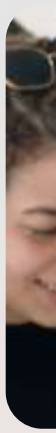
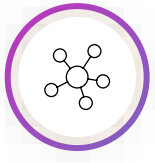


Empower every person and every organization on the planet to achieve more

Microsoft
Dynamics 365

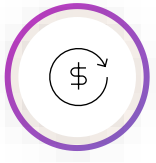
EX CX

5 Top Reasons Customers Choose D365



Single Unified Platform

Market Leader in Gen AI



Cost Savings

Built for Extensibility

Security, Privacy and Compliance

60%
Reduction in TCO

23%
ROI perceived by customers upon supplementing with Microsoft analytics tools

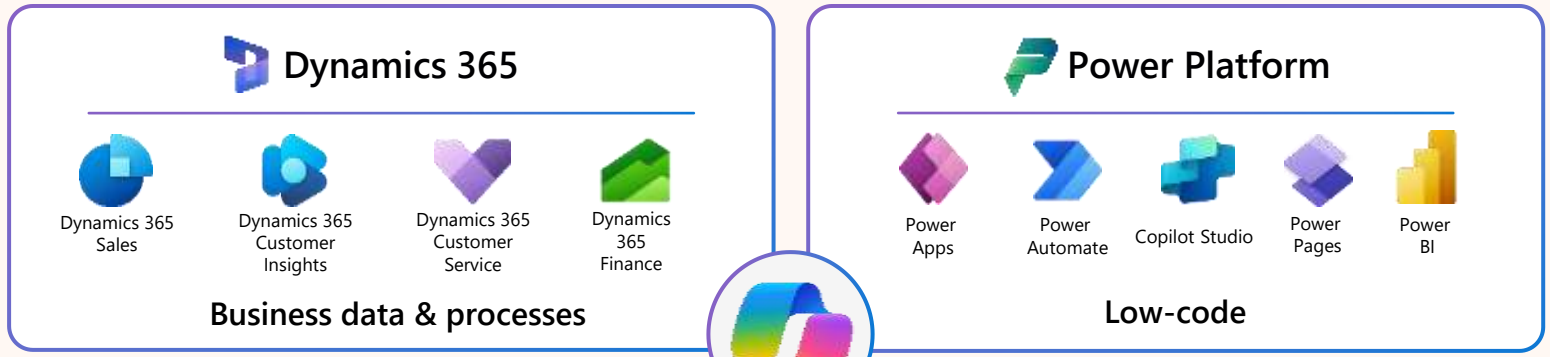
89%
Customers believe value has kept pace with the cost

7%
Higher ease of use vs. competitors - reported by customers

Source: Nucleus Research

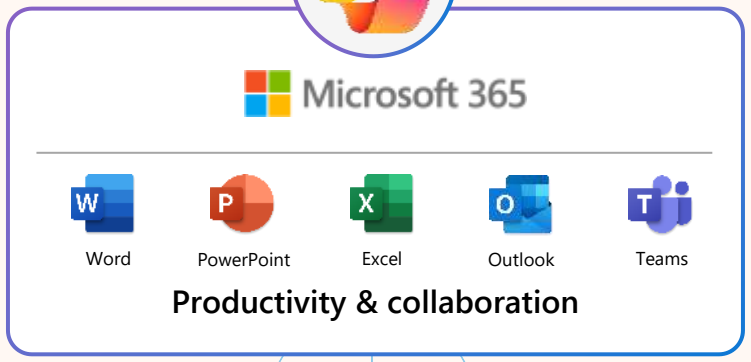
Microsoft Platform for Business Applications

A unified suite of leading CRM and ERP applications



#1 low-code platform for app dev, automation & BI

AI Copilot in every product

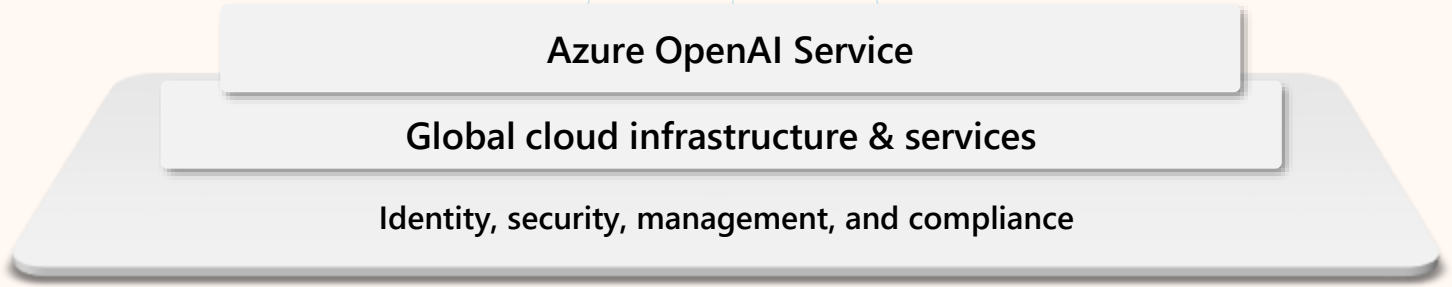


Seamless integration with Microsoft 365

Microsoft Graph | Dataverse | 3rd-party data

Run on Azure OpenAI Service, AI app dev, and enterprise cloud infrastructure

Built-in security, compliance, privacy and Responsible AI approach



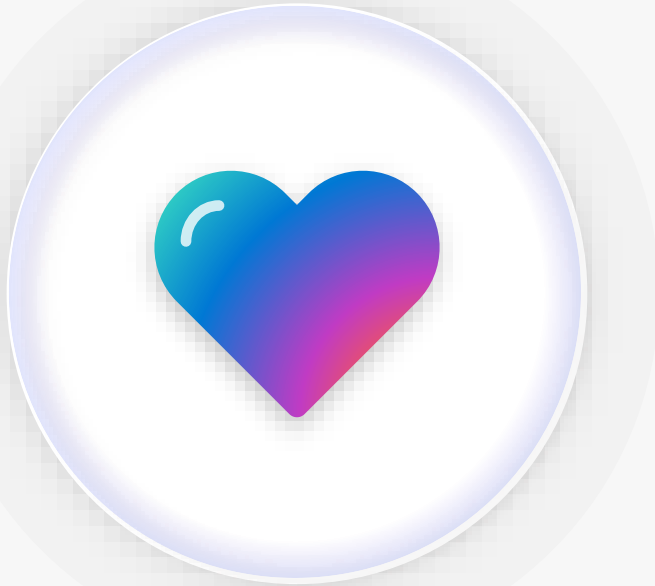
Global Systems Integrators

KPMG EY Capgemini accenture avanade

Global ISV Partnerships

TEMENOS Adobe fenergo: BACKBASE VERIPARK FINASTRA

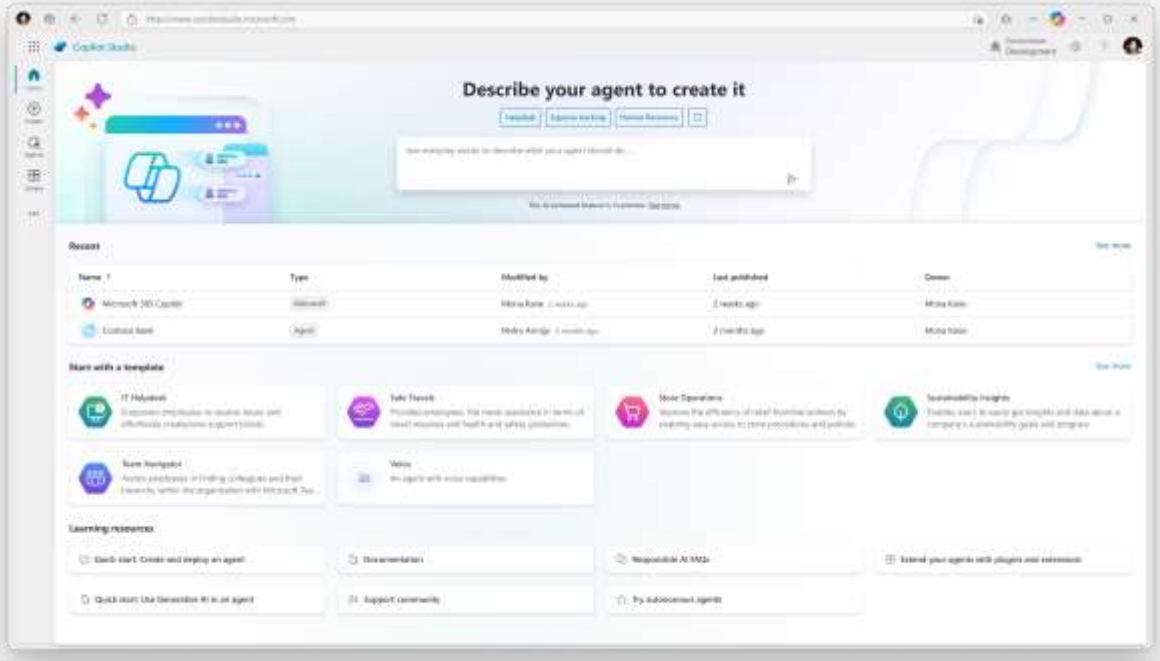
Copilot



Business Process

Copilot Studio

Copilot Studio is the solution to build agents that **extend Microsoft 365 Copilot** or **operate standalone**.



- 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

More than 50,000 customers across every industry have used Copilot Studio

to help improve performance and efficiency while reducing costs and risks

Rabobank

Conversational banking copilot on both telephony and digital channels

PayPal

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

Holland America Line

Helping customers find and book the perfect cruise

accenture

Creating customer focused copilots as a Microsoft Partner

Customer copilot to help find the right products and support

CINEPLEX

Copilot that helps with customer service for guests

Copilot

Human augmentation

Works as your personal assistant

There are only as many Copilots as there are people

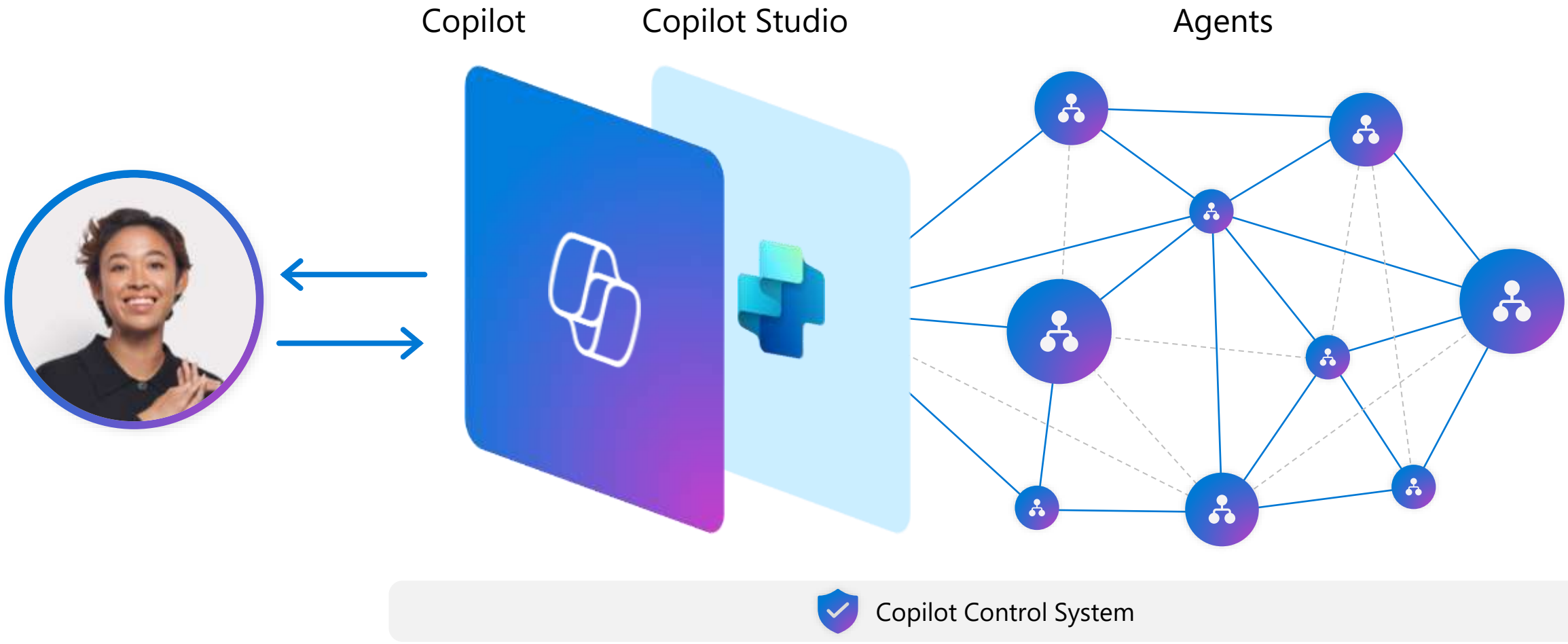
Agents

Expert systems that can work autonomously

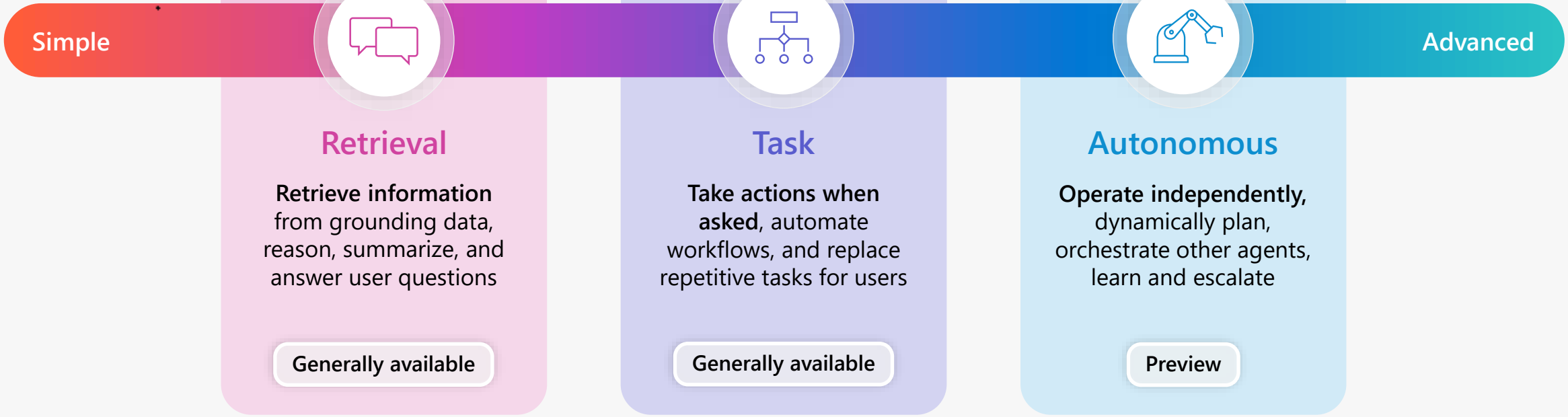
Works on behalf of a process or company

There are more agents than people

Copilot is the UI for AI



Spectrum of agents



Agents vary in levels of complexity and capabilities depending on your need

Agent tooling

No code

Pro code

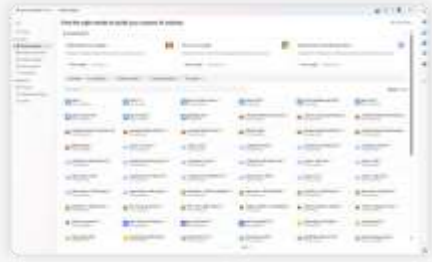
For End Users

Agent builder

For Makers

Copilot Studio

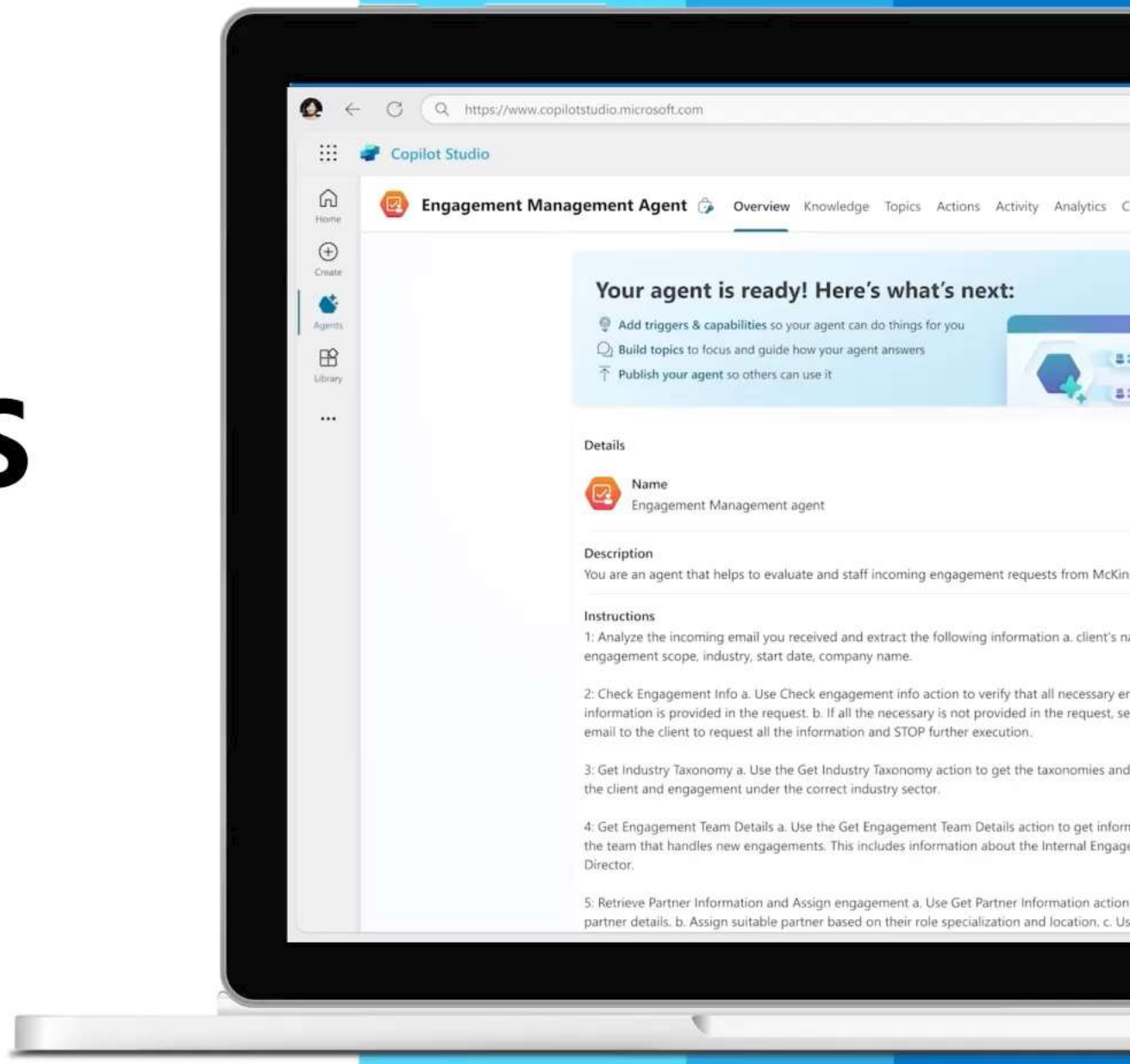
For Developers



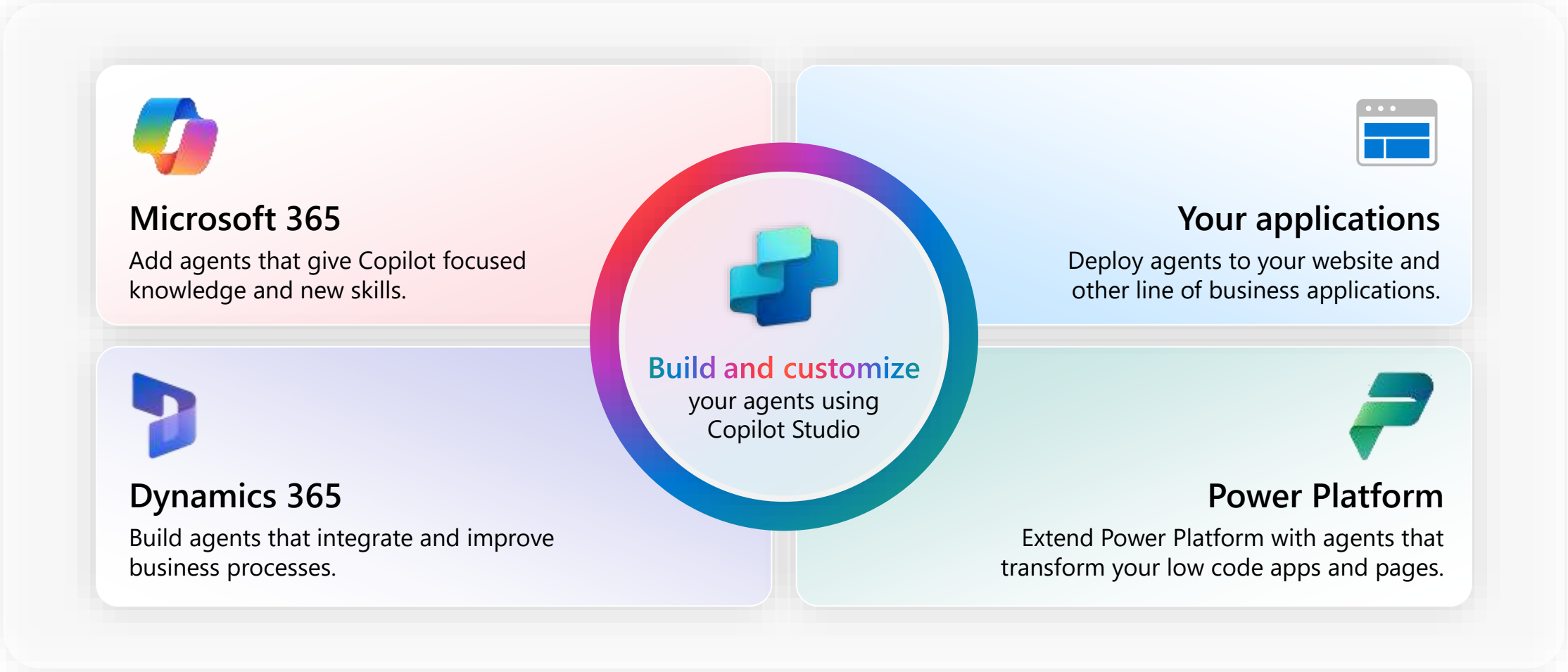
Copilot Studio + Azure AI

Copilot Studio

Autonomous Agent

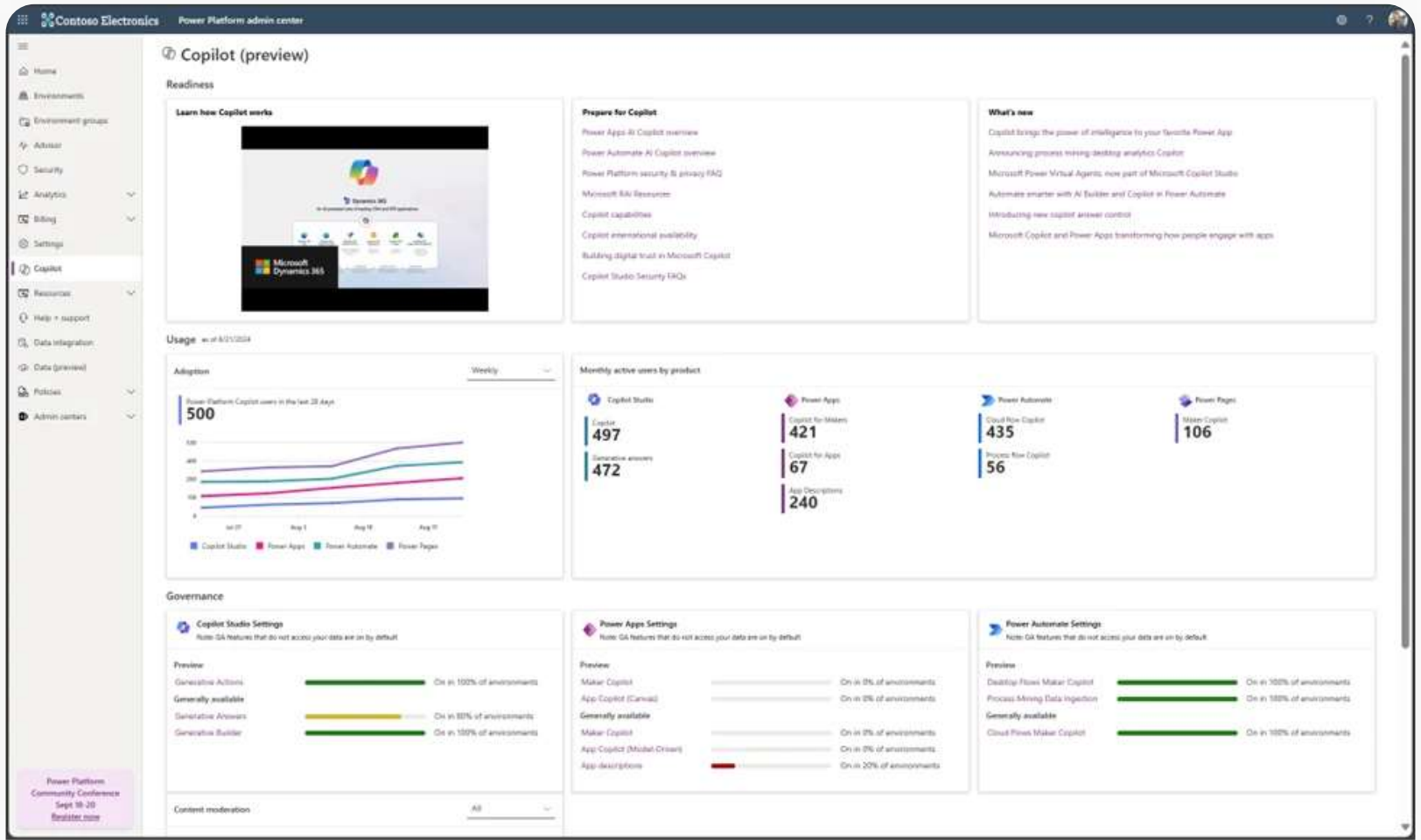


Deploy & use agents in any system



Public preview

Copilot Hub for Governance & Enablement



Announcing

Copilot Studio available pay-as-you-go in Azure

Launching December 1

Pay with standard Azure subscription

Billed based on consumption

No need to assign new users

Fremtidens kundeopplevelse

CUSTOMER

Customer Experience Applications

Engage

- Dynamics 365 Contact Center
- Chat
- Social
- Web
- SMS
- Email
- Voice
- Video
- IoT
- Teams
- Self-Service Bots and IVR
- Intelligent Routing

Execute

- Dynamics 365 Customer Service
- Dynamics 365 Sales
- Customer Insights

Shared

Unified Experience | Capabilities | Data Model | Intent-driven AI | Agents

Create, Adapt, & Automate

- Power BI
- Power Apps
- Power Automate
- Copilot Studio
- Power Pages

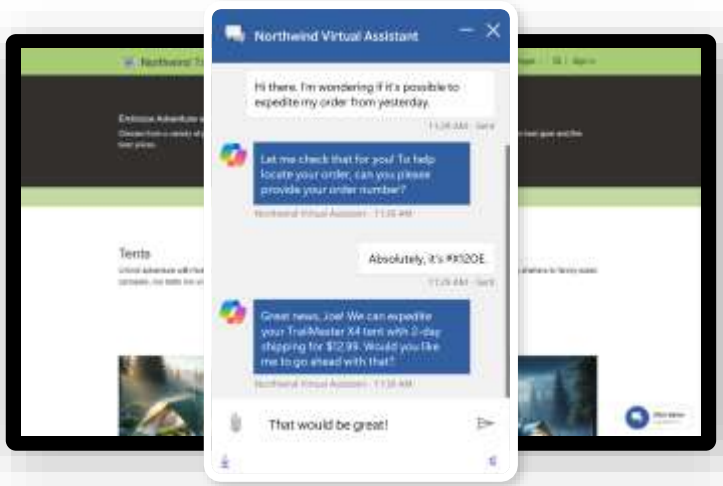
Data Layer

- Microsoft Dataverse
- Microsoft Intelligent Data Platform

Planet-scale

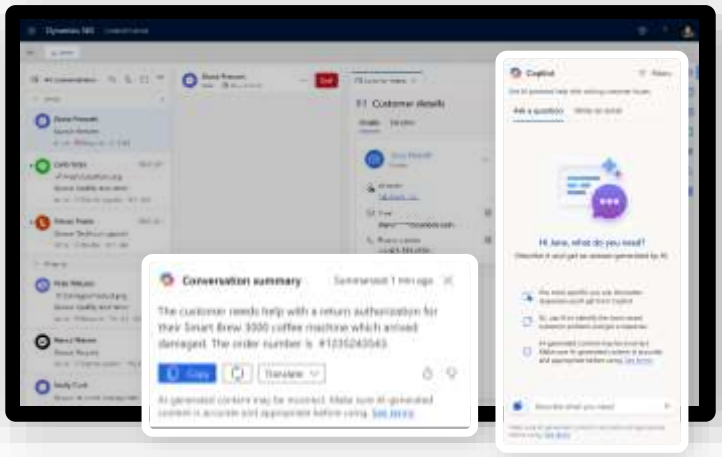
- Azure trusted AI Platform

Microsoft Dynamics 365 Contact Center



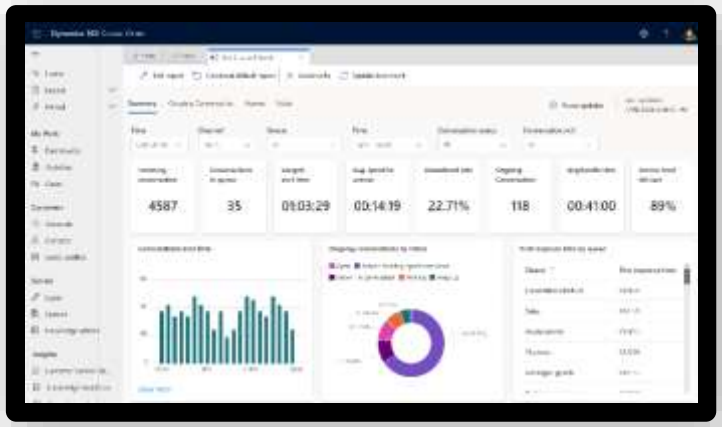
Deliver effortless self service

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



Accelerate assisted service

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



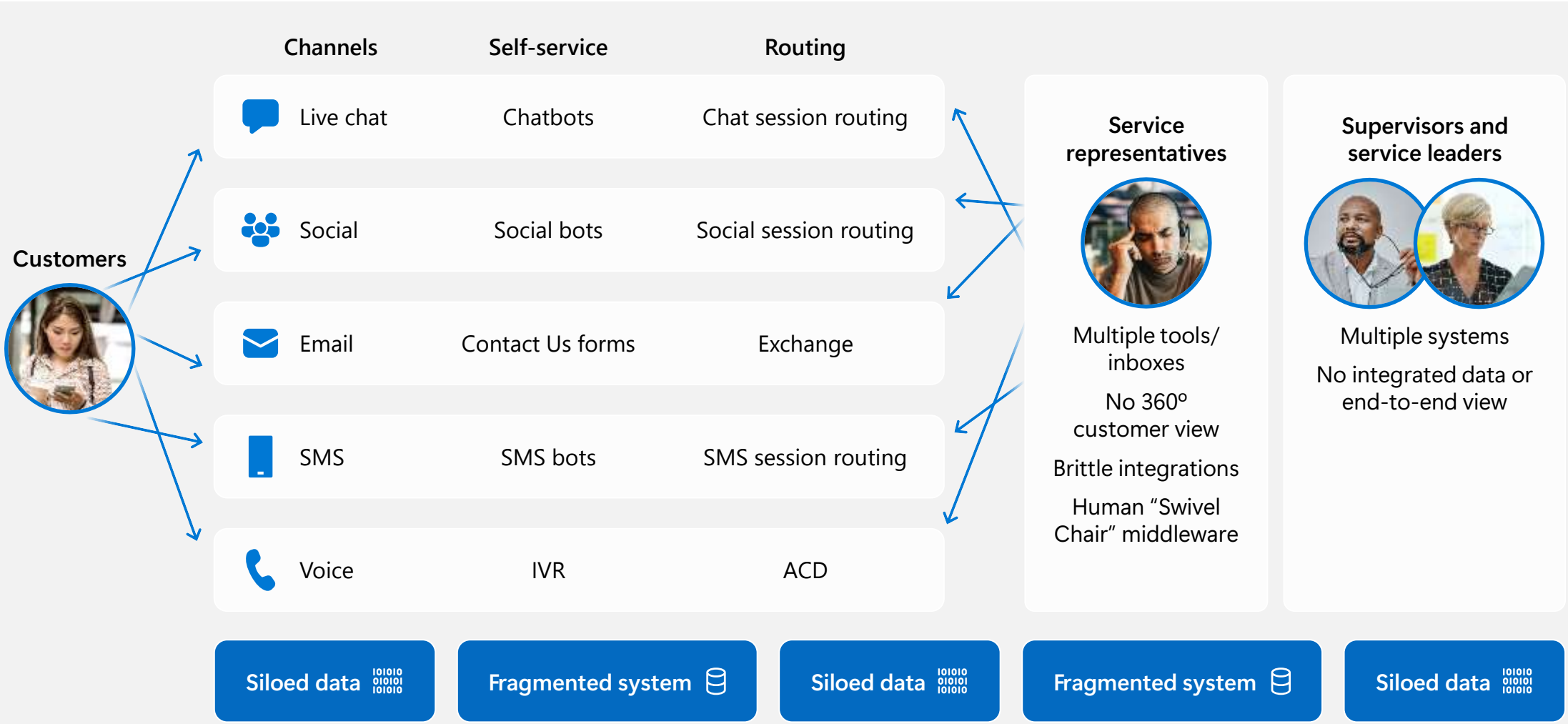
Drive efficiency and reduce costs

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

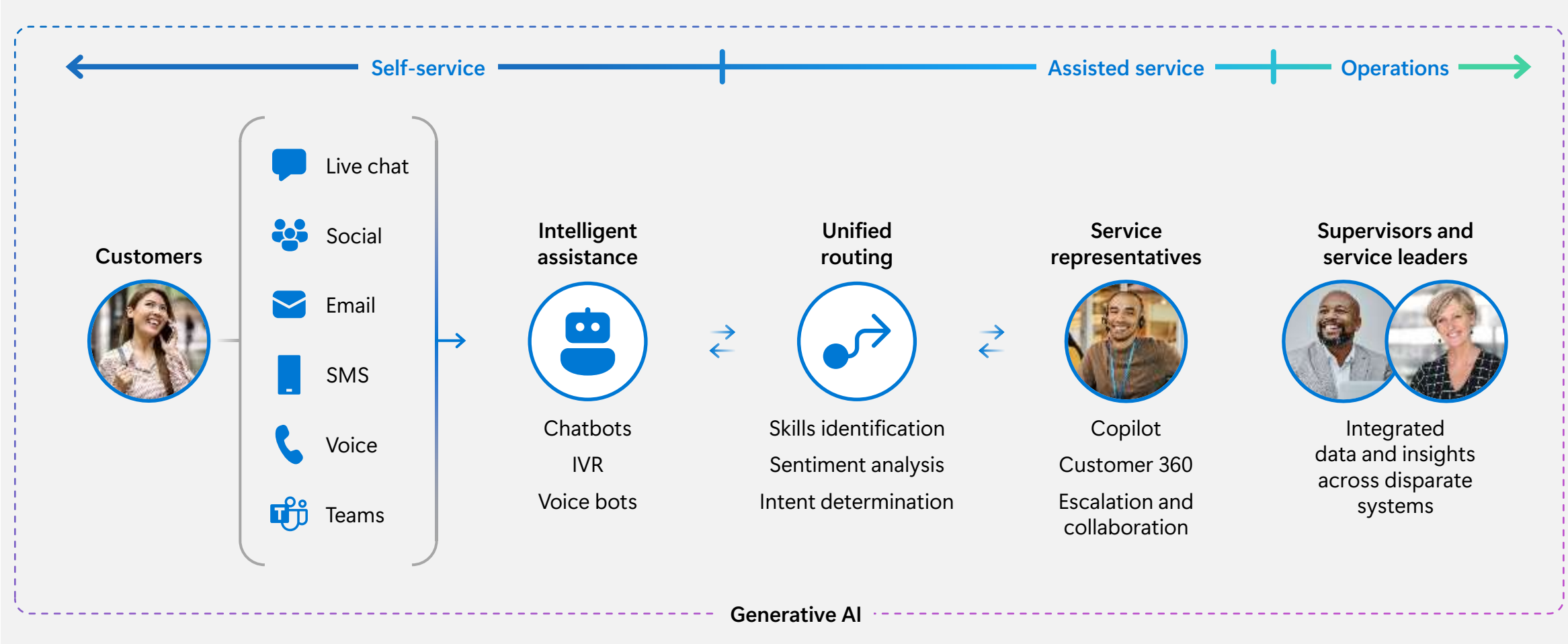
Select the underlined text to navigate to the associated capability slide.

Why are poor service experiences so common?

Typical contact center infrastructure creates friction



Modernize your contact center with a complete solution



Why choose Microsoft for your contact center?

1

Comprehensive vision for service

Microsoft offers comprehensive, composable solutions for the contact center from a single vendor, including CCaaS, CRM, generative AI, and more. We meet you where you are and offer a path to consolidation and growth.

2

Infused with Copilot from end to end

Microsoft has infused generative AI throughout the service workflow, from self-service to routing, assisted service, post-call wrap-up, and analytics—all connected to the data you rely on.

3

Built for scalability and reliability

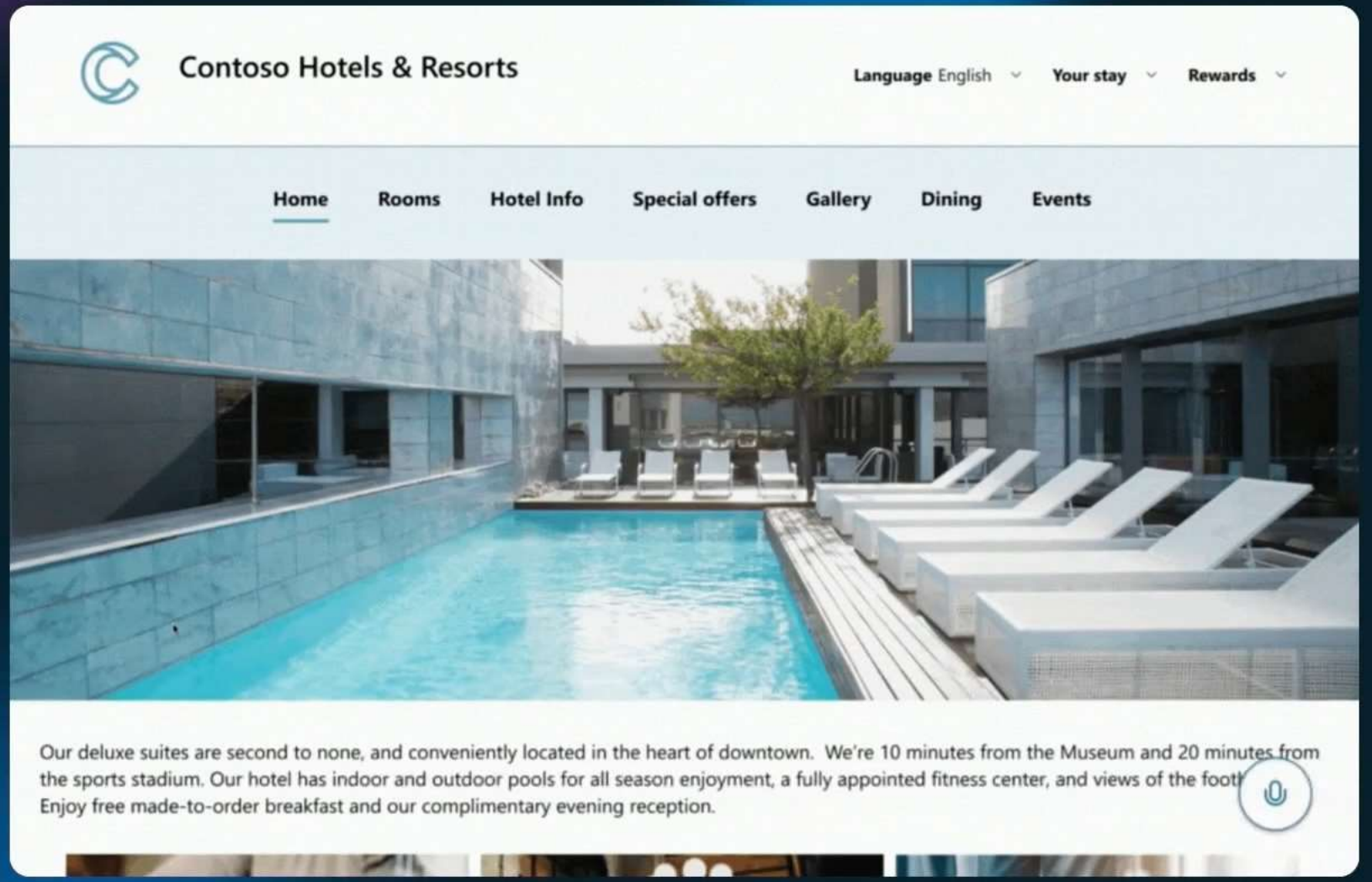
Our solution was built from the ground up for modern cloud infrastructure, providing scalability, reliability, and security for critical contact center workloads. As your needs evolve, you can count on Microsoft Cloud.

Copilot Studio now natively supports voice

Build transformative user experiences using Copilot Studio

Interact contextually using voice or images

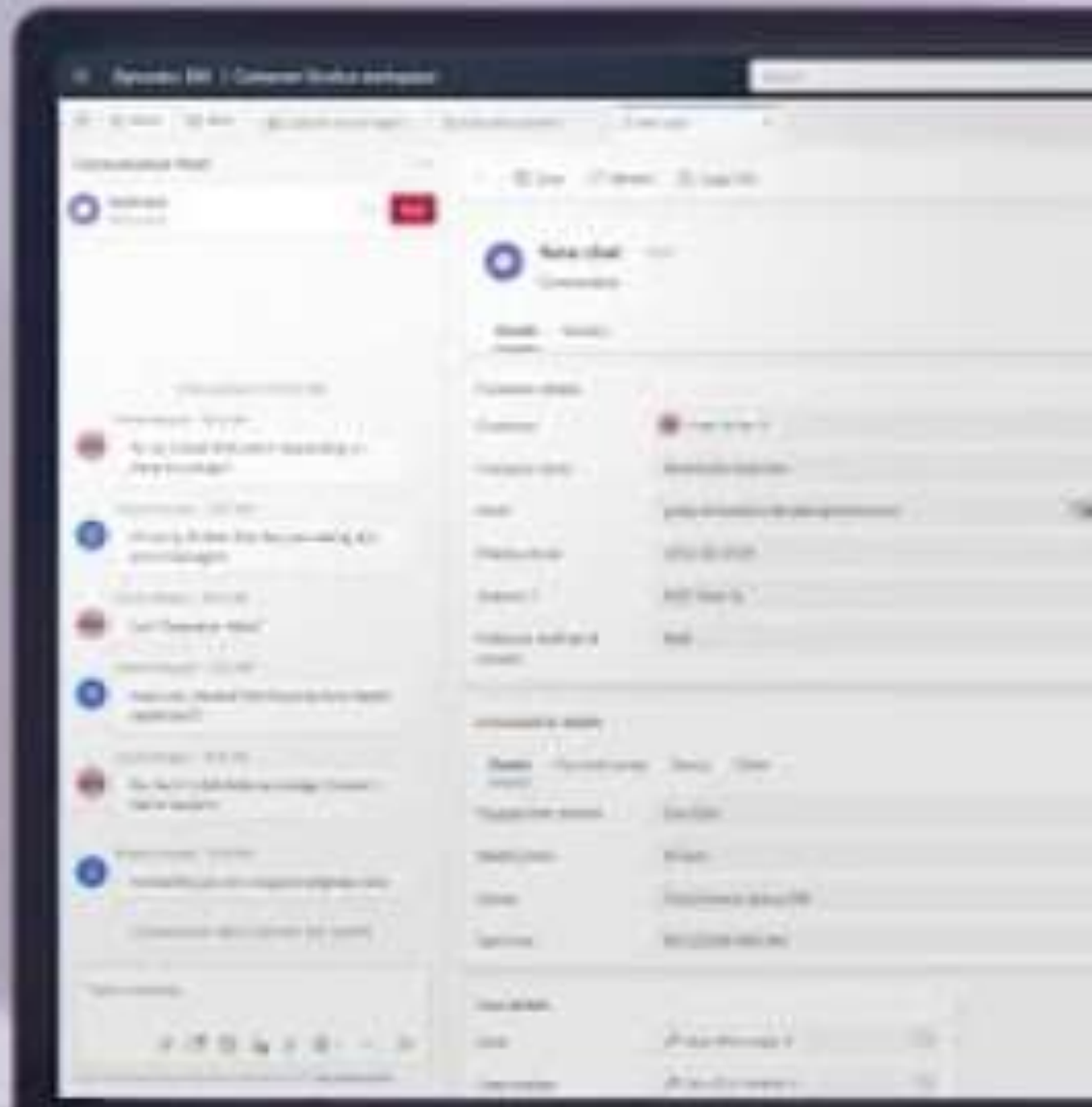
Embed the multimodal agent in your applications and websites using the SDK



Dynamics 365

Customer Intent & Customer Knowledge Management Agents

Microsoft Dynamics 365



Dynamics 365

Case Management Agent

Microsoft Dynamics 365

Customer service deprecation

Customer Service Hub app to be removed for new organizations with Enterprise licenses in February 2025

Effective February 2025, the Customer Service Hub app will no longer be available for all new organizations with Enterprise licenses. We'll continue to support the application for all existing organizations and new customers with license types other than Enterprise (for example, Customer Service Professional licenses). We recommend that existing customers migrate to Customer Service workspace. More information: Migrate to Customer Service workspace from removed or deprecated apps

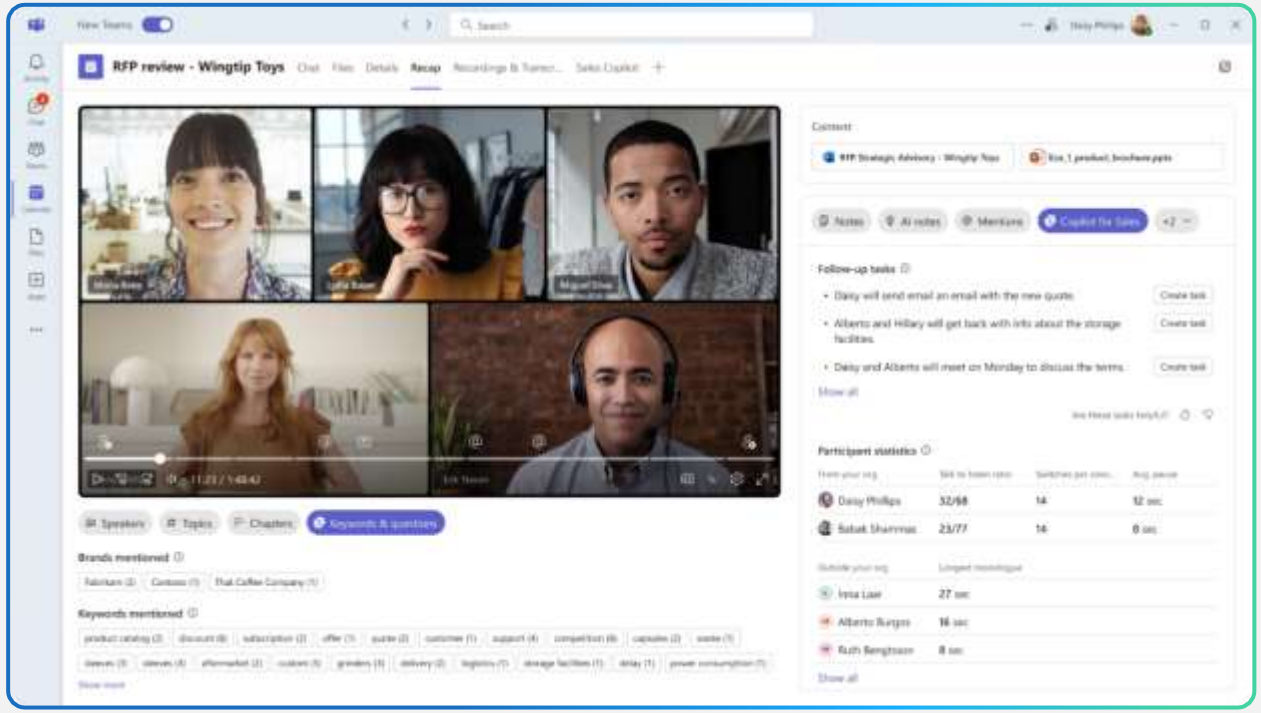
Deprecations in Dynamics 365 Customer Service | Microsoft Learn

Copilot in Dynamics 365 Sales

Microsoft 365 Copilot for Sales

Next-generation AI assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal.

- View opportunity summary
- Analyze sales conversations
- Draft a proposal
- Create a revenue data chart



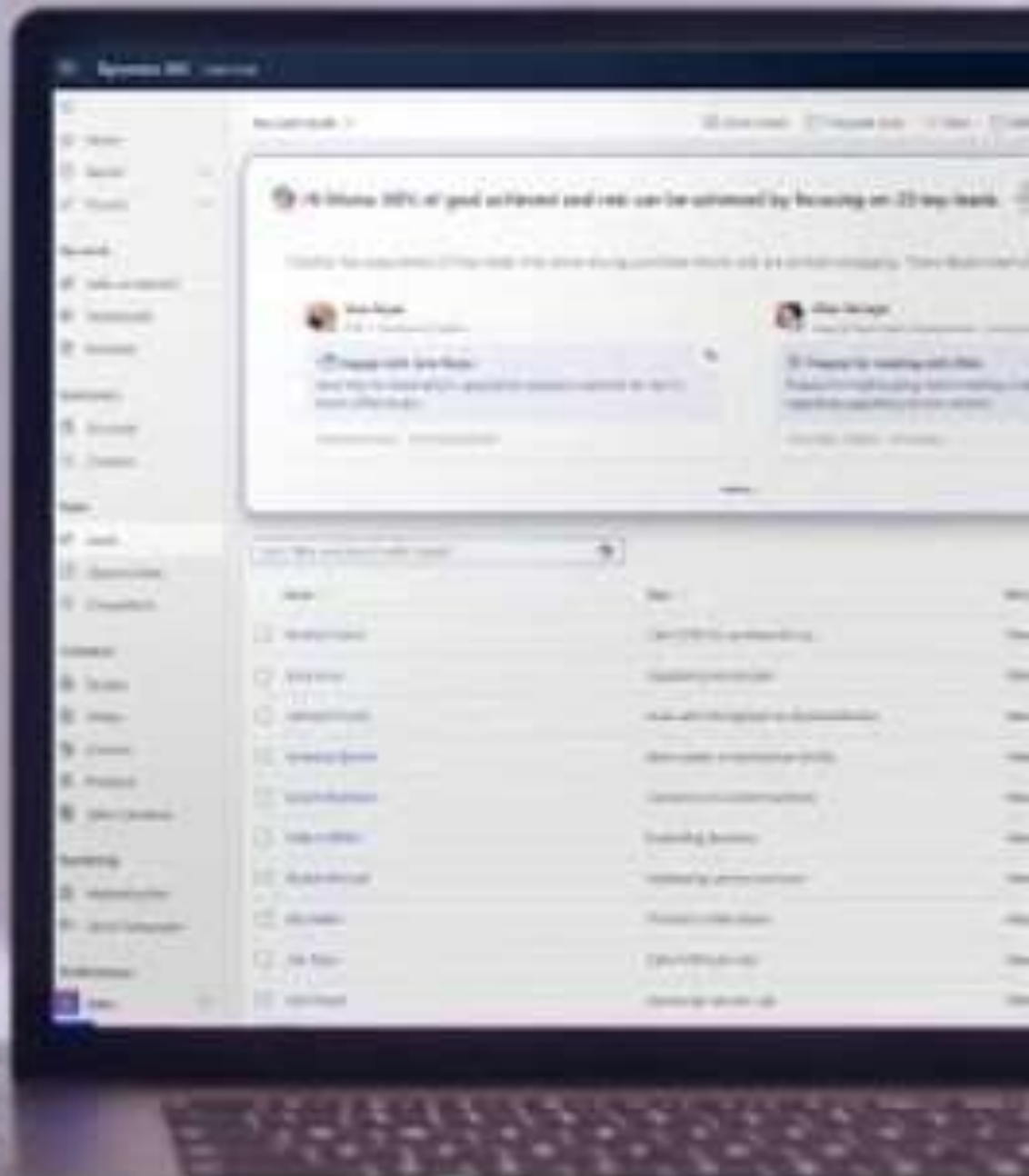
- Create CRM tasks from a meeting
- Update opportunity stage
- Show conversion rate
- Create a pitch presentation

Copilot for Sales is experienced in Microsoft 365 and connects to your CRM system

Dynamics 365

Sales Qualification Agent

Microsoft Dynamics 365



Customer Insights – Roadmap W2 2024 (Oct 2024 - Mar 2025)

Advanced Journey Capabilities

- Create journeys by using Copilot to describe them – **GA**
- Wait on segment membership to trigger the next step in a journey - **PP**
- Control how fast customers can enter a journey - **GA**
- Split your audience into groups to deliver unique customer experiences - **GA**
- Understand customers inflow and exits at every journey step - **PP**
- Orchestrate journeys using any marketing interactions - **GA**
- Personalize customer messages based on web interactions - **PP**
- Improve engagement and compliance with double opt-in - **GA**
- Prevent duplicate emails to shared email address- **GA**

Forms & Event Management

- Easily create an event portal for customers to access all events details and register - **PP**
- Easily setup and execute pre and post event communication - **PP**
- Maximize event capacity with waitlist registration - **PP**
- Streamline form filling and event registration with form prefill - **PP**
- Collect extra customer information without creating custom attributes – **PP**
- Generate leads that link to an existing contact - **PP**

Testing & Analytics

- Get actionable insights on email engagement with heatmap analytics - **PP**
- Export your data to your own storage for custom reporting - **PP**

Data & Insights

- Accelerate time to insights with data in Delta Lake format – **GA**
- Use automation to manage segments and measures - **GA**
- Use Microsoft OneLake as a data source – **PP**
- Enhance security for your connected data sources using Azure Managed Identity – **GA**
- Activate your customer data using Azure Data Lake Storage – **GA**
- Filter the rows and columns from source data for improved processing - **PP**

GA- General Availability
PP - Public Preview

Release Planner W2 2024

Deprecation Dynamics 365 Outbound Marketing

Work with your partner to mitigate risks

> ⓘ **Important**
>
> **The outbound marketing module will be removed from Customer Insights - Journeys on June 30, 2025.** To avoid interruptions, transition to real-time journeys before this date.

Transition overview - Dynamics 365 Customer Insights | Microsoft Learn

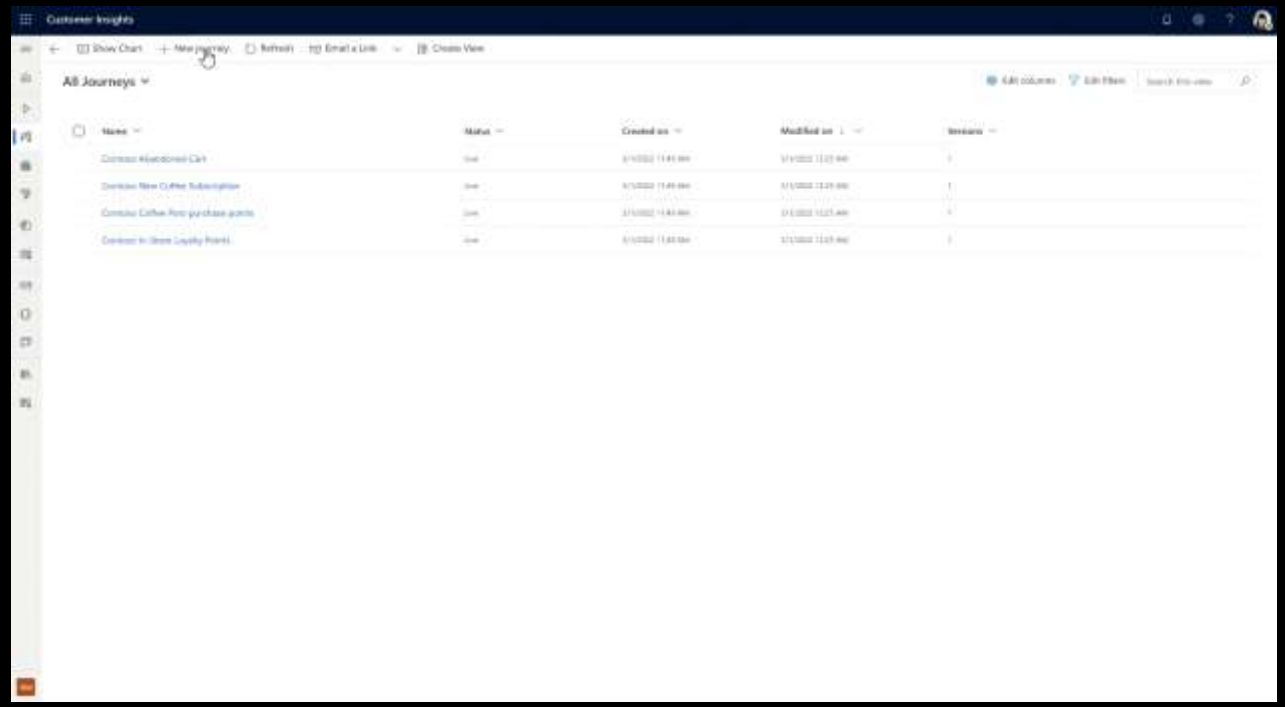
Copilot

GA

Create customer journeys by using Copilot to describe them

Turn words into journeys. Harness the power of AI and effortlessly craft customer journeys within minutes simply by describing them and deliver new tailored customer experiences.

- Use everyday natural language to describe the journey you want to create.
- Get inspiration about how to get started with a list of suggested journeys.
- See a preview of the journey Copilot created.
- Get a detailed summary of the Copilot-created journey before you start adding your content.



Easily create an event portal for customers to access all events details and register

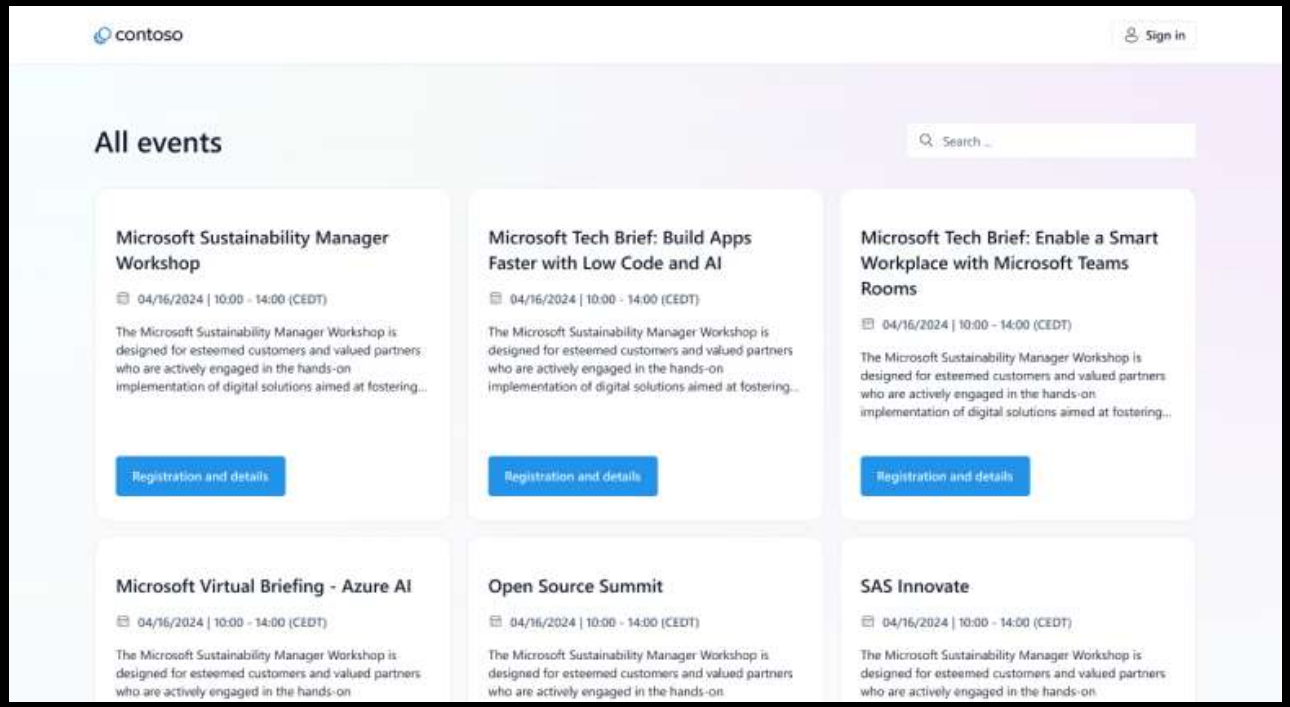
Create a comprehensive event portal where customers can access event details, session specifics, speaker schedules, and register conveniently. Easily integrate it to your existing CMS or deploy via Power Pages to tailor it to your brand identity.

Portal hosting options:

- Embed in an existing website.
- Leverage an out-of-the-box Power Pages template for quick deployment.

Portal includes:

- A list of your upcoming events.
- Detailed summary for each event, including session information and speakers.



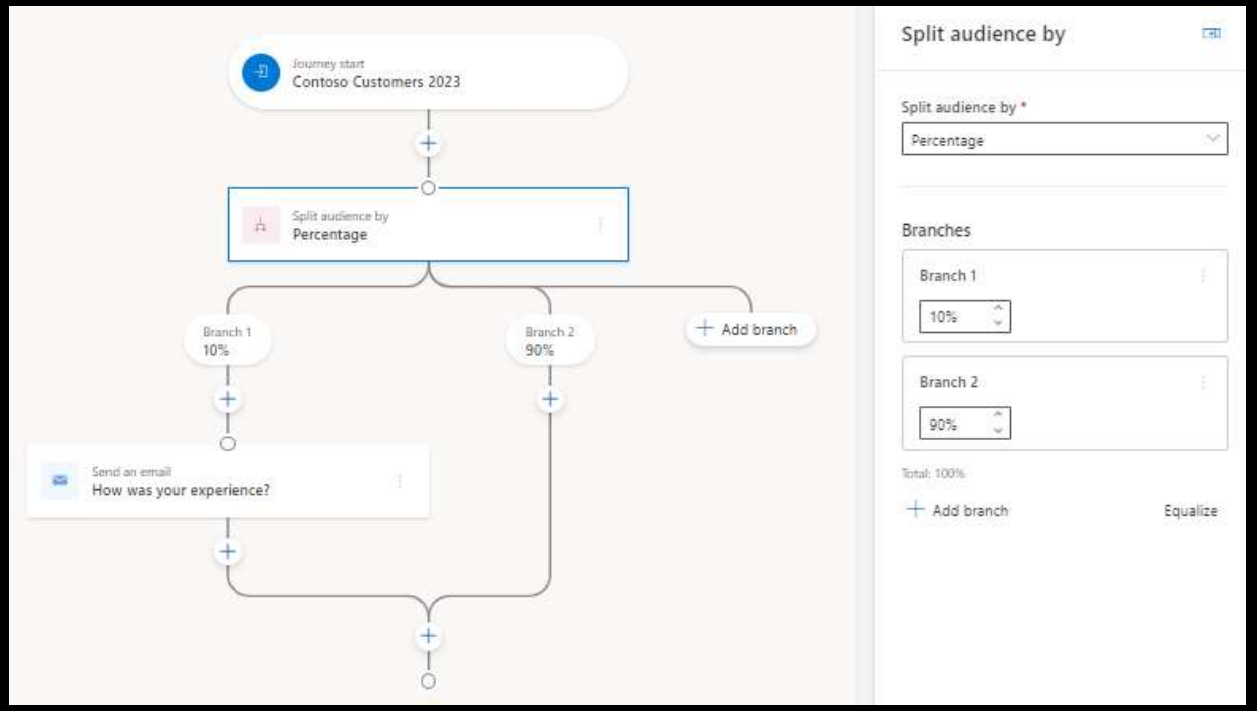
GA

Split your audience into groups to deliver unique customer experiences

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

You can split your audience by.

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



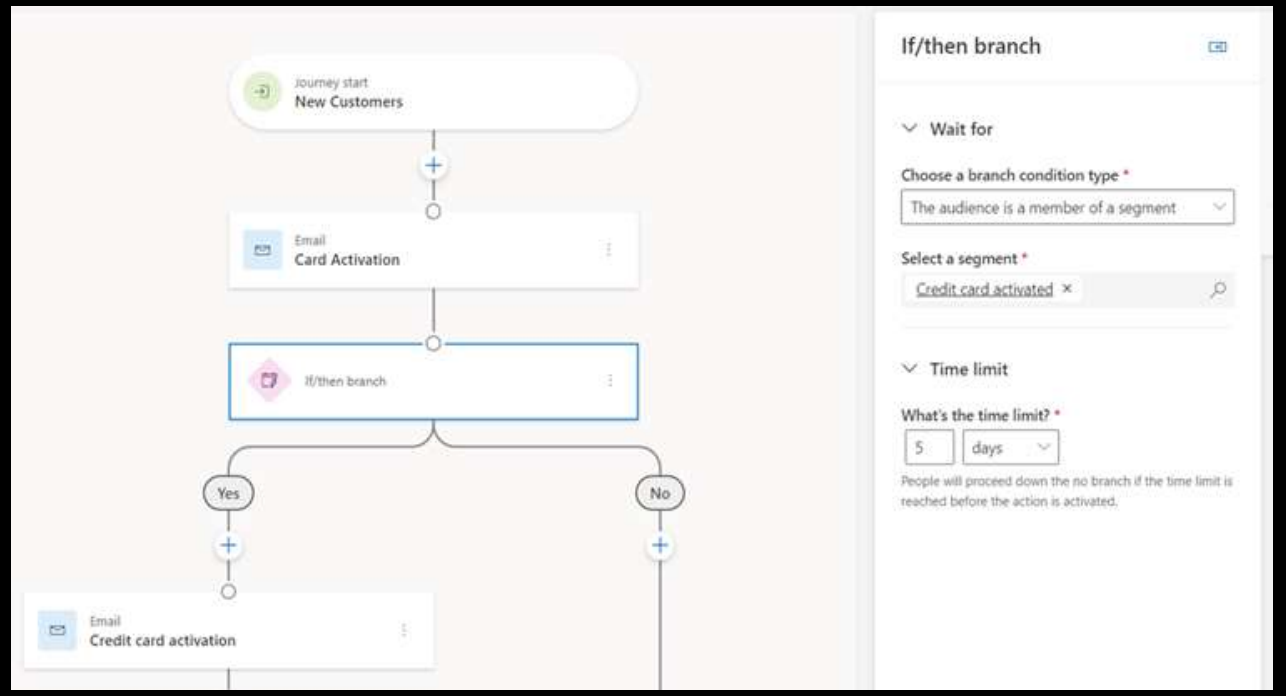
🚀 Send a survey, test a new experience, or offer promotions to a specific number of customers to a random sample of customers.

Preview

Wait on segment membership to trigger the next step in a journey

Gain even more control over your customer's experience by waiting for them to become a member of a segment before continuing to the next steps in a journey.

- Create journeys that wait until a customer becomes part of a segment before continuing to the next steps in the journey.
- Choose a segment as the condition for an if/then branching step.
- Set the amount of time you want to wait for the customer to become a member of the segment before continuing.
- Choose what actions should be taken if the customer is or is not a member of the segment.



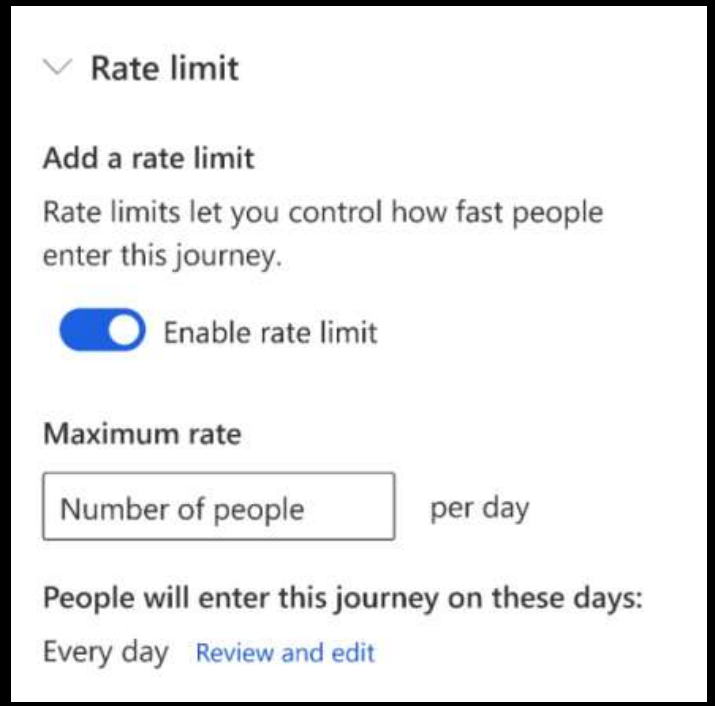
🚀 Send a welcome email after customers activate their credit card. If the card was not activated, send a reminder. Use a segment that includes all customers who should activated credit cards, add a condition for the if/then branch to wait for each customer to activate their credit card.

GA

Improve your customer experience by controlling how fast customers enter a journey

Space out the sending of messages over time by setting how quickly you want customers to enter your journey. Prevent overwhelming downstream operations with a large influx of requests from customers who receive messages from your journey.

- Control how fast customers enter your journey with journey rate limiting.
- Set rate limits per-day or per-hour.
- Choose which days of the week customers can enter the journey.
- Rate limits only apply to segment-based journeys. Trigger based journeys do not support rate limiting at this time.

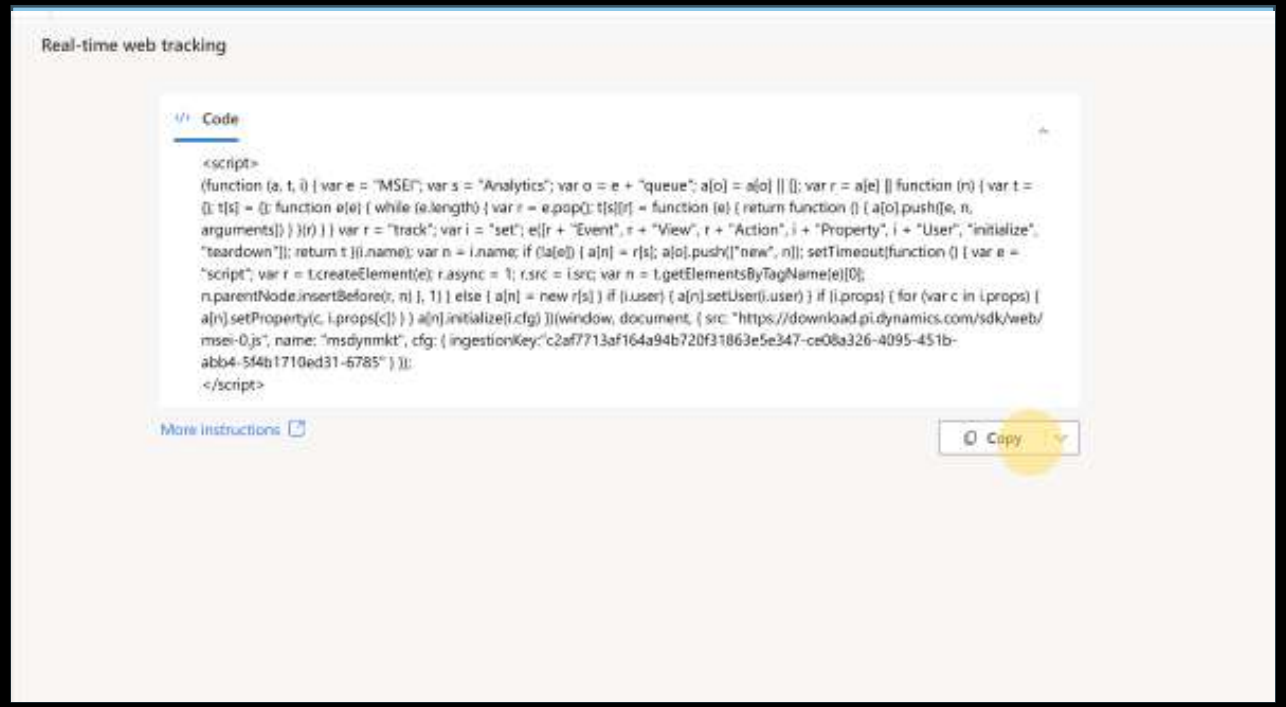


🚀 If you have a journey that sends messages to your entire customer base with a call-to-action to contact your call center. You can now slow down how fast customers enter the journey, avoiding thousands of phone calls at the same time.

Personalized customer messages based on website interactions

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

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



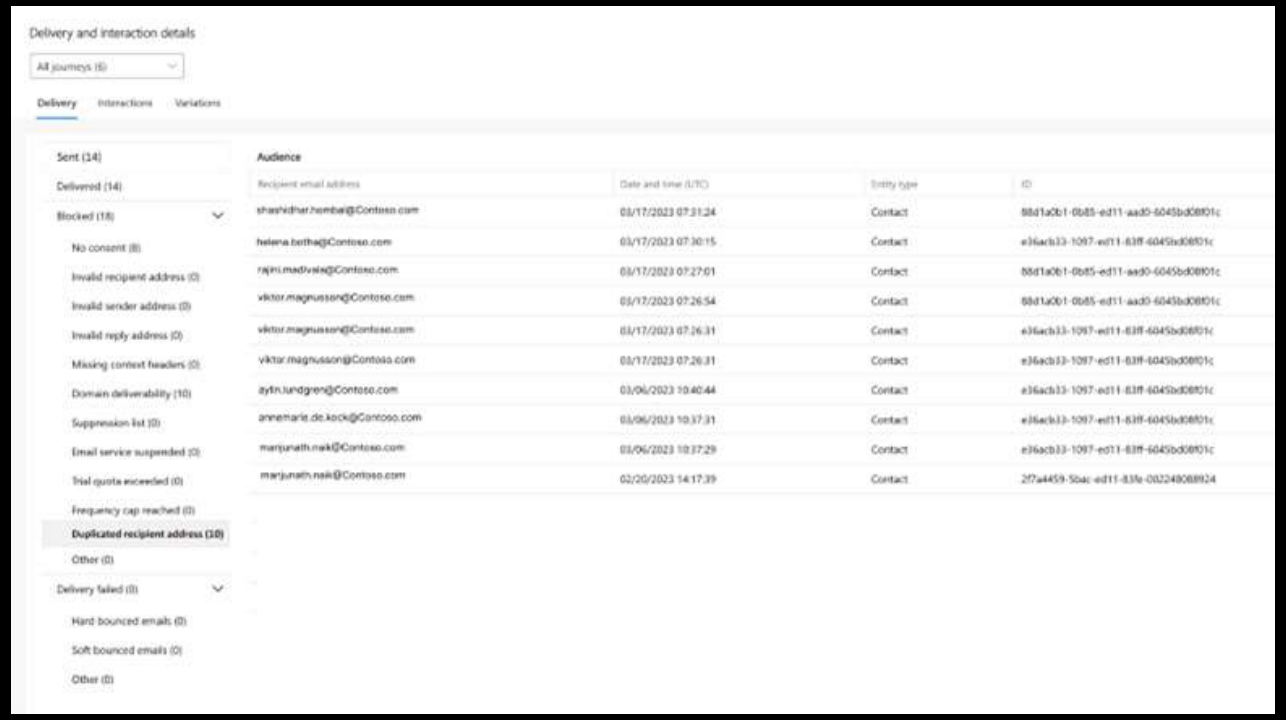
🚀 Engage your customers when they show interest by sending a personalized offer after they visit your website.

GA

Prevent duplicate emails to contacts that share an email address

Ensure that even if your data has multiple contacts with the same email address, your message will be sent only once to your customers, keeping their inboxes clutter-free and preserving your brand reputation.

- Enable or disable email deduplication for real-time segment-based journeys.
- Ensure that each message is sent just once to each unique email address for segment-based journeys.
- Review duplicated email addresses in journey analytics.



Orchestrate journeys using any marketing interaction

Leverage marketing interaction triggers to orchestrate or branch customer journeys, and engage your customers based on the interactions they have with your marketing messages.

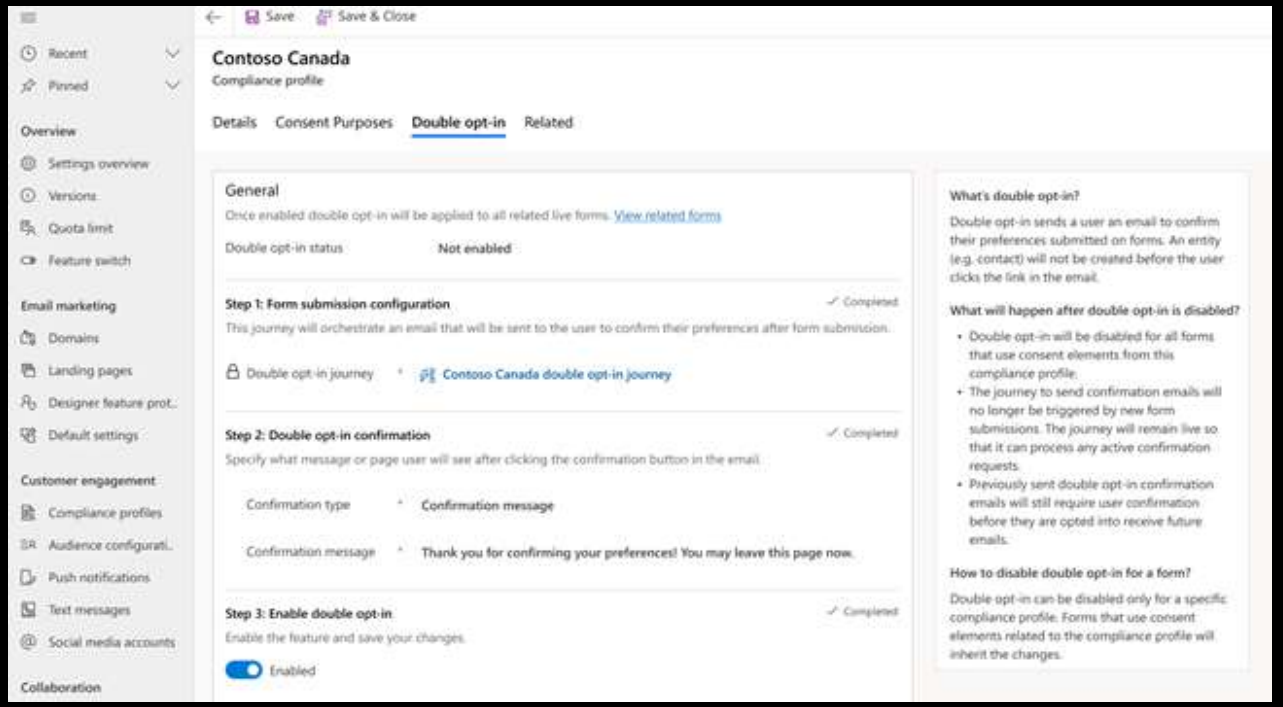
- Use the standard out-of-the-box triggers to facilitate greater engagement with your customers rather than more complex approaches such as Power Automate flows.
- Use marketing interactions such as "email link clicked" to orchestrate customer journeys based on a certain customer interaction.
- Make the right business decisions by branching journeys based on customer interactions and responses.

GA

Improve engagement and compliance with double opt-in

Ensure a high-quality, engaged subscriber base, and enhance your sender reputation while complying with data protection regulations using double opt-in.

- Administrators can enable double opt-in at a compliance profile level and easily enforce double opt-in flow for all the forms using the compliance profile.
- Use familiar concepts like triggers and journeys to orchestrate the double opt-in process, allowing you to customize the process to meet your business needs.
- New contacts (or leads) won't be created until the customer has confirmed their opt-in, keeping your contact and lead lists free of bad data.



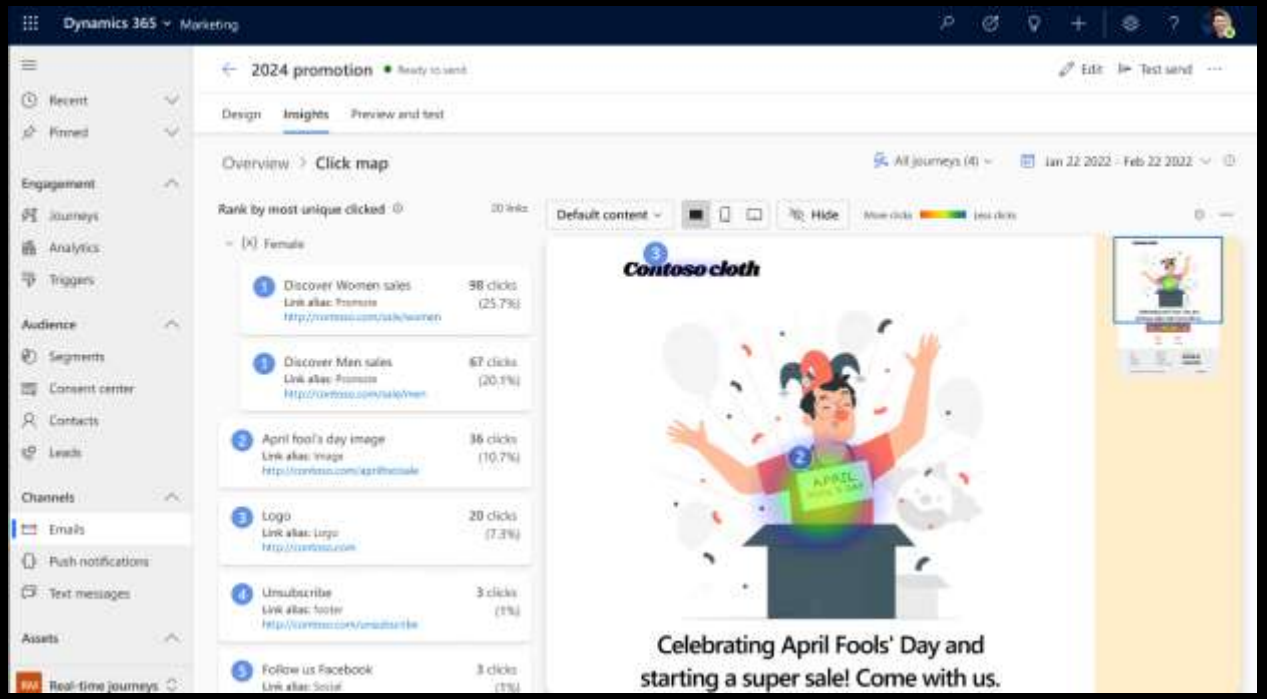
Moments that matter

Preview

Get actionable insights on email engagement with heatmap analytics

Deep dive into customer interactions with actionable insights that you can leverage to refine your email strategy using email heatmaps analytics.

- Get a fast and visual way to understand engagement based on your email design in desktop and mobile.
- Understand which email area and links get the most and the least engagement by viewing the click-through rate (CTR), total clicks, and unique clicks.
- Filter the heat map based on the journey version, and date.



🚀 At a glance see the area of your email that receive the least and most engagement and optimize your new email campaigns on mobile and desktop to increase user engagement.

Scale & Throughput for Customer Insights – Journeys

Send up to **300M messages monthly**

10M messages daily

500 000 messages per hour

Throughput guidance - Dynamics 365 Customer Insights | Microsoft Learn

Service limits and fair use policy - Dynamics 365 Customer Insights | Microsoft Learn

Fremtidens kundeopplevelse

CUSTOMER

Customer Experience Applications

Engage

- Dynamics 365 Contact Center
- Chat
- Social
- Web
- SMS
- Email
- Voice
- Video
- IoT
- Teams
- Self-Service Bots and IVR
- Intelligent Routing

Execute

- Dynamics 365 Customer Service
- Dynamics 365 Sales
- Customer Insights

Shared

Unified Experience | Capabilities | Data Model | Intent-driven AI | Agents

Create, Adapt, & Automate

- Power BI
- Power Apps
- Power Automate
- Copilot Studio
- Power Pages

Data Layer

- Microsoft Dataverse
- Microsoft Intelligent Data Platform

Planet-scale

- Azure trusted AI Platform

THANK YOU