

AI-Powered Customer Experiences

Transform your sales, marketing and service
with Dynamics 365 Copilot



This content is for...

Business leaders in sales, marketing and customer service looking to improve team efficiency and productivity using AI-powered tools.



Estimated reading time:
Six minutes

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As we look ahead, we believe this next generation of AI will unlock a new wave of productivity growth, with powerful copilots designed to remove the drudgery from our daily tasks and jobs, freeing us to rediscover the joy of creation.”

Satya Nadella
Chairman and Chief Executive Officer
Microsoft¹

Productivity doesn't mean working more or working faster – it's about focusing on what matters. Fast-arising risks and opportunities demand extreme agility. A hybrid workplace means more emails, meetings and minutia. Customers demand more personalised experiences across channels.

Traditional tools aren't keeping up

Sales, marketing and service teams spend too much time on clerical tasks like CRM updates. The customer information they rely on gets siloed or goes stale. Responding to emails becomes a full-time job. Dull tasks drain energy and creativity.

Unaddressed, these challenges lead to poor customer experiences and lost revenue. The answer is to make the most of talented teams by empowering sales, marketing and service to do what they do best – build relationships, think creatively and collaborate to win.

¹ [The Future of Work with AI](#), Satya Nadella, March 16, 2023

Opportunity is here in the form of next-generation AI

Next-generation AI finds patterns in data and uses them to create new outputs, such as text, images or data. Based on years of Microsoft research and development, these capabilities are now available through Dynamics 365 Copilot.

Using simple, natural-language prompts, employees can use copilot features to perform a wide range of tasks from drafting personalised emails to managing CRM data. As a result, they can work more efficiently, focus on high-value tasks and make personal connections with more customers.

This eBook explores how empowering your team with these new capabilities helps them contribute their best work.





Sellers need to know their customers and stay updated with ever-changing deal flows. Informed, data-driven interactions can make the difference in customer retention and revenue.

Empowering sellers with AI

Copilot features in Microsoft Viva Sales help sellers manage time, enhance productivity, alleviate workloads and close deals. Viva Sales is included with Dynamics 365 Sales Premium or available as a standalone offering for Salesforce CRM.

Accelerating and improving email interactions

Sellers often spend considerable time drafting email responses to customers. They must gather data from the CRM, review their notes and recall conversations. Copilot in Viva Sales automates the routine parts of this process. It draws on data from the CRM, email context and combined data from Microsoft Graph to generate suggested responses. This capability saves sellers time by offering responses tailored to both the customer's unique needs and the individual seller's communication style.

Delivering instant meeting summaries

AI-generated meeting summaries offer another valuable tool for sales professionals. Sellers can focus on their conversations with customers instead of taking notes. Copilot in Viva Sales records and transcribes calls while conversation intelligence features capture key highlights, questions and follow-ups.

When a meeting is over, sellers can use Copilot in Viva Sales to create a customer-ready summary including CRM data and context from earlier meetings. After verifying and editing, the seller can send the information to the customer much sooner than if they had to create the entire summary manually. This feature helps sellers stay engaged during content-heavy sales meetings.

Prioritising opportunities

Additionally, AI-powered solutions can help sales teams identify high-value opportunities and decide the most effective next steps using relationship intelligence and 'who knows whom' capabilities. Sales teams can use this information to allocate resources strategically, focus on the most promising leads and nurture valuable connections.



Customer data enhances marketing professionals' ability to strategise, adapt and connect with customers. Yet marketers often rely on scarce data analysts to uncover insights and sometimes wait weeks for results.

Accelerating customer insights

With Copilot in Dynamics 365 Customer Insights, marketing teams can use natural language to access and explore data.

For example, if a team wants to know which product category is most popular among customers aged 25-34 or see sales trends in a particular city, they can query data using conversational language prompts.

Copilot provides results instantly.

Simplifying segmentation

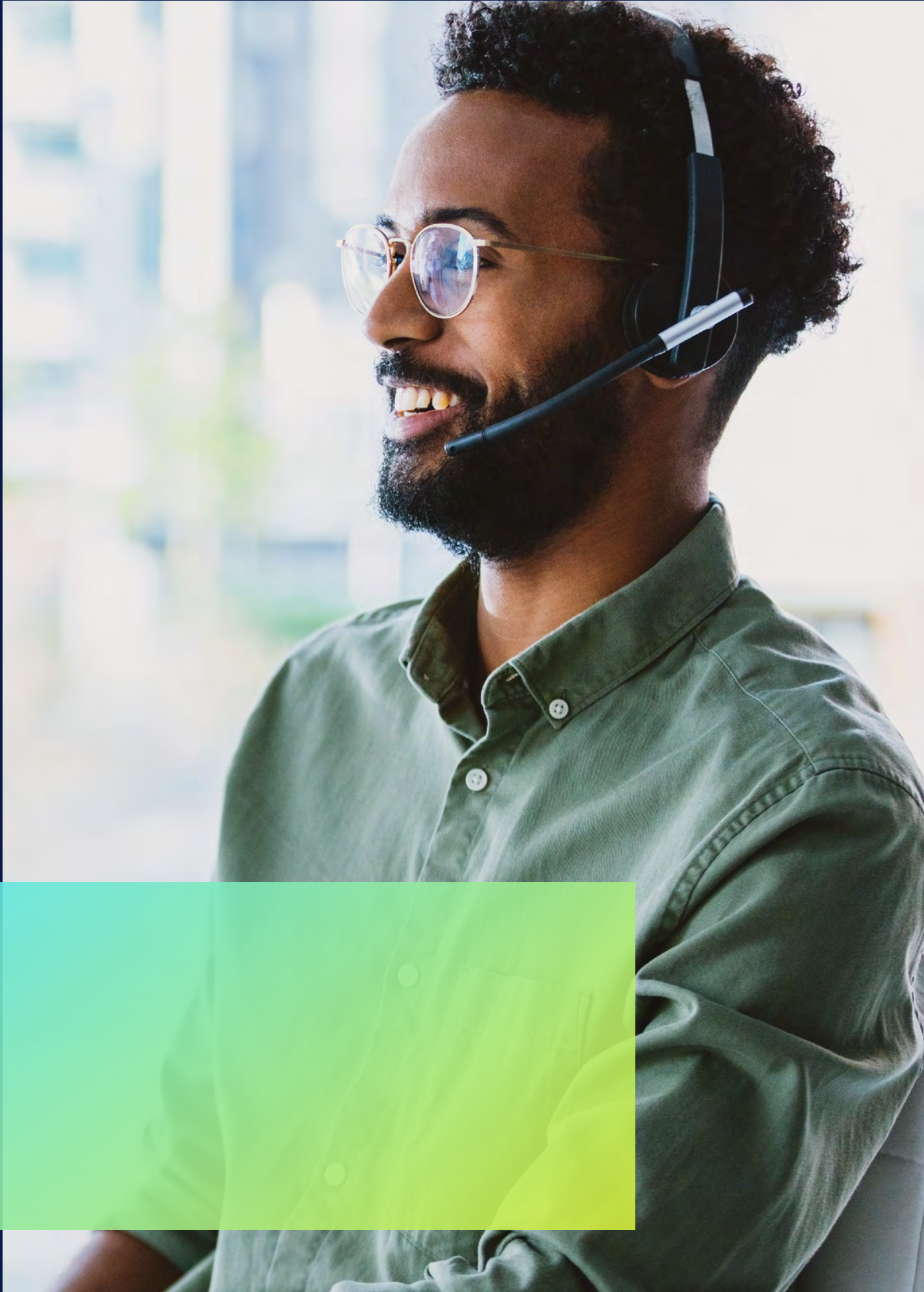
To save marketers time in creating or enhancing segments, Dynamics 365 Marketing includes Query Assist, a copilot feature. Instead of learning specialised query techniques, marketers can describe target groups using natural language.

Generating creative campaign ideas

Using the campaign ideas feature, marketers can get a head start on campaign creation, creating high-quality content faster and with less effort. They can rapidly generate ideas based on an initial topic and even create first drafts of blog posts, ads or other content in seconds.

Improving email relevance

Relevant email marketing is a proven way to engage with potential customers. Marketers can elevate email using AI, which generates engaging text with a customisable tone from key points they provide.



Service excellence keeps customers coming back. Yet teams face growing workloads and cross-channel interactions, requiring new tools to help them keep pace.

features, agents spend less time searching for content and drafting replies, which enables them to focus on more nuanced cases and spend more time with customers.

Freeing time to connect with customers

Using Copilot in Dynamics 365 Customer Service, customer service professionals can more quickly find resources, efficiently handle cases and automate time-consuming tasks, enhancing the customer experience.

Responding to customer needs with ease

Just as with sales and marketing, customer service professionals can use Copilot in Dynamics 365 Customer Service to simplify the creation of data-informed email and chat responses. By taking advantage of copilot

Creating engaging chatbots

Copilot in Power Virtual Agents helps organisations build and deploy chatbots that engage customers naturally and intuitively. They can handle routine tasks, answer frequent questions and provide personalised experiences around the clock. Support agents can prioritise more challenging cases, while customers get faster service across channels.

Copilot capabilities are built to meet high standards for security, compliance and privacy. They use the latest business data to generate correct and relevant responses. And they are available as part of commonly used Microsoft apps, including Office, Teams and Dynamics.

Embracing the future of productivity

The foundational capabilities of next-generation AI, like creating, summarising, analysing, collaborating and automating, are already productivity game changers. Over time, copilot features adapt to employee needs to help them perform sophisticated tasks and queries. By taking advantage of this powerful technology, you can help your people work smarter and deliver outstanding CX daily.

Elevate CX with Microsoft

[Explore now](#)

