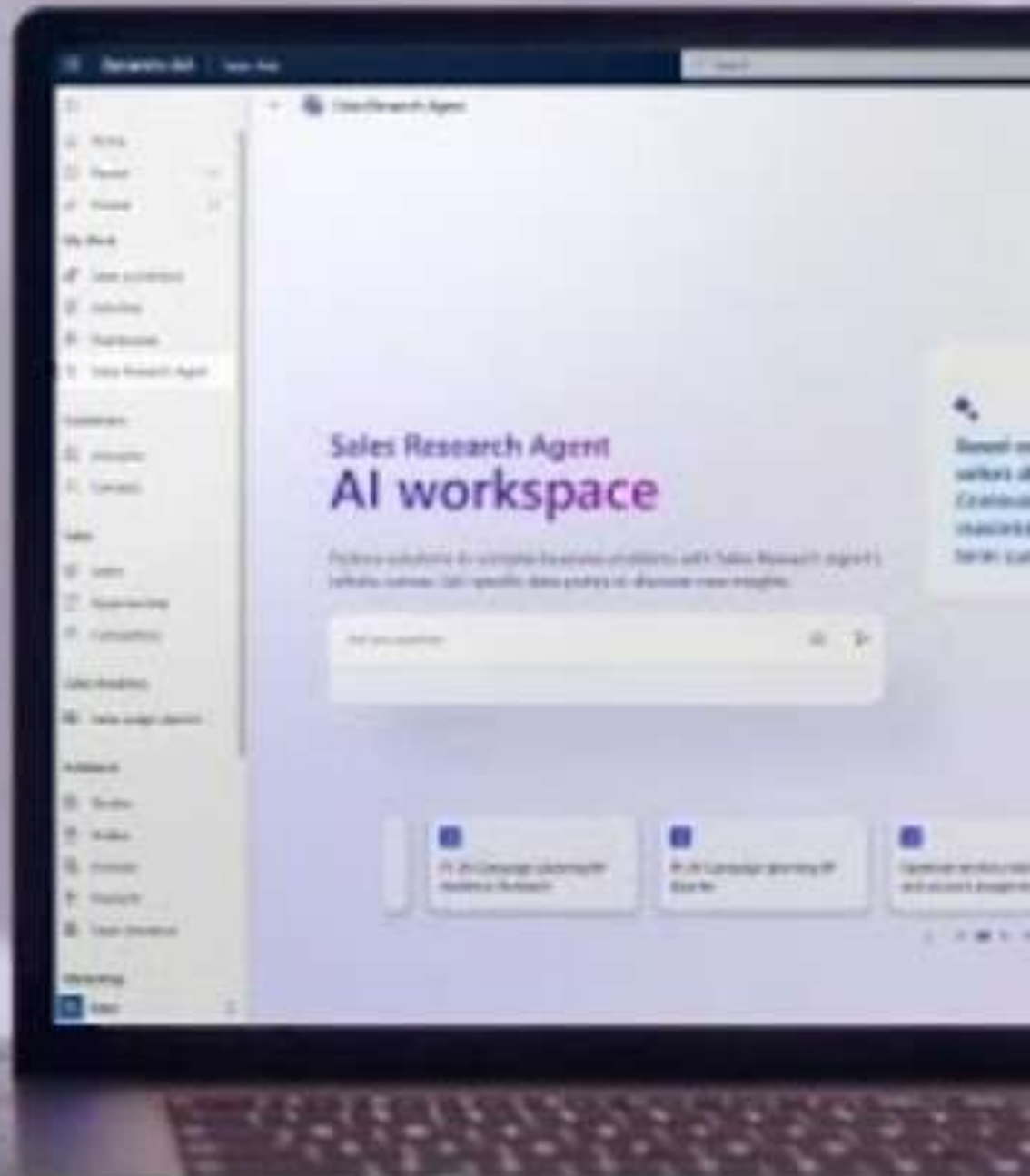
Sales Close Agent



Microsoft

Dynamics 365

Sales Research Agent



Microsoft Dynamics 365

AI first unified, but still composable, CX platform

Self-service

Assisted CX

Customer

- Live Chat
- Social
- Email
- SMS
- Voice
- IoT
- Teams

Self-service Agents
(Voice and digital)

Unified Routing

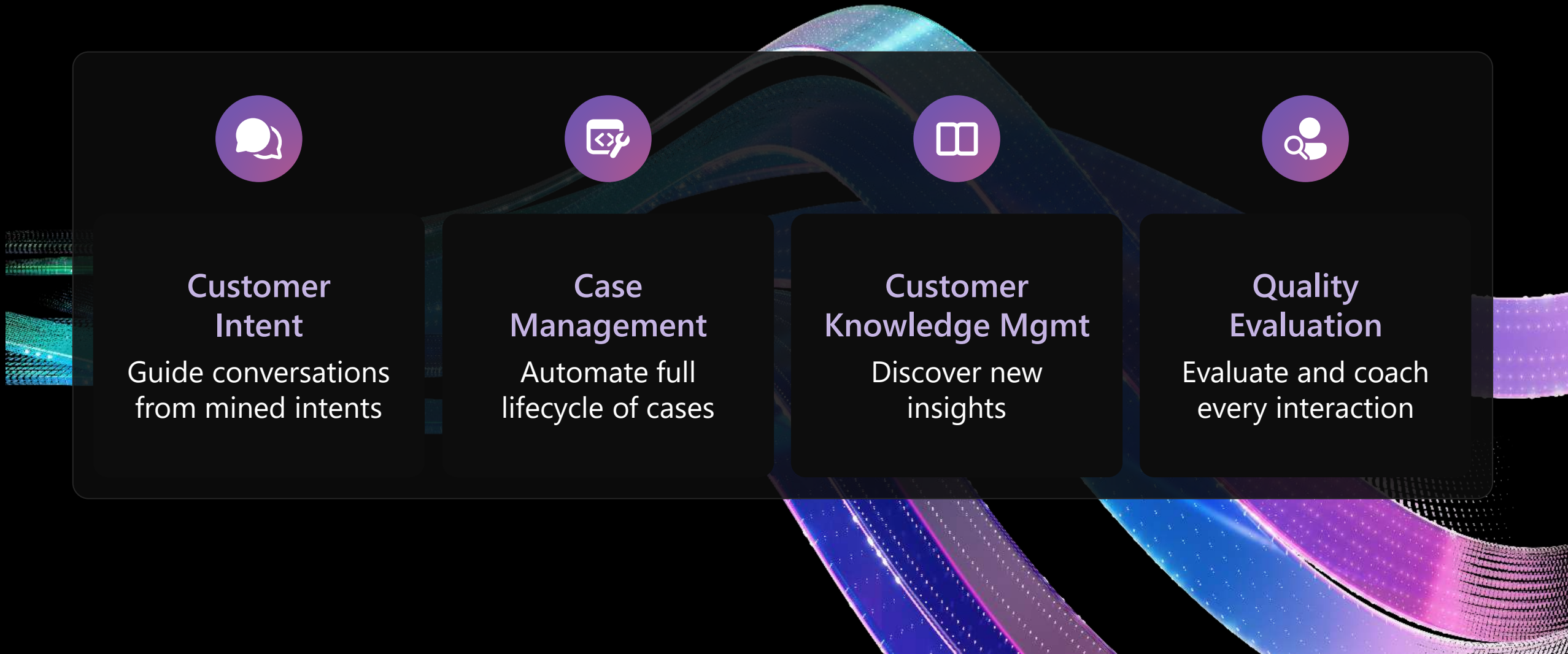
Customer Teams

AI | Data

conversations + knowledge + interaction history + integrated data + quality signals

Generally Available

Pre-built autonomous agents



Customer Intent

Guide conversations from mined intents

Case Management

Automate full lifecycle of cases

Customer Knowledge Mgmt

Discover new insights

Quality Evaluation

Evaluate and coach every interaction

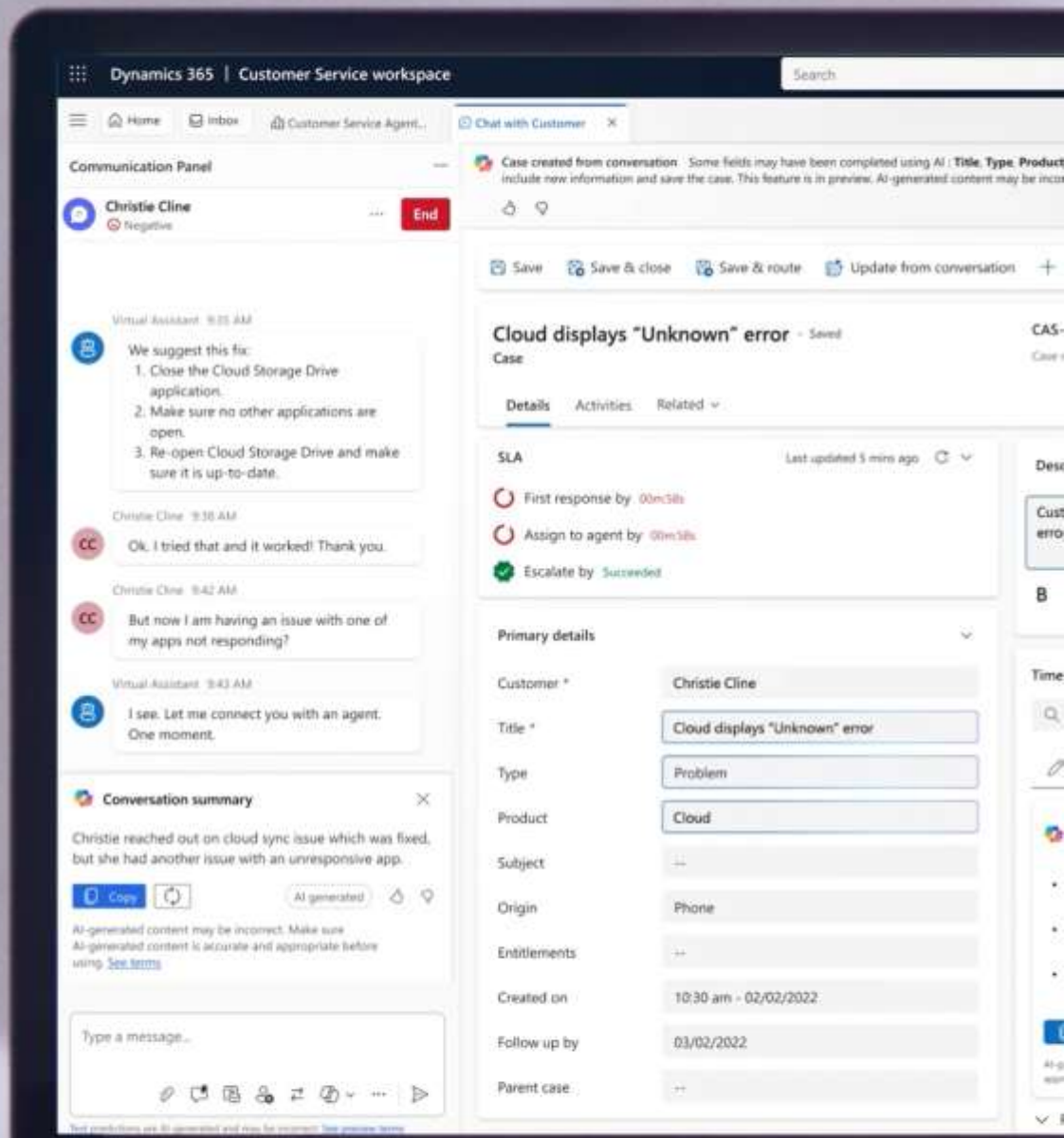
Dynamics 365

Case Management Agent

Customer Intent Agent

Customer Knowledge Management Agent

Quality Evaluation Agent



Generally Available

Dynamics 365 Contact Center

Quality Evaluation Agent

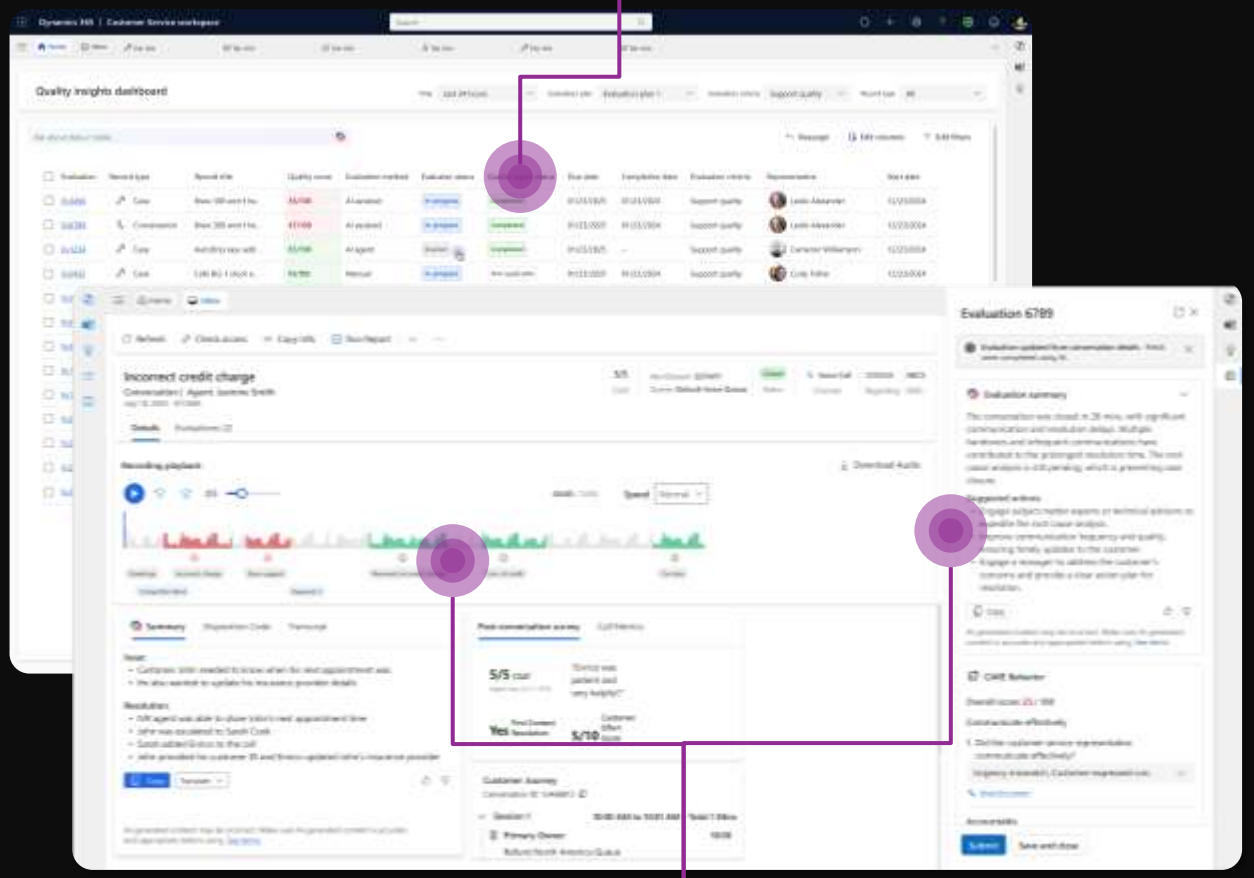
Increase service quality with AI-led evaluations and automated scoring

Identify **empathy, compliance, and effectiveness** in every interaction with both AI agents and reps

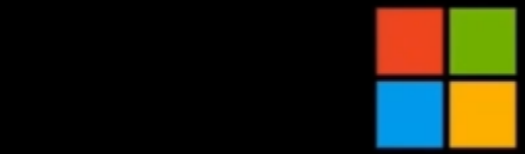
Deliver personalized **coaching recommendations** for reps

Empower **supervisors with insights** to drive continuous improvement

Real-Time Analysis – Quality metric dashboards for all open and recently completed conversations let your supervisors deliver efficient support



Conversation View – Drill down into individual conversations for detailed analysis that can assist coaching, including summarized Copilot insights



Generally Available

Dynamics 365 Contact Center

Teams Phone Extensibility

Unify telephony with Microsoft Teams Phone in Dynamics 365 Contact Center

Eliminate **separate phone systems** and complex configuration

Leverage Teams' **global number availability** and enterprise-grade calling features

Enable contact center users with **Teams Phone licensing & entitlements**

Generally Available

Dynamics 365 Contact Center

Proactive Engagement

Personalize every interaction using real-time AI and customer data to tailor each conversation

Reach customers at the right moment on their **preferred channel** — voice, SMS, or email

Trigger **timely outreach** with AI-driven scheduling and channel optimization

Hi, Dianne. You have an upcoming delivery scheduled tomorrow 11/6 at 1:30 PM. We require an authorized adult to receive the delivery. Please confirm your availability.

Dianne Prescott
Something came up and looks like I need a reschedule.

Thank you for letting us know. I would love to assist you with a reschedule of the delivery. Do you have a preferred date in mind?

Dianne Prescott
I should be home on Friday. Can I schedule for then?

Absolutely. I do see a few openings where I can slot you in. Is 1:30 PM still a comfortable time?

Data Ingestion – Generally Available
New Dashboards – Public Preview

Dynamics 365 Contact Center

Diagnostics

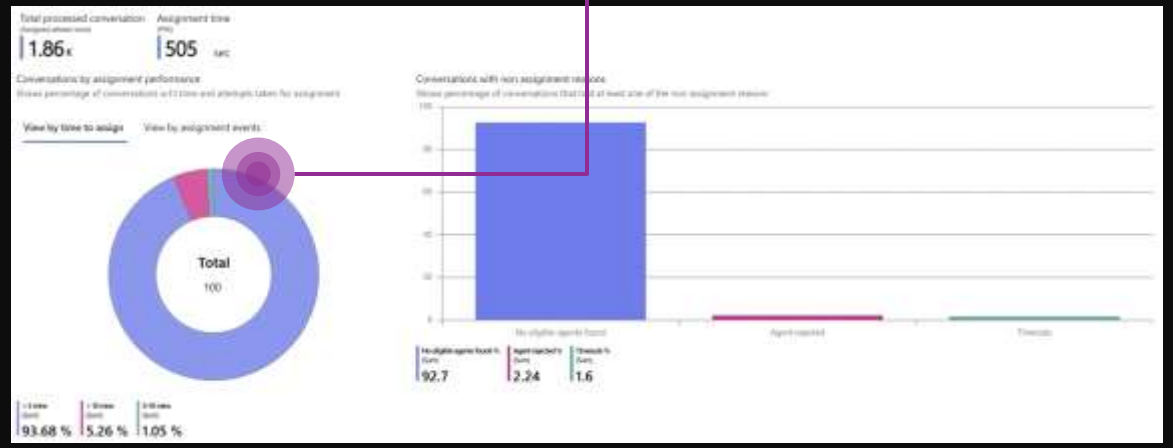
Monitor, detect, diagnose, and resolve system or resource issues quickly

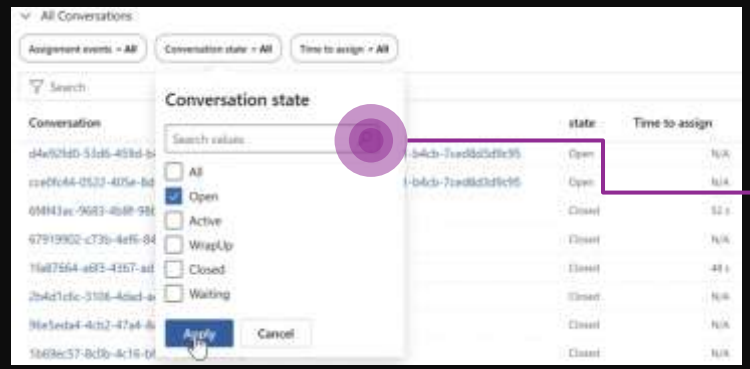
Application Insights data pipeline gives you new **information on the contact center health**

New dashboards in Application Insights and the Supervisor Workspace enable your team to **drill into your data**

Harness Copilot to **detect, explain, and resolve service issues**

New Dashboards – Admins and supervisors can assess the health of the business at-a-glance





…and slice down to individual conversations for fast analysis and de-bugging

Preview – Nov 2025
Generally Available – Mar 2026

Dynamics 365 Contact Center

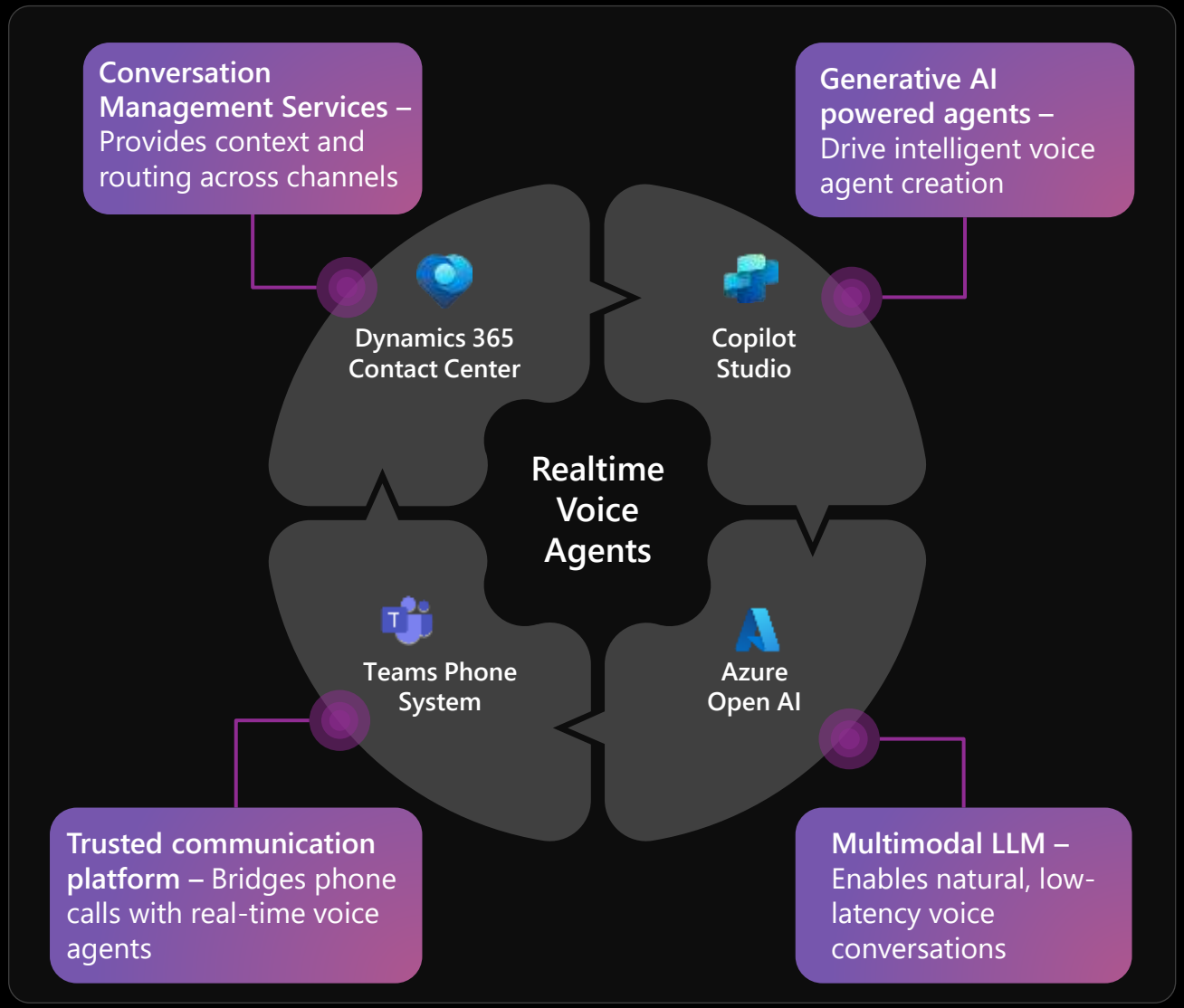
Real-time Voice Agents

Human-like voice conversations powered by Azure Open AI Services

Azure Open AI GPT real-time models directly integrated with Copilot Studio

Deliver **natural, and context-aware conversational experiences** compared to traditional IVR bots

Speak directly with voice agents that respond in real time with **emotion and language understanding**



Transform contact center into a growth engine with agentic CX


What’s new in Copilot Studio and roadmap

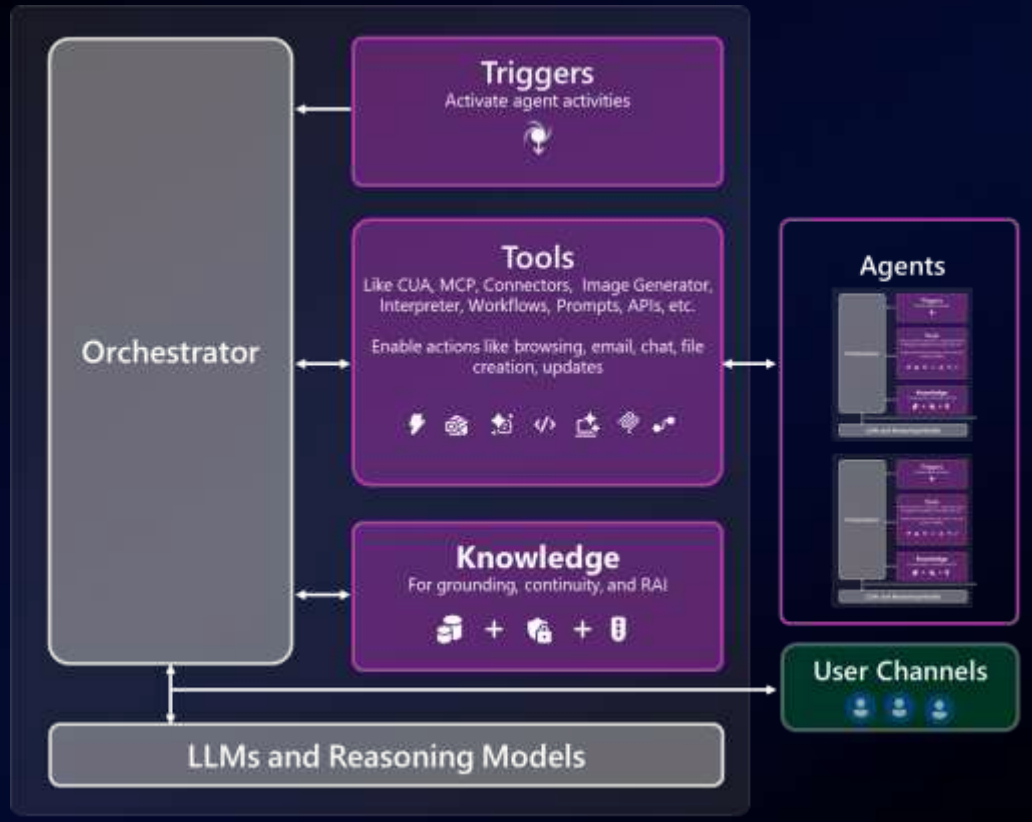
What's new in Copilot Studio

What's new in Copilot Studio and roadmap

Building an agent

Analytics
insights, what's working, what's not

Evaluations
test cases to set the bar, maintain it through future changes



Governance
manage and govern agents

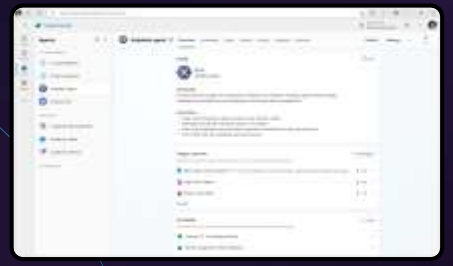
Life cycle management

Security
control secure agent ecosystem

Continuous improvement

Build agents and workflows
by simply describing what you want

Integrations
Integrate with Azure Foundry



Trigger your agents and workflows interactively through a chat, or autonomously through events

Copilot Studio

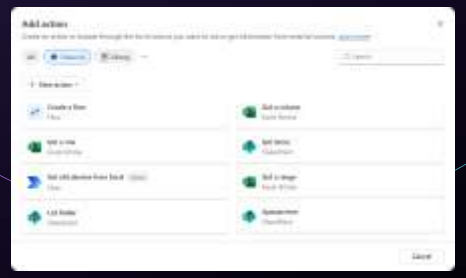
Create, manage and publish all from one E2E tool and SaaS service

Monitor and Improve
with rich analytics, observability, and custom evaluations

Chat over your knowledge
Provide generative answers **over** your knowledge – wherever it is - in M365, in Dataverse, in 3rd party systems and more

Publish to **multiple channels, and go live instantly**

Govern and manage **your agents with sophisticated capabilities**

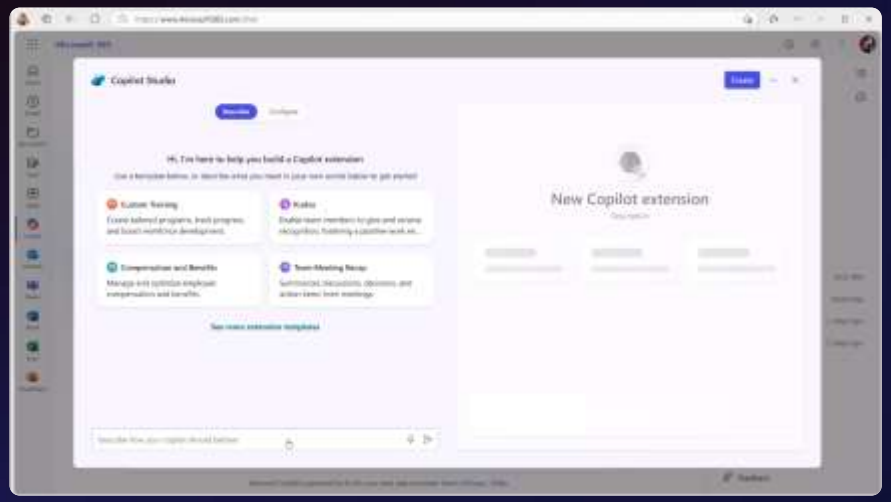


Use workflows
Create your own agent workflows and deterministic processes – allow your agents to use them and (soon) allow workflows to call your agents

Orchestrate over multiple agents and tools such as APIs, PP connectors, MCP servers, and powerful built-in tools such as Computer Use Agents

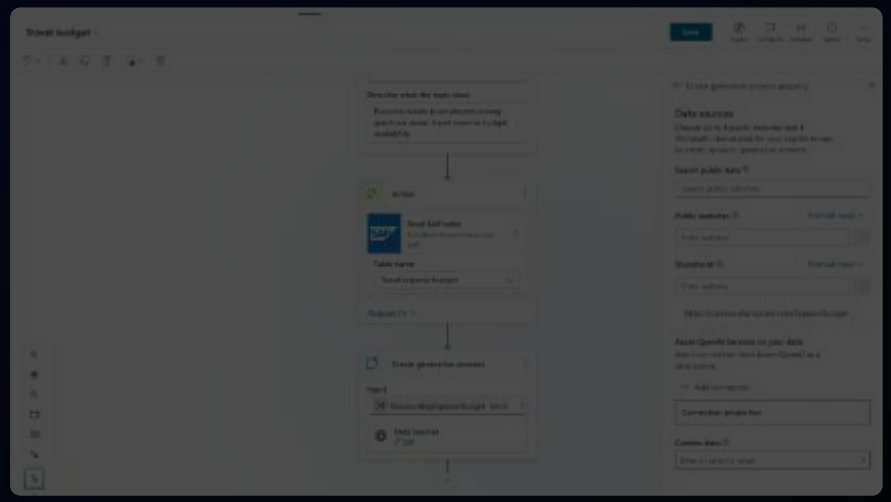
Copilot Studio Roadmap & What's New

For End Users

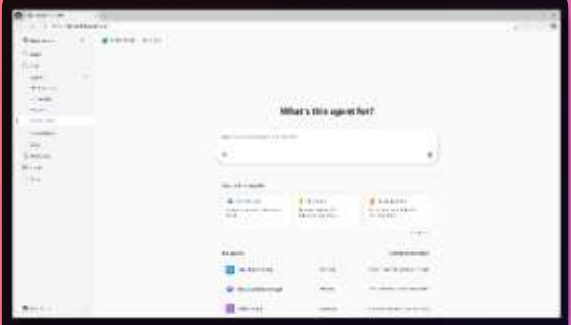


Microsoft 365 Copilot Agent Builder

For Makers

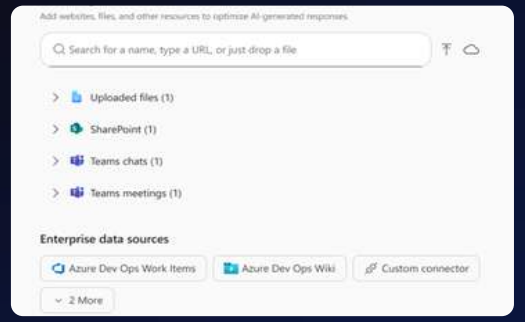


Copilot Studio



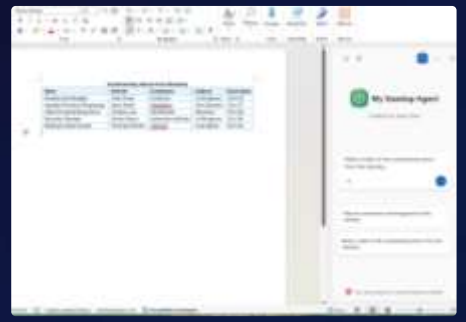
Agent Creation & Upgrade

- Simplified creation
- Improved load times and performance
- Copy to full MCS to access sophisticated capabilities



More Powerful agents

- Leverage Office skills to generate Office artifacts Word, Excel and PowerPoint
- New knowledge sources available for agents



Agents in the flow of work

- Agents available in Office surface like Word, Excel etc.
- Shared agents are discoverable in store ‘Shared with me’ section
- Copilot can recommend agents inline where appropriate.

Workflows Agent

- Create workflows within M365 Copilot
- Workflow can use LLM as steps like summarize email from my manager
- Workflow can call other Agents as a step in the flow

Information Workers

More powerful agents

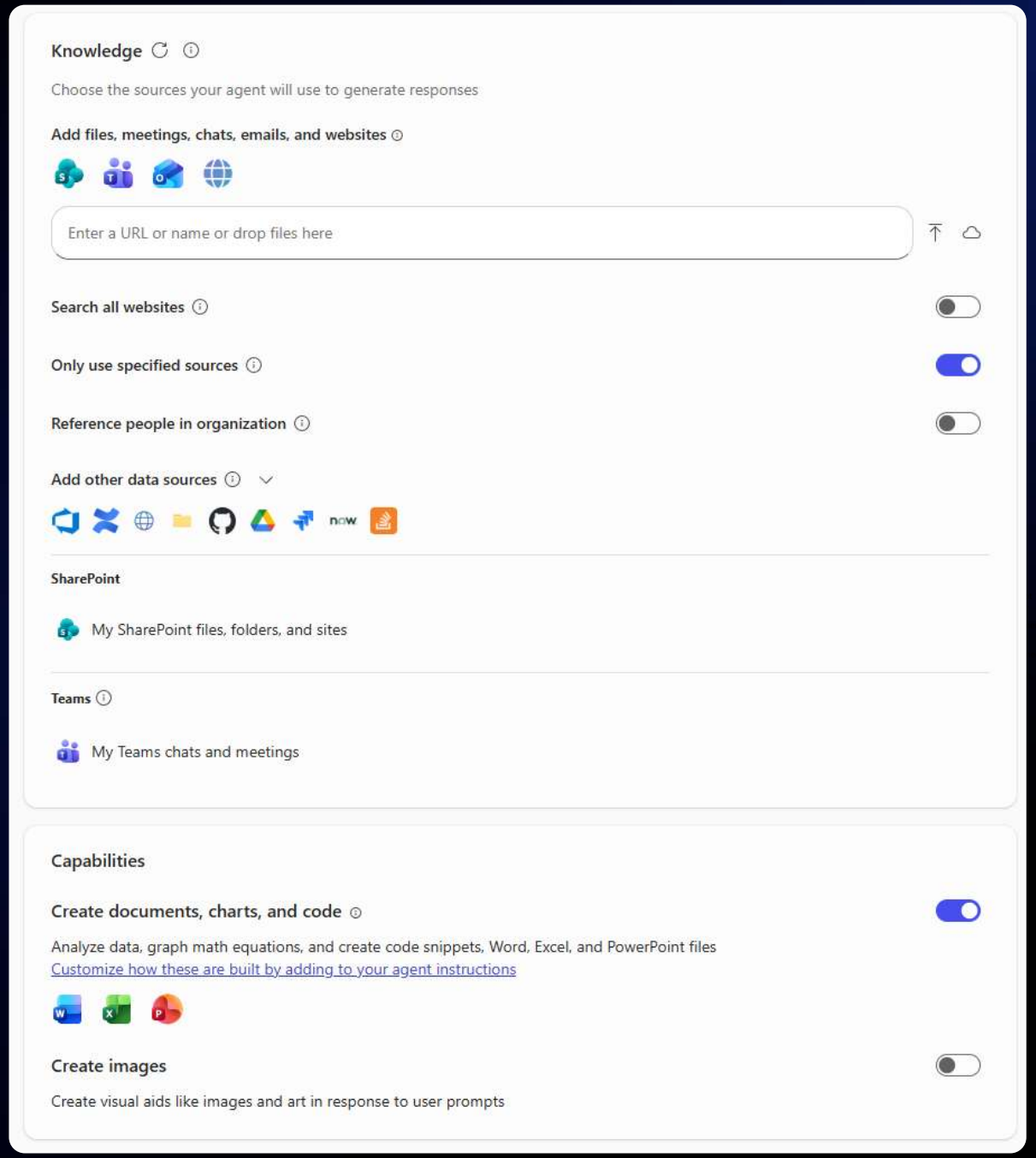
1. Agents can use **Office skills** to generate M365 **(Word, Excel, PowerPoint)** files to save time on common content creation tasks

2. Better responses with tons of new Knowledge sources - **Teams meetings and calendars,** your **work profile and org chart, OneNote** for personal or team notes, **delegate/shared** mailbox and enhanced embedded file size up to **512MB**

3. Enhanced **Copilot connector experience with granular source-level control** across platforms like ADO, Confluence, Google Drive, GitHub, Jira, and ServiceNow

4. Have agent **only respond from authoritative knowledge** provided by you to avoid conflating information from model's internal knowledge

Generally available | November 2025



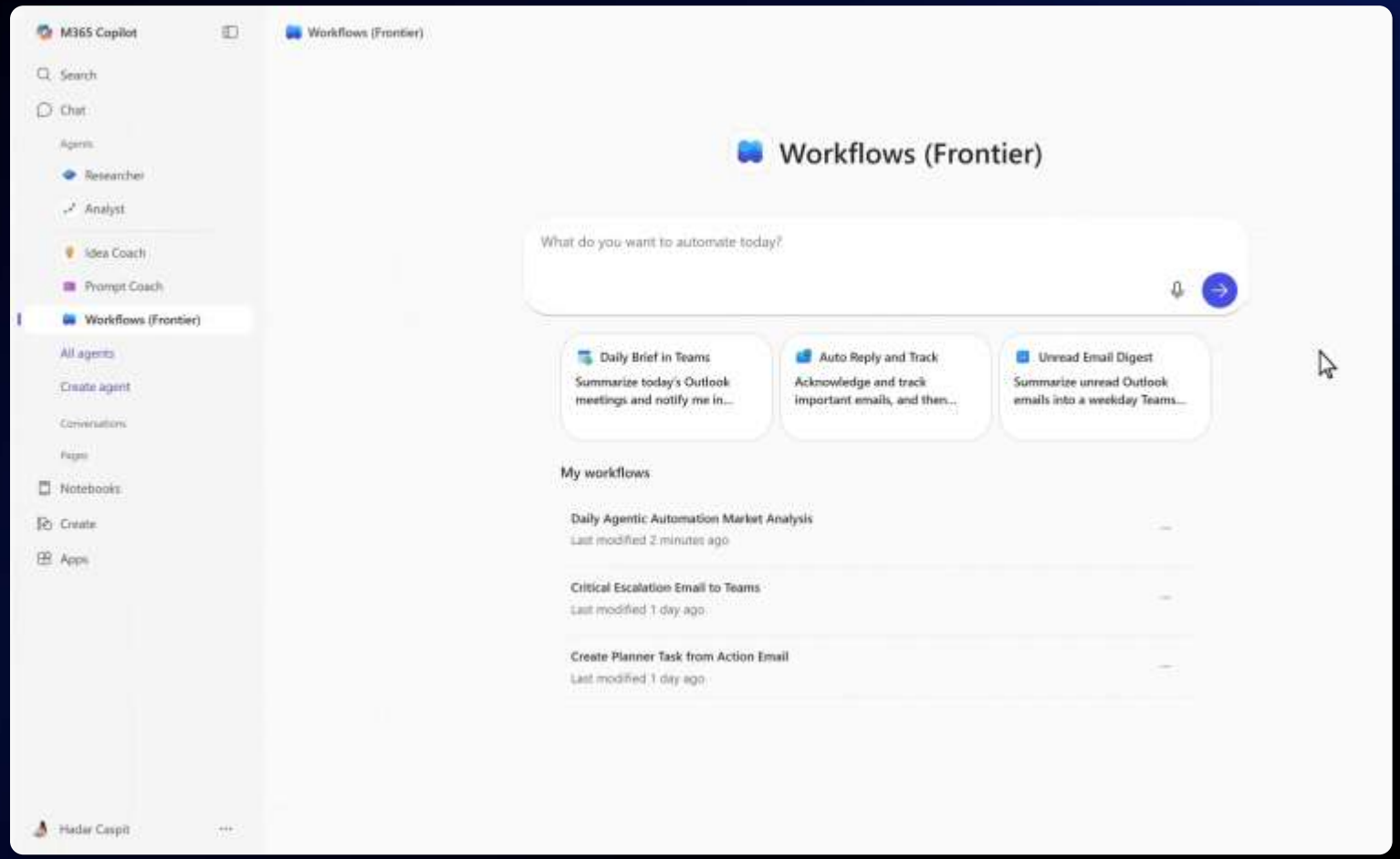
Information Workers

Introducing Workflows Agent

Users can now **create intelligent workflows directly from M365 Copilot** with Workflows Agent. Effortlessly automate tasks across your M365 applications like Teams, Outlook and Planner.

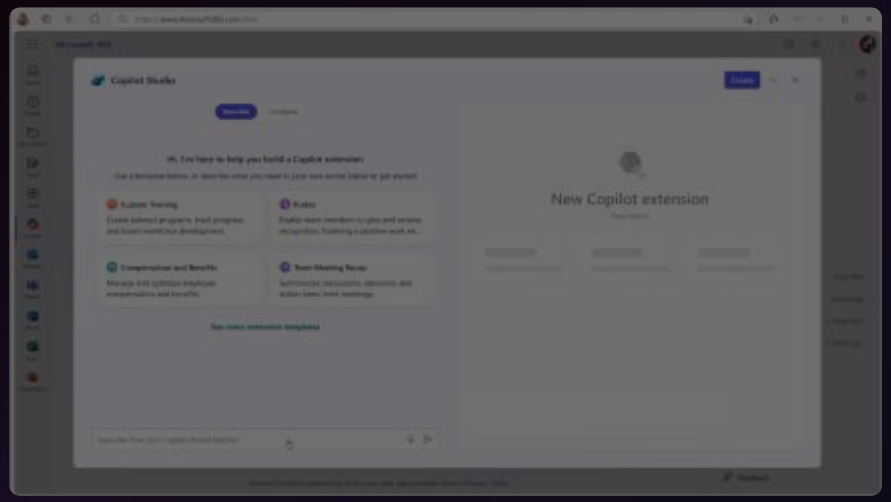
Users will be **guided to prompt and define their automation** while Workflows Agent actively builds the workflow in a graphical representation

Manage and edit active flows directly within M365 Copilot



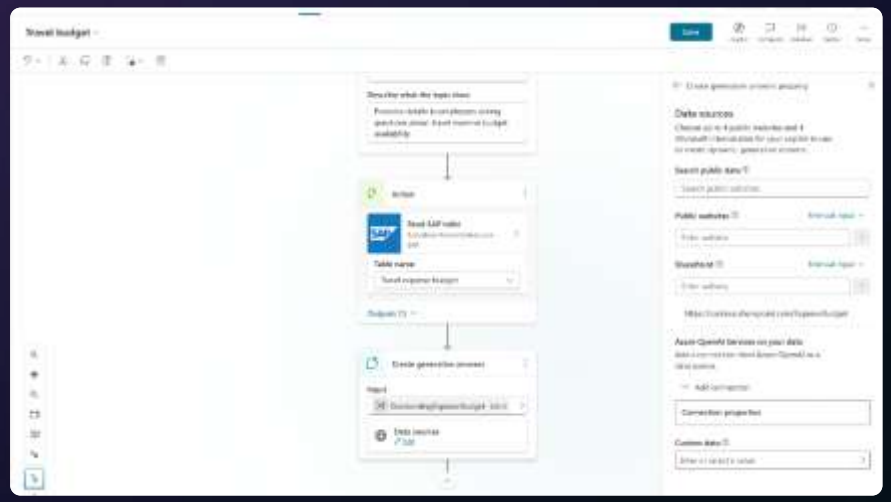
Copilot Studio Roadmap & What's New

For End Users

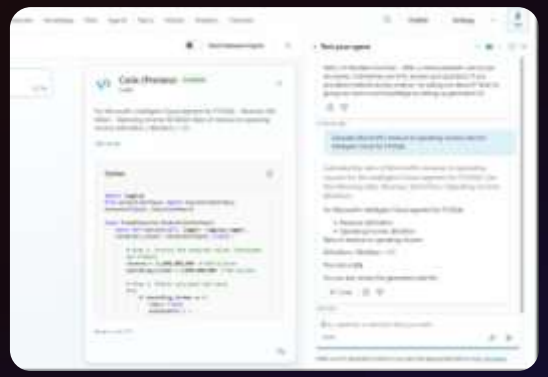


Microsoft 365 Copilot Agent Builder
(Copilot Studio Lite)

For Pro Makers

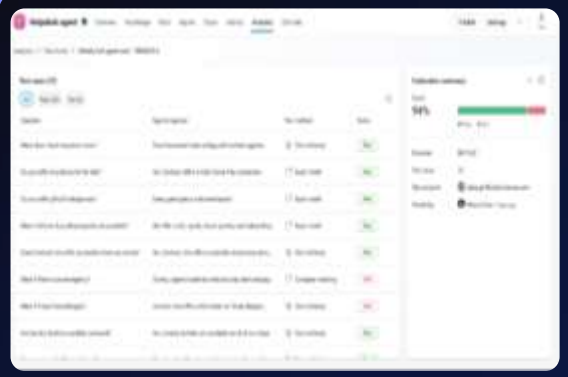


Copilot Studio



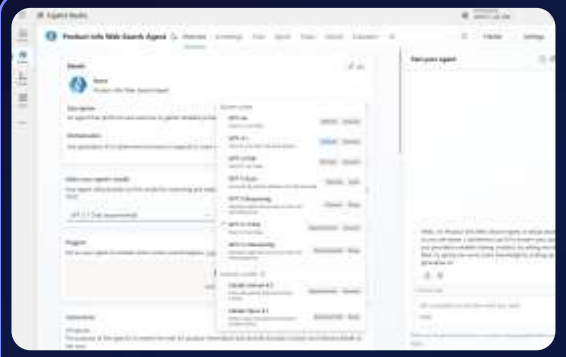
Answers & Tools

- Agentic RAG for data in SharePoint
- Better maker controls for
- Improved quality over graph connectors
- Reason over Structured Data using code interpreter
- Access and interact with apps and sites using CUA



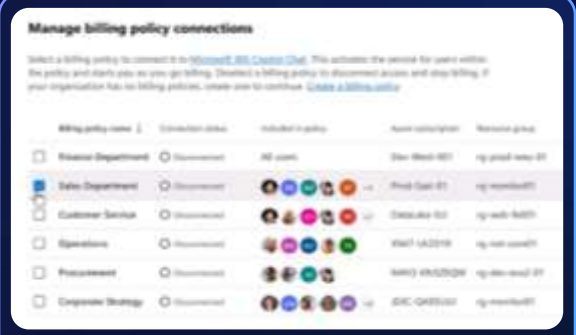
Evaluations & Analytics

- Enable evals for makers
- Analytics – User Themes, ROI, Multi-Agent



Model Choice & Multi-Agents

- MCS makers have access to the latest set of models
- Multiple connected agents can work together – each using a different model



Admin & Governance Capabilities

- Enhanced control system for Agents, and agent inventory
- Lifecycle and Zone governance
- Cost and Adoption Management
- Operations & Reliability Monitoring

Evaluations in MCS

Ensuring agent quality – before deployment :

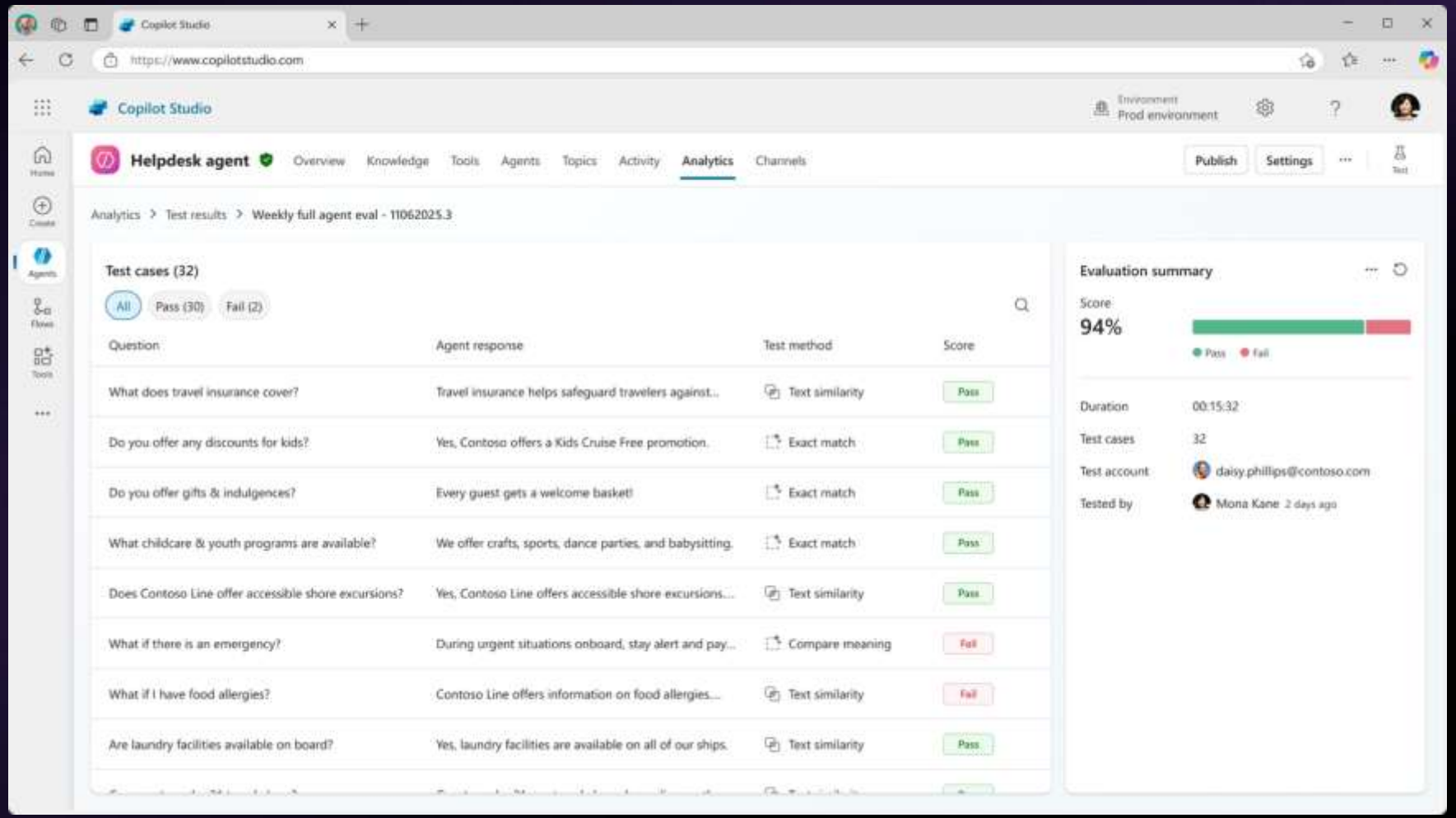
Makers **evaluate agents' quality** directly within Copilot Studio.

Run structured tests to evaluate key scenarios and catch regressions early.

Build or import test sets – upload predefined files, reuse user interactions, or let AI generate new queries from metadata and topics.

Measure detailed results that best fit your business needs with grader-based scoring.

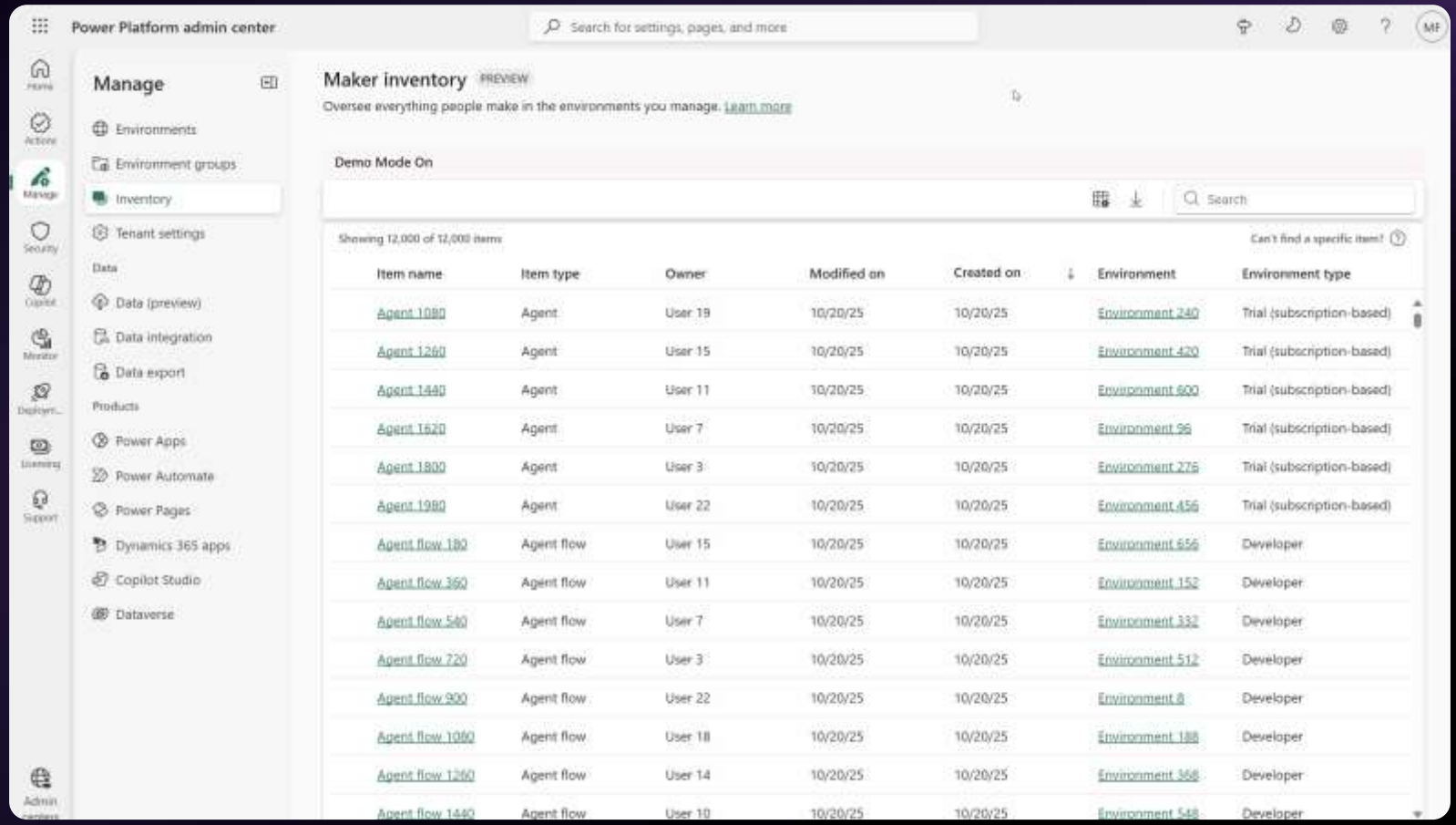
Iterate until reaching the optimal passing score, ensuring confidence before release.



IT Admins

See all your agents

Enhanced agent inventory



See all the tenant's agents, apps and flows

Via UX or APIs

Fast and up to date

Large scale (millions)

Generally Available | November 2025

Check out all the Copilot Studio Sessions!

Wednesday, 11/19

2:45 PM BRK1742	Advanced agent development with Copilot Studio
4:00 PM BRK320	Automation in Copilot Studio: Agent flows and computer use
4:00 PM BRK311	Drive agent adoption with M365 Copilot and the Agent Store

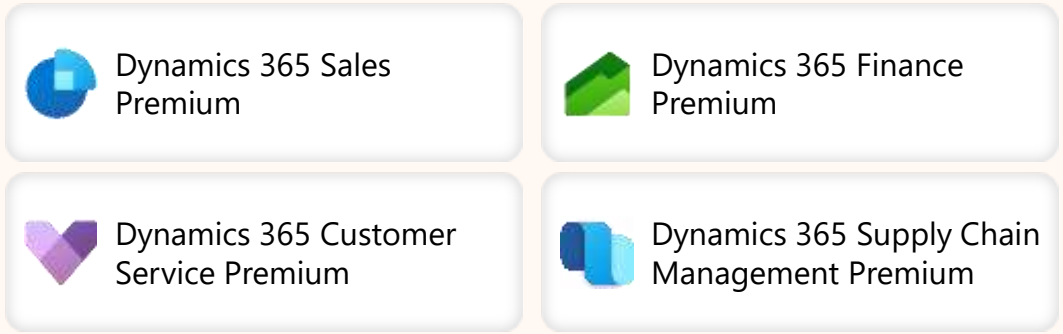
Thursday, 11/20

8:30 AM BRK319	Build Agents for Copilot with the Microsoft 365 Agents Toolkit
9:45 AM BRK317	Building multi-agent systems with MCP and Copilot Studio
11:00 AM BRK312	How to build and publish your agents to the Agent Store
2:15 PM BRK314	Building agents with Copilot Studio and Azure AI Foundry
3:30 PM BRK315	Deep dive into AI tools in Copilot Studio
4:45 PM BRK321	From flows to agents: Modernizing with Copilot Studio + Power Automate

Friday, 11/21

9:00 AM BRK316	Democratizing agent building in Microsoft 365 Copilot
10:15 AM BRK318	Building the most intelligent agents with the latest knowledge sources

New: Accelerate agent adoption with Dynamics 365 Premium



1,000 Copilot Credits are included with each per user license/per month to either run pre-built Dynamics 365 agents and/or custom agents built with Microsoft Copilot Studio

- ✓ **Available for both new and existing Dynamics** 365 Premium users starting 11/25 (but OMC notice went out today)
- ✓ **Copilot Credits from Premium SKUs are accrued at the tenant level**. Customers should allocate Copilot Credits to environments to prevent credits from being used in other workloads (e.g., prevent finance agents from running on Copilot Credits accrued from Sales Premium licenses).
- ✓ **Copilot Credits are our universal currency** to pay for agentic services across Copilot Chat, Microsoft Copilot Studio and Dynamics 365 first-party agents[1].
- ✓ **Additional Copilot Credits** can be bought via (1) pay-as-you-go, (2) capacity packs, and (3) pre-purchase plan

[1] Microsoft reserves the right to update Copilot Credit eligible products.

The era of AI & Agents

Once-in-a-generation opportunity to create value at scale with innovation

The future of Power Platform: AI-powered and enterprise-grade

DEMO

Introducing Vibe.PowerApps.com

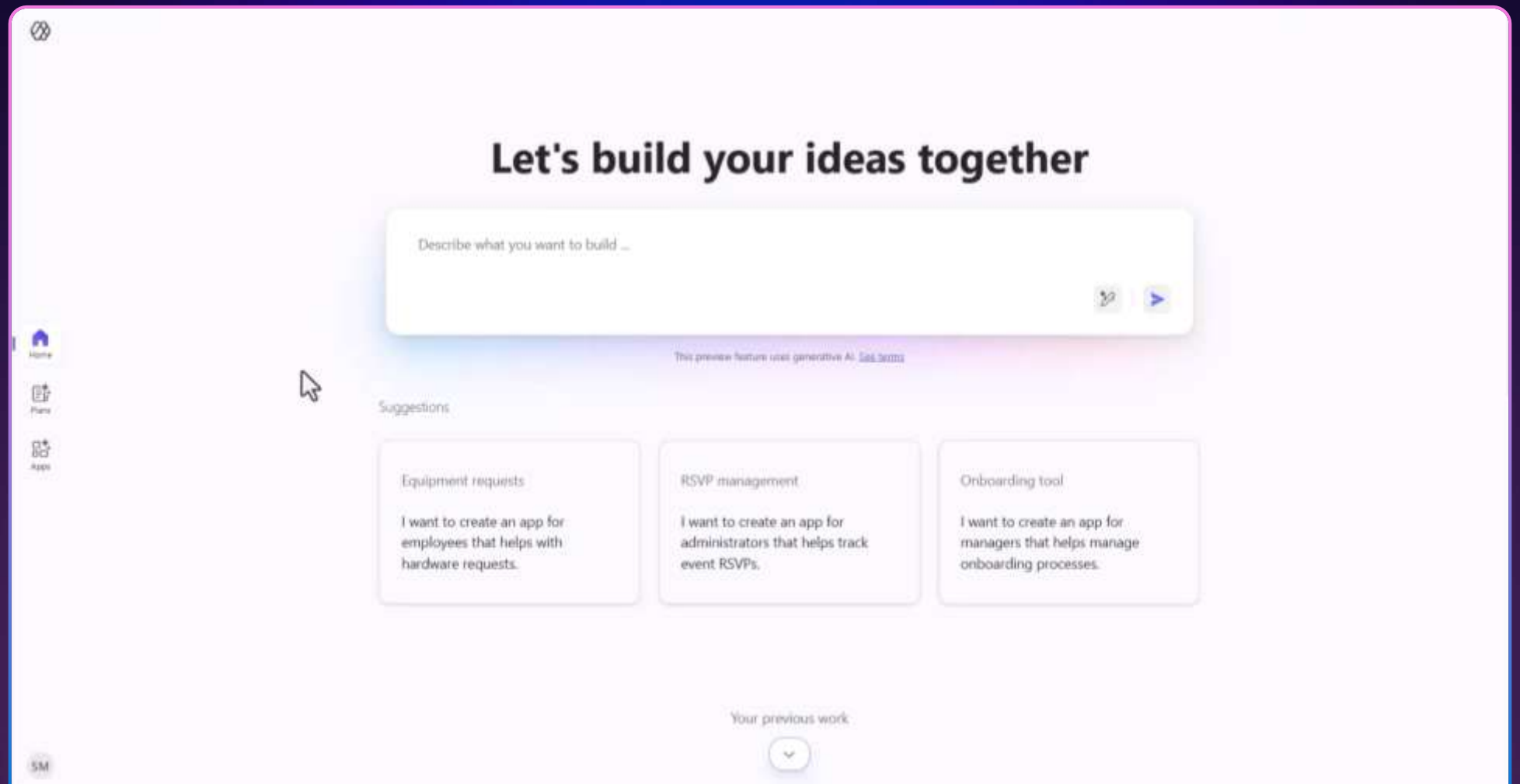
Simon Matthews

Principal PM Manager

NEW

Vibe coding gets an enterprise upgrade with Power Apps

Work with a team of agents including a new Code Agent that builds full-stack apps



Thank you