



Columbus®

Discover automation potential in Dynamics 365 with AI agents

by Columbus

Why AI-first transformation matters now



Workloads are growing faster than teams can manage – 68% of workers struggle to keep pace



Customers expect instant service, accuracy, and personalisation – across every channel

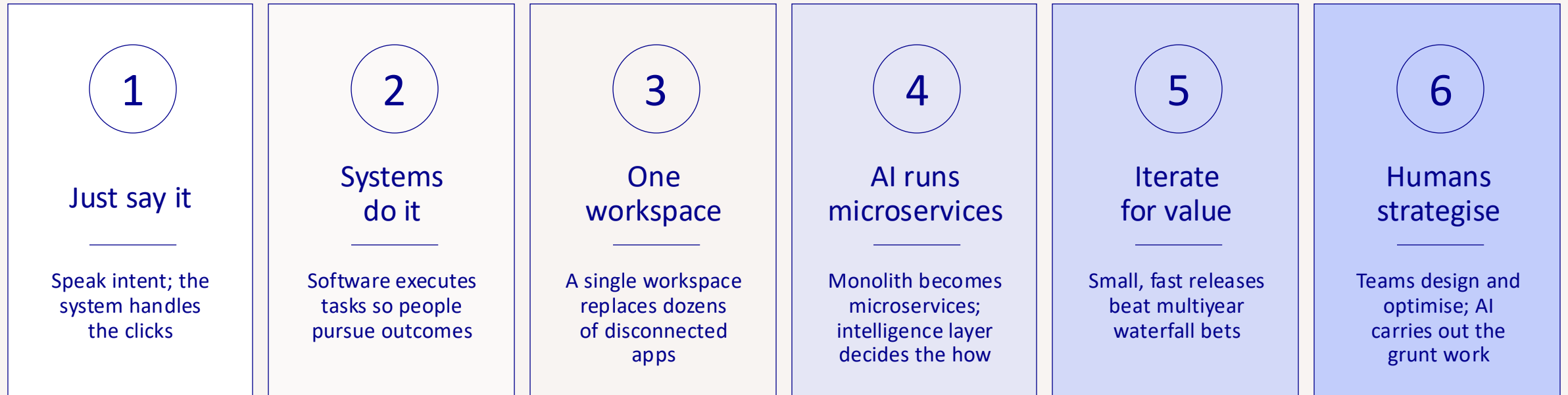


Businesses face pressure to scale without increasing headcount



Manual ERP/CRM workflows slow down innovation and decision-making

We're leaving the era of doing and entering the era of deciding



From Click-First to AI-First – The Vision



An autonomous AI agent is an automation that can do tasks automatically without any human input using AI

Copilot + Agents with Copilot Studio

Finance

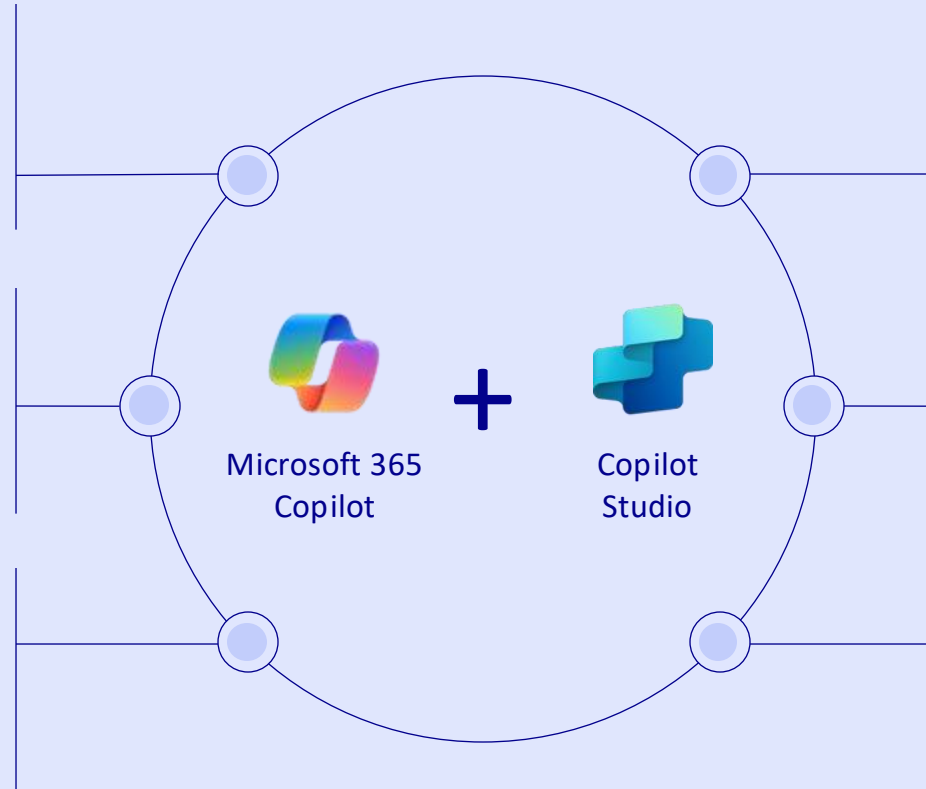
Automate reconciliations, monitor cash flow, flag anomalies, and generate real-time financial reports. AI can suggest budget reallocation based on spend patterns and support audit prep with document tagging.

Marketing

AI drafts campaign content, tracks engagement, suggests targeting improvements, and creates competitor summaries. It can also summarise webinars, mine CRM for buyer insights, and surface content gaps.

Legal

Agents review contracts for standard clauses, flag compliance risks, track document versioning, and assist with policy updates. They can also answer internal legal FAQs and monitor regulatory updates.



HR

AI helps screen CVs, draft job descriptions, answer policy questions, and guide onboarding workflows. It can also surface attrition trends or recommend learning paths based on skills gaps.

Customer Service

Automate ticket categorisation, routing, and resolution. Agents suggest responses, flag sentiment issues, and keep the knowledge base updated. Proactively identify recurring problems and reduce inquiry volumes.

Sales

AI qualifies leads, drafts outreach, summarises meetings, and updates CRM automatically. It recommends next best actions, flags stalled deals, and pulls product or pricing info on demand.

Copilot and agents – making it happen



Copilot

Human
augmentation

Works as your
personal assistant

There are only as many Copilots
as there are people



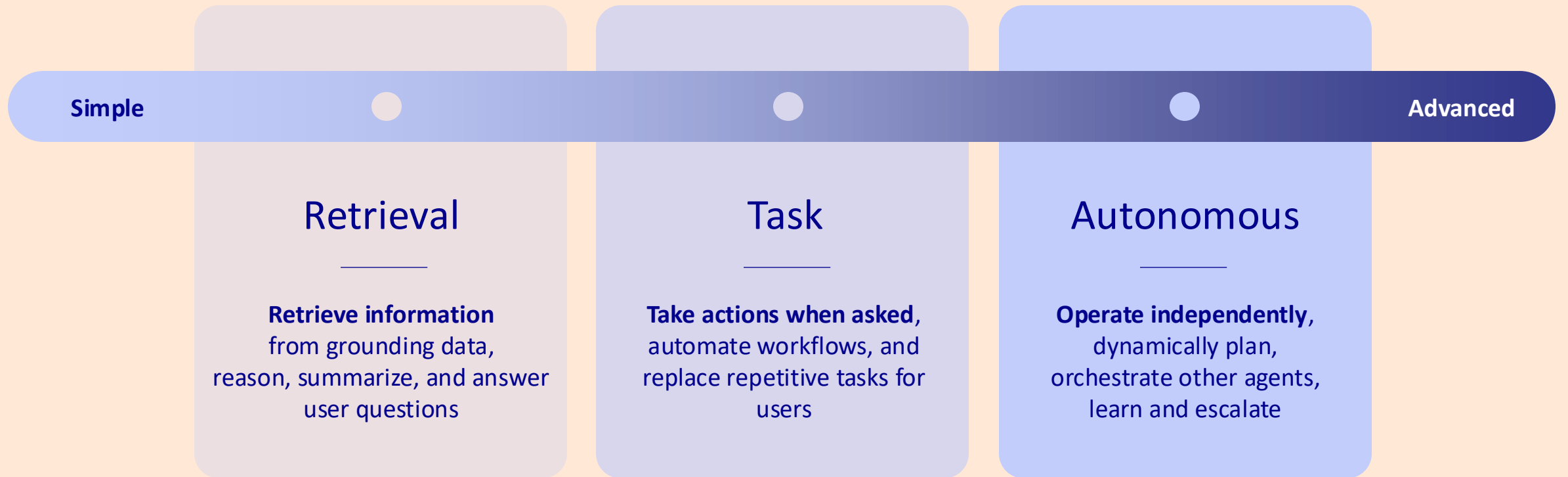
Agents

Expert systems that can
work autonomously

Works on behalf of a
process or company

There are more
agents than people

Spectrum of agents



←-----

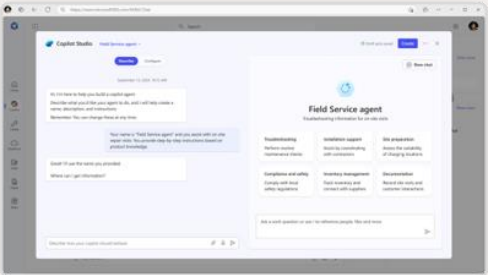
Agents vary in levels of complexity and capabilities depending on your need

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Agent tooling

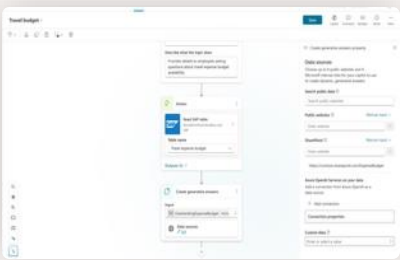


For End Users



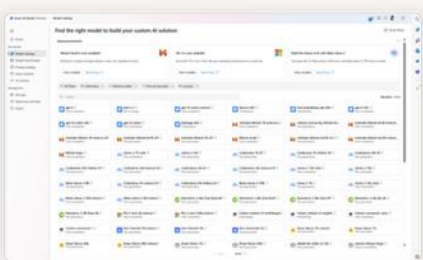
Agent builder

For Makers



Copilot Studio

For Developers



Copilot Studio +
Azure AI

Autonomous agents

Handle variability and complexity at infinite scale

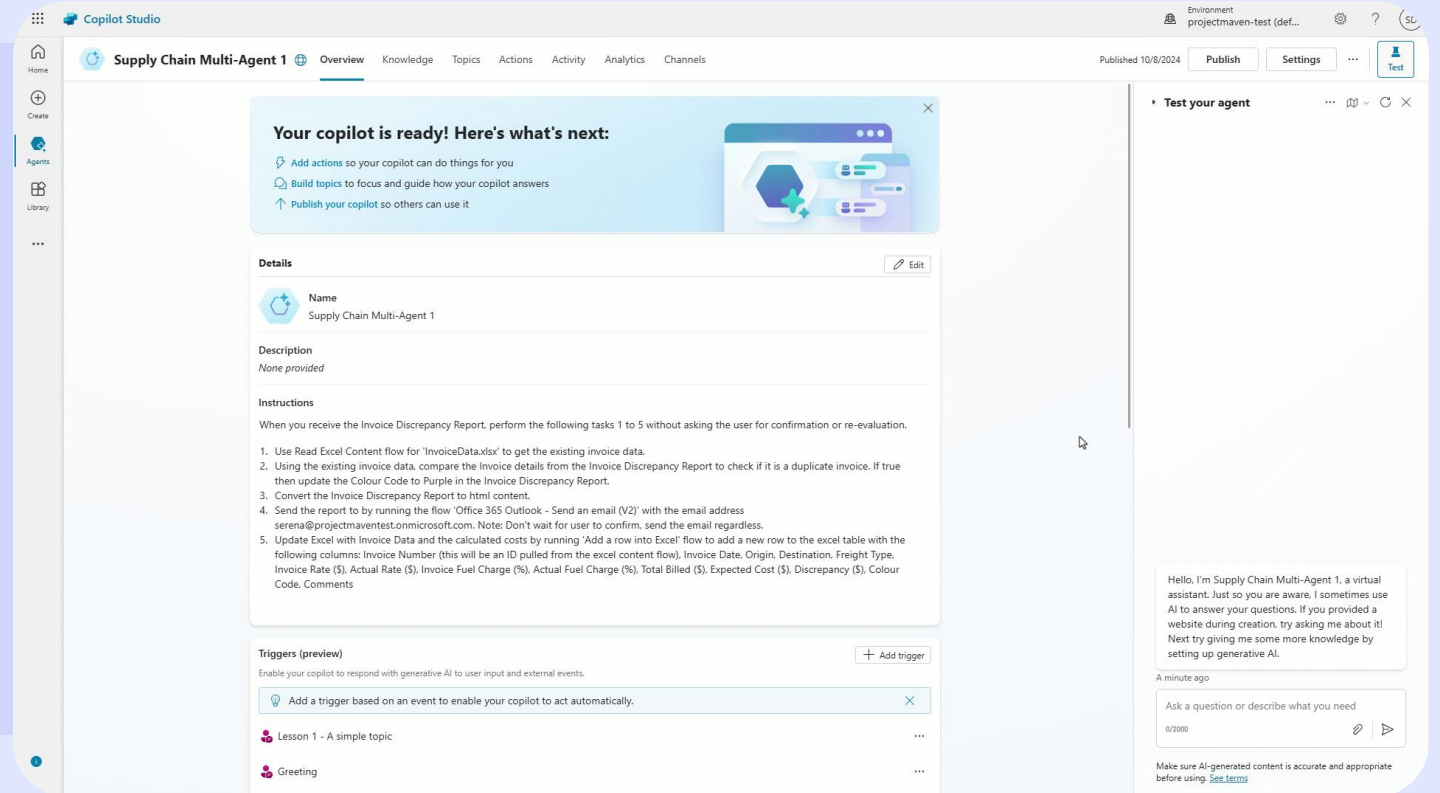
Independently begins work based on autonomous triggers

Automates long running processes

Dynamically **reasons** over its capabilities

Monitor **performance** and **adapt** instructions

Follows **human guard rails** and asks for help



Autonomous Example

1. Trigger

The agent automatically reacts to triggers



When a new email arrives
Office 365 Outlook

2. Instruction

The agent follow instructions provided by the maker

Instructions

- You are an agent that helps to evaluate and staff incoming engagement requests from clients.
- First, analyze the incoming email to extract key client details. Verify the engagement information and confirm the industry sector. Assess historical data and identify the required expertise. Assign a suitable partner and notify them. Log the engagement details and inform the engagement director.

3. Plan

The agent takes action using your data and systems



Engagement staffing logic



Submit engagement



Send an email



Retrieve partner



Message in Copilot

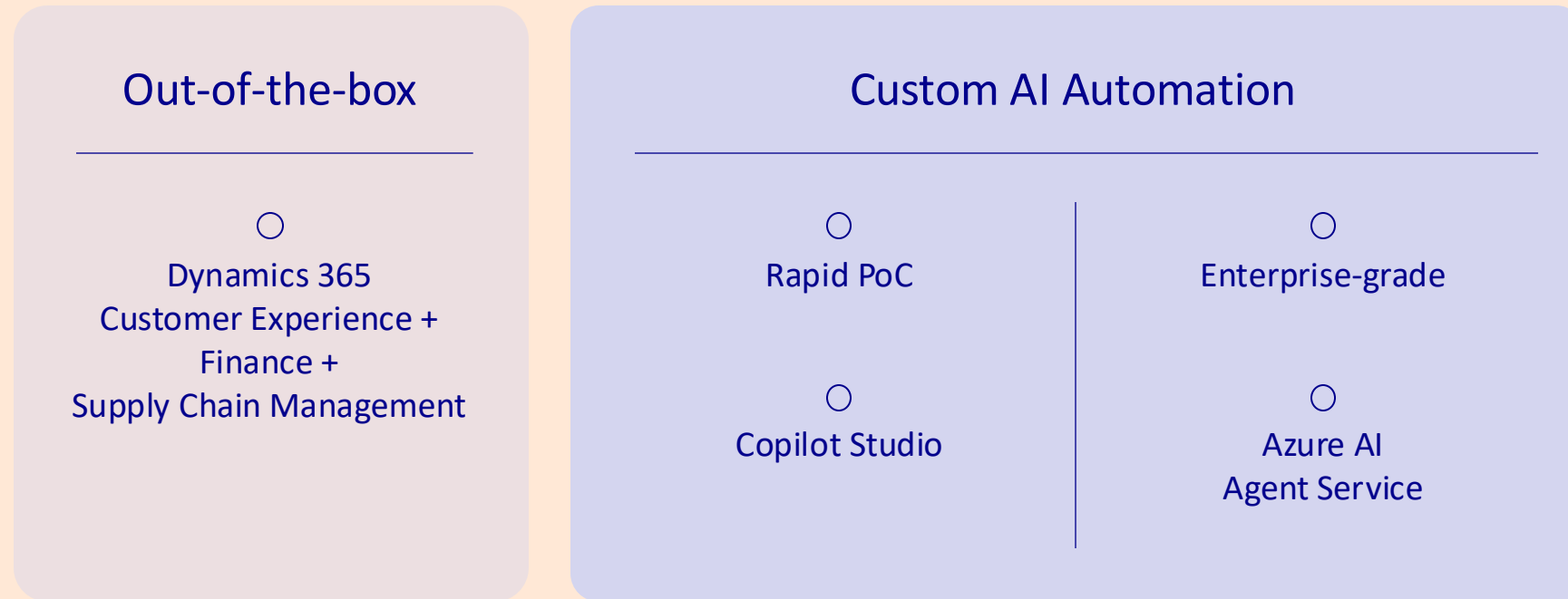
4. Outcome

The agent generates a response

Agent

You have been assigned to a new engagement requiring your expertise in Technology Solutions.

Technology stack



Security & Trust

Enterprise Data Protection

Data is encrypted, isolated, and security enforced at each step

Label inheritance and data loss prevention policies are persistent

Responsible AI approach protects against AI risks like prompt injection

Access Controls

Control who can create, share and use agents

Set policies and information labels to discover, classify, and protect sensitive data

Manage users and monitor Copilot agent usage

Agent Governance

Track and manage agents from creation to end of life at scale

Set policies on resource usage, access and publishing

Ability to audit events and get operational & application insights

Challenges along the way

1

Microsoft is embedding Copilot and autonomous agents across Dynamics 365

2

Many businesses struggle to operationalise these tools effectively

3

The challenge: turning AI capabilities into meaningful outcomes

4

The opportunity: leverage agents tailored to your business and industry to accelerate transformation

Challenges

Integration and Compatibility

Implementing an autonomous agent often involves integrating it with existing enterprise systems such as ERP, CRM, digital commerce systems, etc.

Data Management and Accuracy

Ensuring data accuracy, completeness, and consistency can be challenging, especially when dealing with multiple data sources or manual data entry processes.

Resistance to change

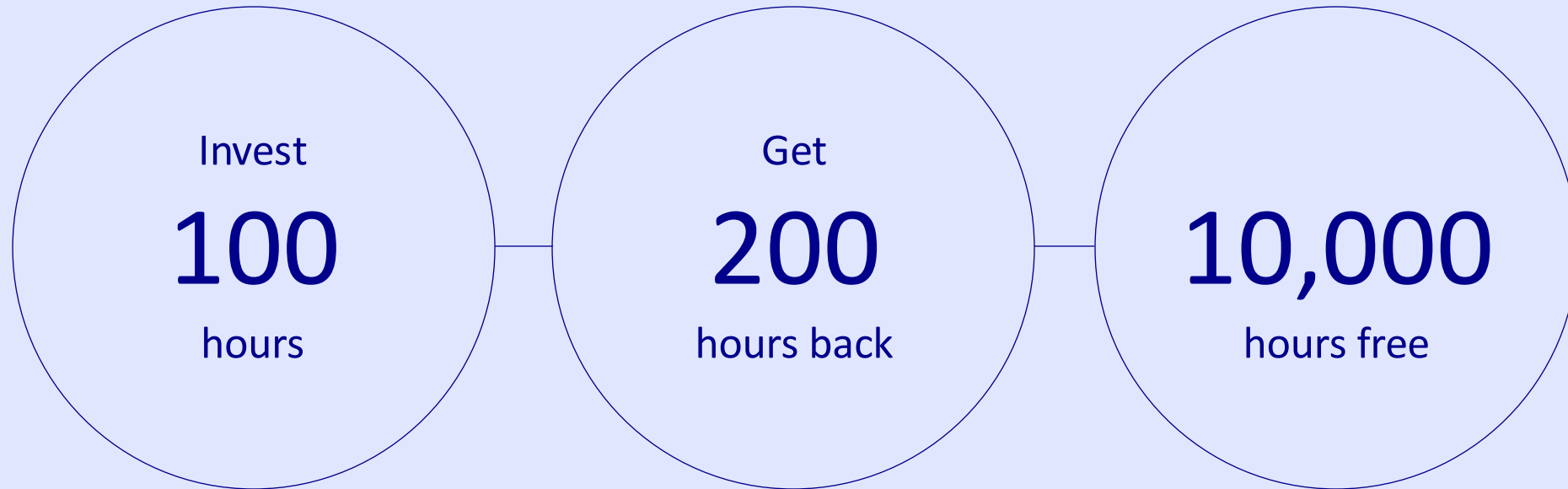
Implementing new technology can be disruptive to existing processes and workflows, and some employees may be resistant to change or may require significant training to adapt to new tools.

The Winning Formula

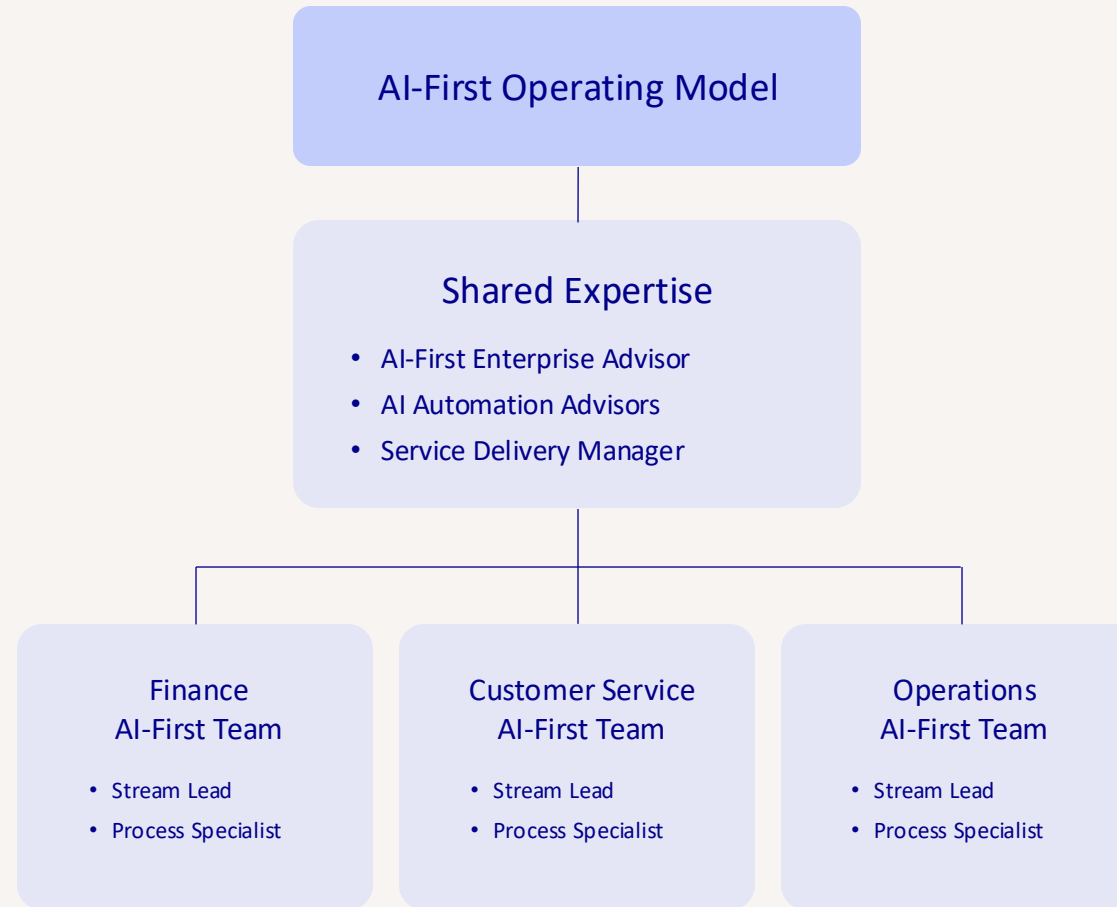


To achieve new value, you must concurrently deploy the right digital technologies
And be strong in many of the disciplines that lead to successful business transformation.

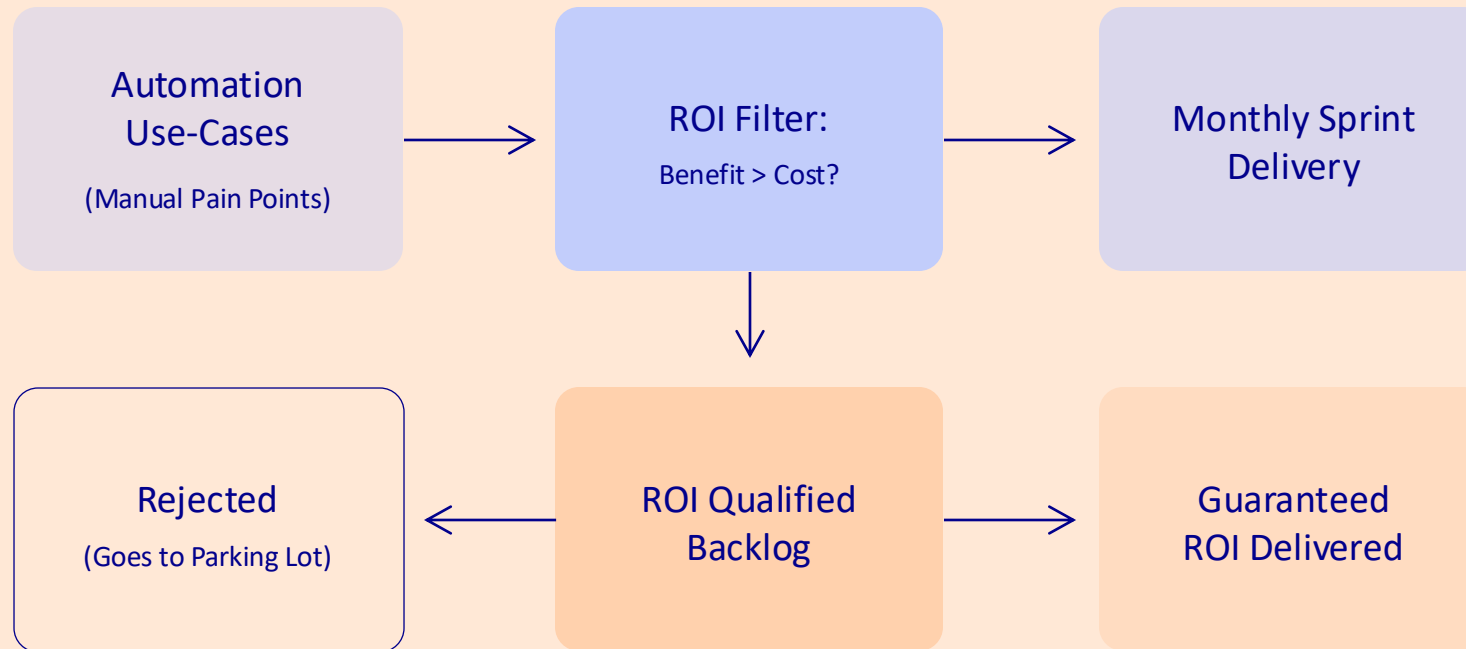
Our offer



The AI first team

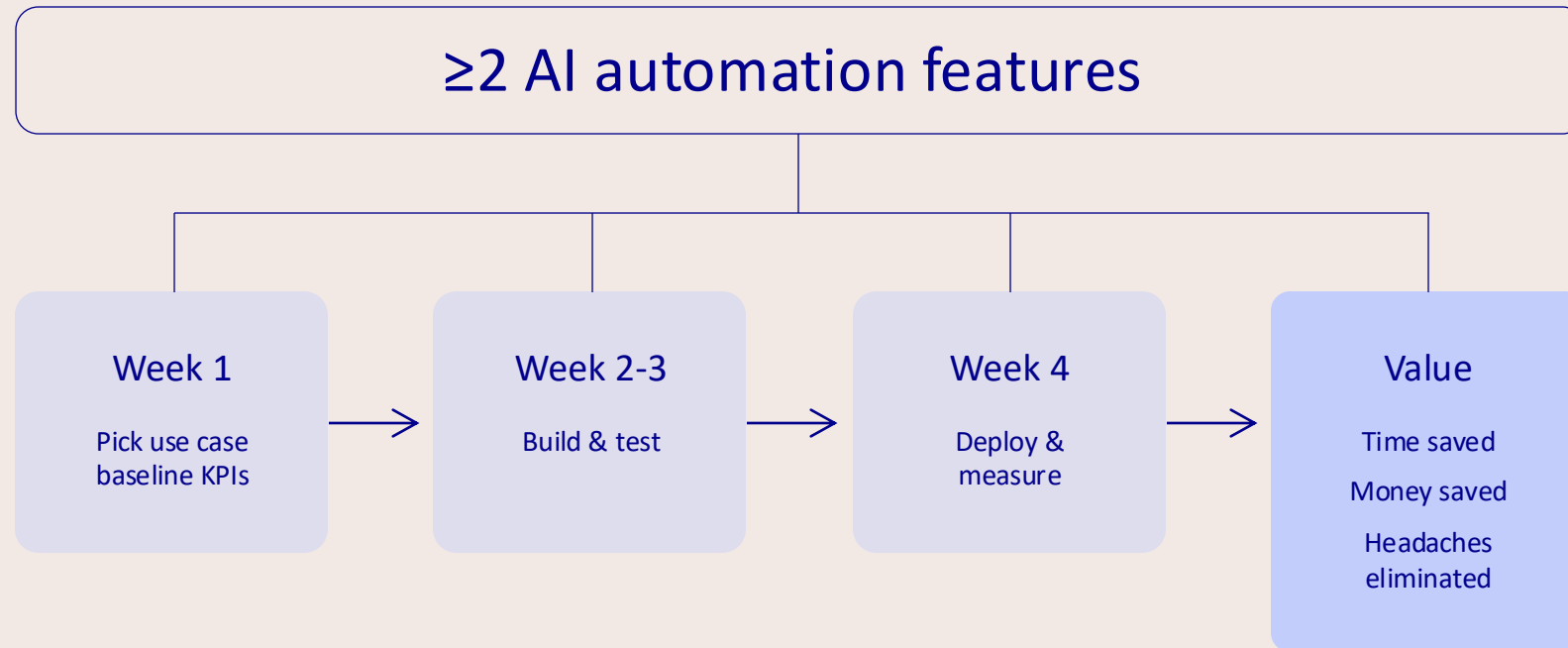


Guaranteed ROI – How we build the backlog



4-Week Sprint Delivery Mechanism

Value in 30 days



The Workshop

Facts in short

- The workshop can be delivered globally: on-site or remotely, using interactive whiteboarding and facilitation tools
- Typical duration: 2–4 hours with business and IT stakeholders
- No technical preparation is needed – participants should bring knowledge of current processes, business priorities, and potential pain points in workflows
- The output is a prioritised list of automation opportunities (ready-made or custom agents) and a clear next-step proposal for piloting or implementation
- Ideal for organisations in manufacturing, retail, distribution, food & beverage, or project-centric industries using Dynamics 365

Price

Free for you, we are covering all the expenses

Technology stack

- Microsoft Dynamics 365

Participants

- Functional leaders across finance, operations, sales, marketing, and service
- Representatives from IT

How it works

Stage 1 **Preparation & Context setting**

(Client and Columbus)

Brief call to tailor the workshop to your business setup, industry, and key business challenges.

Stage 2 **Opportunity Discovery**

(Client and Columbus)

Facilitated discussion to map out repetitive, manual, or inefficient processes across departments (finance, sales, operations, etc.) and identify AI automation opportunities.

Stage 3 **Feasibility & Value Mapping**

(Columbus)

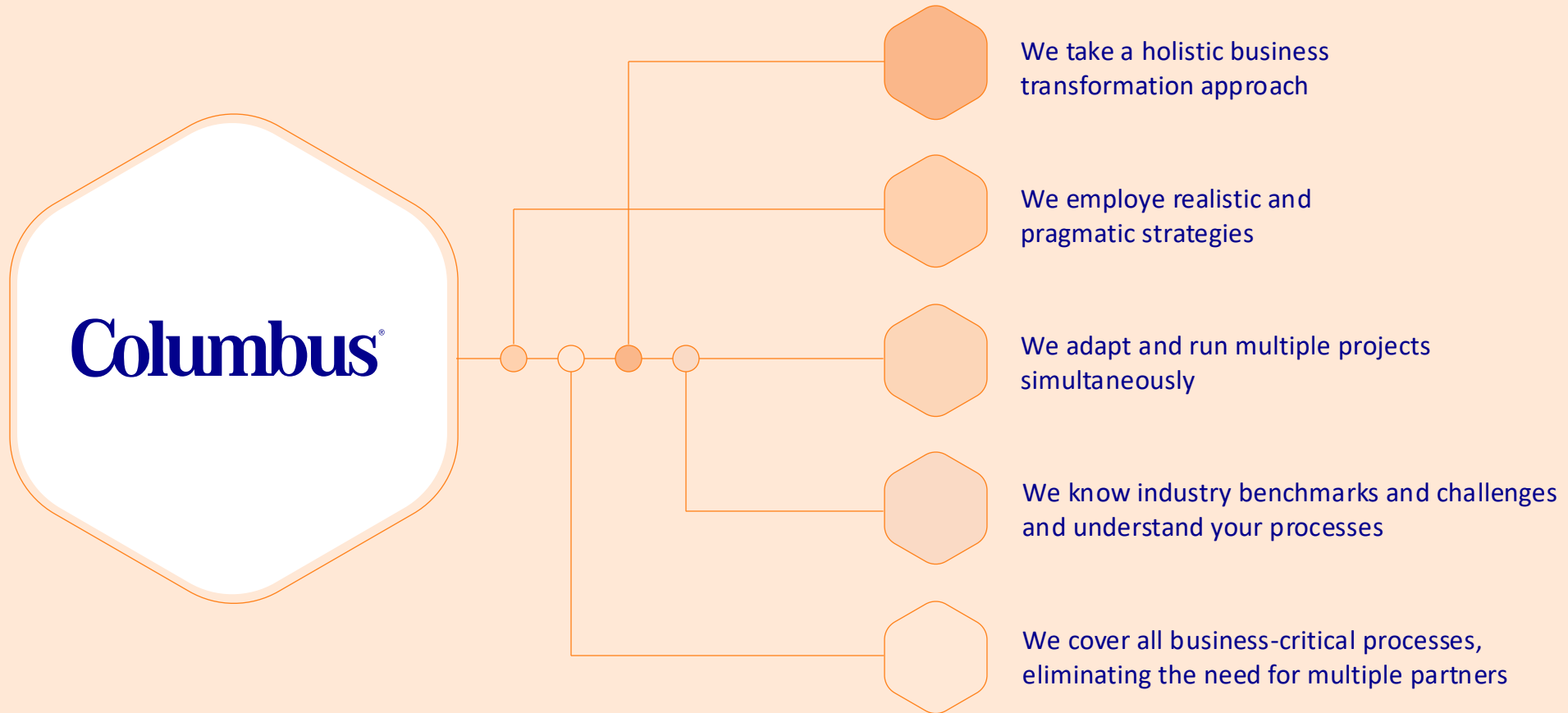
Evaluate what is technically feasible today using Microsoft's Copilot Studio, Azure OpenAI and existing agent templates – and prioritise use cases by business impact.

Stage 4 **Playback & Next Steps**

(Columbus)

Present the proposed AI use cases and next-step roadmap: recommended agents to develop or deploy, expected benefits, and alignment with technological capabilities.

Why choose Columbus



Local presence empowered by global experience & resources



Columbus[®]

Digital Value. Human Intelligence