Microsoft Dynamics 365

Customer Service Modernization

Microsoft is the trusted leader in business applications and low-code solutions

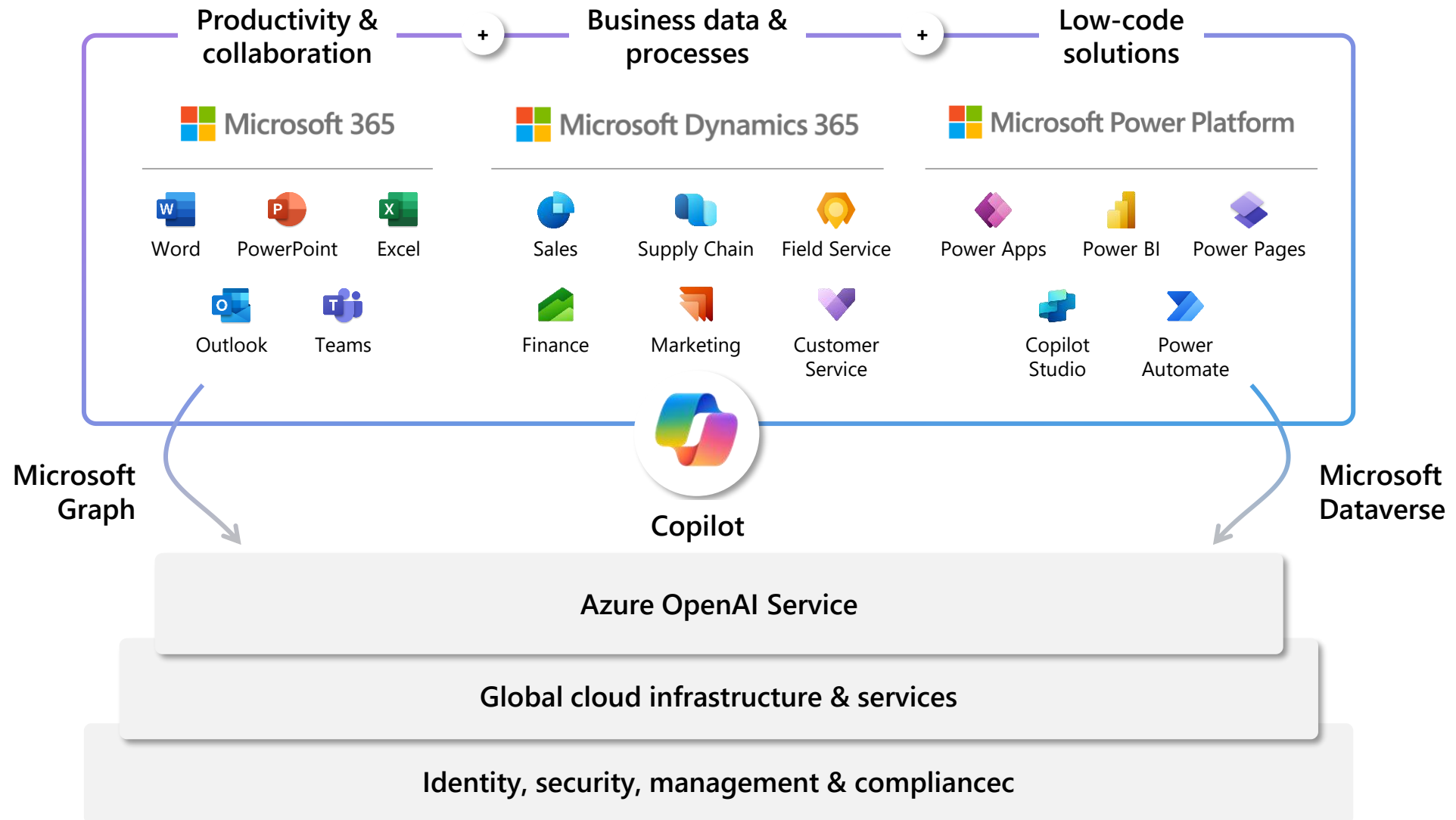Microsoft Dynamics 365

Microsoft Power Platform

97% of Fortune 500 companies choose Dynamics 365 or Power Platform

500K organizations use Dynamics 365 and Power Platform every month

40K+ customers use Copilot features in Dynamics 365 or Power Platform

30 year history of enhancing and redefining CRM and ERP solutions
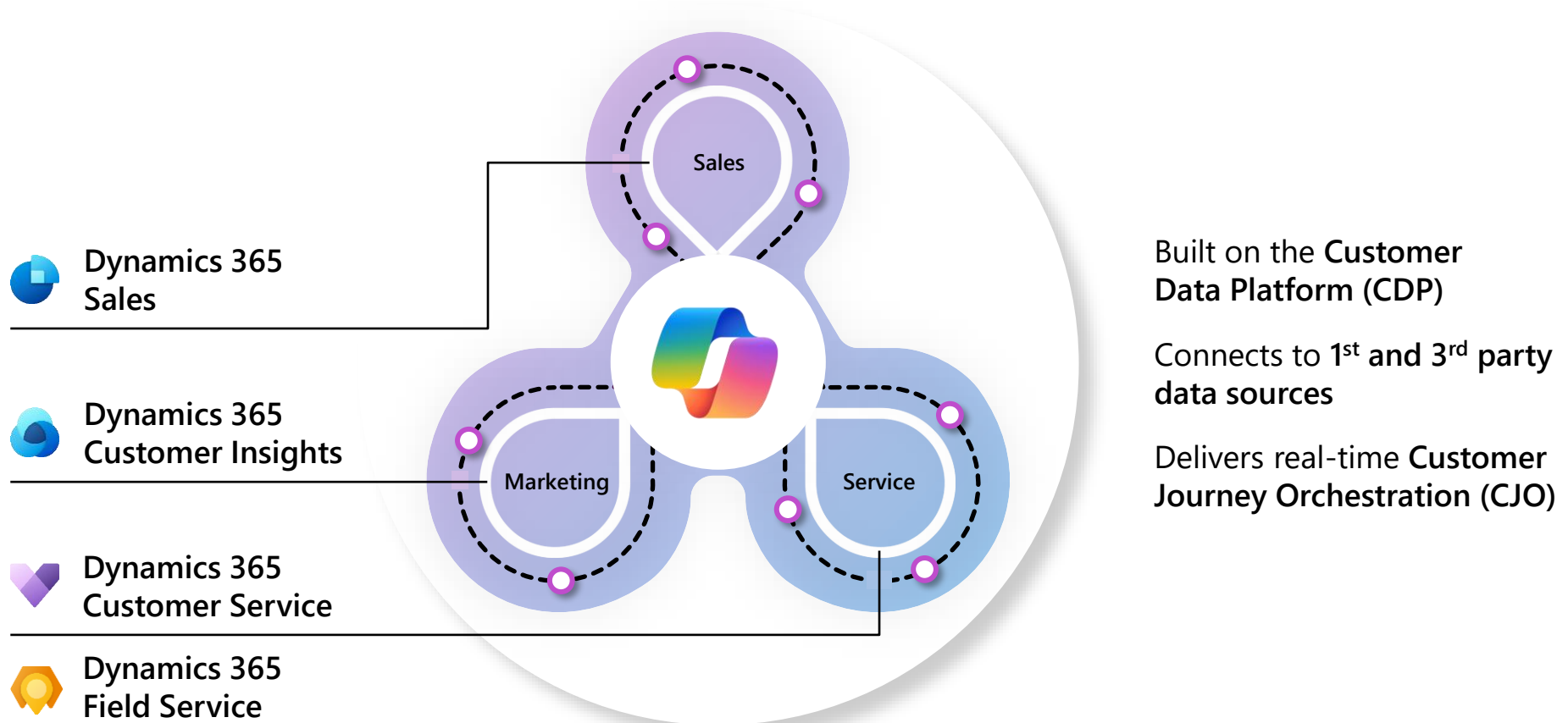
The blueprint for cross-organization impact

Productivity & collaboration + **Business data & processes** + **Low-code solutions**

Microsoft 365 | Microsoft Dynamics 365 | Microsoft Power Platform

Word, PowerPoint, Excel, Outlook, Teams

Sales, Supply Chain, Field Service, Finance, Marketing, Customer Service

Power Apps, Power BI, Power Pages, Copilot Studio, Power Automate

Copilot

Microsoft Graph

Microsoft Dataverse

Azure OpenAI Service

Global cloud infrastructure & services

Identity, security, management & compliancec

How we help customers deliver great experiences

Deeply understand customers　　**Personalize every interaction**　　**Leverage data and AI**

Dynamics 365
Sales

Dynamics 365
Customer Insights

Dynamics 365
Customer Service

Dynamics 365
Field Service

Sales

Marketing

Service

Built on the **Customer Data Platform (CDP)**

Connects to **1st and 3rd party data sources**

Delivers real-time **Customer Journey Orchestration (CJO)**

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

Customer

360-degree view of the customer at every touch point

Interacts with marketing campaign

Marketing

- Improve marketing efficacy and ROI
- Higher quality leads
- Better pipeline health
- Increase cross sell and upsell opportunity

Connects with seller

Sales

- Increase win rate
- Higher deal sizes
- Faster time to close
- Improve seller productivity

Receives ongoing support

Service

- Deliver more contextual and faster support
- Drive first time resolution
- Increase CSAT
- Reduce churn

Personalized customer experience at every stage

The customer journey in service

Service

Customer

360-degree view of the customer at every touch point

Uses automated self-service options

Receives support from agents

Gets onsite service from technicians

Self Service

Assisted Service

Field Service

- Anytime automated fast response to questions
- Quick and easy low-code deployment options
- Conversational AI for human-like interactions

- Engage in customer's choice of channel (omnichannel)
- Improved agent productivity with holistic UX and AI-assist tools
- Modern case management and collaboration

- Proactive service with IoT and AI-driven automation
- Optimized resource scheduling and work order management
- Technicians empowered with mobile app and remote assist

Service experience directly impacts business performance...

83%
of customers agree that great service will turn them from one-time into life-time shoppers[1]

96%
will leave your business if you deliver poor customer service[2]

180%
market share growth for customer-obsessed companies[3]

$7B
in incremental revenue for organizations that resolve customer issues on first contact[4]

[1]Forbes. Is Customer Service Still Important? On A Scale Of 1 To 10, It's An 11. Jul. 20, 2022
[2]Forbes. Ninety-Six Percent Of Customers Will Leave You For Bad Customer Service. Jul. 12, 2020.

[3]Forrester. The State of Customer Obsession, 2023. Oct. 2, 2023.
[4]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).

...but service teams are not equipped to make that impact

53%
of contact center leaders lack the information to help agents better understand customer context[1]

<10%
of contact centers have agents reaching proficiency in fewer than two months[2]

#1
priority is to reduce operating costs and boost productivity, according to business leaders[3]

The bottom line

- Inability to get support on customers' terms are leading to **decreased engagement and brand loyalty**

- Manual tools and systems are leading to **reduced productivity and long case resolution time**

- Limited insights, reactive decision making, and multi-vendor system complexities are leading to **high operational cost**

[1]Forbes. 50 Stats That Prove the Value of Customer Experience. 2019.
[2]ProcedureFlow. The State of Contact Center Training. Jun. 2021.
[3]Customer Contact Week Digital. 2022 January: Market Study: State of Contact Center Technology. Jan. 27, 2022.

The age of AI

AI sets the stage for a new era of innovation

Microsoft Copilot
for Dynamics 365

AI as a real-time collaborator that:

Generates content

Sparks creativity

Automates tasks

Surfaces insights

Copilot in Dynamics 365 Customer Service

transforms the customer experience by empowering agents to drive faster resolution with generative AI and automation.

Copilot in Dynamics 365 Customer Service is built directly into the Dynamics 365 Customer Service platform.
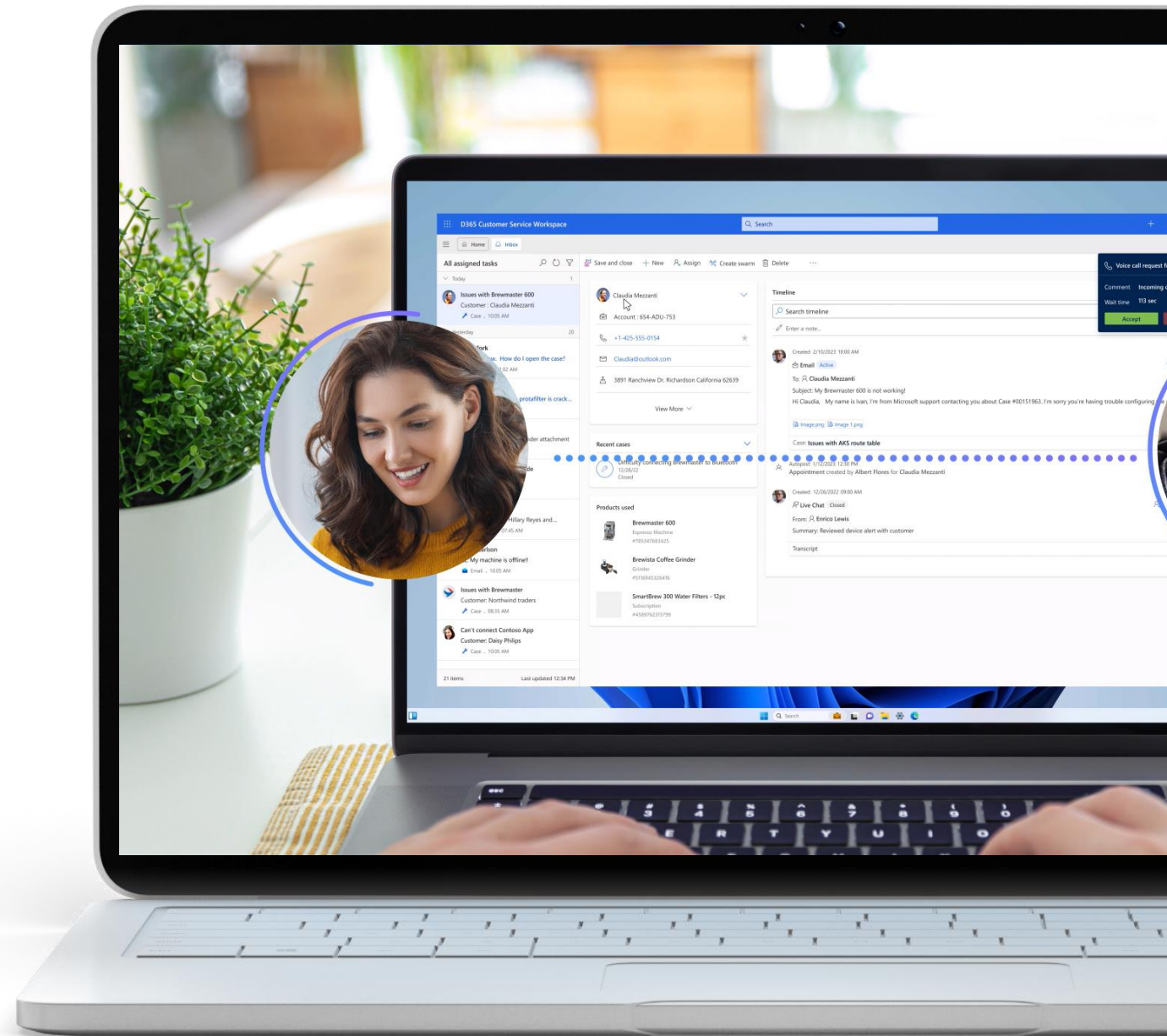
Copilot in Dynamics 365 Customer Service
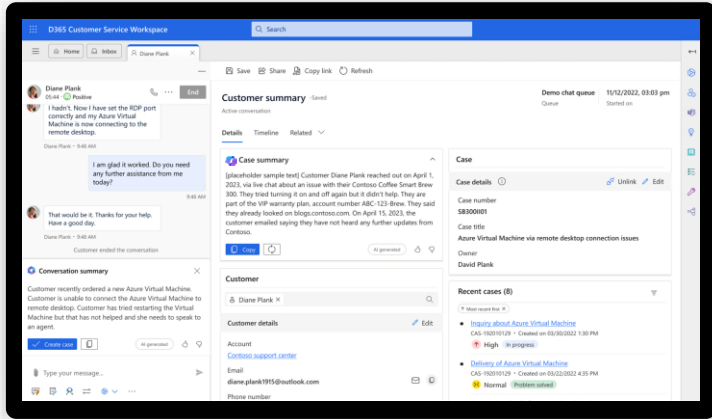
Ramp up quickly with automatic conversation summaries

Expedite activities like ramp ups, handoffs, and wrap ups with automatic conversation summaries
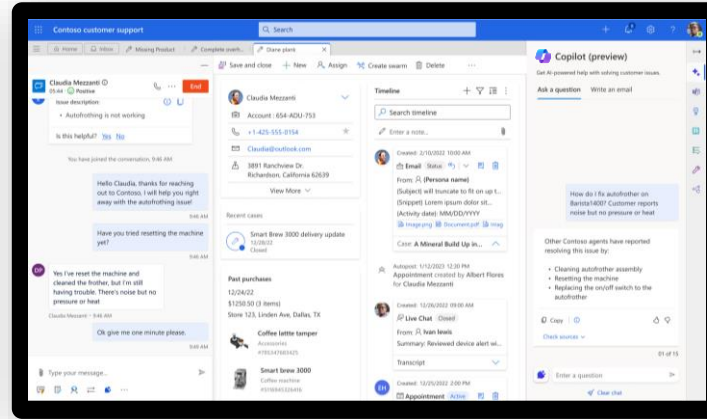
Resolve issues faster with a conversation expert

Use a conversational interface to ask questions of organizational knowledge sources to quickly find answers
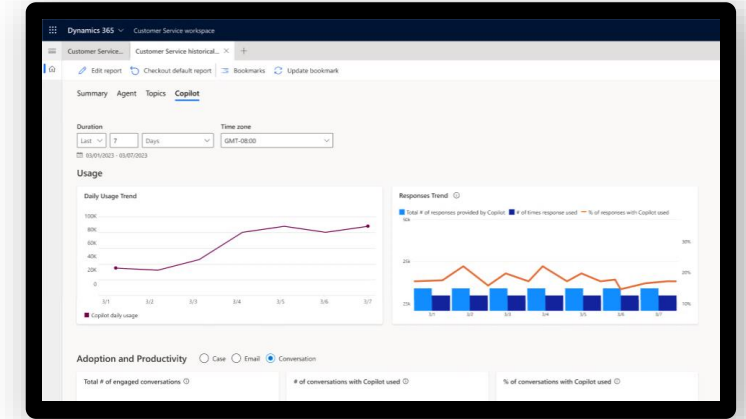
Discover agent productivity improvements

Understand how Copilot is impacting key support metrics, then convert those findings into changes that positively affect agents

Select the underlined text to navigate to the associated capability slide.

Copilot helps every agent become a super agent

Reduce time spent on ramp ups, handoffs, and wrap ups with conversation summaries

Support agents can accelerate the time it takes to ramp up, handoff, and close cases with automatic conversation summaries, including summaries of long-running cases.
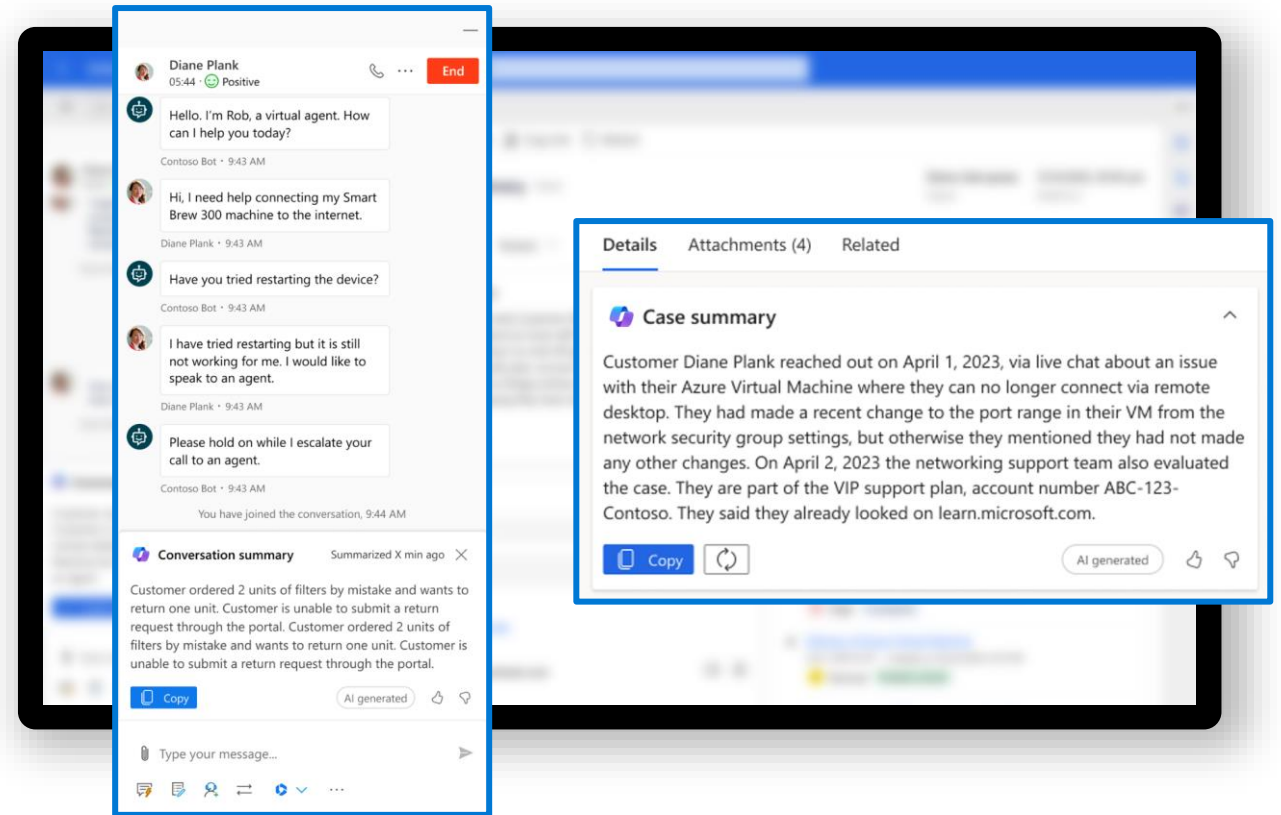
Copilot helps every agent become a super agent
Resolve issues faster with a conversation expert at your fingertips

Using a conversational interface to ask questions of their organization's knowledge sources, agents can quickly gather relevant information to respond to customer's inquiries. Copilot can also create personalized email responses based on the context of that email conversation.
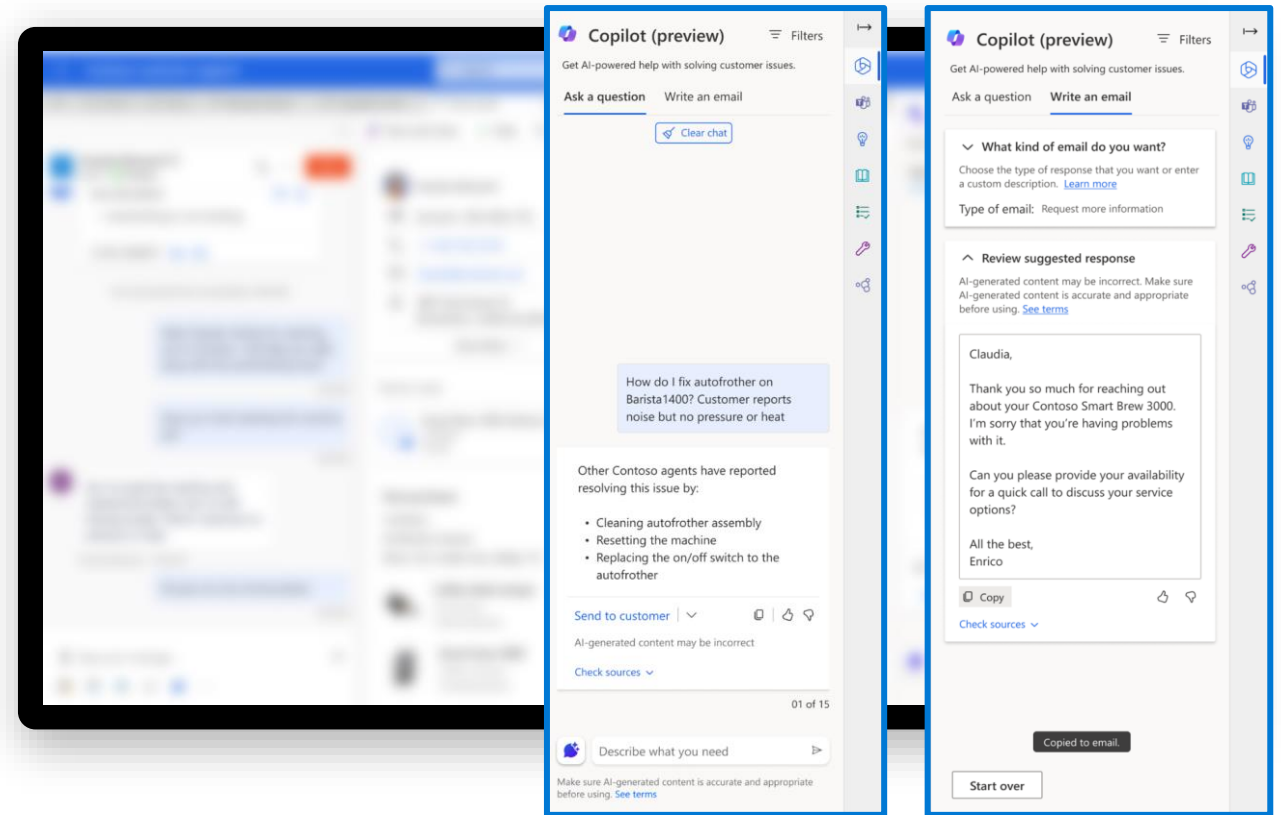
Copilot helps every agent become a super agent
Understand Copilot impact and discover agent productivity improvements

Support managers have a detailed view into Copilot usage by agent groups, and how it's impacting key support metrics including handle times, throughput and more through intuitive out of box reports.
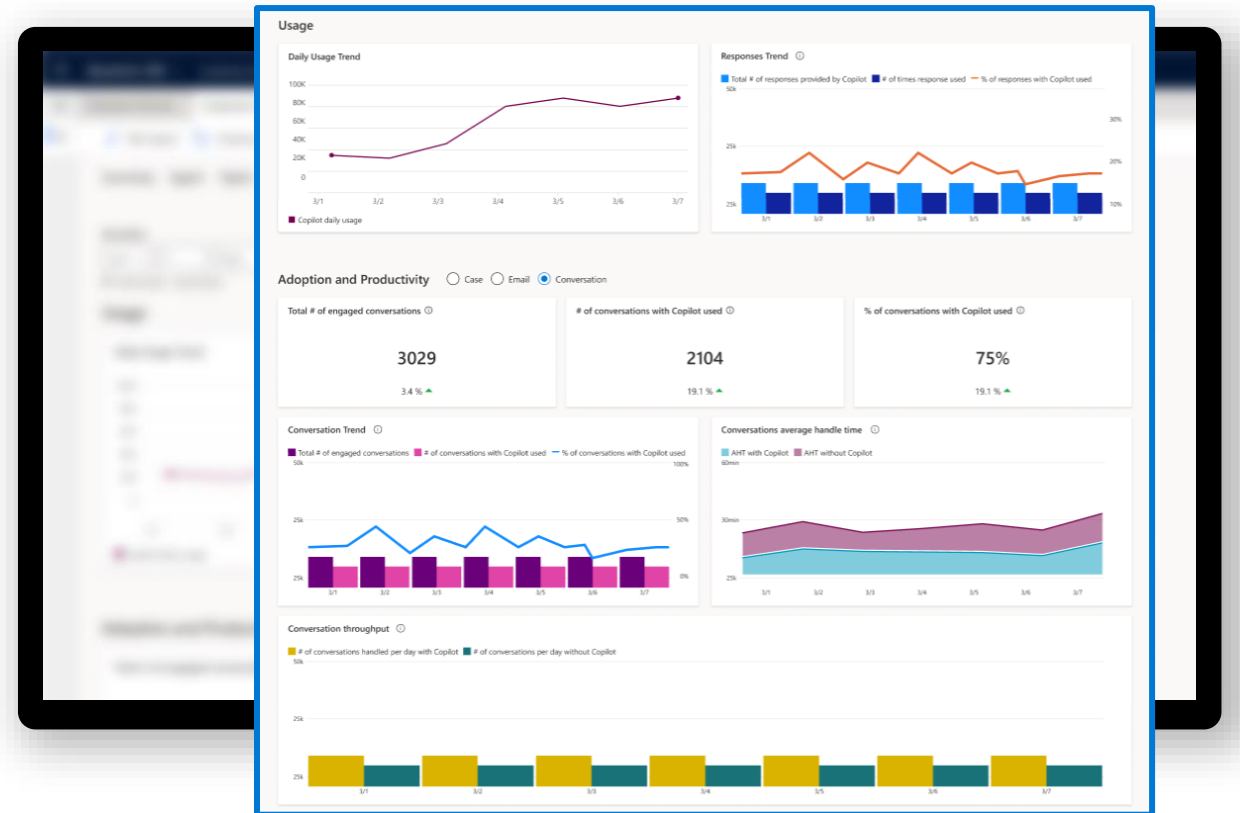
The AI shift in service is impacting everyone

Customer

"I want to access support on my terms, through my preferred channel and get answers quickly and efficiently."

87%
of brands say customers increasingly expect relevant, personalized information based on their decision journey[1]

Agent

"Outdated and manual agent tools and service systems reduce my productivity."

85%
want digital tools to be more agile, to automate daily tasks and make information more accessible[2]

Supervisor

"I don't have the right visibility and analytics to proactively improve my service operations."

61%
of supervisors report a growth in call volume and complexity[3]

Service Leader

"I need digital tools and platforms that do more with my reduced budget."

84%
of leadership believes AI is the key to achieving their call centers' growth objectives[4]

[1]Deloitte. Want to pull ahead of the pack? Ramp up data-driven capabilities. March 2022.
[2]Microsoft. Microsoft Business Trends Survey 2023. According to 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan Customer care in 2022 and beyond.
[3]Microsoft. Microsoft Business Trend Index 2022. August 2022.
[4]CIO Insights. 2022 Trends: Discover the Future of Call Centers. December 2021.

We hear from our customers that they need to:

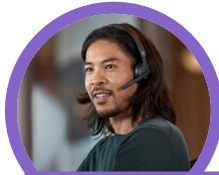| Customer	Agent	Supervisor	Service Leader
Personalize service experience and connect through customer's preferred channel	Make agents' work more effortless with increased productivity and collaboration	Get proactive visibility to maximize service operations	Automate and augment to run the business fast and lean

Capabilities in Dynamics 365 Customer Service

Customer

Personalize service experience and connect through customer's preferred channel

- Engage on channel of choice
- Self serve with conversational AI
- Get 24/7 anytime support
- Connect with the right agent every time

Agent

Make agents' work more effortless with increased productivity and collaboration

- Resolve issues faster with Copilot
- Assist with smart recommendations
- Get real-time context
- Collaborate with Teams

Supervisor

Get proactive visibility to maximize service operations

- Make data-driven decisions
- Gain visibility into trends and issues
- Identify agent coaching opportunities
- Predict and plan for fluctuating needs

Service Leader

Automate and augment to run the business fast and lean

- Increase customer acquisition and revenue
- Automate to drive efficiency
- Scale with elastic cloud
- Simplify and lower costs

Select the dot to navigate to the associated capability slide.

See how you can achieve more with Dynamics 365 Customer Service

Customer

53% higher customer advocacy

48% expect to see higher CSAT with call outcomes by improving agents access to internal collaboration tools[1]

Agent

97% of site visitors' questions resolved

80% decrease in case backlog[2]

73% decrease in average agent handling time[3]

15% improvement in first call resolution[3]

Supervisor

3,850 hours saved weekly with automation

50% time savings due to improved agent productivity[3]

Service Leader

30% decrease in operating cost across the entire CRM solution

[1]Boost Your CX with a Better Integrated Contact Center, CRM, and Collaboration Systems, a commissioned study by Forrester Consulting, April 2021
[2]The Total Economic Impact™ of Microsoft Dynamics 365 Customer Service, a commissioned study by Forrester Consulting, August 2020, result achieved by interviewed government agency
[3]The Total Economic Impact™ of Microsoft Dynamics 365 Customer Service, a commissioned study by Forrester Consulting, August 2020

Copilot experiences for all
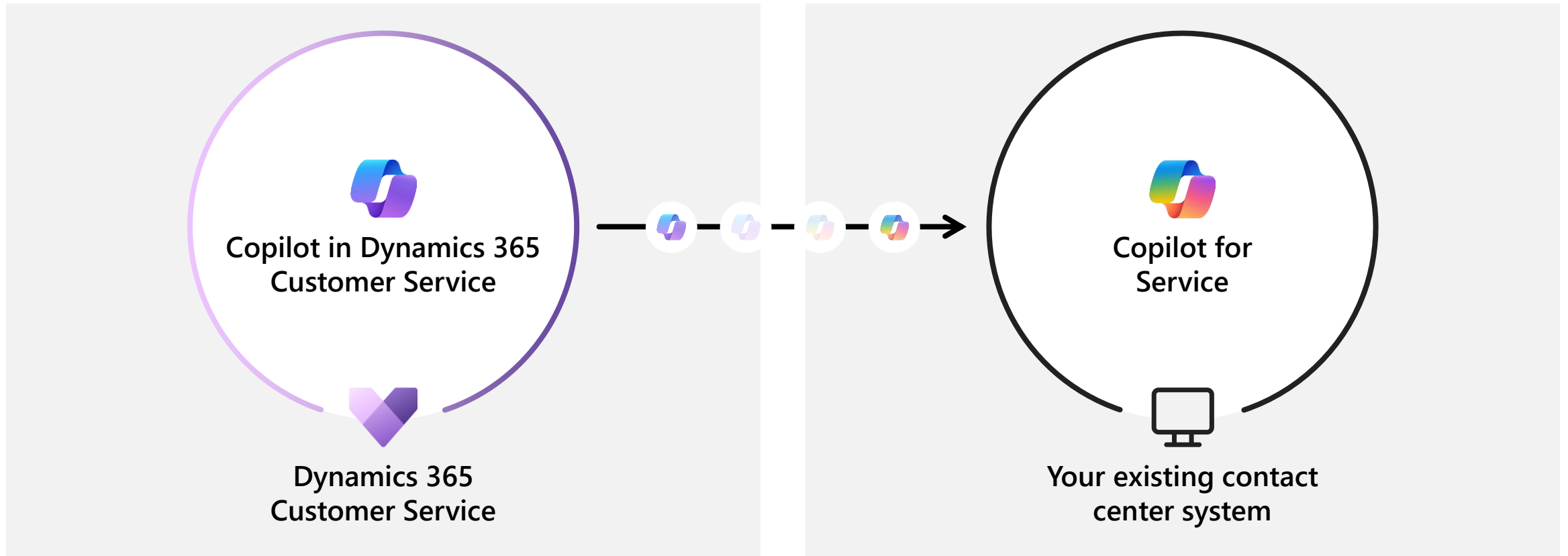
Copilot for Service

modernizes existing service solutions with generative AI to enhance customer experiences and boost agent productivity.

Copilot for Service integrates into existing contact center and CRM solutions without costly rip and replace efforts.
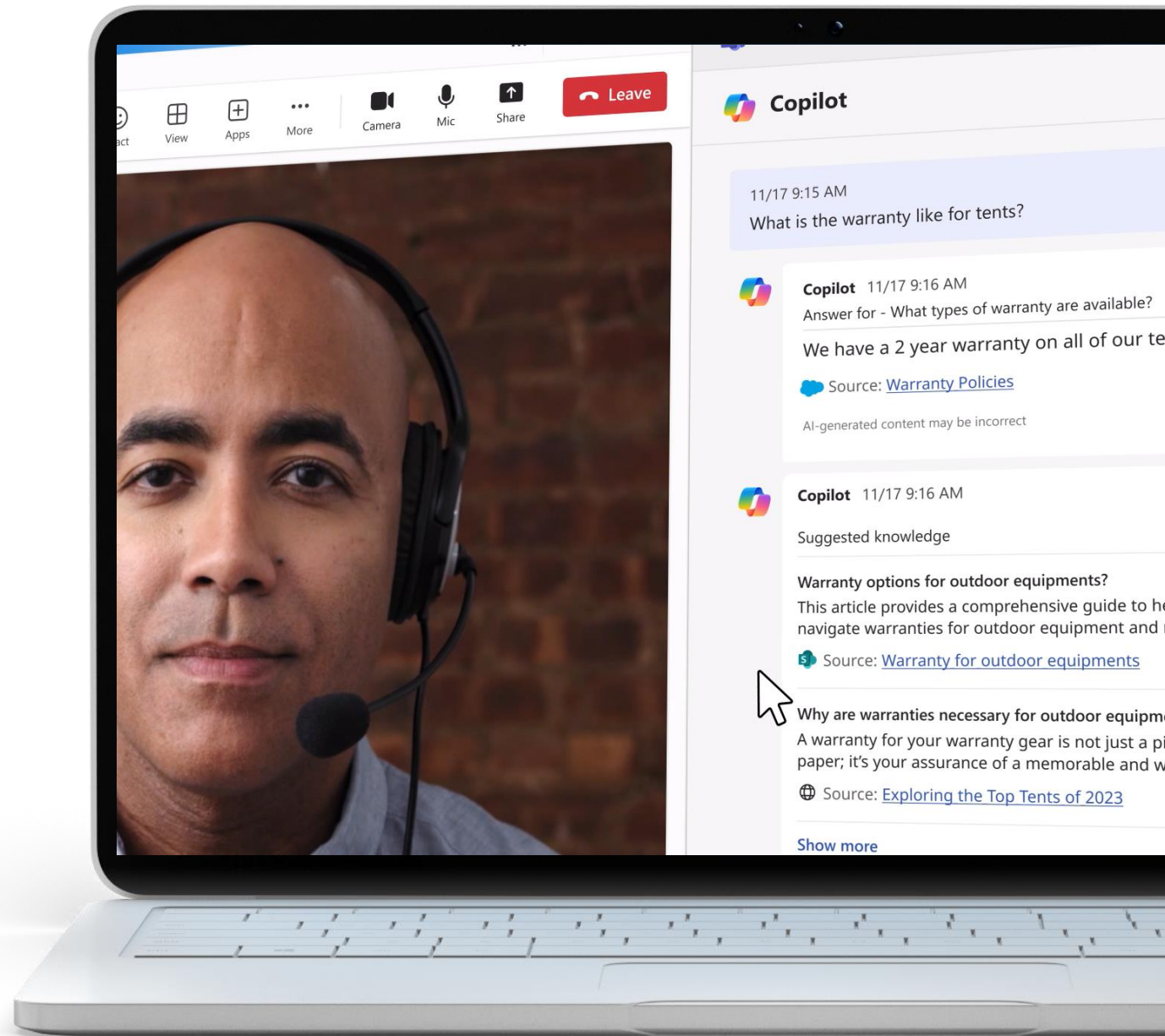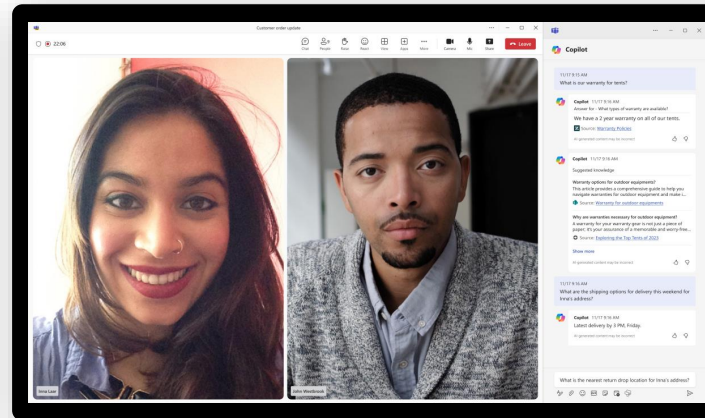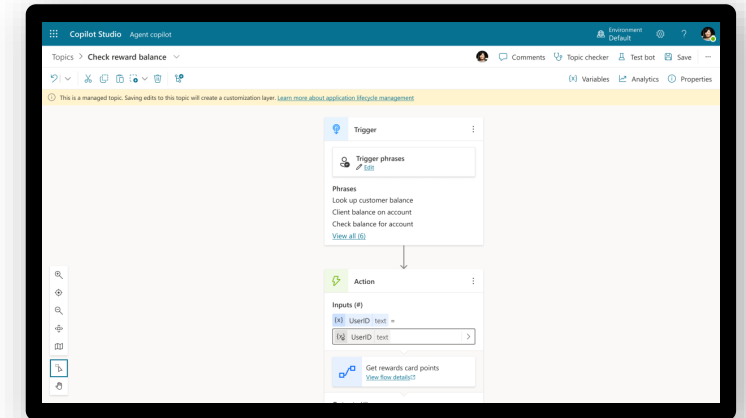
Copilot for Service
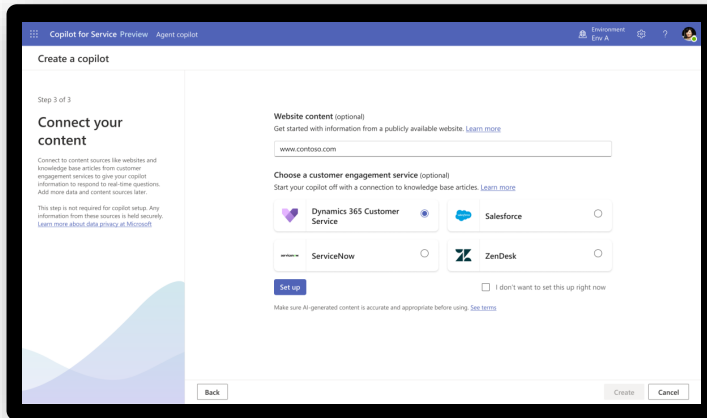
Infuse generative AI into your contact center in minutes

Connect to existing contact center systems and other trusted knowledge sources to enable real-time responses across your data

Boost agent productivity in the flow of work

Help agents accelerate onboarding and case resolution, improve efficiency, and automate tasks

Customize for a solution tailored to your needs

Meet your needs with built-in configuration and extend with Copilot Studio to create custom dialog and automate workflows
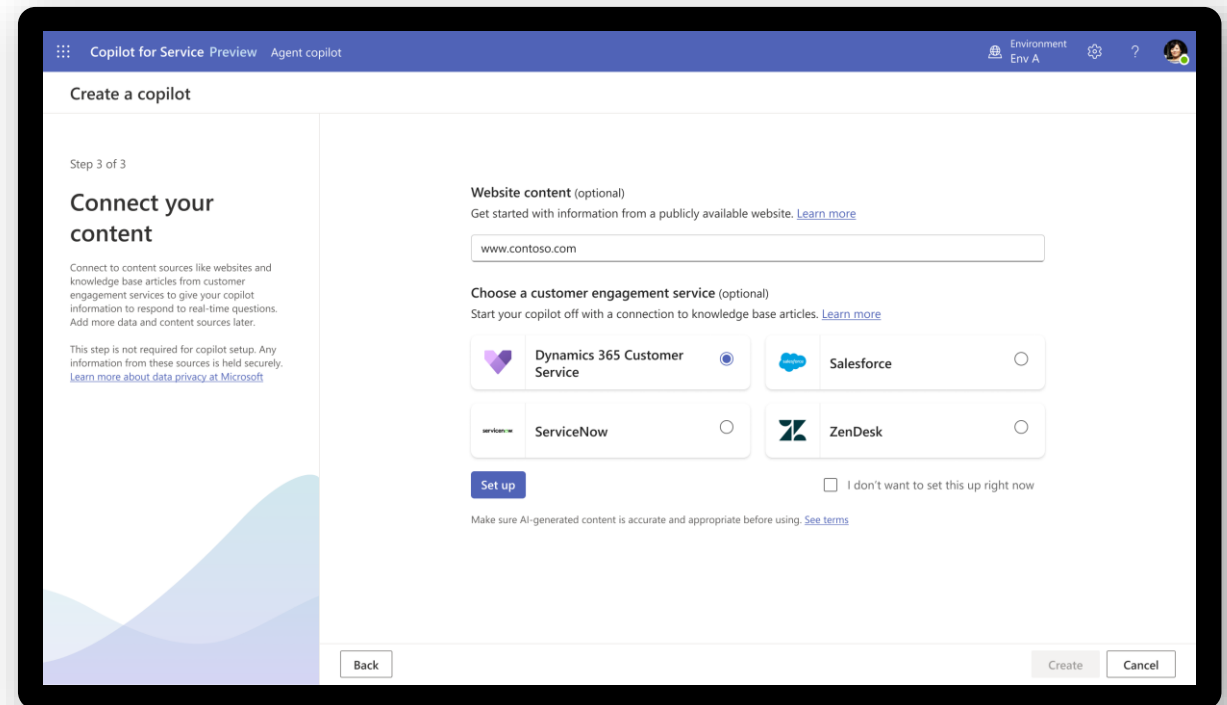
Infuse generative AI into contact center
Integrate data across trusted knowledge sources

Accelerate time to production with point-and-click setup

Access out-of-the-box integrations with major service vendors, including Salesforce, ServiceNow, and Zendesk

Connect to public websites, SharePoint, knowledgebase articles, and offline files

Boost agent productivity in the flow of work
Access productivity enhancements in the tools agents already use every day

Combine generative AI with contact center knowledge to resolve customer issues

Ask questions in natural language to receive relevant answers in the productivity tools agents use every day, such as Outlook and Teams with Copilot for Microsoft 365

Embed Copilot in agent desktops of choice including Salesforce, ServiceNow, ZenDesk and others
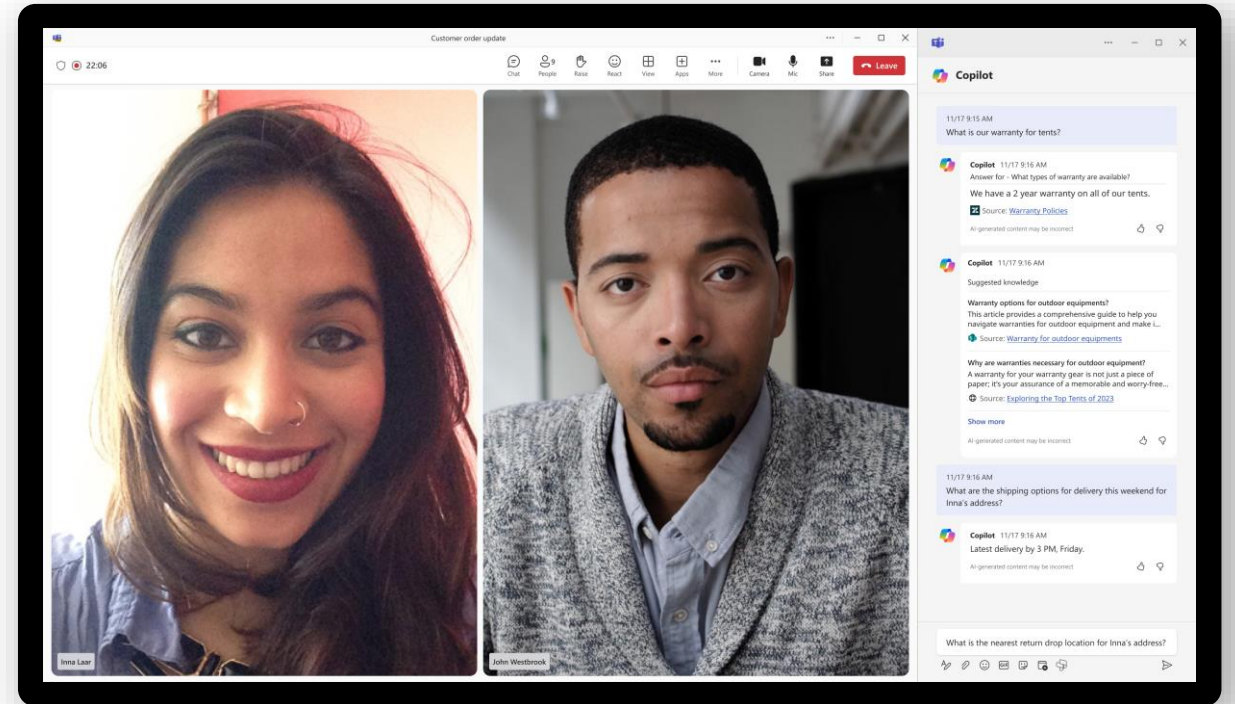
Customize for a solution tailored to your needs
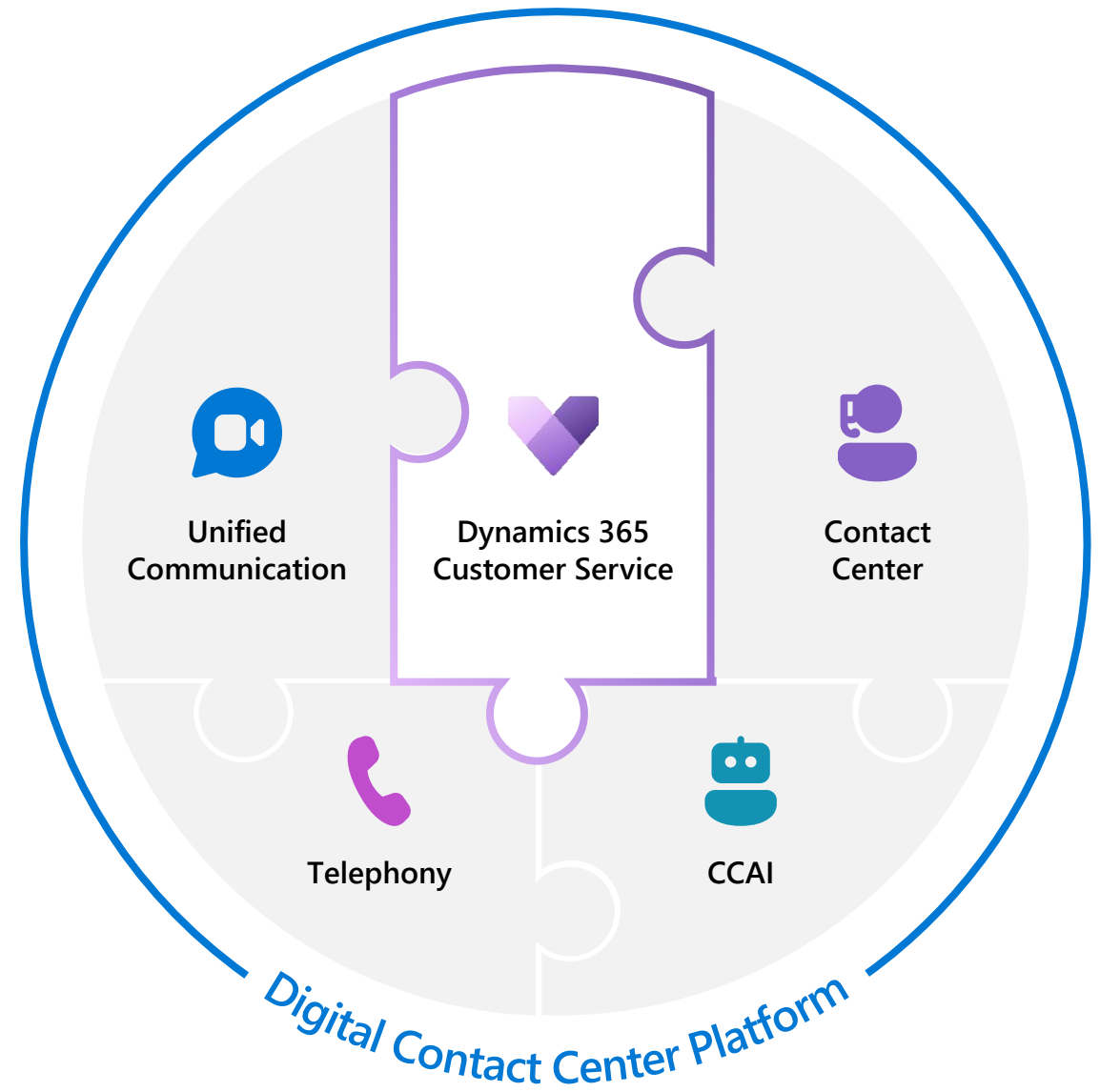## Configure and extend for a uniquely customized solution

Customize with Microsoft Copilot Studio—add additional topics, automate actions and workflows

Extend to other systems with more than 1,000 pre-built and custom connectors that eliminate the need for expensive IT integration work
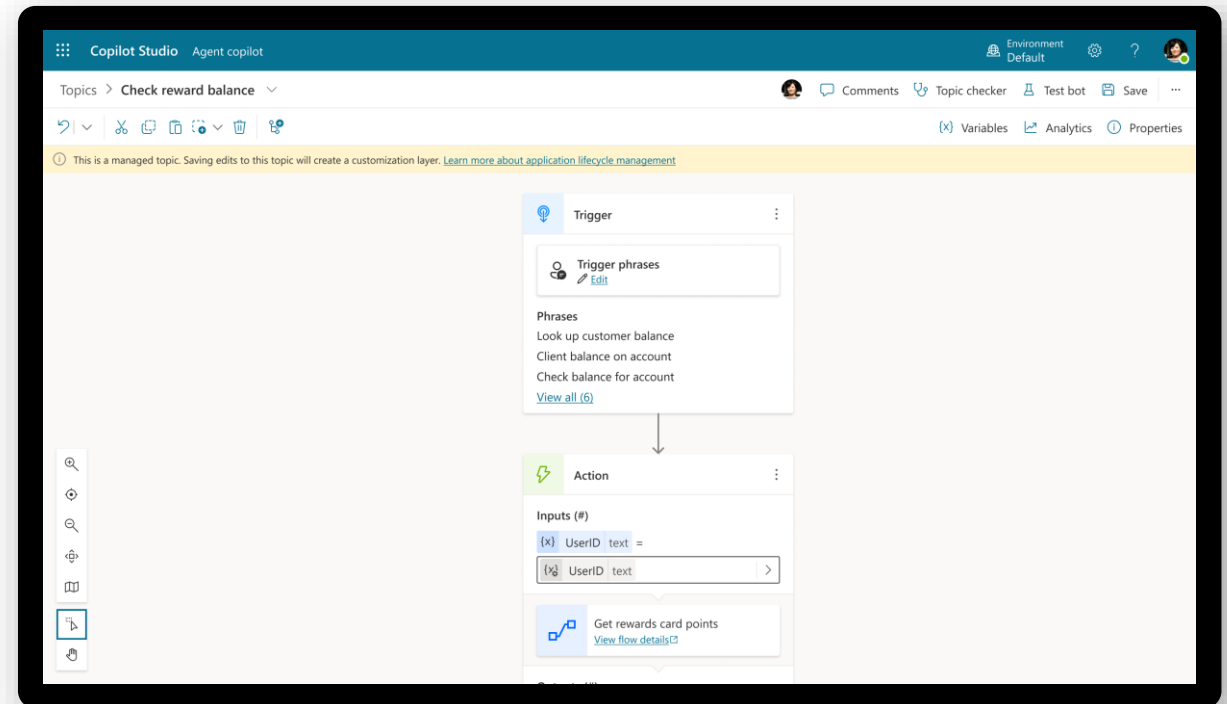
Expand and customize your service solutions with a platform

Meet customers where they are with **your preferred solutions** in an **open, flexible platform**

Unified Communication

Dynamics 365 Customer Service

Contact Center

Telephony

CCAI

Digital Contact Center Platform

The scale of Microsoft's support

10s of thousands of agents

92 contact centres

120 countries

1B+ consumers

46 languages

Across consumer and commercial businesses
10,000 enterprise, 1M+ SMB
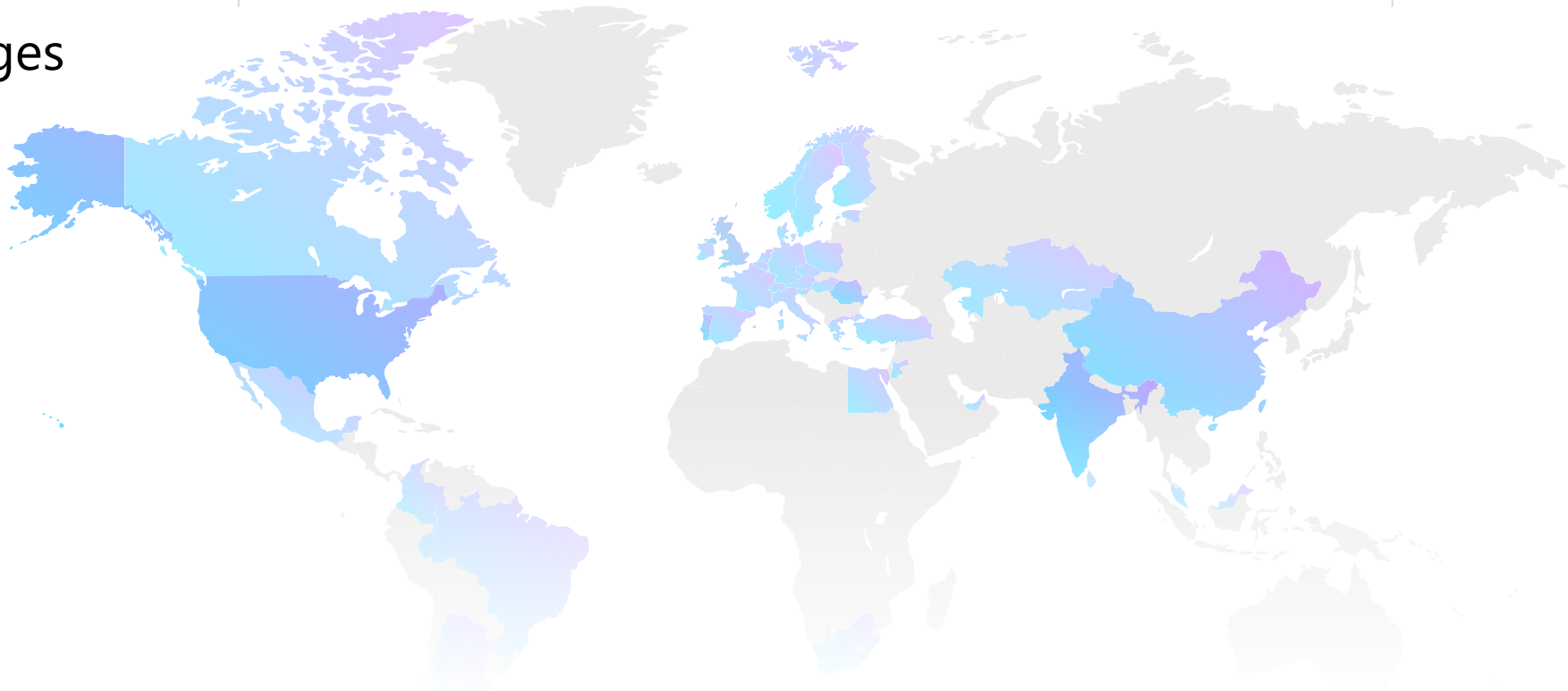
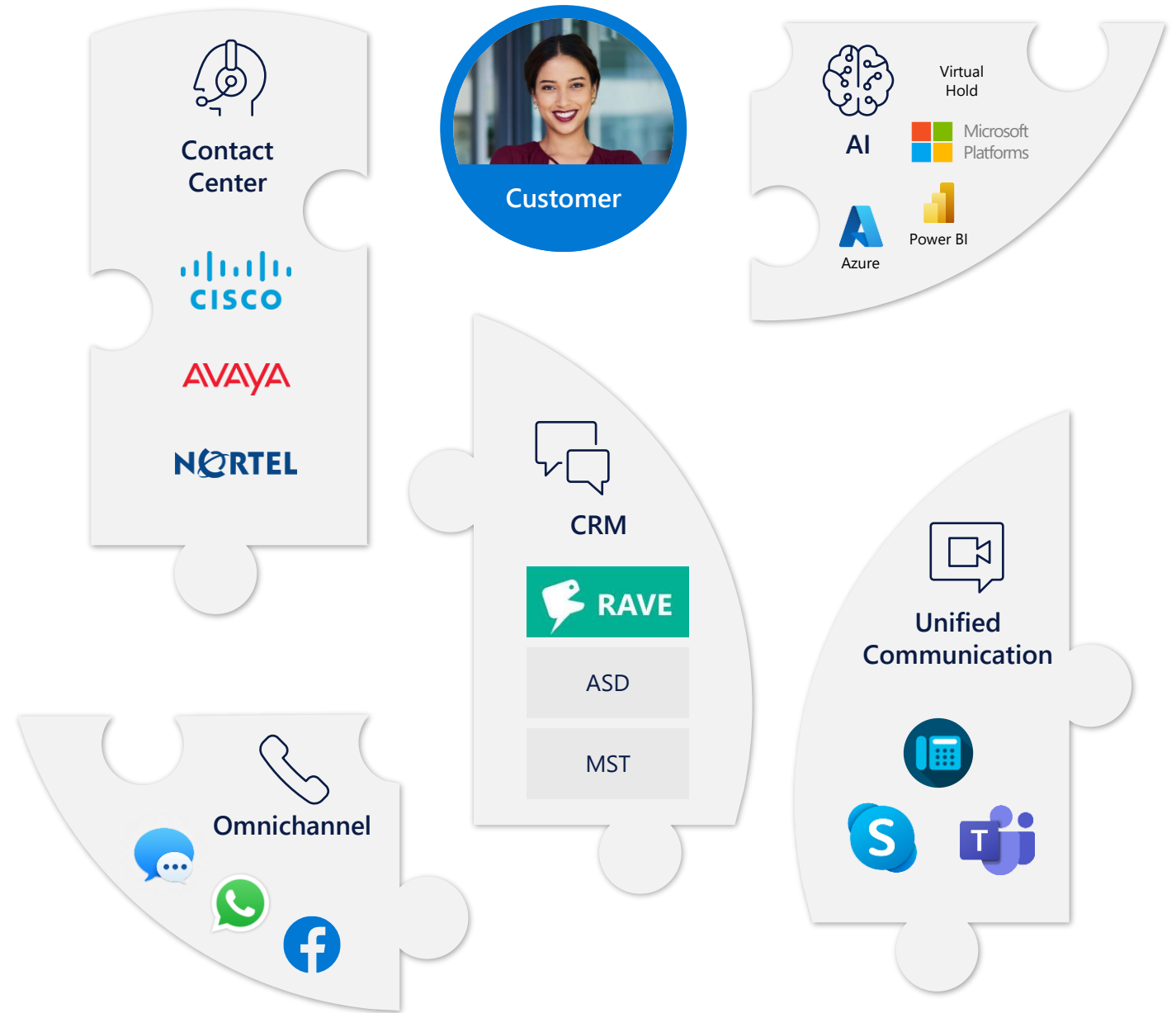Dynamics 365 Xbox Azure Office Teams

145M+ contacts

73M+ calls

61M+ emails

11M+ chats

Disparate solutions in 16 different systems and 500 tools and vendors to manage

Digital transformation journey to modernize Microsoft support

2019 — **16 different systems** for case management and **500 tools** for customer care

2020 — **Unifying systems and tools in one customer care platform** built on Dynamics 365 Customer Service

2021 — Integrating Teams for **real-time collaboration**

2022 — **Expanding AI**, intelligent routing, PVA chatbots and **migrating omnichannel to platform**

2023 — Copilot in Dynamics 365 Customer Service to **scale personalized service and resolve issues faster**

32% boost in self help

20% reduction in missed routes

31% increase in first-call resolution

12% CSAT increase

Front agents to super agents

Office of Chief Economist, Wave 2.5 Study results of internal use of Copilot in Dynamics 365 Customer Service among Microsoft commercial business support engineers

Agent success

"

Already in love with Copilot. Using this to answer couple of my teammates' customer related queries!

"

Findings

In one support business, **13% of cases** that normally require collaboration with peers were **resolved independently**

Agents have **reduced average handling time by 12-16%** while **reducing the time to close cases by 7.5%** and **first responses to customers 9% faster**

Copilot has helped **reduce the total number of phone and email interactions by 6-8%**, with **9-12% more cases are being handled over chat**

Creating a single customer care platform built on Dynamics 365 Customer Service

Unified Communication

CRM

Contact Center

Telephony

CCAI

Digital Contact Center Platform
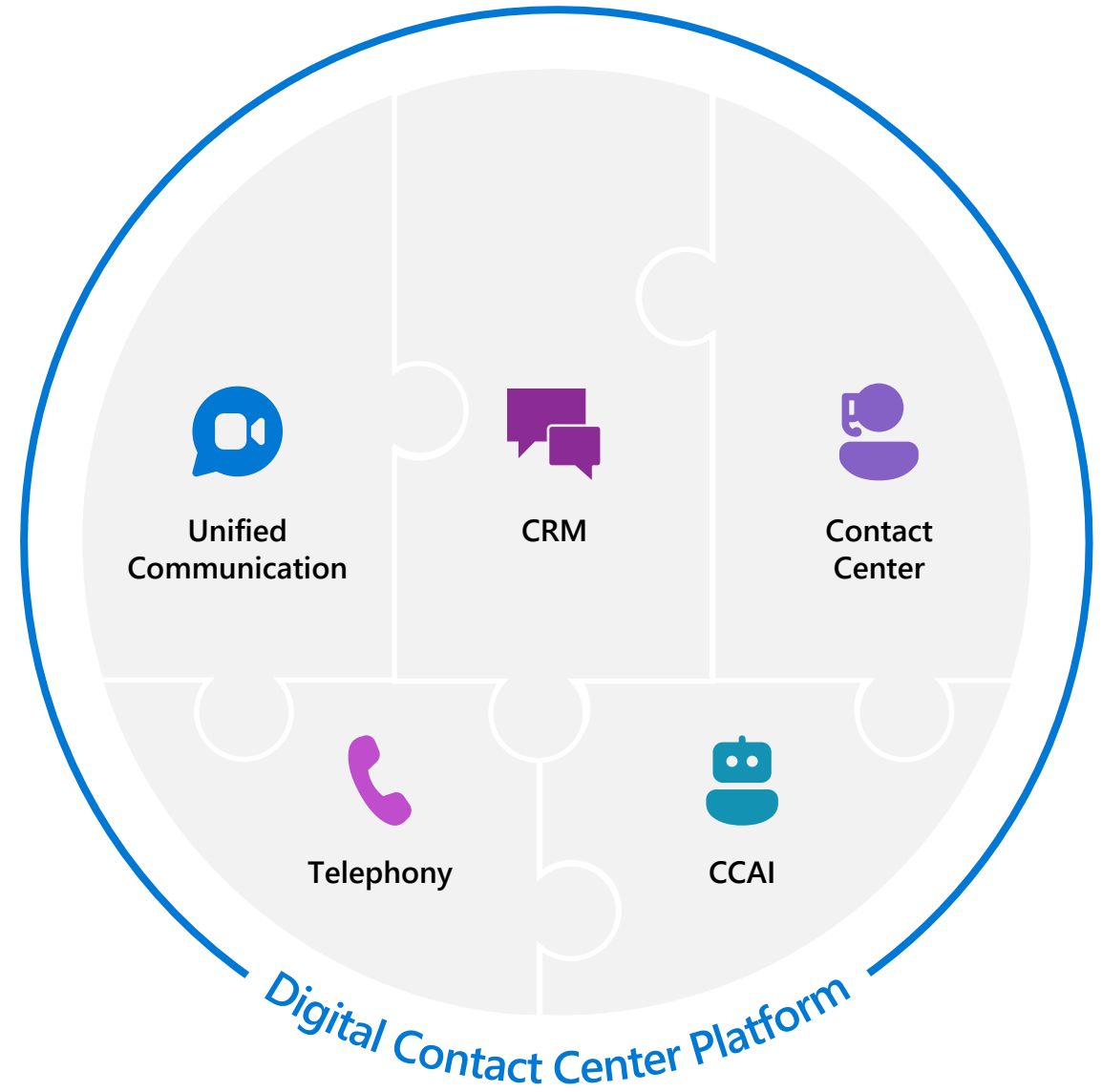
Microsoft empowers support engineers to shine brighter with Dynamics 365 Customer Service

[Read full story here](#)

Microsoft set out to improve the efficiency of its Customer Service team

Microsoft Dynamics 365

NatWest Group

Customer:
· NatWest

Industry:
· Financial Services

Size:
· 10,000+ employees

Country:
· United Kingdom

Products and services:
· Microsoft Dynamics 365
· Dynamics 365 Customer Service

"We needed a cutting-edge customer engagement platform to modernize the CX across all of our business areas... Microsoft Dynamics 365 was the only clear choice."

— **Wendy Redshaw, CDIO Retail Bank, NatWest Group**

Situation:

As one of the UK's leading financial services institutions, NatWest employs more than 14,000 front-line colleagues to look after 16 million customers.

Solution:

It chose Microsoft Business Applications for its new platform, with Microsoft Dynamics 365 Customer Service at its core.

Impact:

NatWest has reduced the cost and risk associated with maintaining its legacy systems, streamlining processes and delivering a better experience for its customers. **Consolidated 5 different booking legacy apps and delivered more than £10M+ software savings** by consolidating onto Dynamics 365.

Lufthansa Cargo
Networking the world.

Customer:
· Lufthansa Cargo

Industry:
· Travel and Transportation

Size:
· 1,000-9,999 employees

Country:
· Germany

Products and services:
· Dynamics 365 Sales
· Dynamics 365 Customer Service
· Dynamics 365 Customer Voice

Read full story here

"The major advantage is the level of transparency between the different departments. It ensures we're always talking about the same customer—no matter at which of the multiple touchpoints they engage with us throughout their journey."

— Michele D'Angelo, Senior Manager of Processes and Performance for Global Customer Service at Lufthansa Cargo

Situation:

As one of the world's leading companies in airfreight transportation, Lufthansa Cargo provides transport service with speed, efficiency, and care. The organization wanted a unified system that allowed for greater collaboration and intelligent customer insights.

Solution:

Lufthansa Cargo developed oneCRM, a custom sales and customer service platform built on Microsoft Dynamics 365 Sales, Dynamics 365 Customer Service, and Dynamics 365 Customer Voice.

Impact:

With oneCRM, sales and customer service teams have centralized access to information, data, and proactive suggestions making it easier for the organization to provide standout sales and service to its customers. **Decreased operating cost by 30%** across the entire CRM solution.

Customer:
· SHI Cryogenics Group

Industry:
· Manufacturing

Size:
· 50-999 employees

Country:
· United States

Products and services:
· Dynamics 365 Customer Service
· Dynamics 365 Field Service
· Dynamics 365 Sales

Read full story here

"With Dynamics 365 Customer Service, we've harmonized our operations at a global level. We can streamline the service of products from all around the world in one centralized location."

— Anthony Pothecary, Operations and Quality Manager, SHI Cryogenics Group

Situation:

One of its biggest customers was eager to learn more about the products that SHI Cryogenics Group uses. The company recognized this as an opportunity to provide a major customer with better visibility and reimagine its service and repair operations.

Solution:

SHI Cryogenics worked with partner Velosio to implement Microsoft Dynamics 365 Customer Service to provide customers with real-time insights into performance issues and service needs and help the company's engineers repair equipment.

Impact:

In addition to improving products, SHI Cryogenics used its new intelligent business applications to substantially **reduce product repair turnaround times from two months to two weeks and increase UK sales revenues by 78.6% over five years**.

Customer:
· Westpac: New Zealand Limited

Industry:
· Banking and Capital Markets

Size:
· 1,000-9,999 employees

Country:
· New Zealand

Products and services:
· Dynamics 365 Sales
· Dynamics 365 Customer Service
· Power Platform

"In 2018, we wanted to transition to an even more customer-centric business strategy, with a more consistent approach to customer onboarding, follow-up, and personalization. We introduced the cloud-based Dynamics 365 Customer Service and Sales modules, and our understanding of the full breadth of the possibilities has been growing ever since."

— Deyna List, Chief Experience Officer for Business Services, Westpac NZ

Situation:

Westpac wanted to create a bridge between the bank's on-premise CRM environment and a new cloud-based system. Needed to automate processes across the business to improve CX and digital transformation to remain at the forefront of banking in New Zealand.

Solution:

Engineered system to sync on-premise data with Microsoft Dynamics 365 in real-time. Migrated to the cloud to improve customer data security, accuracy, and quality. Used Power Platform to build over 20 applications to transform processes across the business.

Impact:

Automated credit submission process **cut downtime to first decision by 21.5%**. Power Platform initiatives combined to **save 3,850 hours per week** across the business. Automated data reconciliations are performed daily, ensuring data accuracy and quality.

University of
Salford
MANCHESTER

Customer:
· University of Salford Manchester

Industry:
· Higher Education

Size:
· 1,000-9,999 employees

Country:
· United Kingdom

Products and services:
· Dynamics 365 Customer Service
· Power Apps

[Read full story here](#)

"We estimated a 30% increase based on the abandonment rates we were seeing, but we've seen a 300% increase in applications from overseas students for some courses."

— **John McCarthy, Associate Chief Operating Officer, University of Salford Manchester**

Situation:

As a global institution with over 23,000 students from around the world, reliance on legacy solutions hindered its ability to attract top global talent.

Solution:

To streamline the applicant journey, the university modernized their admissions and operations with D365 and Power Platform to support better, faster student engagement.

Impact:

By combining at least 7 legacy systems into a new admissions portal, they've seen a **300% increase in applications from overseas students and international enrollment increased from 900 to 1,800.**

Microsoft Dynamics 365

Information & eGovernment Authority

Customer:
· Information & eGovernment Authority, Kingdom of Bahrain

Industry:
· Government

Size:
· 50-999 employees

Country:
· Bahrain

Products and services:
· Dynamics 365 Customer Service
· Microsoft 365
· Microsoft Teams

"Dynamics 365 is used to build secure Customer Relationship Management (CRM) platforms for a couple of ministries. Having a single sign-on into all systems is an effective way to attract employees to join the cloud... users can operate from anywhere, at anytime, without any concerns for security."

— Hesham Ebrahim Al-Hashemi, Director of Government Systems Support & Maintenance at iGA

Situation:

The iGA of the Kingdom of Bahrain is the central authority that operates and manages IT applications for the government. Since its mission is to innovate public services for citizens through digital transformation, the iGA needed a strategy to accelerate the process.

Solution:

The iGA created a new productivity environment by moving to the cloud with Microsoft 365 and Dynamics 365.

Impact:

When COVID-19 pandemic hit in 2020, the iGA's team, with employees from more than 70 other government organization,s were ready to work from home using cloud solutions. The government entities are securely connected, while **more than 100,000 working hours saved per week** by employees working in the cloud.

Real results from our customers

100,000	hours saved weekly by transitioning to cloud
3,850	hours saved weekly with automation
97%	of site visitors' questions resolved
79%	increase in revenue over five years
77%	reduction in repair turnaround time
53%	higher customer advocacy
30%	decreased operating cost

Global success transforming customer service

Dräger   Humana   COMCAST   SHI Cryogenics Group   Eneco   STADIO   TEDI LONDON   mater   GAUTENG PROVINCIAL GOVERNMENT REPUBLIC OF SOUTH AFRICA

Trusted by

95% of the top 20

financial institutions

Trusted by

more than half

of the top retailers

Trusted by

9 of the top 10

telcos worldwide

PHIHONG   verizon   Rakuten   Albertsons   METRO BANK   the power of humanity AUSTRALIAN RED CROSS   Sabadell   SpareBank 1 SR-BANK   TRAFNIDIAETH CYMRU TRANSPORT FOR WALES

Natwest

Why Microsoft

97%	**500k+**	**16**	**1**
Fortune 500 companies use Business Applications	Microsoft business application customers	Analyst reports where Microsoft is positioned as a Leader	Common data model across all business applications

Leader

- **AI** with large language model, ML, and Azure Cognitive Services
- **Collaboration and productivity** infused in business processes
- **Low-code platform** embedded in Dynamics 365

Ensure your success with Microsoft Unified

Maximize your investment with expert-led services from planning to deployment and beyond

Protect your organization

Get advice to proactively manage IT health and maximize uptime with a comprehensive response plan

Accelerate your outcomes

Partner with a team of Microsoft experts who know you to co-design, configure, and implement solutions

Enable you to do more

Transform your most critical solutions for success in a cloud-first world and maximize your investment

Microsoft Copilot Principles

Decades of research & development	Committed to advancing Responsible AI	Secure from the start	Reliability & performance at scale for large AI models	Trusted by AI leaders like OpenAI

Runs on trust

Your data is your data

Learn more about responsible AI
Deliver enterprise AI built for security and privacy and Putting principles into practice at Microsoft

Let's get started

- Quantify the business value with our Business Value Specialists

- See it in action with a self-guided tour

- Jump start your deployment with the support of Microsoft Partners

Capabilities

Personalize service experience

- Engage on channel of choice

- Self-serve with conversational AI

- Get 24/7 anytime support

- Connect with the right agent every time

Select the dot to navigate to the associated capability slide.

Personalize service experience
Engage on channel of choice

Provide customers the choice and convenience in connecting through different digital engagement channels

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

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

Easily add custom messaging channels, video conferencing, co-browsing or remote assist capability
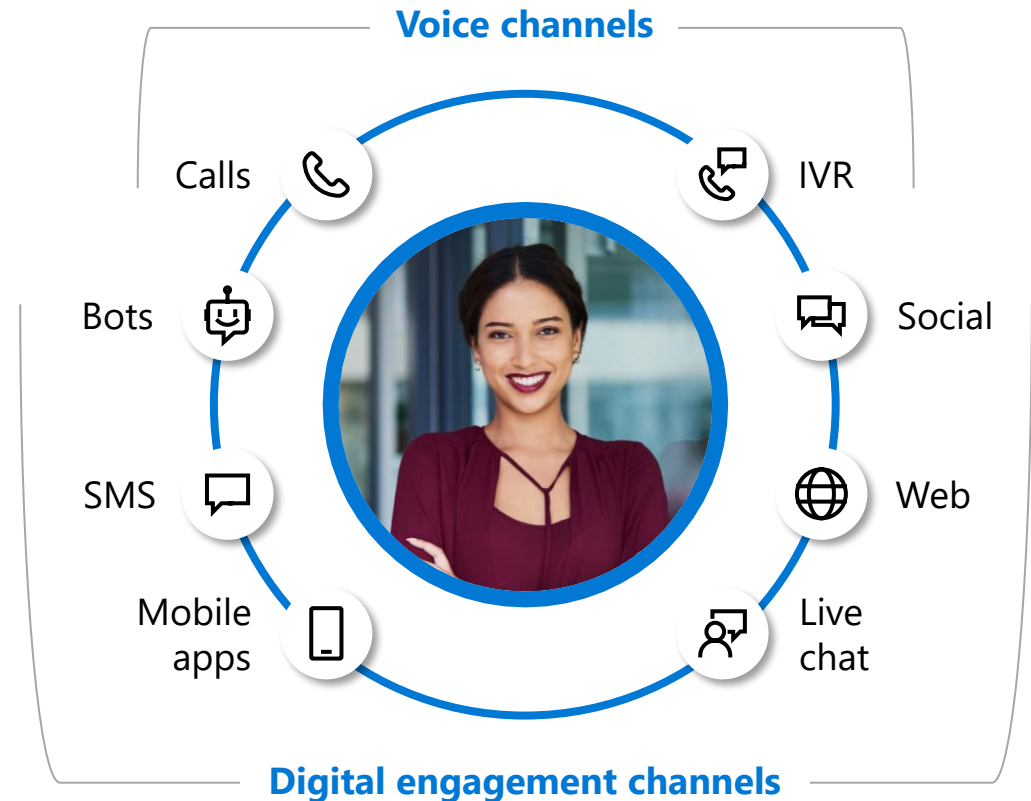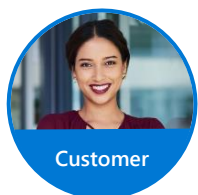
Customer

Voice channels

Calls

IVR

Bots

Social

SMS

Web

Mobile apps

Live chat

Digital engagement channels

Select the persona icon to the left to return to the capabilities overview slide.

Personalize service experience

Self serve with conversational AI

Provide a powerful conversational IVR experience in real time through natural, human-like interactions,

☆ Get relevant answers immediately from intelligent conversational bots that provide solutions, using trusted websites and internal documents

Improve customer satisfaction by resolving issues with intelligent conversational Power Virtual Agents (IVR) that is now enhanced with generative AI capabilities

Personalize self-service with natural language processing from Nuance for conversational AI

Customer

Voice channels

IVR

Contoso Coffee
Mobile 1 833-450-2035

2:13
Verizon

Add call   Video call   Bluetooth

Speaker   Mute   Keypad

Hi, my name is Kona. Welcome to Contoso Coffee. How can I help you this morning?

Carla Yates
Hey Kona. I'm trying to buy an extended warranty for the Cafe A-100 espresso machines.

I'd be happy to help you out, I see you are calling from 425 894 9300. I've located your account in our system. Could you tell me your security code so that I can validate your details?

Natural language processing for human-like interactions

Resolve issues with IVR in Copilot Studio

☆ = New release | Select the persona icon to the left to return to the capabilities overview slide.

Personalize service experience

Get 24/7 anytime support

Build bots quickly and easily with no developer skills, using low-code/no-code Power Virtual Agents

Automate routine conversations with real-time monitoring to handle simple cases

Transfer or escalate bot conversations to agents with full context of interaction for complex cases

Customer
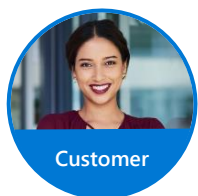
Bot in development to automate routine conversations with low/no code in Copilot Studio

Bot in action to resolve simple issues
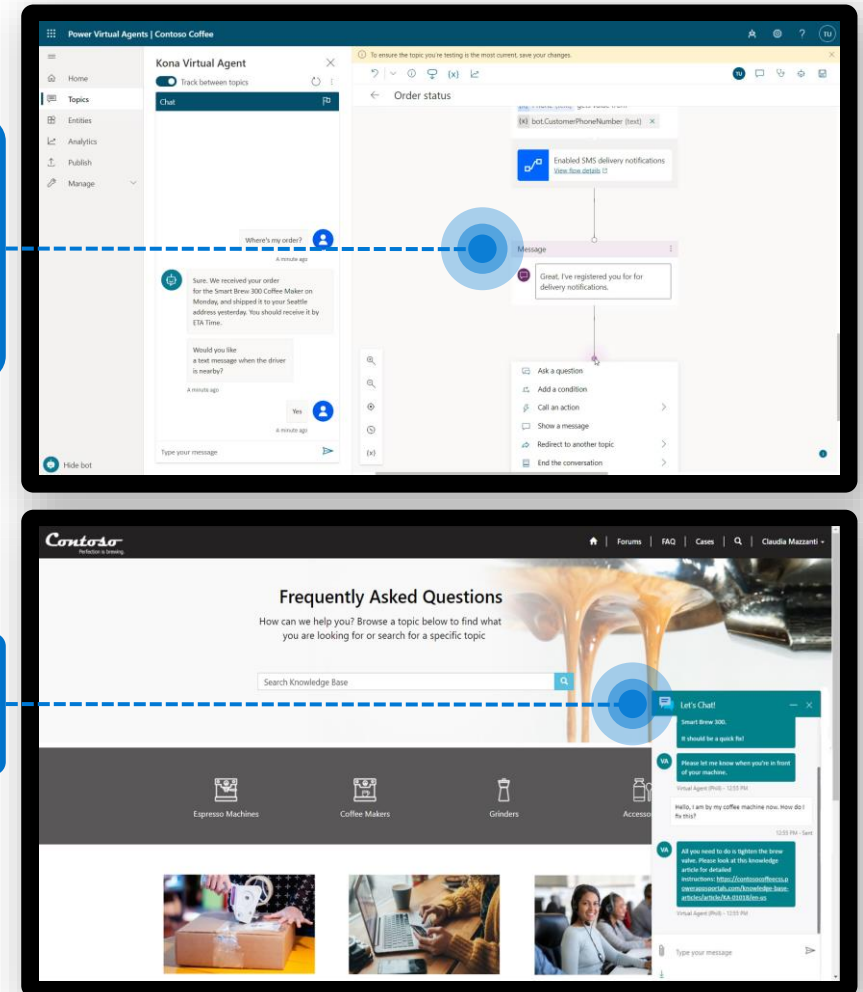
Select the persona icon to the left to return to the capabilities overview slide.

Personalize service experience
Connect with the right agent every time

Assign incoming services requests on any channel to queues and intelligently route to best-suited agent

---

Improve CSAT using automatic classification and unified routing to optimize channel performance

---

Improve first-time resolution with standardized rules and AI-based routing to match service request with best-suited agent
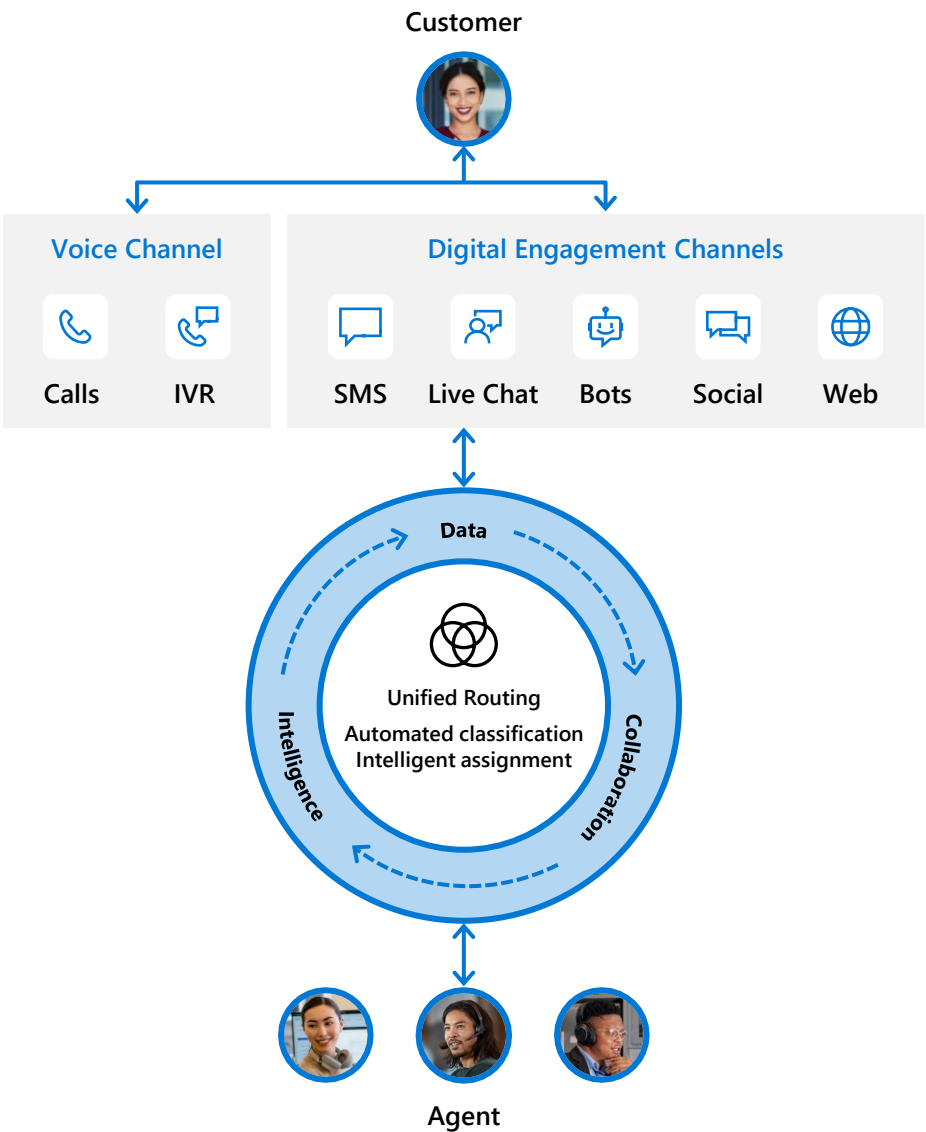
Customer

Customer

Voice Channel

Calls   IVR

Digital Engagement Channels

SMS   Live Chat   Bots   Social   Web

Data

Intelligence

Unified Routing
Automated classification
Intelligent assignment

Collaboration

Agent

Select the persona icon to the left to return to the capabilities overview slide.
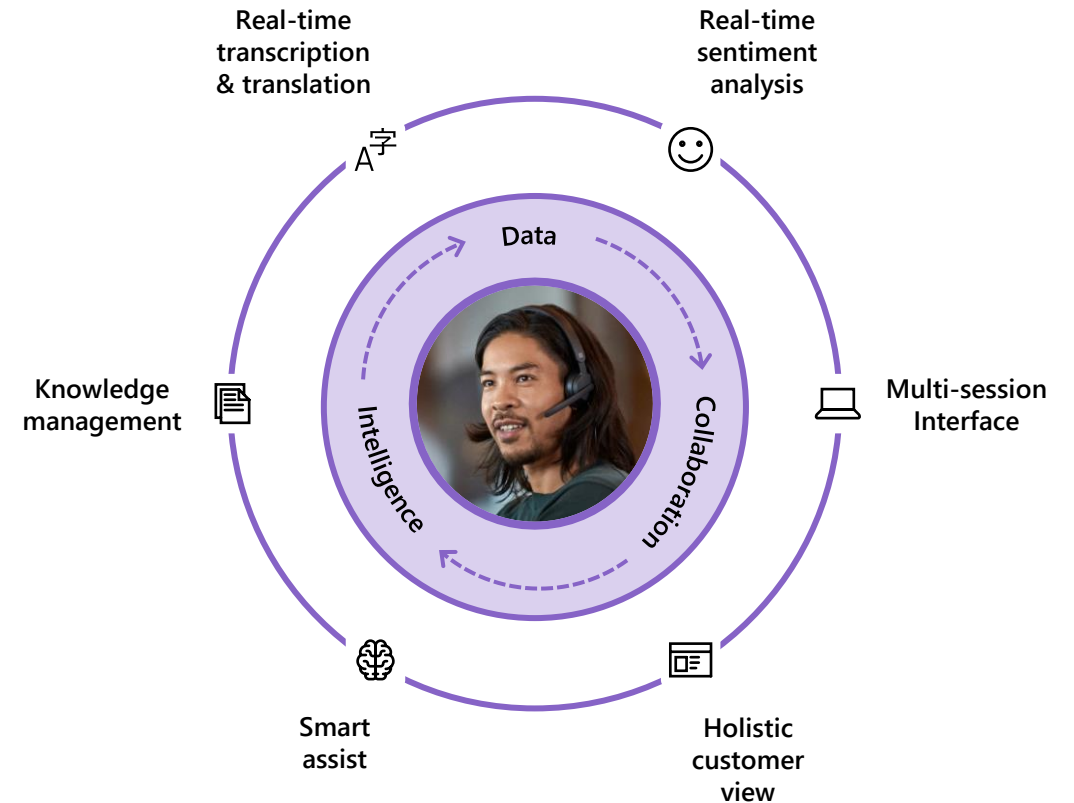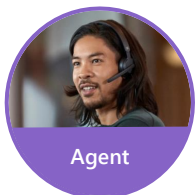
Make agents' work more effortless

- Resolve issues faster with Copilot

- Assist with smart recommendations

- Get real-time context

- Collaborate with Teams

Select the dot to navigate to the associated capability slide.

Make agents' work more effortless

☆ Resolve issues faster with Copilot

Chat with generative AI-powered Copilot that can diagnose issues, ask follow up questions, gather information and provide solutions using internal knowledge, historical cases, and data from customer interactions and trusted websites

With one click, deliver tailored and contextualized responses to any complex questions in real time through chat

Create relevant and personalized email responses in seconds for complex issues that would normally take minutes or hours

Get automatic conversation summaries including notes, emails and conversations to accelerate wrap ups and handoffs
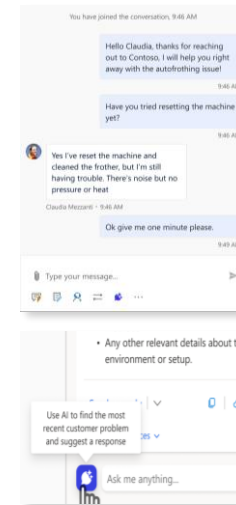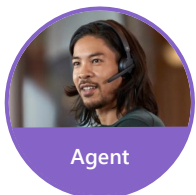
Single click chat answers
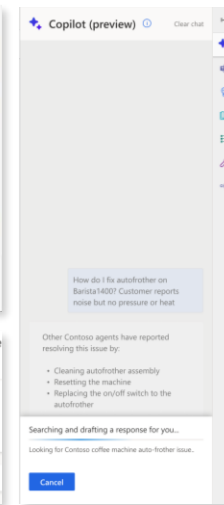
Conversation dialog with Copilot
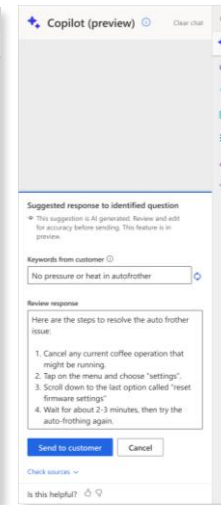
Email response generation
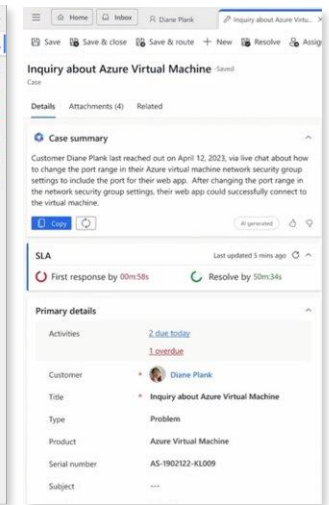
Case summarization

Agent

Make agents' work more effortless

Assist with smart recommendations

Automatically surface AI-driven suggested knowledge articles and similar resolved cases with Smart assist

Easily configure search filters, author language, and manage knowledge categories

Accelerate time to resolution with intuitive, AI-suggested replies for agents directly in the digital messaging experience

View knowledge base content inline, including images and videos, and easily share with customers

Agent
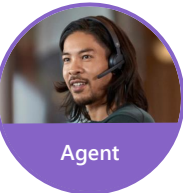
Configure search filters, categories

Save time with article templates

Knowledge article suggestions from Smart assist

Recommended similar cases
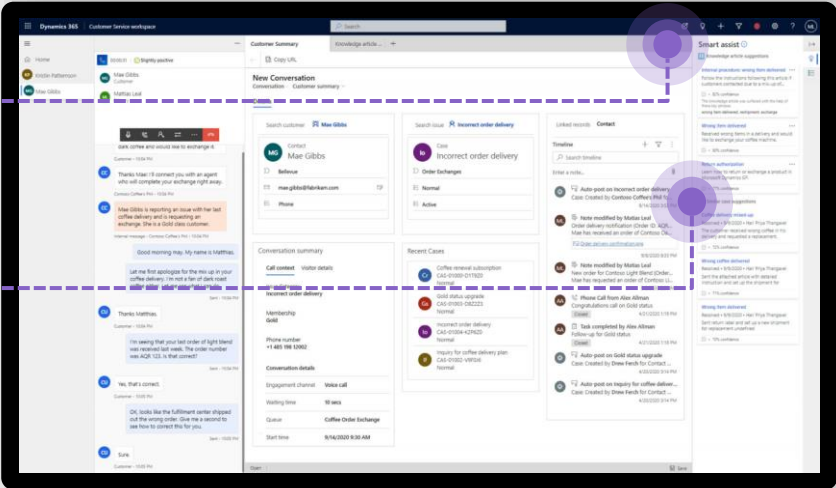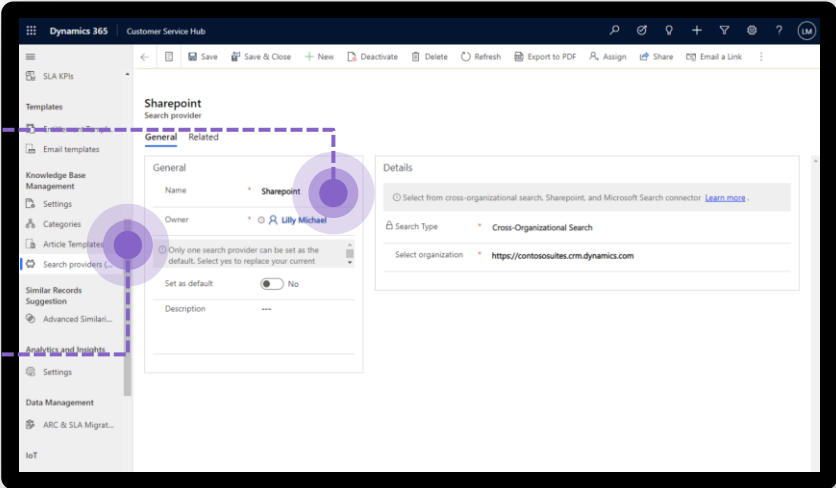
Select the persona icon to the left to return to the capabilities overview slide.

Make agents' work more effortless

Get real-time context

Resolve issues faster using real-time transcription and multi-lingual translation

Give agents the ability to steer conversations toward a positive resolution with real-time sentiment analysis

Increase agent effectiveness with AI-recommended knowledge articles and Smart assist real-time to highlight similar resolved cases

Powerful agent desktop with a holistic view of customer data (history, transcript, profile), multi-session UI/UX with Inbox, activity timeline and ability to pin/unpin records

Agent

Real-time transcription & translation

Real-time sentiment analysis

Data

Intelligence

Collaboration

Knowledge management

Multi-session Interface

Smart assist

Holistic customer view

Select the persona icon to the left to return to the capabilities overview slide.

Make agents' work more effortless

Collaborate with Teams

Connect and expedite issue resolution with key contacts and AI-suggested colleagues who have resolved similar cases

Seamlessly access and share Dynamics 365 service records across Teams and Microsoft 365

Interact and update Dynamics 365 records, manage tasks, and automatically capture notes during Teams meetings

Discover experts and quickly create a swarm for them to come together and drive issue resolution

Agent
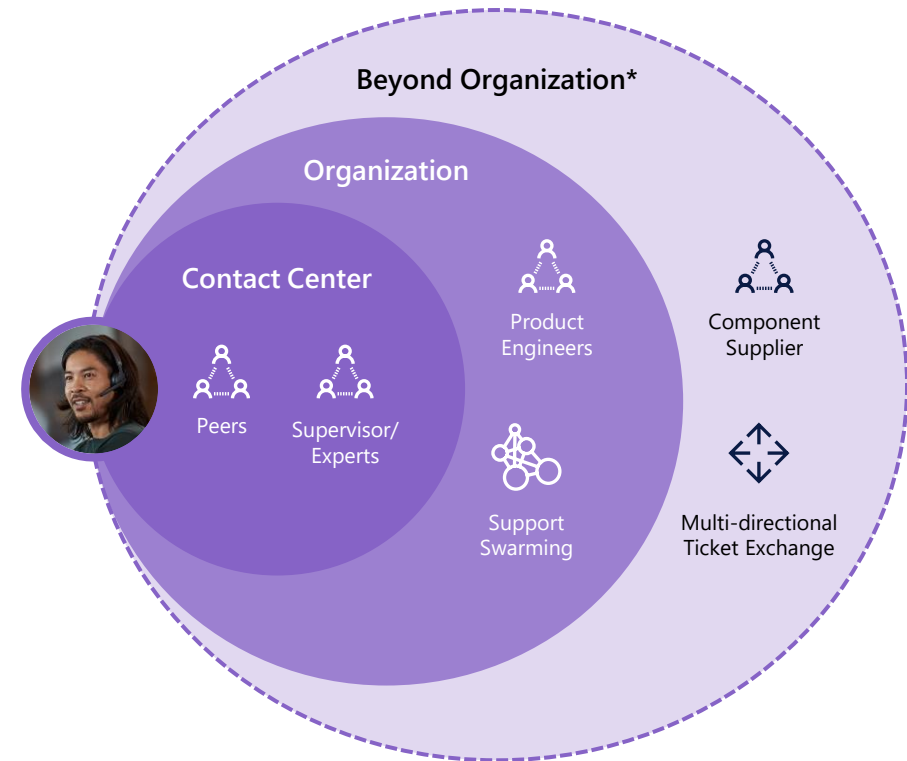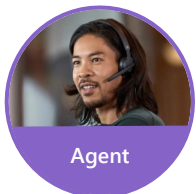
*Beyond organization: Future vision/roadmap capability | Select the persona icon to the left to return to the capabilities overview slide.

Get proactive visibility to maximize service operations

- Make data-driven decisions

- Gain visibility into trends and issues

- Identify agent coaching opportunities

- Predict and plan for fluctuating needs

Select the dot to navigate to the associated capability slide.
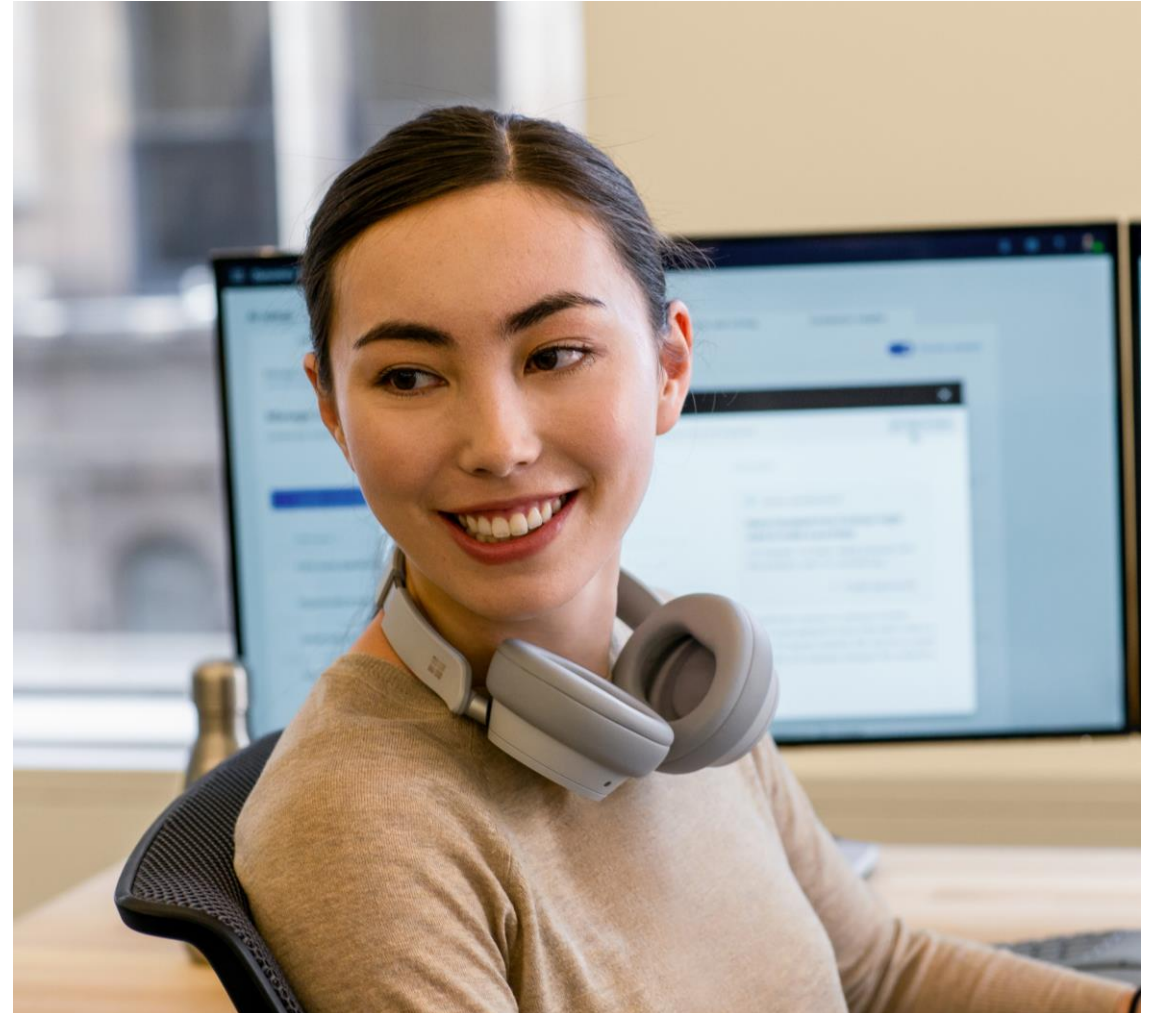
Get proactive visibility to maximize service operations
Make data-driven decisions

AI-driven analytics and key insights in one, comprehensive and easy to view supervisor dashboard

Omnichannel insights dashboard provides KPI and trends to understand overall state of the support experience at-a-glance

Use transcription and sentiment analysis of conversations to train and coach agents

Get full visibility into support conversations with alerts for conversations that may require intervention

Supervisor
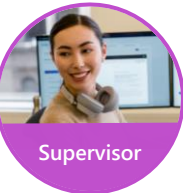
Comprehensive omnichannel dashboards
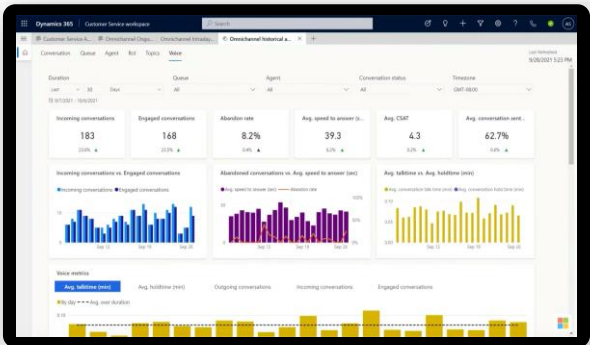
Topic discovery highlights improvement opportunities
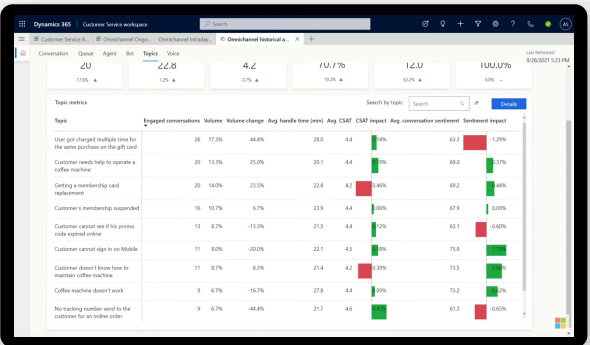
Transcription and sentiment analysis of conversations
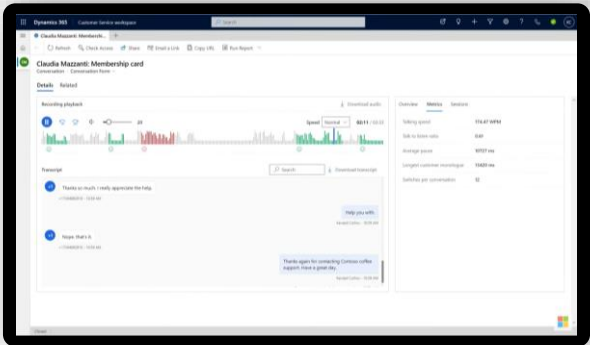
Monitor, whisper, or join ("barge") into an active conversation
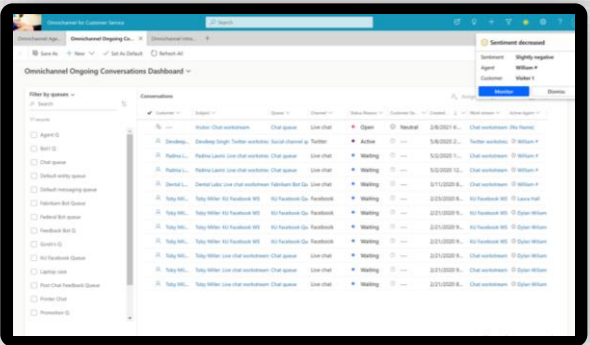
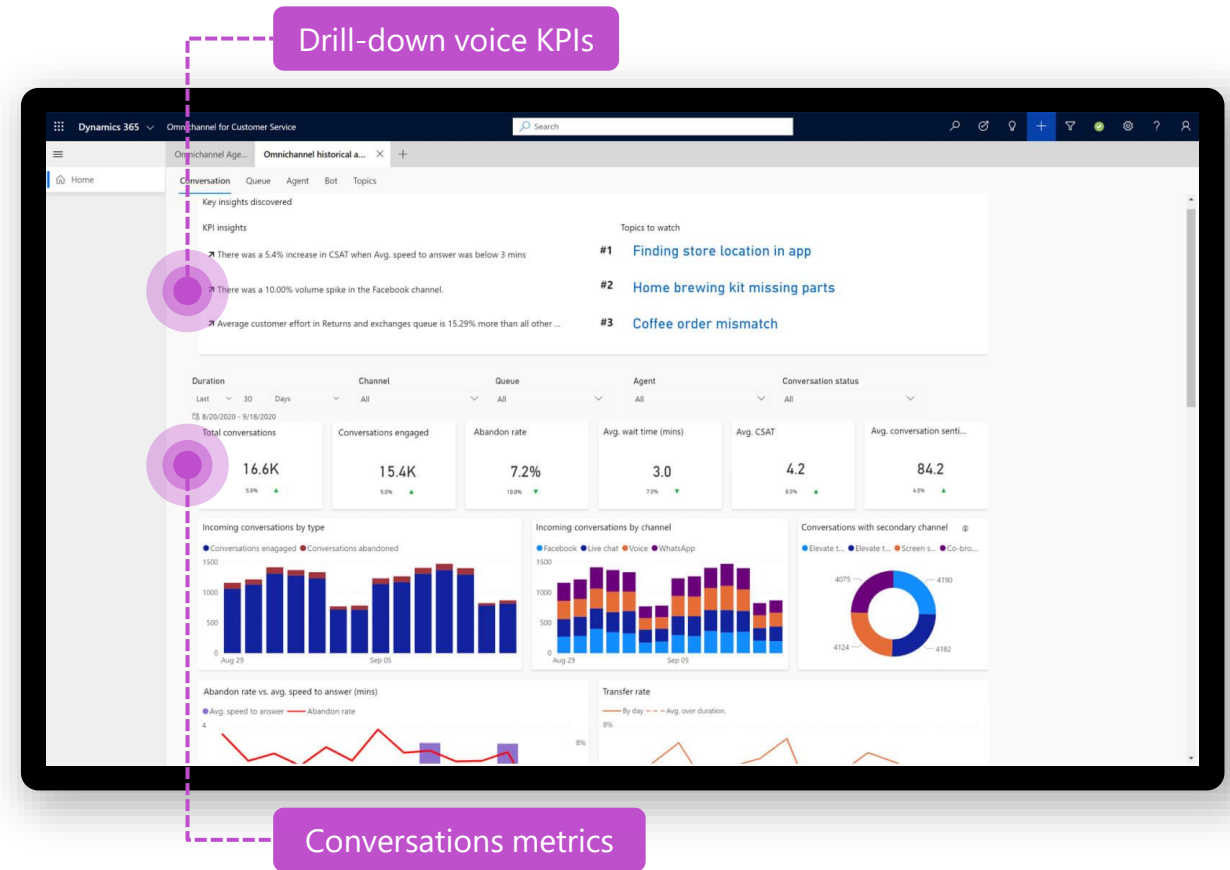Select the persona icon to the left to return to the capabilities overview slide.

Get proactive visibility to maximize service operations
## Gain visibility into trends and issues

Gain rich insights from voice KPIs and conversation and channel analytics, and customer sentiment

Get access to reports that include availability, average length of time in conversations, average response time per session, and incoming conversations by channel

Enhance data visualizations using Power BI and eliminate toggling from one app to another using one embedded experience
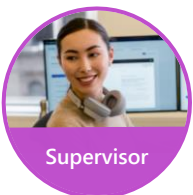
Drill-down voice KPIs

Conversations metrics

Supervisor

Select the persona icon to the left to return to the capabilities overview slide.

Get proactive visibility to maximize service operations

Identify agent coaching opportunities

View individual agent performance to overall group KPIs and find coaching opportunities

Get full visibility into support conversations with alerts for conversations that may require intervention or barging in

Get actionable insights into how agents and support topics are affecting organizational KPIs

Review agent productivity improvements with a detailed view into Copilot usage by agent groups and the usage impact on key support metrics
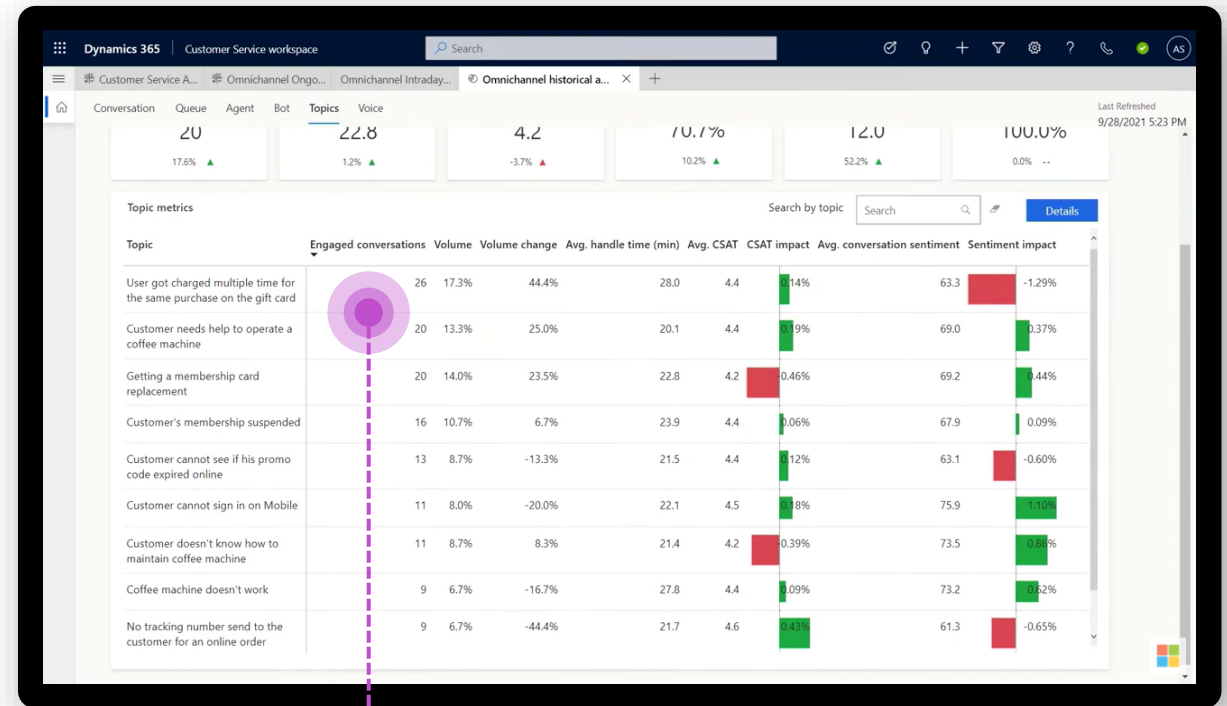
Topic discovery highlights improvement opportunities
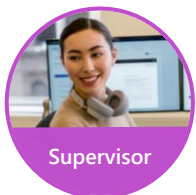
Supervisor

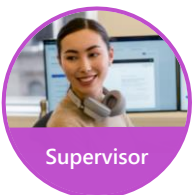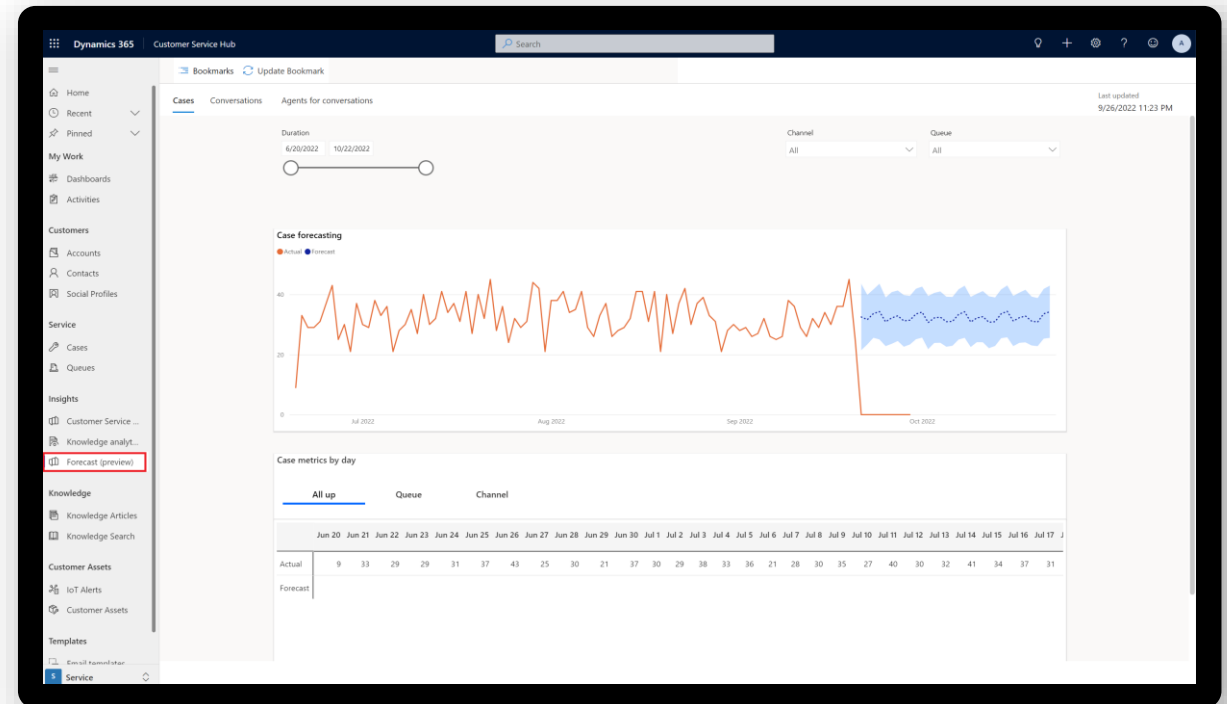Select the persona icon to the left to return to the capabilities overview slide.

Get proactive visibility to maximize service operations
Predict and plan for fluctuating needs

Use the forecast report to help plan the right level of staffing for your business based on predicted volume of cases and conversations

Automatically detect seasonality from historical traffic to accurately predict case or conversation volume during special or seasonal events

Visualize forecast volumes on a daily, weekly, and monthly interval basis by channel and queue

Supervisor

Select the persona icon to the left to return to the capabilities overview slide.

Run the business fast and lean

- Increase customer acquisition and revenue

- Automate to drive efficiency

- Scale with elastic cloud

- Simplify and lower costs

Run the business fast and lean
Increase customer acquisition and revenue

Track user behavior and data to identify optimal engagement opportunities to improve CSAT and reduce abandonment

Help customers navigate through the products and drive up-sell and cross- sell revenue with personalized offers from agents as well as virtual assistants and chatbots

Proactively notify customers of special promotions and updates and accelerate their purchase intent
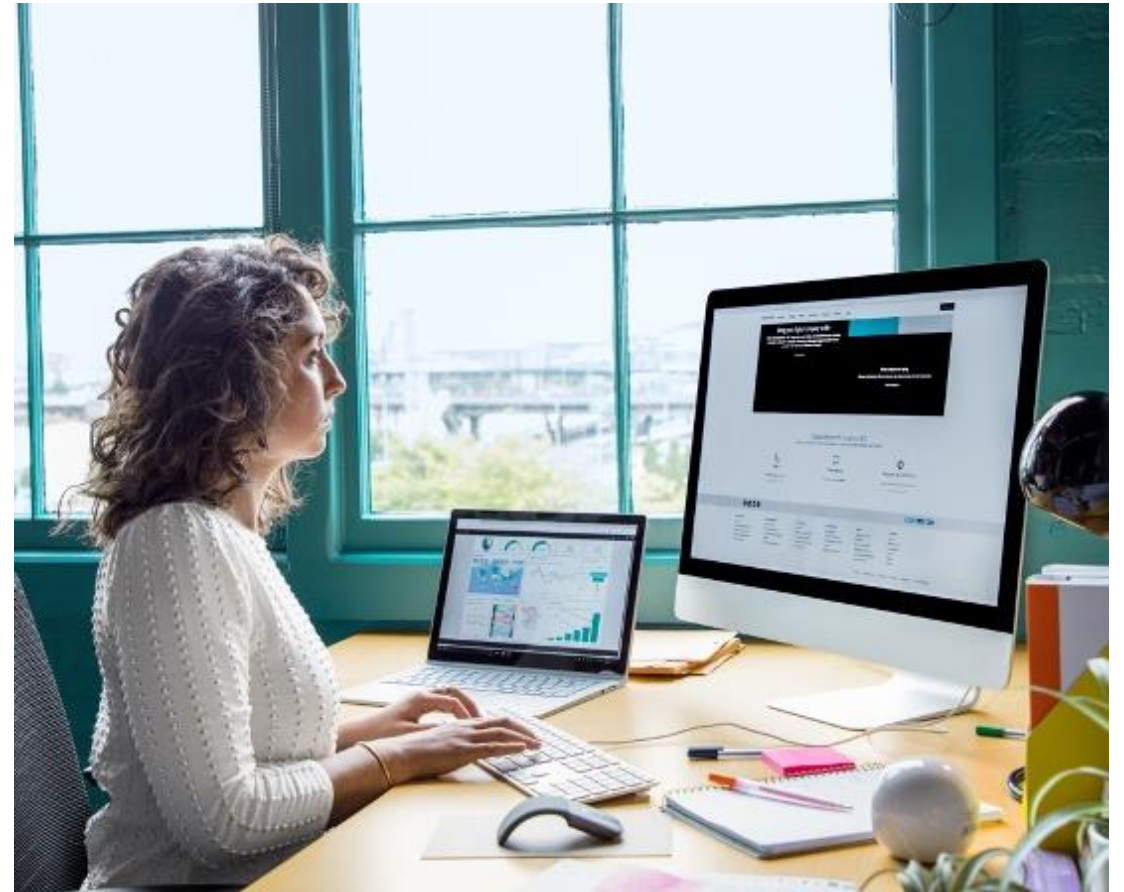
Service Leader

Select the persona icon to the left to return to the capabilities overview slide.

Run the business fast and lean

Automate to drive efficiency

Reduce average case handling time by automating post-call wrap-up and repetitive tasks, including creating and sending Outlook emails

Increase efficiency for hybrid teams by using automation to request and track approvals in a collaborative Teams space

Increase customer satisfaction by getting faster approvals using systematic collaboration on issues such as high-value refunds, fee-waivers or rebooking of expensive flights

Save agent's time labor cost with automation of repetitive tasks and reduced onboarding and training

Service Leader
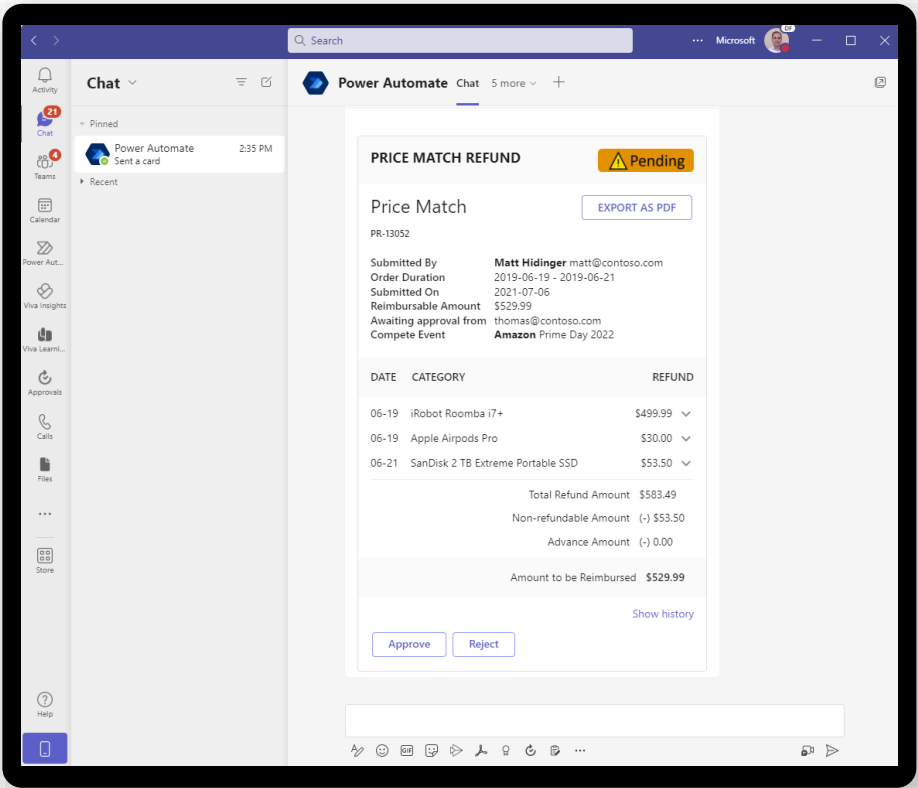
$3.4M cost savings possible via systematic collaboration through automation*

Select the persona icon to the left to return to the capabilities overview slide.

*Calculation assumes the following: $15 agent fully loaded cost; 5 price-match requests/day/agent; 250 agents in org. Savings of 30 minsper request at $15/hr implies ~$9.4K per day or ~$281K per mo or ~$3.4M per year.
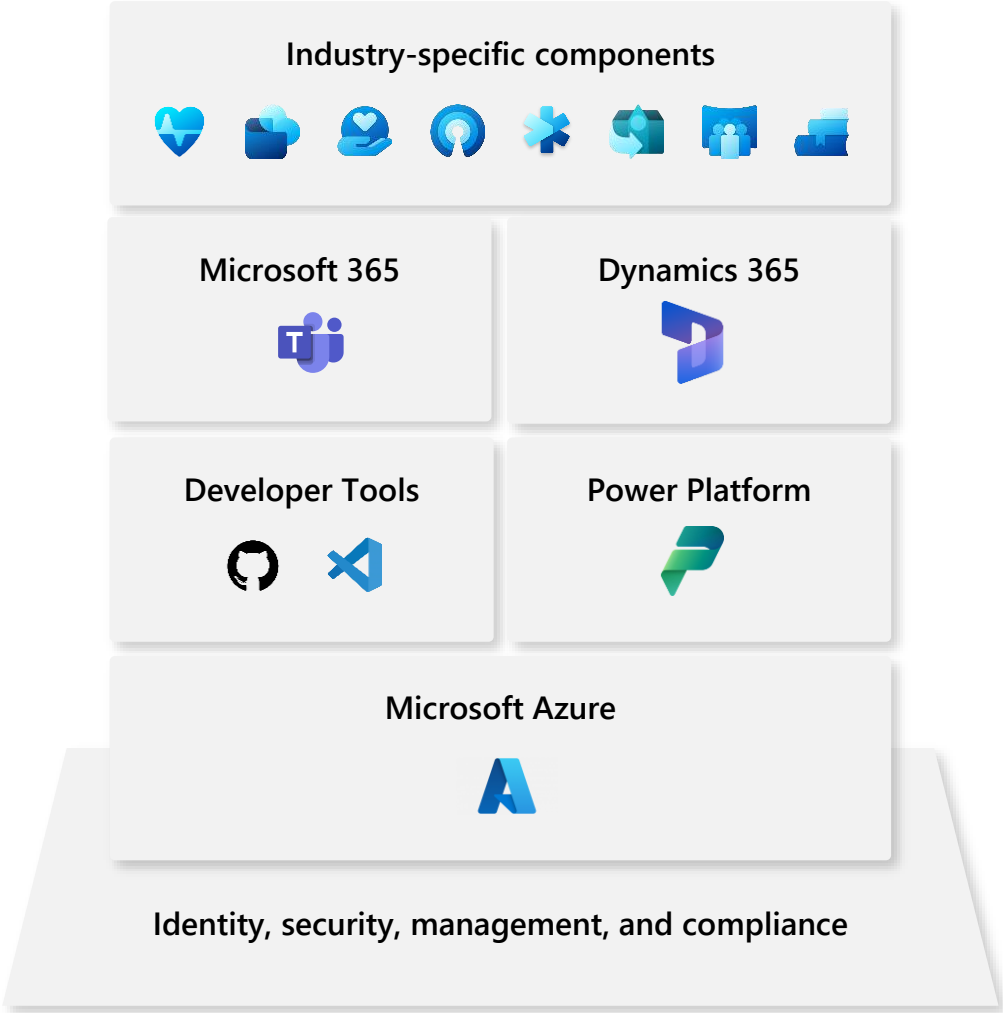
Run the business fast and lean
Scale with elastic cloud

Scale to accommodate fluctuations; adjust to changes in contact volume, agent headcounts, wait times, and service levels without performance impact

Find finished as well as customizable solutions that are open, extensible, and adaptive

Over 900 data connectors and adapters built into the system to allow easy integrations with comprehensive offerings that are composable as well as bite-sized

Service Leader

Industry-specific components

Microsoft 365

Dynamics 365

Developer Tools

Power Platform

Microsoft Azure

Identity, security, management, and compliance

Select the persona icon to the left to return to the capabilities overview slide.

Run the business fast and lean
Simplify and lower costs

Reduced labor, onboarding, and training costs from automation of repetitive tasks

Highly accurate and sophisticated AI models to shape customer service solutions that are continuously learning from 1 billion+ consumers, staying ahead of customer's evolving needs

Drive operational efficiency while reducing multi-vendor complexities, cost and time investment with a single vendor solution, all built on Microsoft cloud

Service Leader

Select the persona icon to the left to return to the capabilities overview slide.

Microsoft's Responsible AI principles

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.

Fairness

Reliability & Safety

Privacy & Security

Inclusiveness

Transparency

Accountability

Copilot copyright commitment

Use Copilot services with confidence

| We stand behind our Copilot customers | We are sensitive to the concerns of authors | Copyright guardrails are built into the product |

A Leader in CRM Customer Engagement Center

Gartner logo
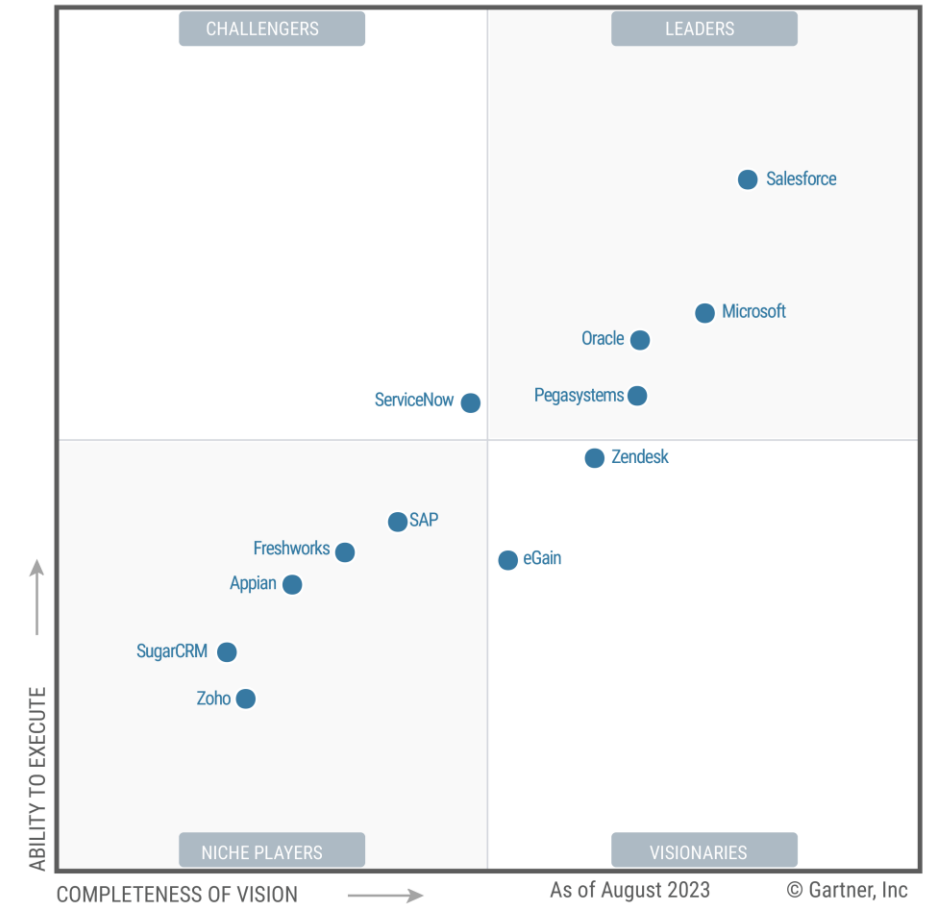
Magic Quadrant™ for the CRM Customer Engagement Center

November 2023

Read the report

Figure 1: Magic Quadrant for the CRM Customer Engagement Center

Magic Quadrant chart with axes "ABILITY TO EXECUTE" (vertical) and "COMPLETENESS OF VISION" (horizontal). Quadrants labeled CHALLENGERS, LEADERS, NICHE PLAYERS, VISIONARIES. Vendors plotted: Salesforce, Microsoft, Oracle, Pegasystems, ServiceNow, Zendesk, SAP, Freshworks, Appian, eGain, SugarCRM, Zoho. As of August 2023. © Gartner, Inc

A Leader in Service Life-Cycle Management Platforms

IDC MarketScape

October 2023

IDC MarketScape Worldwide Service Life-Cycle Management Platforms, 2023–2024

Source: IDC, 2023

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of ICT suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the icons.