



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



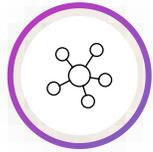


Microsoft
Dynamics 365

EX

CX

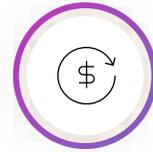
5 Top Reasons Customers Choose D365



Single Unified Platform



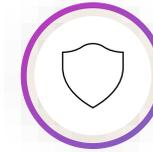
Market Leader in Gen AI



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%

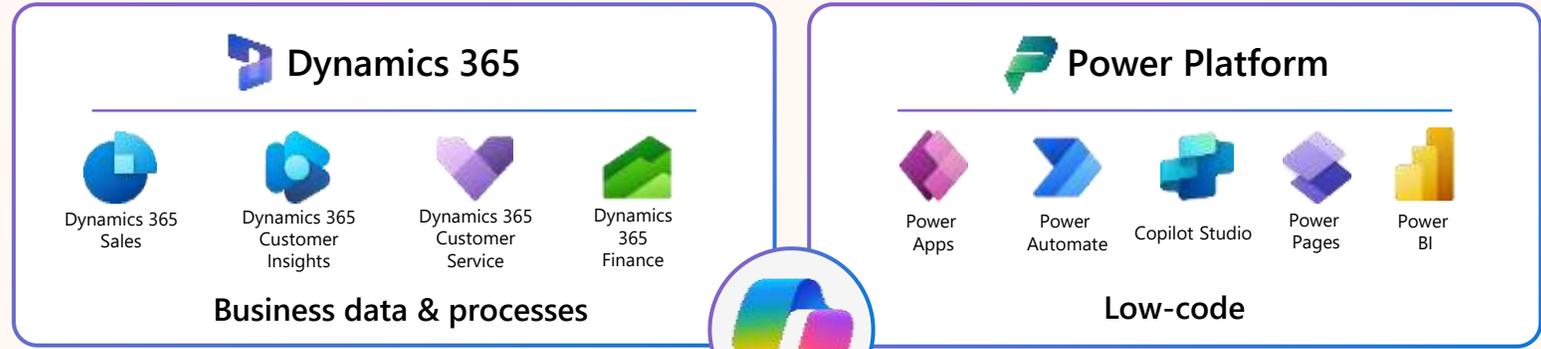
Customers believe value has kept pace with the cost

7%

Higher ease of use vs. competitors - reported by customers

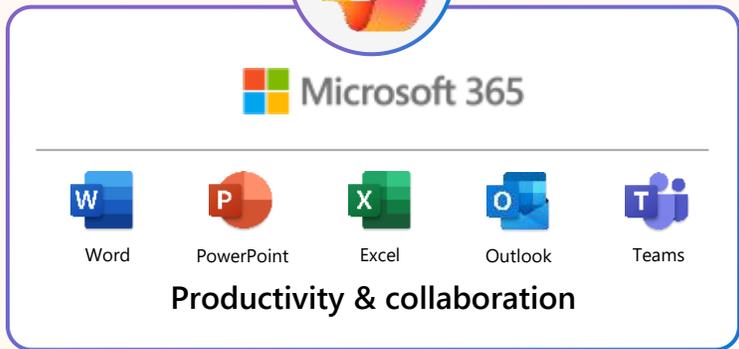
Microsoft Platform for Business Applications

A unified suite of leading CRM and ERP applications



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

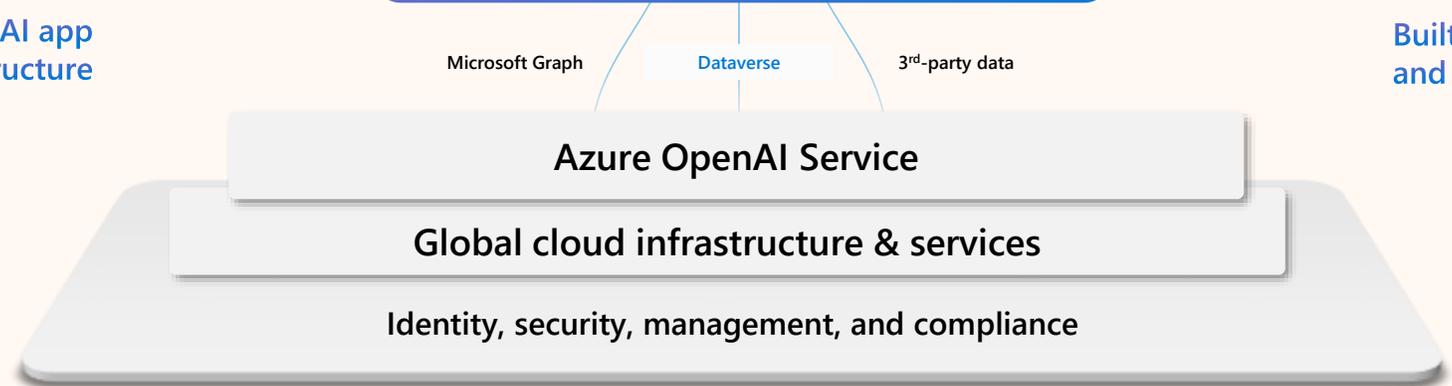
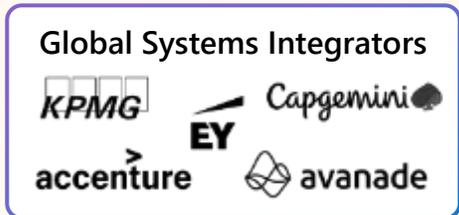
AI Copilot in every product



Seamless integration with Microsoft 365

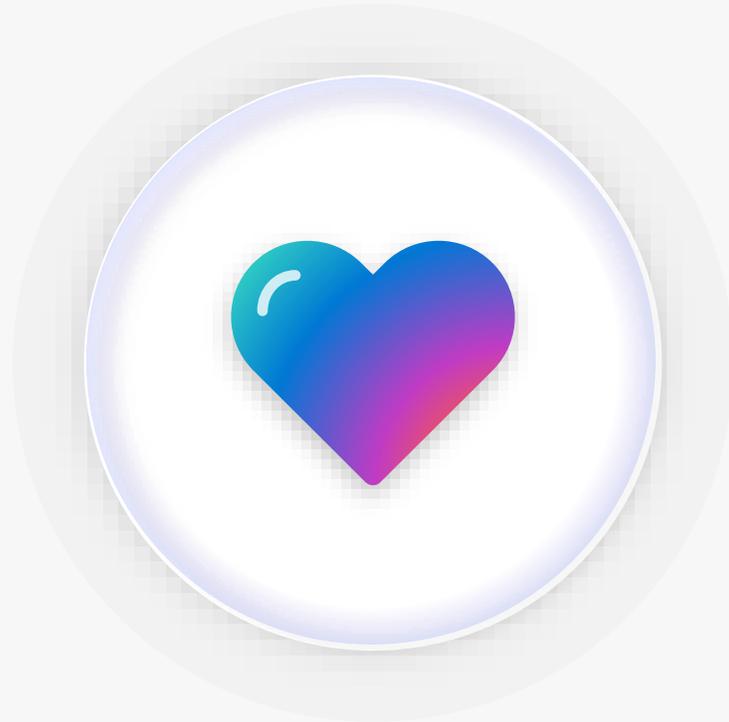
Run on Azure OpenAI Service, AI app dev, and enterprise cloud infrastructure

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





Copilot

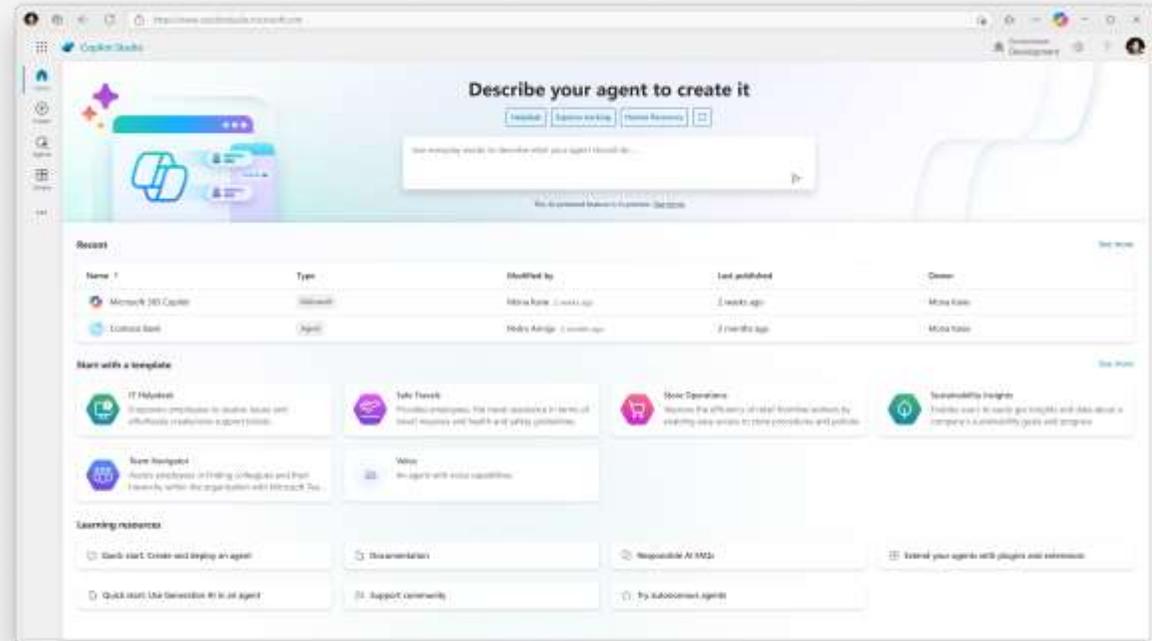


**Business
Process**



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

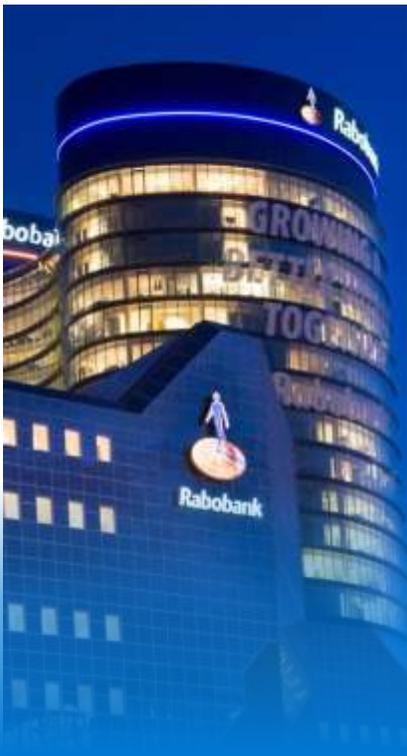
✓ Access everything in one place

✓ 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



Conversational banking copilot on both telephony and digital channels



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



Holland America Line

Helping customers find and book the perfect cruise



Creating customer focused copilots as a Microsoft Partner



Customer copilot to help find the right products and support



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

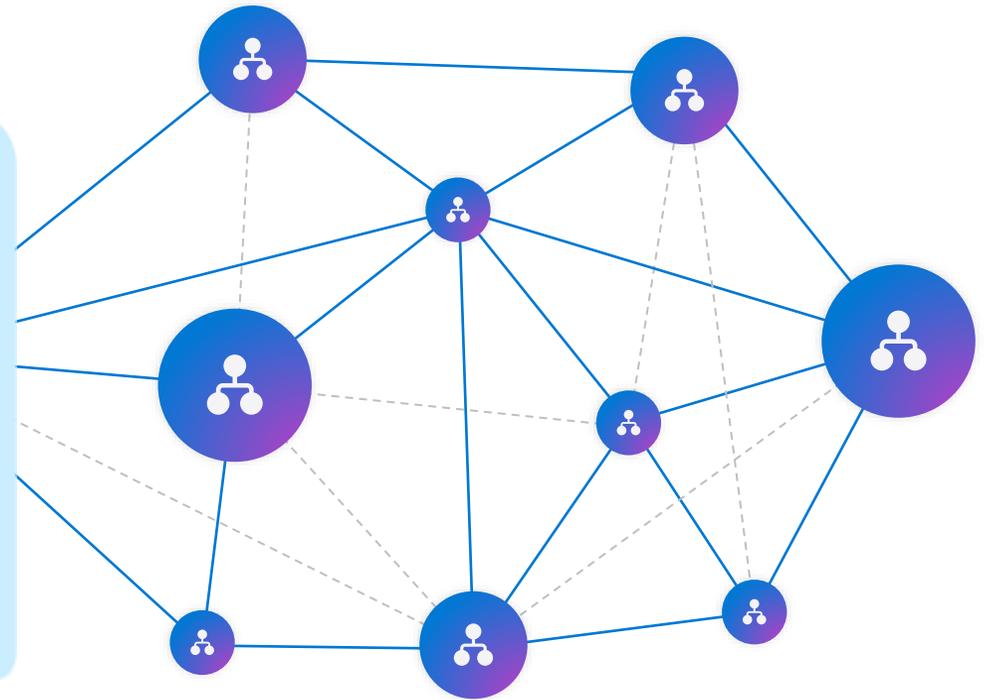
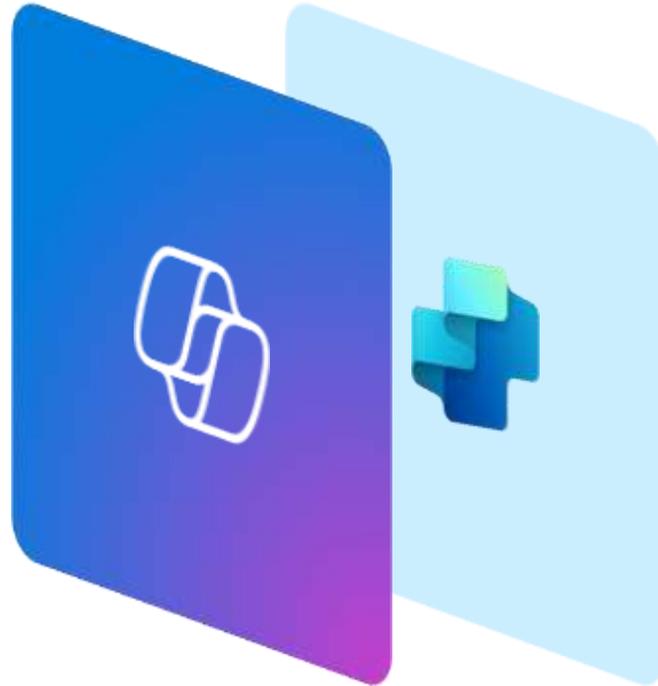
There are more agents than people

Copilot is the UI for AI

Copilot

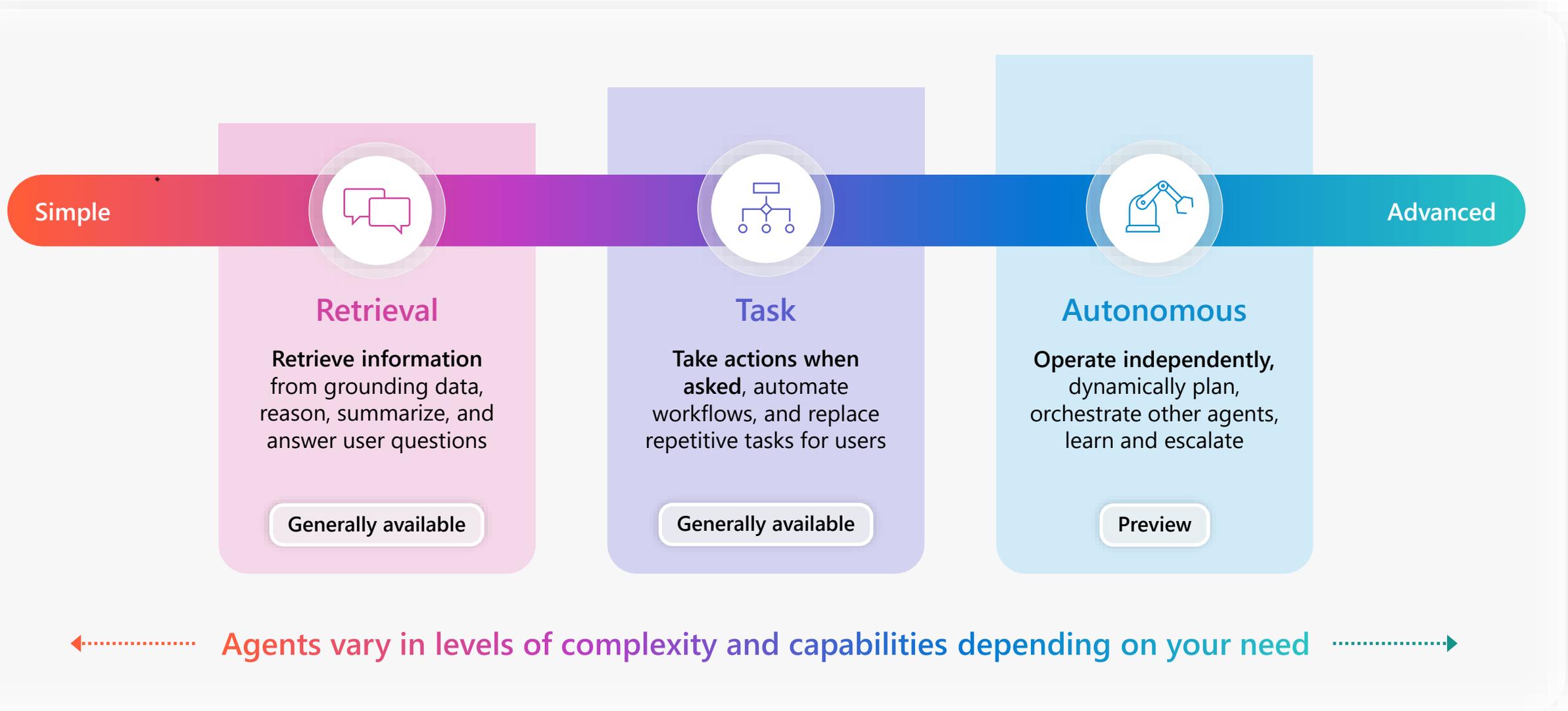
Copilot Studio

Agents

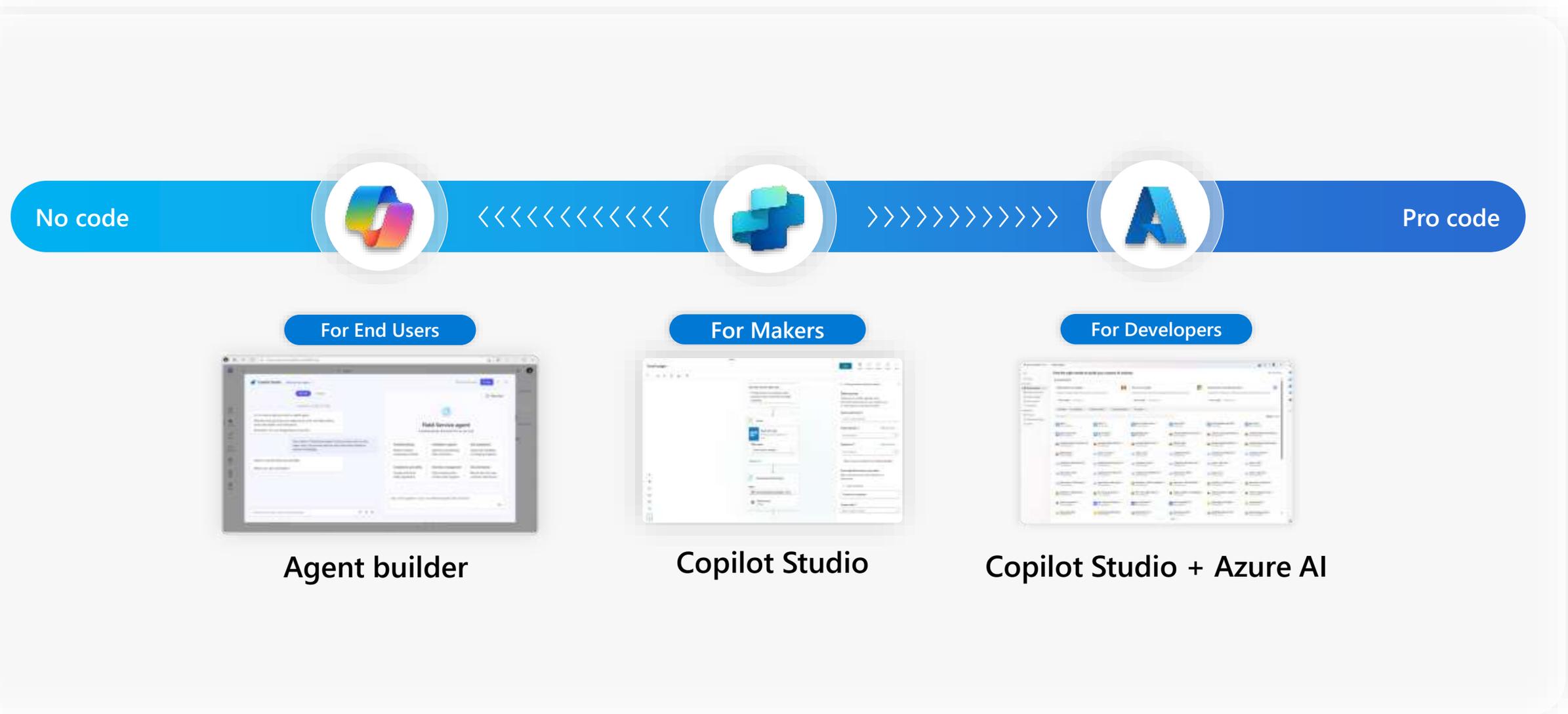


Copilot Control System

Spectrum of agents

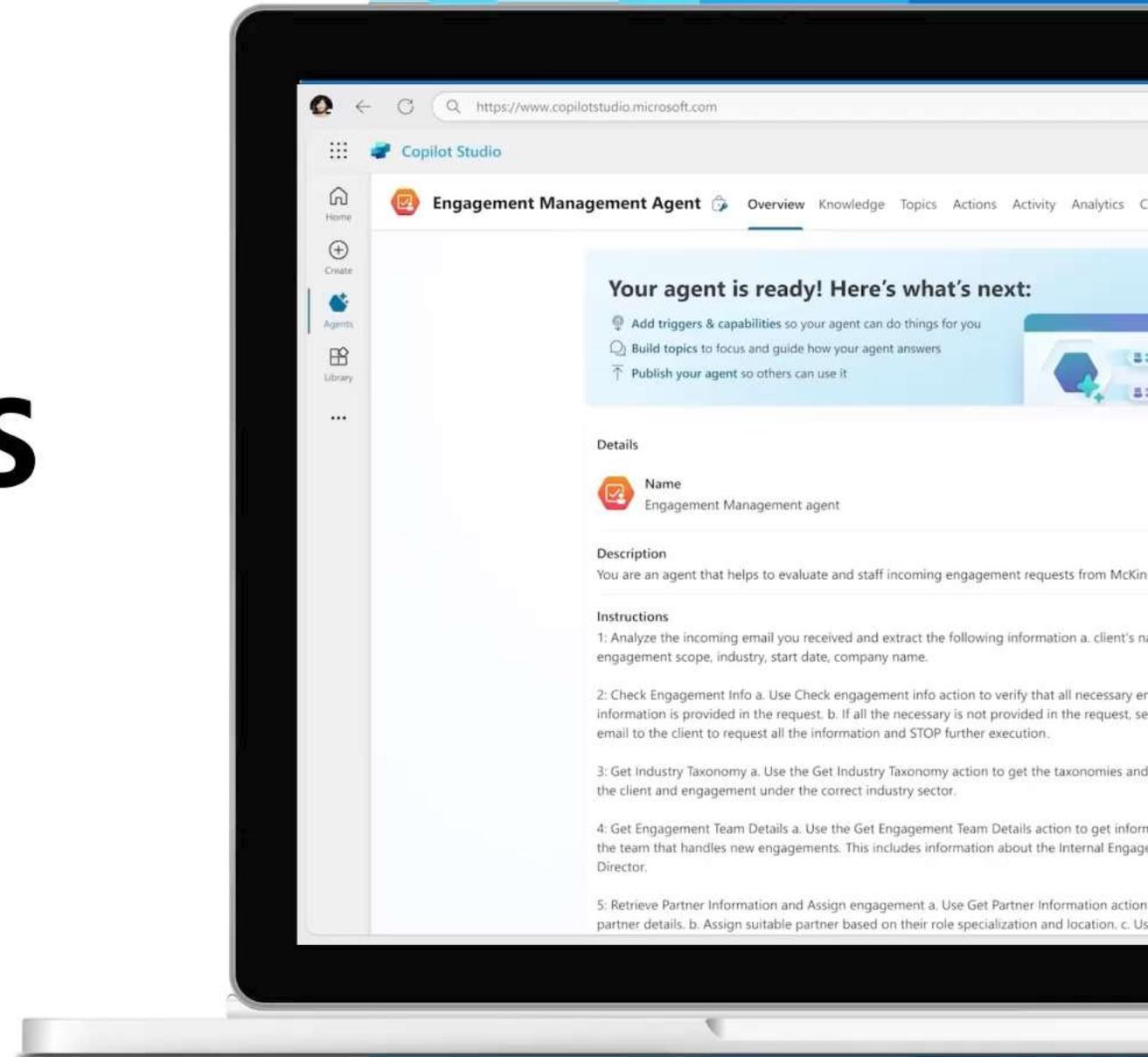


Agent tooling



Copilot Studio

Autonomous Agent



Deploy & use agents in any system



Microsoft 365

Add agents that give Copilot focused knowledge and new skills.



Your applications

Deploy agents to your website and other line of business applications.



Dynamics 365

Build agents that integrate and improve business processes.



Build and customize
your agents using
Copilot Studio



Power Platform

Extend Power Platform with agents that transform your low code apps and pages.

Public preview

Copilot Hub for Governance & Enablement

Readiness

Learn how Copilot works

- Power Apps AI Copilot overview
- Power Automate AI Copilot overview
- Power Platform security & privacy FAQ
- Microsoft 365 Resources
- Copilot capabilities
- Copilot international availability
- Building digital trust in Microsoft Copilot
- Copilot Studio Security FAQs

What's new

- Copilot brings the power of intelligence to your favorite Power App
- Announcing process mining desktop analytics Copilot
- Microsoft Power Virtual Agents, now part of Microsoft Copilot Studio
- Automate smarter with AI Builder and Copilot in Power Automate
- Introducing new copilot answer control
- Microsoft Copilot and Power Apps transforming how people engage with apps

Usage as of 8/15/2024

Adoption Weekly

Power Platform Copilot users in the last 28 days: **500**

Monthly active users by product

Product	Count to Make	Generative answers	App Descriptions
Copilot Studio	497	472	-
Power Apps	421	67	240
Power Automate	435	56	-
Power Pages	106	-	-

Governance

Copilot Studio Settings

Note: GA features that do not access your data are on by default

Feature	Status	On in % of environments
Preview	On	100%
Generative Actions	On	100%
Generally available	On	100%
Generative Answers	On	100%
Generative Builder	On	100%

Power Apps Settings

Note: GA features that do not access your data are on by default

Feature	Status	On in % of environments
Preview	On	0%
Maker Copilot	On	0%
App Copilot (Canvas)	On	0%
Generally available	On	0%
Maker Copilot	On	0%
App Copilot (Model Driven)	On	0%
App descriptions	On	20%

Power Automate Settings

Note: GA features that do not access your data are on by default

Feature	Status	On in % of environments
Preview	On	100%
Desktop Flow Maker Copilot	On	100%
Process Mining Data Ingestion	On	100%
Generally available	On	100%
Cloud Flow Maker Copilot	On	100%

Power Platform Community Conference Sept 18-20 Register now

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**



CUSTOMER



Engage

Customer Experience Applications

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

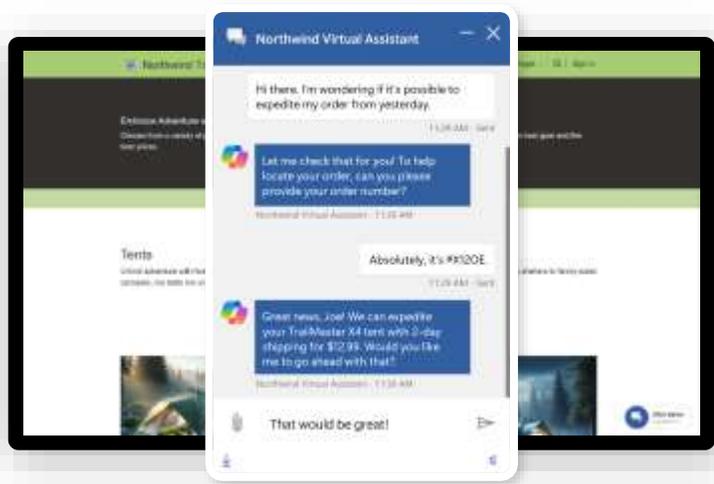
Microsoft Dataverse

Microsoft Intelligent Data Platform

Planet-scale

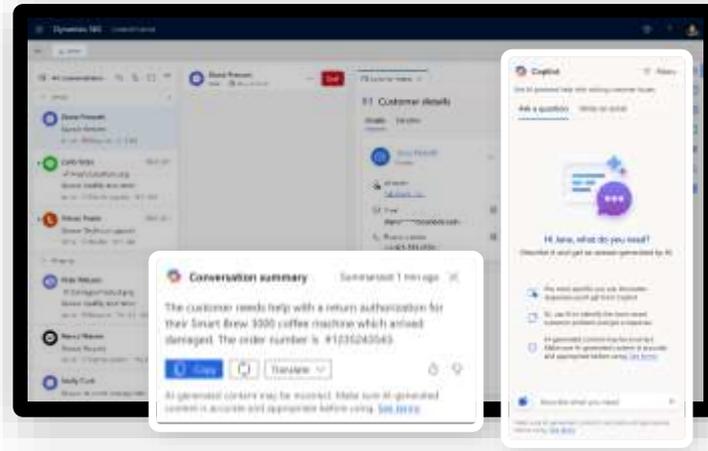
Azure trusted AI Platform

Microsoft Dynamics 365 Contact Center



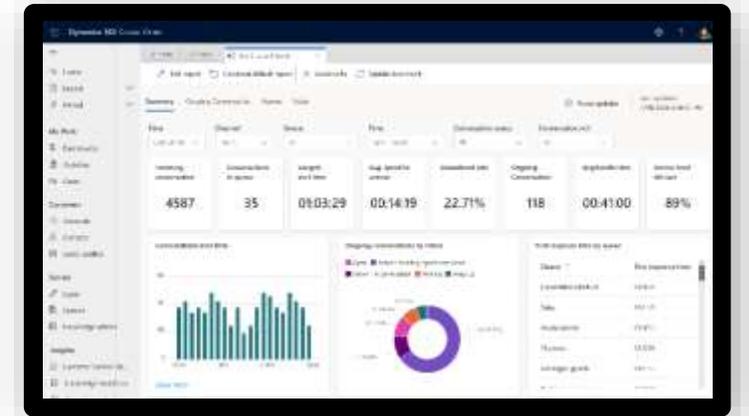
Deliver effortless self service

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.

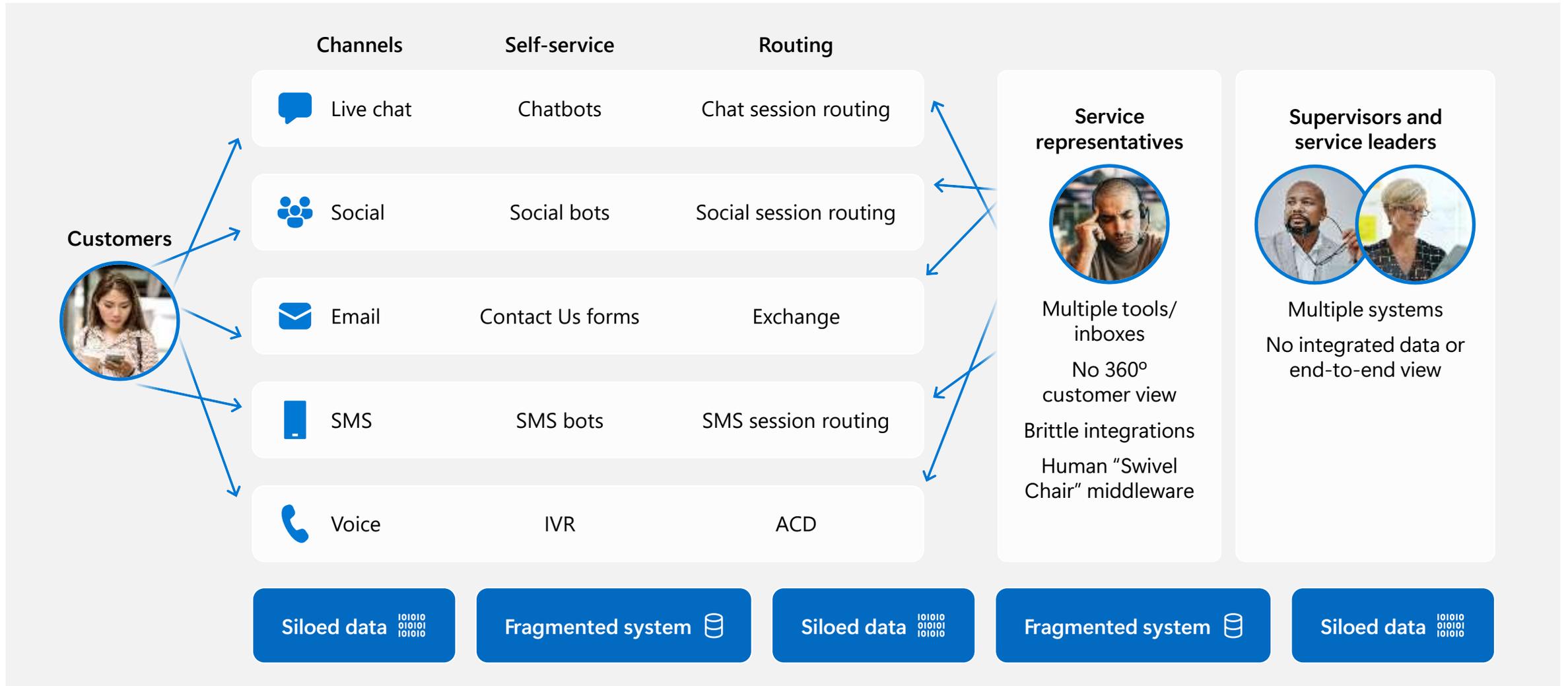


Drive efficiency and reduce costs

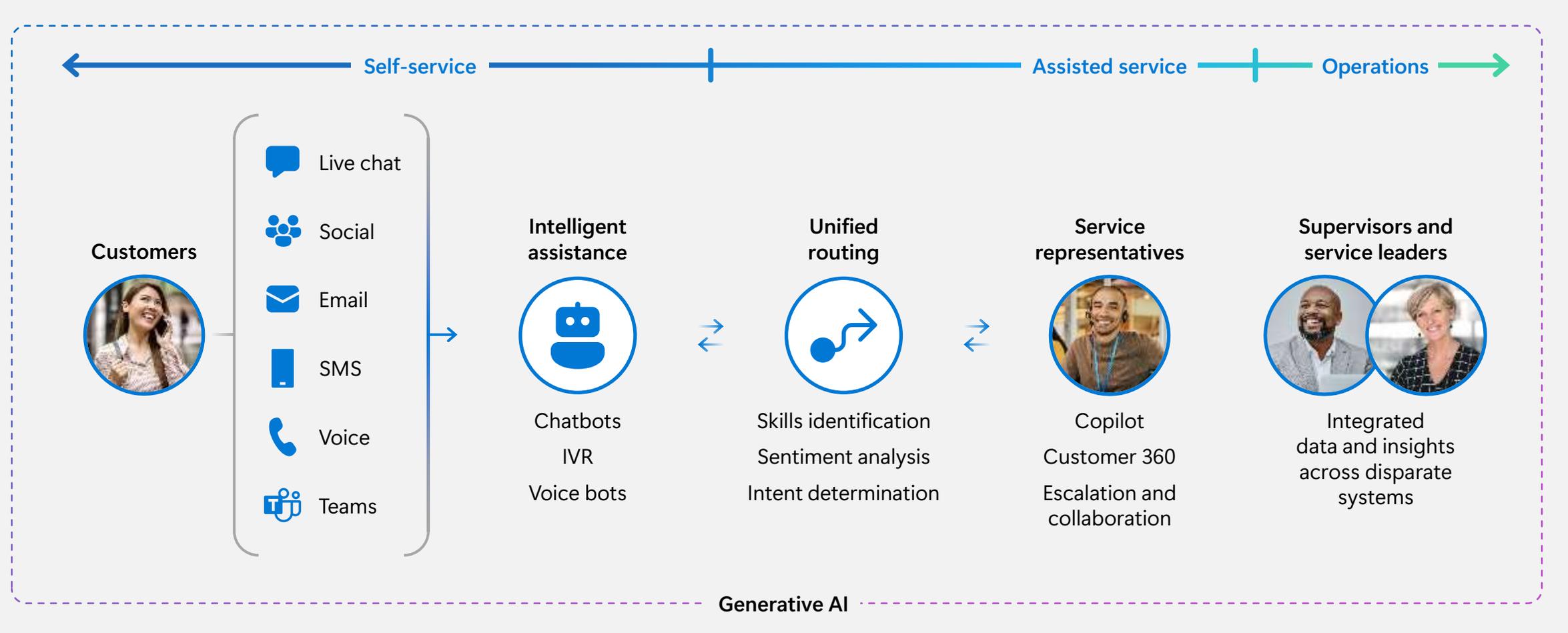
Gain a single view of truth across disparate data and support channels, plus the tools you need to optimize contact center operations.

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?



Comprehensive vision for service

1 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.



Infused with Copilot from end to end

2 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.



Built for scalability and reliability

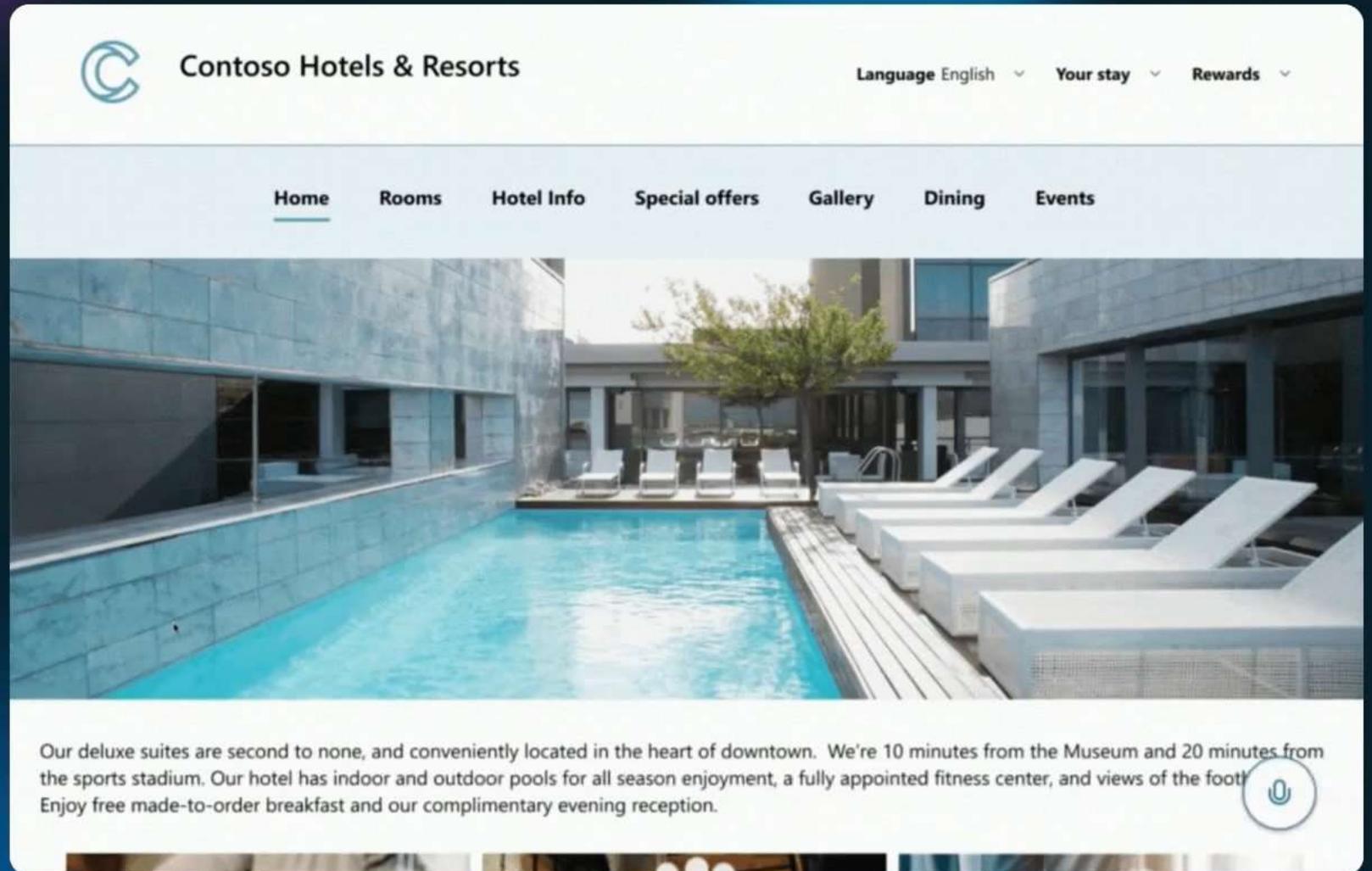
3 Our solution was built from the ground up for modern cloud infrastructure, providing scalability, reliability, and security for critical contact center workloads. As your needs evolve, you can count on Microsoft Cloud.

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



The screenshot displays the website for Contoso Hotels & Resorts. The header includes the logo, the company name, and navigation links for Language (English), Your stay, and Rewards. A secondary navigation bar lists Home, Rooms, Hotel Info, Special offers, Gallery, Dining, and Events. The main content area features a large image of an outdoor swimming pool with lounge chairs. Below the image, there is a text block describing the hotel's amenities and location, and a circular icon with a microphone symbol, indicating voice search functionality.

Contoso Hotels & Resorts

Language English ▾ Your stay ▾ Rewards ▾

[Home](#) [Rooms](#) [Hotel Info](#) [Special offers](#) [Gallery](#) [Dining](#) [Events](#)

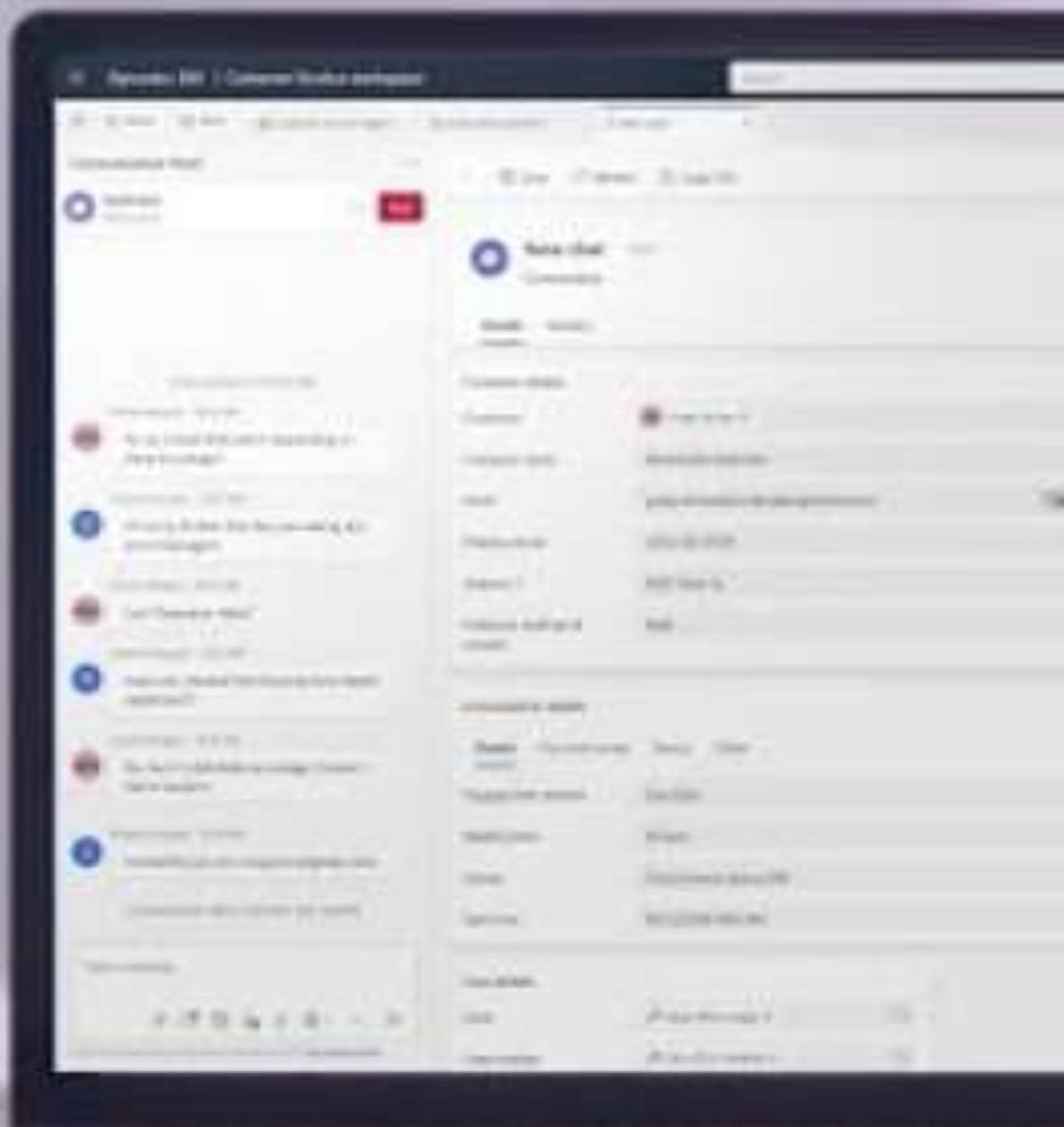
Our deluxe suites are second to none, and conveniently located in the heart of downtown. We're 10 minutes from the Museum and 20 minutes from the sports stadium. Our hotel has indoor and outdoor pools for all season enjoyment, a fully appointed fitness center, and views of the foot...
Enjoy free made-to-order breakfast and our complimentary evening reception.

Dynamics 365

Customer Intent & Customer Knowledge Management Agents



Microsoft
Dynamics 365



Customer service deprecation

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

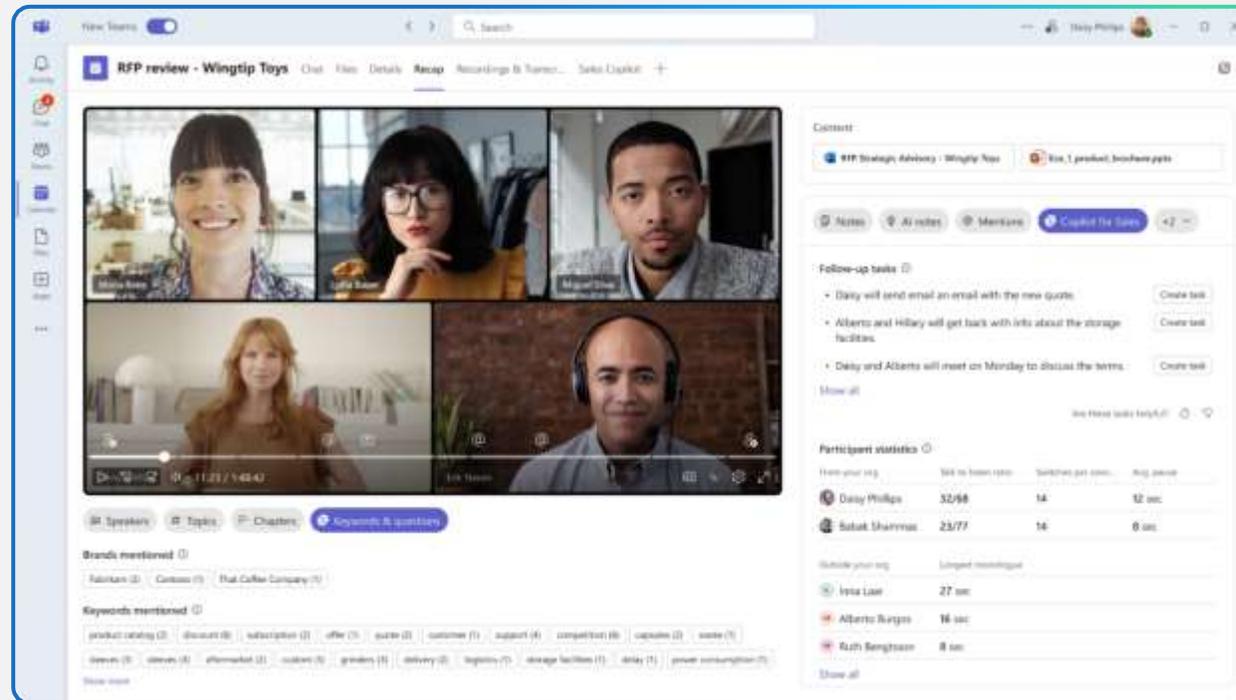
Effective February 2025, the Customer Service Hub app will no longer be available for all new organizations with Enterprise licenses. We'll continue to support the application for all existing organizations and new customers with license types other than Enterprise (for example, Customer Service Professional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

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

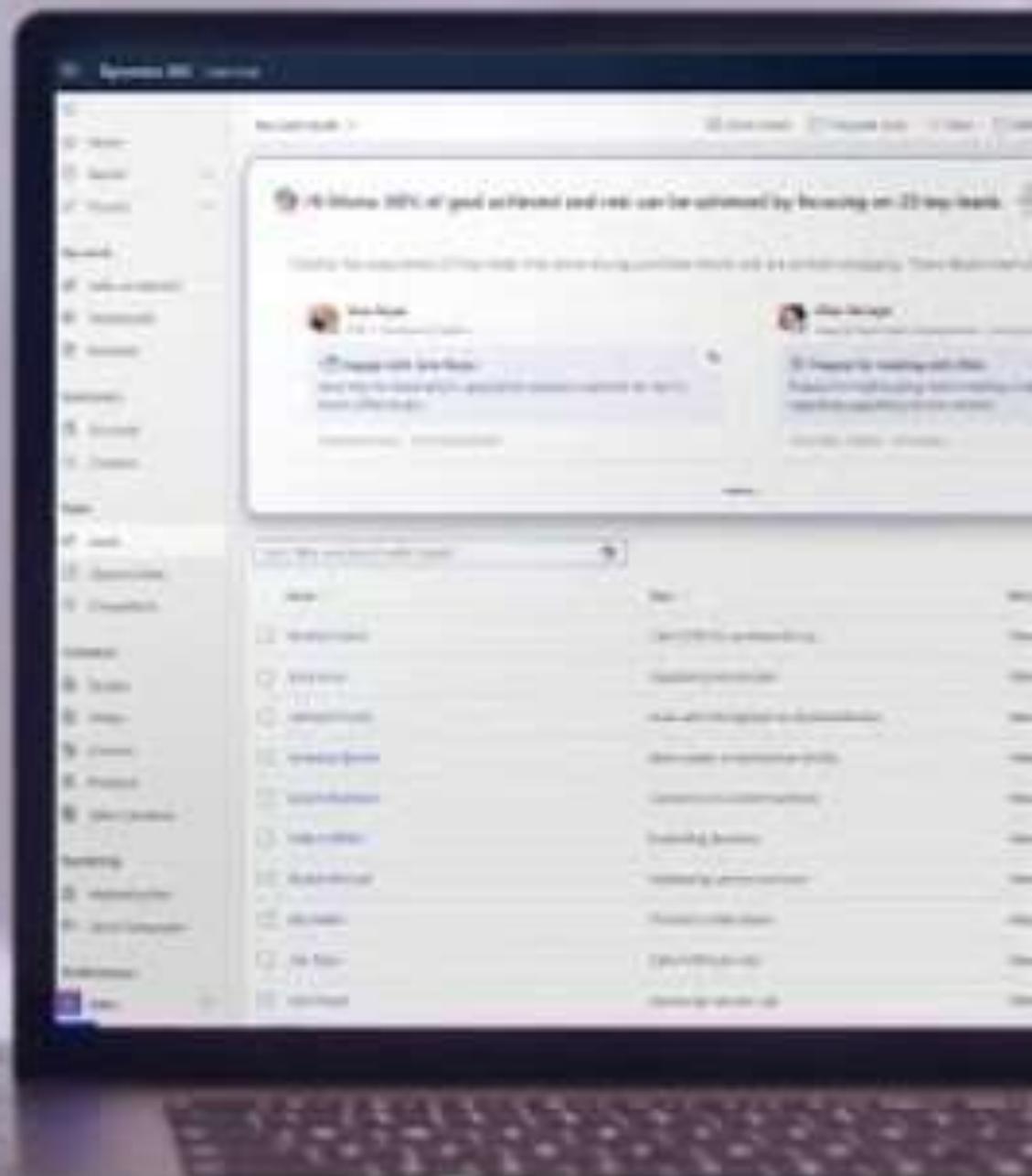
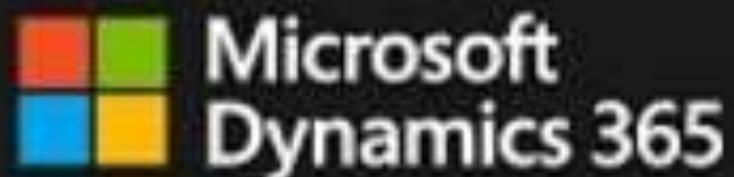
 Show conversion rate

 Create a pitch presentation

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

Dynamics 365

Sales Qualification Agent



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

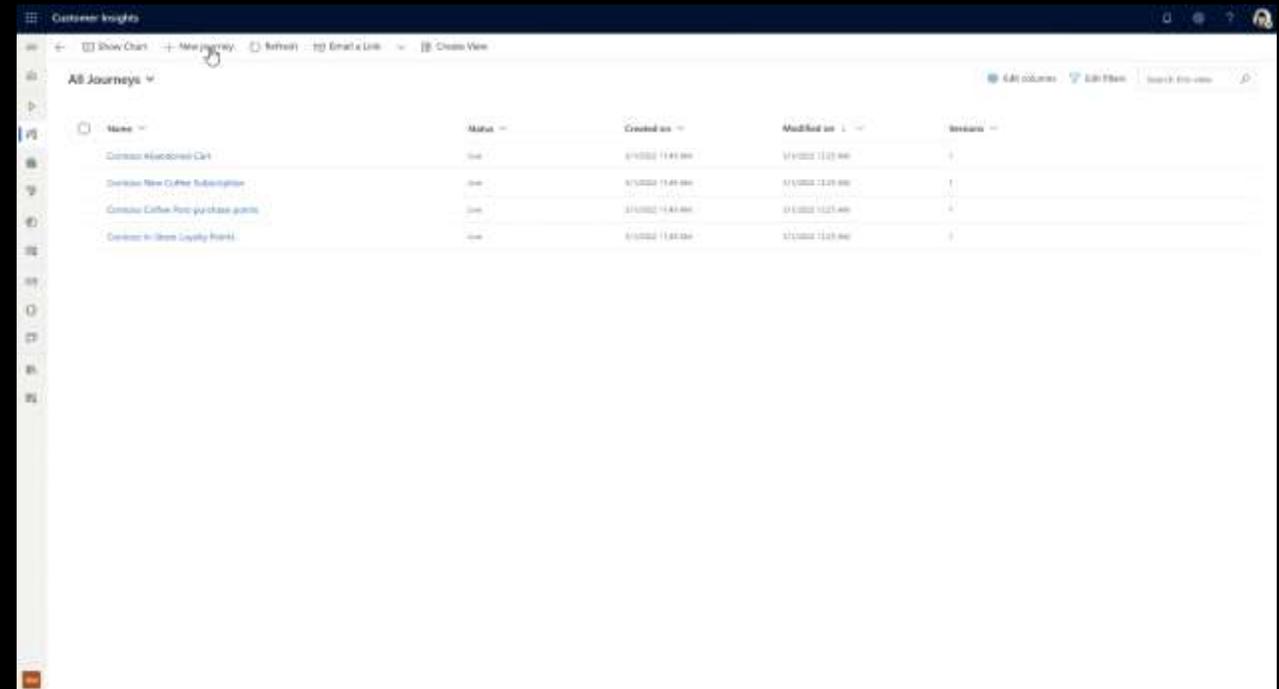
The [outbound marketing](#) module will be removed from Customer Insights - Journeys on **June 30, 2025**. To avoid interruptions, transition to real-time journeys before this date.

[Transition overview - Dynamics 365 Customer Insights | Microsoft Learn](#)

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.



The screenshot displays the 'Customer Insights' interface, specifically the 'Journeys' section. The page title is 'Customer Insights' and the sub-section is 'All Journeys'. The interface includes a navigation bar with options like 'Show Chart', 'Merge Journeys', 'Refresh', 'Email a Link', and 'Custom View'. Below the navigation bar, there are options to 'Add columns', 'Edit View', and a search bar. The main content area shows a table with the following columns: 'Name', 'Status', 'Created on', 'Modified on', and 'Actions'. The table contains four rows of suggested journeys:

Name	Status	Created on	Modified on	Actions
Complete Keyboard Kit	Live	3/1/2024 11:49:00 AM	3/1/2024 11:49:00 AM	1
Complete New Coffee Subscription	Live	3/1/2024 11:49:00 AM	3/1/2024 11:49:00 AM	1
Complete Coffee Pod purchase alerts	Live	3/1/2024 11:49:00 AM	3/1/2024 11:49:00 AM	1
Complete to Share Loyalty Points	Live	3/1/2024 11:49:00 AM	3/1/2024 11:49:00 AM	1

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

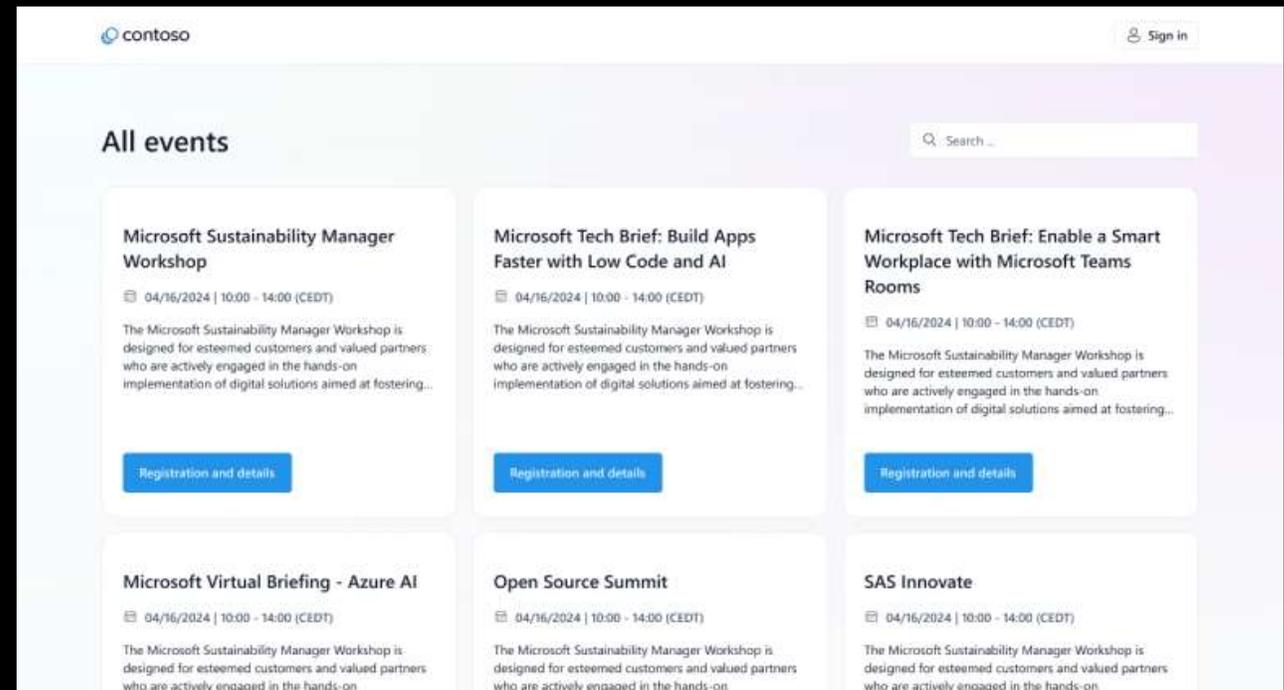
Create a comprehensive event portal where customers can access event details, session specifics, speaker schedules, and register conveniently. Easily integrate it to your existing CMS or deploy via Power Pages to tailor it to your brand identity.

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.

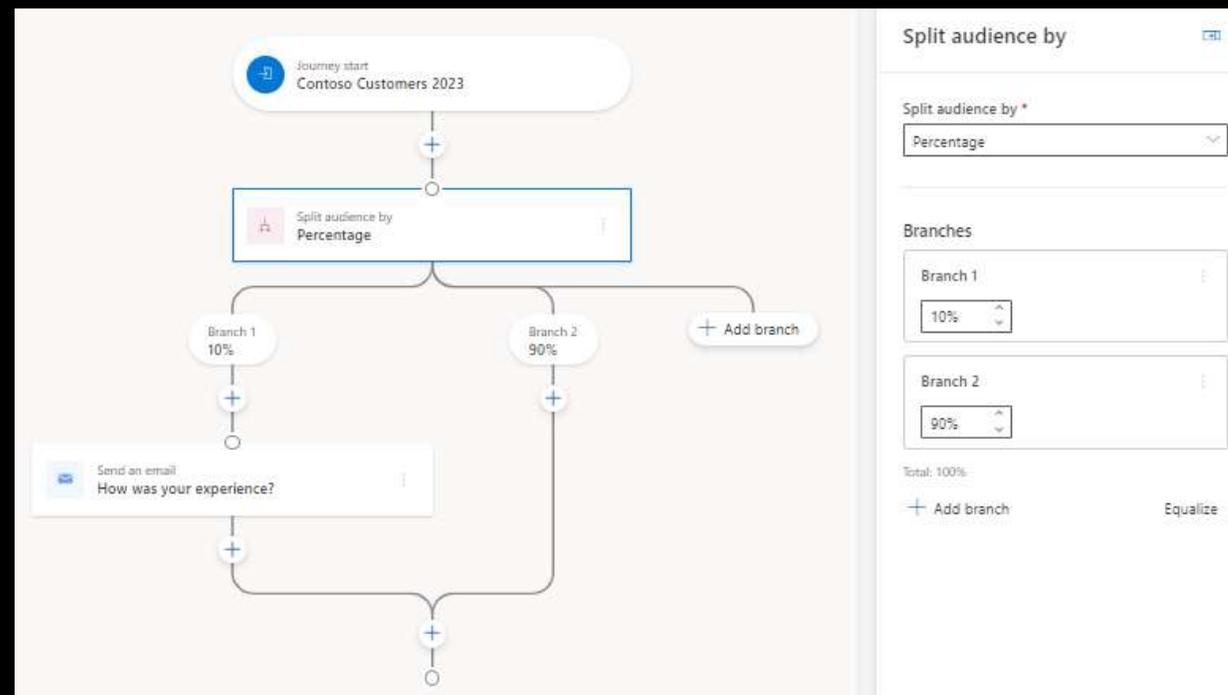


Split your audience into groups to deliver unique customer experiences

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.

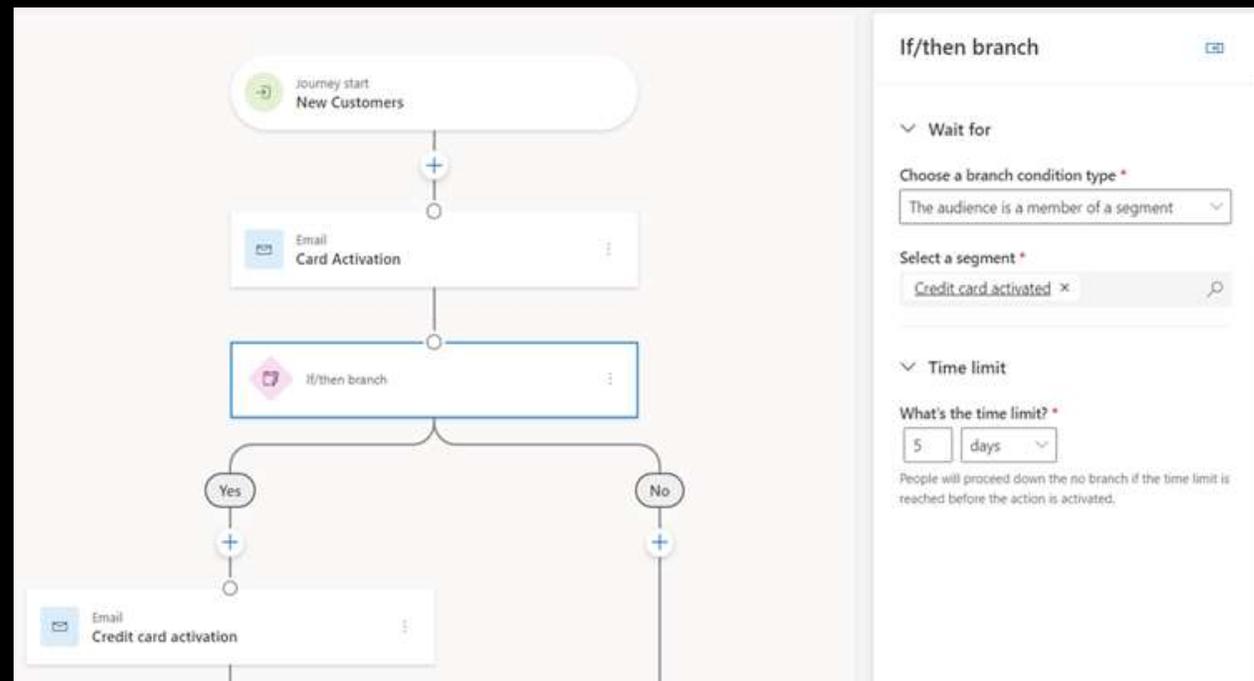


 Send a survey, test a new experience, or offer promotions to a specific number of customers to a random sample of customers.

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.

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.

▼ Rate limit

Add a rate limit

Rate limits let you control how fast people enter this journey.

Enable rate limit

Maximum rate

per day

People will enter this journey on these days:

Every day [Review and edit](#)

 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.

Real-time web tracking

```
Code
<script>
(function(a,t,i){var e="MSEI",var s="Analytics",var o=e+"queue",a[o]=a[o]||[],var r=a[e]||function(n){var t=
[{}],t[s]={};function e(e){while(e.length){var r=e.pop(),t[s][r]=function(e){return function(){a[o].push([e,n,
arguments])}}(r)};var r="track",var i="set",e[r+"Event",r+"View",r+"Action",i+"Property",i+"User","initialize",
"teardown"];return t}(i.name);var n=i.name;if(!a[e]){a[n]=r[s];a[o].push(["new",n]);setTimeout(function(){var e=
"script",var r=l.createElement(e),r.async=1,r.src=i.src;var n=l.getElementsByTagName(e)[0];
n.parentNode.insertBefore(r,n),1)}else{a[n]=new r[s]}if(!i.user){a[n].setUser(i.user)}if(!i.props){for(var c in i.props){
a[n].setProperty(c,i.props[c])}a[n].initialize(i.cfg)}(window,document,{src:"https://download.pi.dynamics.com/sdk/web/
mse-0.js",name:"msdynmkt",cfg:{ingestionKey:"c2af7713af164a94b720f31863e5e347-ce08a326-4095-451b-
abb4-5f4b1710ed31-5785"}));
</script>
```

More instructions  

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



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.

The screenshot displays the 'Delivery and interaction details' section for a journey. It features a dropdown menu for 'All journeys (1)' and tabs for 'Delivery', 'Interactions', and 'Variations'. The 'Delivery' tab is active, showing a summary of delivery status on the left and a detailed table of audience members on the right.

Sent (14)		Audience			
Delivered (14)	Blocked (18)	Recipient email address	Date and time (UTC)	Entry type	ID
	No consent (8)	shashidhar.hembel@Contoso.com	03/17/2023 07:31:24	Contact	00d1a0b1-0b85-ed11-aad3-6045bd0801c
	Invalid recipient address (2)	helenabotha@Contoso.com	03/17/2023 07:30:15	Contact	e36ac33-1097-ed11-83ff-6045bd0801c
	Invalid sender address (2)	r@nt.madvisia@Contoso.com	03/17/2023 07:27:01	Contact	00d1a0b1-0b85-ed11-aad3-6045bd0801c
	Invalid reply address (2)	viktor.magnusson@Contoso.com	03/17/2023 07:26:54	Contact	00d1a0b1-0b85-ed11-aad3-6045bd0801c
	Missing content headers (2)	viktor.magnusson@Contoso.com	03/17/2023 07:26:31	Contact	e36ac33-1097-ed11-83ff-6045bd0801c
	Domain deliverability (10)	ayfn.lundgren@Contoso.com	03/06/2023 10:40:44	Contact	e36ac33-1097-ed11-83ff-6045bd0801c
	Suppression list (2)	annemarie.de.kock@Contoso.com	03/06/2023 10:37:31	Contact	e36ac33-1097-ed11-83ff-6045bd0801c
	Email service suspended (2)	marjunath.nair@Contoso.com	03/06/2023 10:37:29	Contact	e36ac33-1097-ed11-83ff-6045bd0801c
	Trial quota exceeded (1)	marjunath.nair@Contoso.com	02/20/2023 14:17:39	Contact	2f7a4459-5b4c-ed11-83ff-002248080124
	Frequency cap reached (1)				
	Duplicated recipient address (18)				
	Other (1)				
	Delivery failed (1)				
	Hard bounced emails (1)				
	Soft bounced emails (2)				
	Other (1)				



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.



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.

The screenshot displays the 'Double opt-in' configuration page for a compliance profile named 'Contoso Canada'. The page is divided into several sections:

- General:** Shows the 'Double opt-in status' as 'Not enabled'. A note indicates that once enabled, it will be applied to all related live forms.
- Step 1: Form submission configuration:** Marked as 'Completed'. It describes the journey of sending an email to confirm preferences after form submission. A 'Double opt-in journey' is listed as 'Contoso Canada double opt-in journey'.
- Step 2: Double opt-in confirmation:** Marked as 'Completed'. It specifies the message or page user will see after clicking the confirmation button. The 'Confirmation type' is set to 'Confirmation message', and the 'Confirmation message' is 'Thank you for confirming your preferences! You may leave this page now.'.
- Step 3: Enable double opt-in:** Marked as 'Completed'. It includes a toggle switch that is currently turned 'On' (Enabled).

On the right side, there are two informational sections:

- What's double opt-in?:** Explains that double opt-in sends an email to confirm preferences. An entity (contact) will not be created until the user clicks the link in the email.
- What will happen after double opt-in is disabled?:** Lists three consequences: 1) Double opt-in will be disabled for all forms using consent elements from this profile. 2) The journey to send confirmation emails will no longer be triggered by new form submissions. 3) Previously sent double opt-in confirmation emails will still require user confirmation before they are opted into future emails.

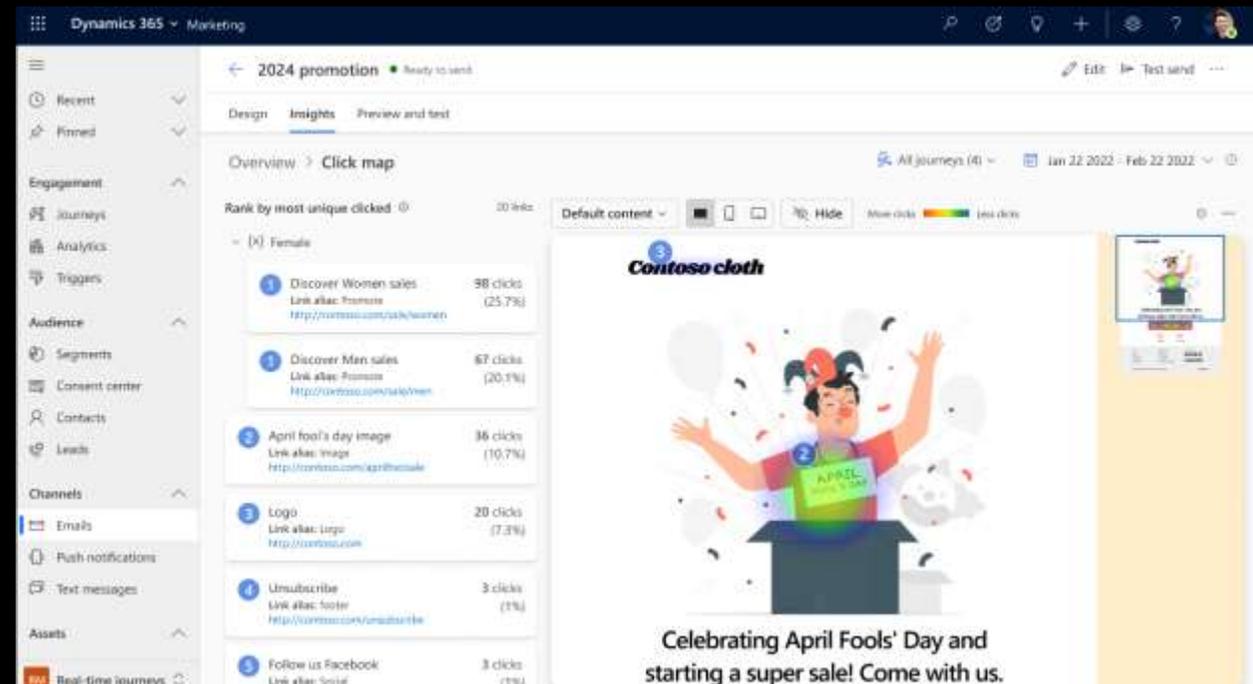
At the bottom right, there is a section titled 'How to disable double opt-in for a form?' which states that double opt-in can be disabled only for a specific compliance profile, and forms using consent elements related to that profile will inherit the changes.



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