



Microsoft 365 Copilot for Service

Transform the productivity of
customer service representatives






The role of service representatives is getting harder

43%

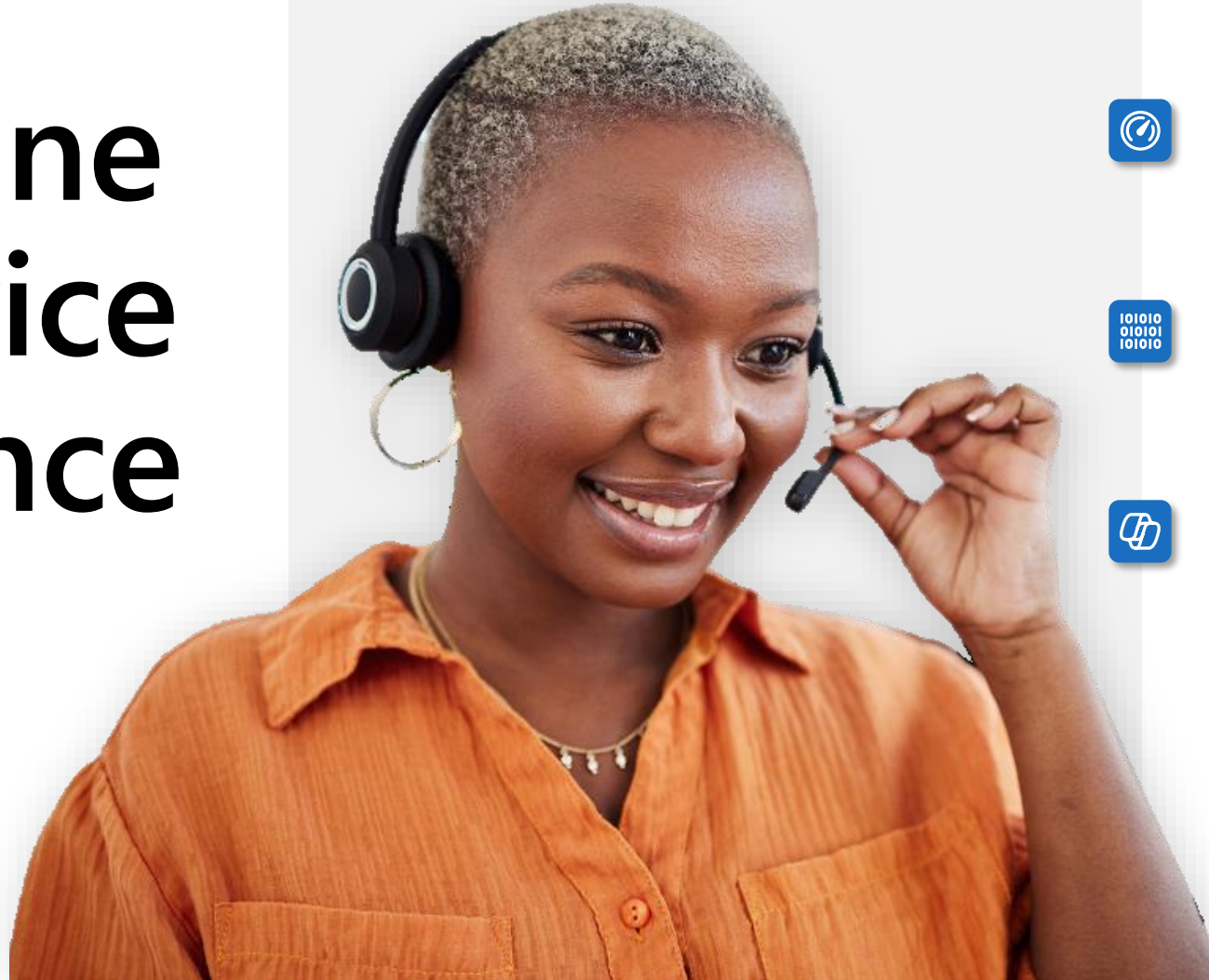
of [customer service] reps reported they were overwhelmed by the number of systems and tools needed to complete work¹



-  Increased workload and customer demands
-  Disparate tools and knowledge sources
-  Systems and tech modernization hurdles

Reimagine the service experience

Empower service reps with AI



Streamline
tasks



Unify
knowledge



Harness
generative AI

The generative AI advantage

Expected gains for service reps

30-50% increase in productivity¹

68% of reps believe they will be more productive²

29% of labor time can be automated³

Examples of early impact

12-16% reduction in average handling time⁴

9-12% increase in managed cases and chats⁴

13% decrease in the need for peer assistance⁴

¹BCG. [How Generative AI is Already Transforming Customer Service](#). Jul. 6, 2023

²Microsoft. [What Can Copilot's Earliest Users Teach Us About Generative AI at Work?](#) Nov. 15, 2023

³Bain & Company. [How Generative AI Will Supercharge Productivity](#). August 2023.

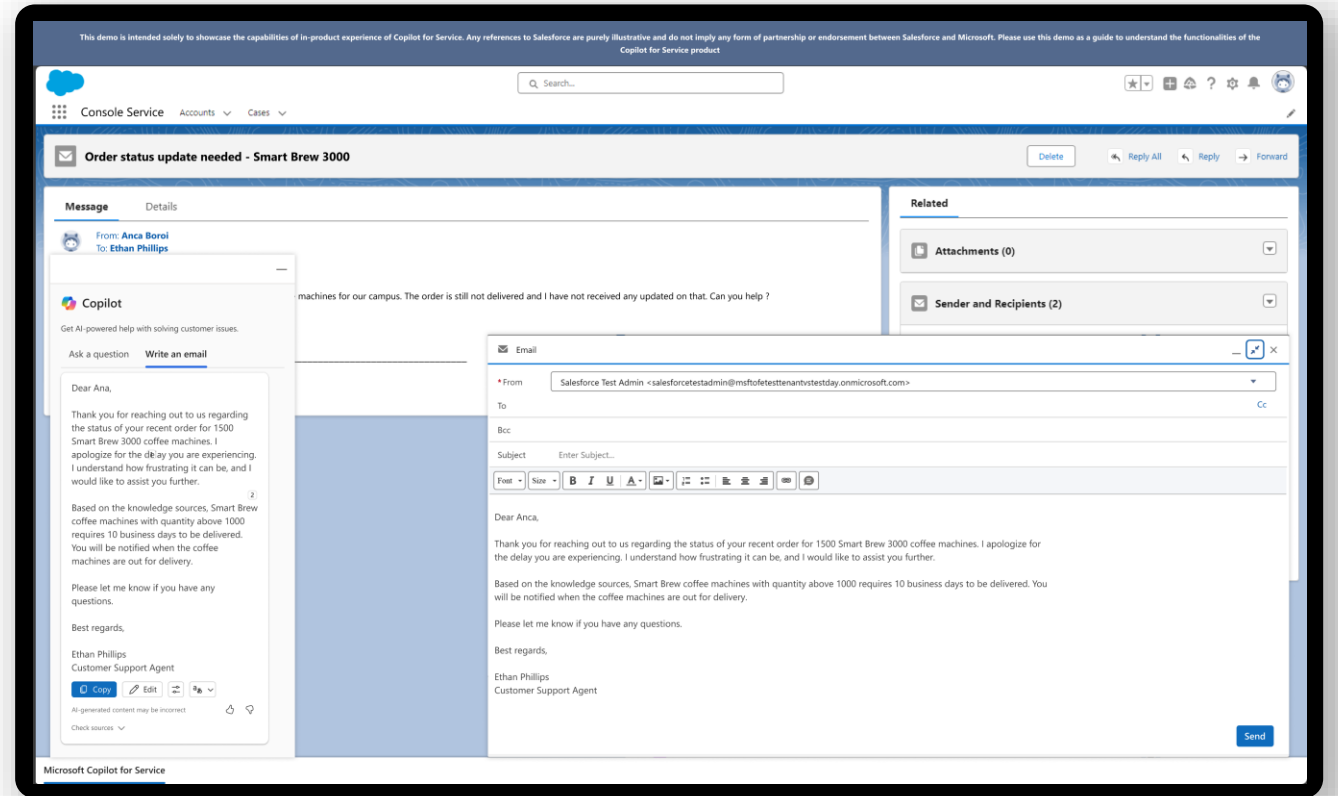
⁴Study conducted by Microsoft's Office of the Chief Economist, in partnership with the Dynamics 365 product group. The initial results shared here reflect those of 11.5K customer service reps, with 6.5K reps who used Copilot and the control group of 5K reps who did not use Copilot.



Copilot for Service

Copilot for Service brings generative AI into your existing contact center

Modernize existing service solutions with generative AI to enhance customer experiences and boost rep productivity.





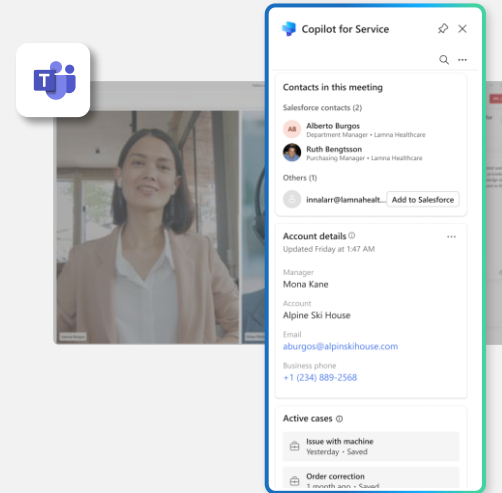
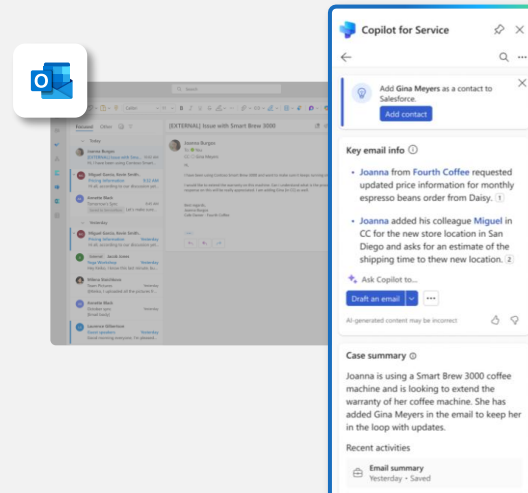
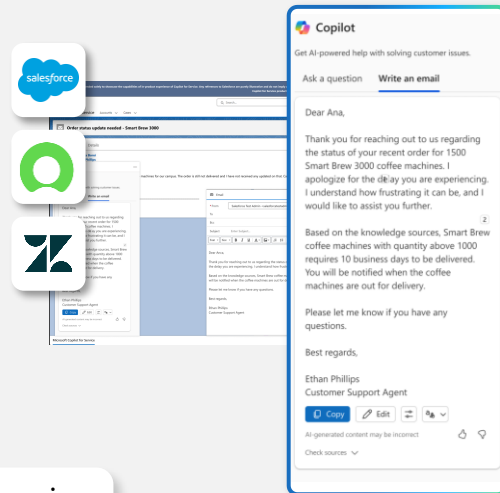
Copilot for Service

Maximize service rep productivity in the flow of work

Embed Copilot directly into desktops

Ask questions and receive relevant answers from across CRM solutions, contact center systems, and other knowledge sources

Surface knowledge directly in Teams and Outlook



Generate case summaries from CRM records

Draft personalized emails and follow-ups using contextual data

Browse and update CRM records

Create a meeting invite with detailed case summaries

View conversation summaries with CRM record information

Generate meeting recaps with suggested follow-ups

Capabilities



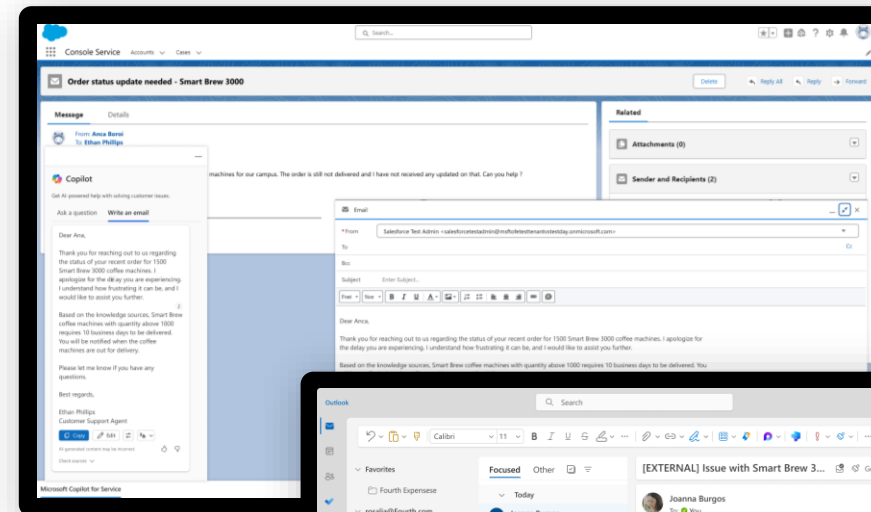
Boost productivity in the flow of work

Provide access in Outlook and Teams, as well as CRMs of choice

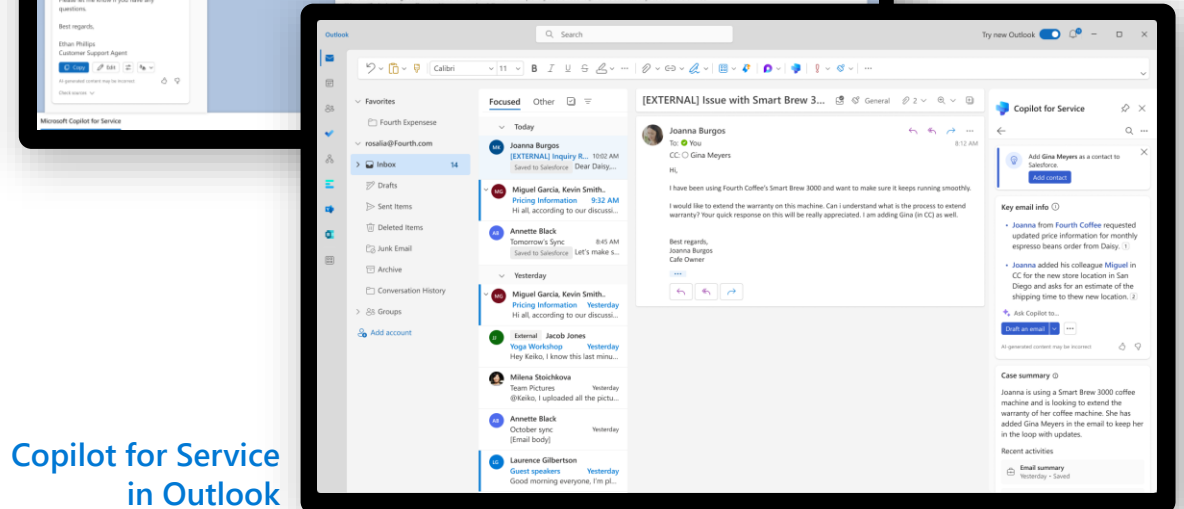
Accelerate onboarding and case resolution, improve efficiency, and automate tasks for reps in their flow of work

Access directly in desktop software of choice such as Salesforce, as well as the other tools like Outlook and Teams

Draft customer emails, ask questions on knowledge, summarize cases, and more—anchored on understanding the unique context of CRM data



Copilot for Service in Salesforce



Copilot for Service in Outlook

Boost productivity in the flow of work

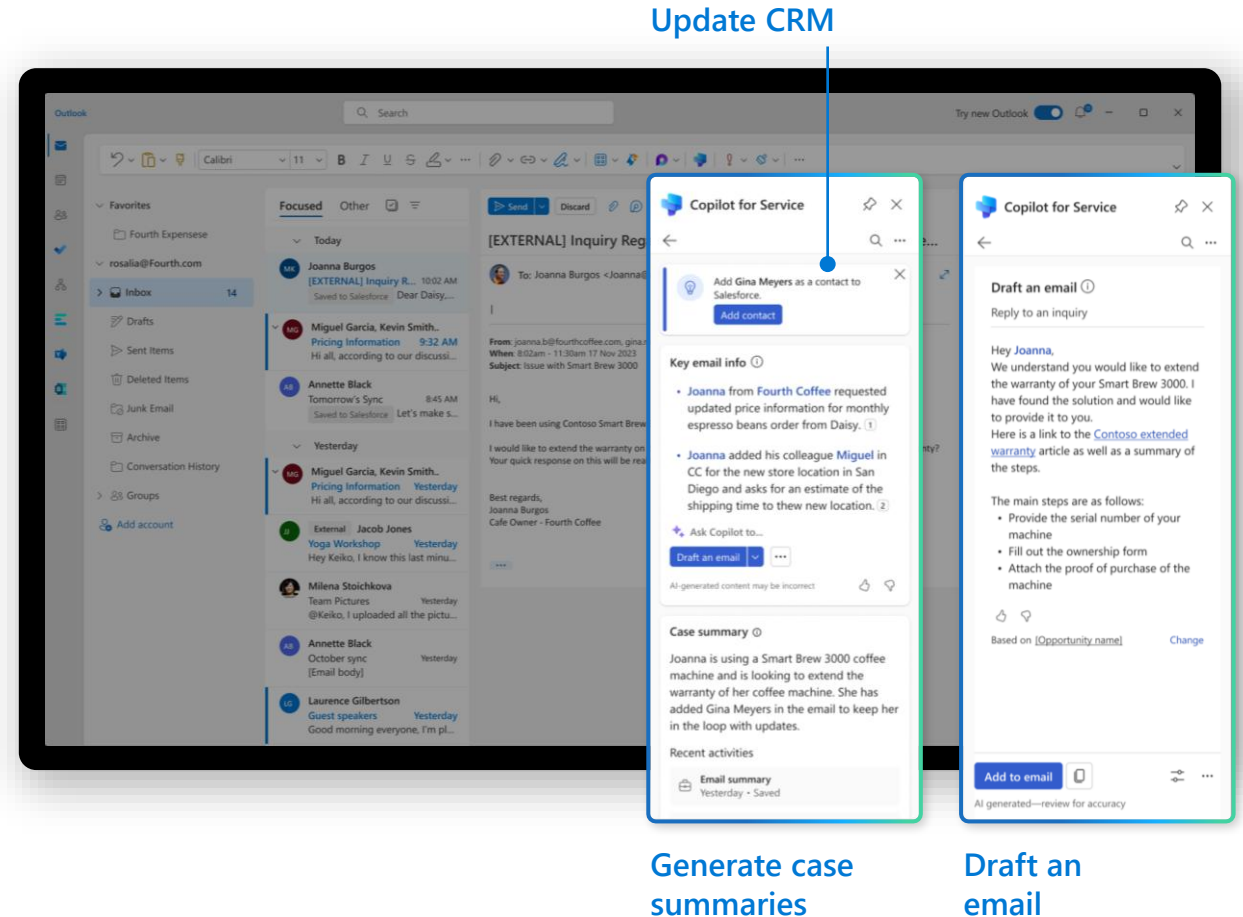
Get answers and respond to customers fast

View case summaries pulling insights from CRM data to rapidly understand case progress and reduce onboarding time

Generate personalized emails and contextual follow-ups that pull in email conversations and CRM information to accelerate responses

Get automated summaries of conversations for fast wrap-ups and handoffs, reducing time spent on writing or skimming for context

View and update CRM records directly from Outlook and Teams to simplify wrap-ups



Update CRM

Generate case summaries

Draft an email

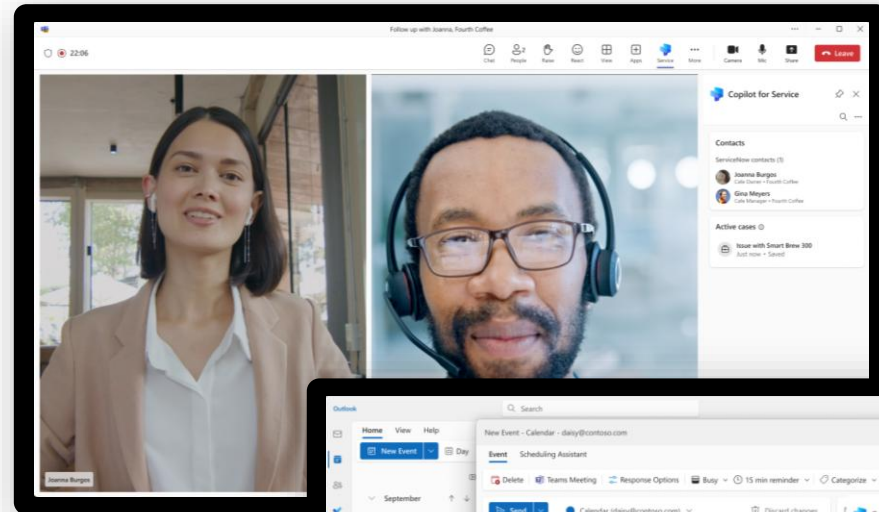
Boost productivity in the flow of work

Automate routine tasks with ease

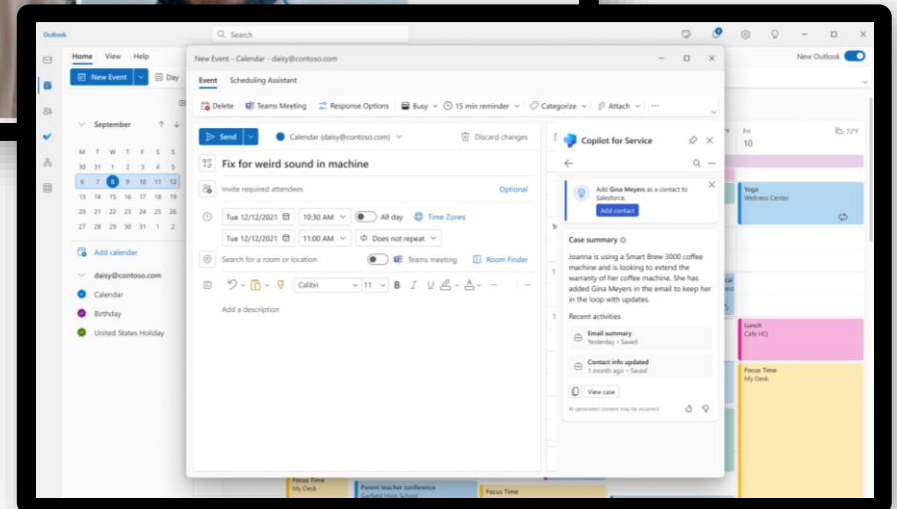
Schedule meetings and pull in case summaries to quickly add context

View case details directly in Teams to ramp up quickly during a meeting

Generate meeting recaps with summaries of key discussion points and suggested next steps to accelerate wrap-ups



View case details



Schedule a meeting

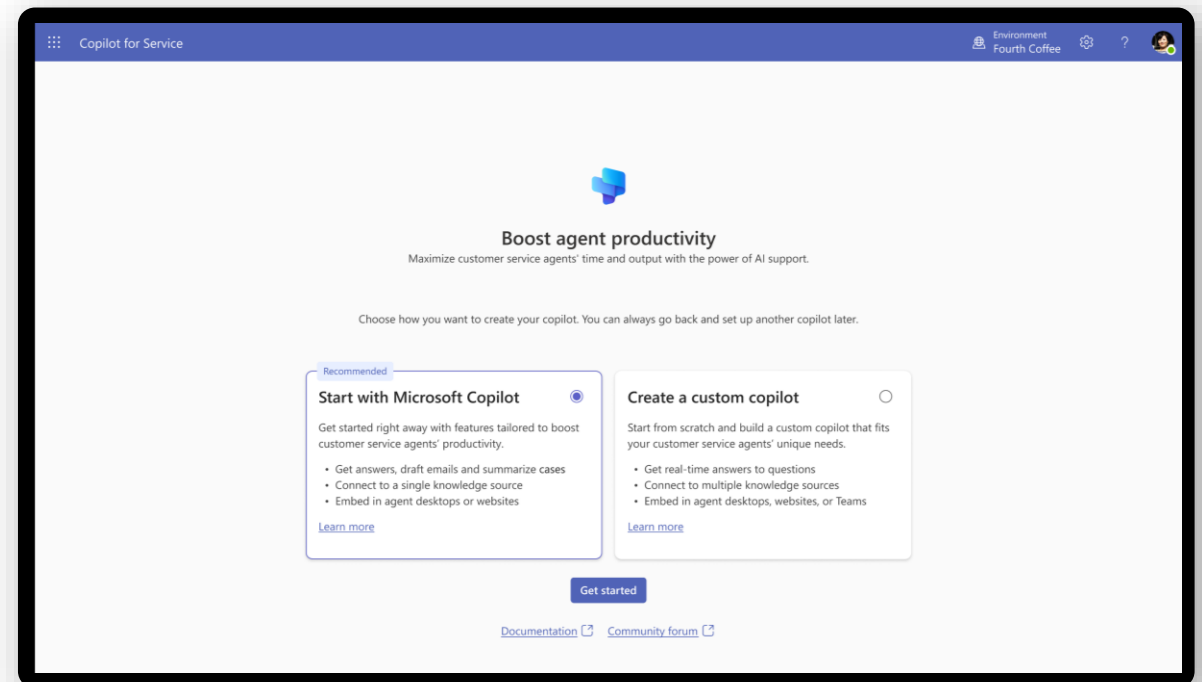
Infuse generative AI into existing contact centers

Go-live faster and avoid costly rip-and-replace efforts

Accelerate time to production with point-and-click setup that works with your existing systems

Leverage pre-configured to a single knowledge source; or create custom by connecting to multiple sources

Deliver directly to CRM desktops, including Salesforce and ServiceNow



Point-and-click setup

Copilot for Service

Our Goals:

Modernize existing contact centers with generative AI to enhance service experiences and boost service rep productivity.

Copilot for Service unlocks an organization's trusted knowledge to accelerate onboarding and case resolution, improve efficiency, and automate tasks for reps in their flow of work.



Copilot for Service

Our focus areas:

1

Administrator Experiences

Delivering intuitive administrator experiences to create, deploy and configure agents in desktops and M365 apps.

2

Experiences in CRM desktops

Helping reps resolve customer issues faster with an agent in their desktop of choice that can reason over CRM data.

3

Experiences in M365 apps

Equipping reps with experiences in M365 apps—including Outlook and Teams—to boost their productivity.



“A support agent can now converse over knowledge articles using multiturn conversations, quickly bringing them the information they need to support our customers—**without changing applications or potentially searching through hundreds of knowledge articles.**”

—Christian Hutter, Microsoft Practice Leader, RSM US

Customer:

- RSM

Industry:

- Partner professional services

Country:

- United States

Products and services:

- Microsoft Copilot for Service
- Microsoft Copilot Studio

[Watch customer video here](#)

Situation:

To resolve customer support cases, agents had to search for answers across multiple sources of knowledge stored in different databases. If searching took too much time, the case was automatically escalated to a specialty team.

Solution:

To help service agents support customers without changing applications support, RSM connected Copilot for Service to its existing internal ServiceNow knowledge base.

Impact:

RSM is excited about its results, which include:

- Gaining a holistic understanding of the client in real time
- Reducing resolution time and resolving more issues on the first touch of a case
- Reducing onboarding time for new agents

Why Microsoft

97%

Fortune 500
companies use
Business Applications

500k+

Microsoft business
application customers

16

Analyst reports where
Microsoft is positioned
as a Leader

1

Common data model
across all business
applications

Leader

- The world's first copilot in both CRM and ERP
- Collaboration and productivity infused in business processes
- Low-code platform embedded in Dynamics 365

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



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

Let's get started

Learn more about Copilot for Service in the [blog](#)

Explore the [Copilot for Service webpage](#)



Thank you



Licensing



Microsoft Copilot

Copilot

Copilot for
Microsoft 365

Copilot for
Sales

Copilot for
Service

Foundational capabilities



Web grounding



Commercial data protection



Enterprise-grade data protection



Microsoft Graph grounding



Microsoft 365 Apps



Copilot Studio



Role-specific capabilities





Licensing details for Dynamics 365 Customer Service and Copilot for Service

D365 Customer Service Enterprise ¹	Microsoft Copilot for Service	Capabilities	GA	Where experiences surface
●	●	Core CRM/CEC capabilities <ul style="list-style-type: none"> Case management, knowledge management, intelligent routing of records, reporting and analytics 	<ul style="list-style-type: none"> Available now 	
●		Copilot experiences in Dynamics 365 Customer Service <ul style="list-style-type: none"> Case summary, multi-turn Q&A, draft an email, out-of-the-box knowledge integration 	<ul style="list-style-type: none"> Available now 	Dynamics 365 Customer Service
●		Copilot experiences in Dynamics 365 Customer Service <ul style="list-style-type: none"> Multiturn chat auto prompting 	<ul style="list-style-type: none"> July 2024 	
● ¹		Copilot experiences in Dynamics 365 Customer Service with Omnichannel <ul style="list-style-type: none"> Conversation summary, sentiment analysis 	<ul style="list-style-type: none"> Available now 	
	●	Copilot experiences in third-party CRM desktops <ul style="list-style-type: none"> Copilot embedded in Salesforce and/or other desktops <u>Context aware</u> Copilot embedded in Salesforce and/or other desktops 	<ul style="list-style-type: none"> February 2024 July 2024 	CRM
	●	Pre-built integrations with knowledge sources <ul style="list-style-type: none"> Out-of-the-box integrations with CRM systems (e.g., Salesforce, ServiceNow, Zendesk), websites, SharePoint, and offline files 	<ul style="list-style-type: none"> February 2024 	
● ^{2,3}	●	Copilot for Microsoft 365 <ul style="list-style-type: none"> Microsoft 365 App Copilots, Copilot Studio, Microsoft Graph, etc. 	<ul style="list-style-type: none"> Available now 	Copilot for Microsoft 365 (\$30)
● ³	●	Outlook integrated experiences <ul style="list-style-type: none"> Email summary and drafting enriched with CRM data, view/edit CRM records (contacts, cases), case summary Schedule a meeting based on email context, meeting prep, create new case 	<ul style="list-style-type: none"> April 2024 July 2024 	Outlook
● ³	●	Teams integrated experiences <ul style="list-style-type: none"> View/edit CRM records (contacts, cases, accounts), case summary Meeting recap (including suggested notes and creating CRM tasks) Meeting prep 	<ul style="list-style-type: none"> April 2024 March 2024 July 2024 	Teams
● ³	●	Microsoft 365 Chat integration experiences <ul style="list-style-type: none"> Plugins to ask questions, summarize CRM entities such as case, reason over knowledge 	<ul style="list-style-type: none"> April 2024 	Microsoft 365 Chat

¹Included with Omnichannel add-in; ²Copilot for Microsoft 365 can be licensed separately; ³Only available after purchase of Copilot for Service

Licensing details with Copilot for Service

App	Scenario	Capability	Copilot for Microsoft 365	Copilot for Service
 Outlook	Email read	Highlight key emails	Y	Y
		Summarize email threads	Y	Y
		Save emails and appointments to CRM		Service value
		Summarize email threads with CRM data		Service value
		Add/update contacts to CRM		Service value
		Read/write/summarize access to CRM entities		Service value
	Email compose	Draft new email	Y	Y
		Draft reply email	Y	Y
		Use excel data in email reply	Y	Y
		Draft reply with CRM data		Service value
		Draft reply with Teams meeting summary and tasks		Service value
		Read/write/summarize access to related CRM entities		Service value
	Calendar	Meeting prep with CRM case summary		Service value
		Read/write/summarize access to related CRM entities		Service value
 Teams	During meeting	Catch me up, Q&A, discussion so far, wrap up	Y	Y
		Real time service prompts and tips		Service value
		Read/write/summarize* access to related CRM entities		Service value
	Post meeting	Summary, notes, tasks	Y	Y
		Follow up items with CRM task creation		Service value
	Chat/ Microsoft 365 Chat	Q&A and summarize* over content	Y	Y
		Q&A over connectors (Salesforce, ServiceNow, Zendesk)	Y	Y
		Summarize and Q&A over CRM data		Service value