



inogic

White Paper

Next Best Action - Whitepaper

Aim:

Next Best Action is an AI-powered solution for Microsoft Dynamics 365 that guides users on the most effective next step in their daily work. Embedded inside Dynamics 365 and powered by Azure AI, the solution analyzes historical data, activity patterns, engagement signals, and defined success outcomes to deliver real-time, explainable recommendations. The main purpose of Next Best Action is to help users reach their desired goals. It makes work in CRM easier by guiding users to the right actions at the right time. By providing actionable insights where users work, it helps businesses increase win rates, reduce churn, and enhance overall customer engagement.

Features:

- Context-aware next best action recommendations based on historical successful actions taken to reach defined goals.
- Personalized guidance based on historical success patterns to achieve desired goals.
- Next Best Action cards with an explainable AI summary outlining the purpose of the recommendation and the goal to be achieved, enabling informed decision-making.
- Real-time suggestions triggered when CRM activities (such as emails, phone calls, meetings, etc.) are created or updated.
- Next Best Action digest: a daily or weekly email that lists all recommended next best actions.
- Track all NBA activities in a timeline to monitor follow-ups and progress.

Supported Versions

Versions: Microsoft Dynamics 365 9.0 & above, Dataverse.

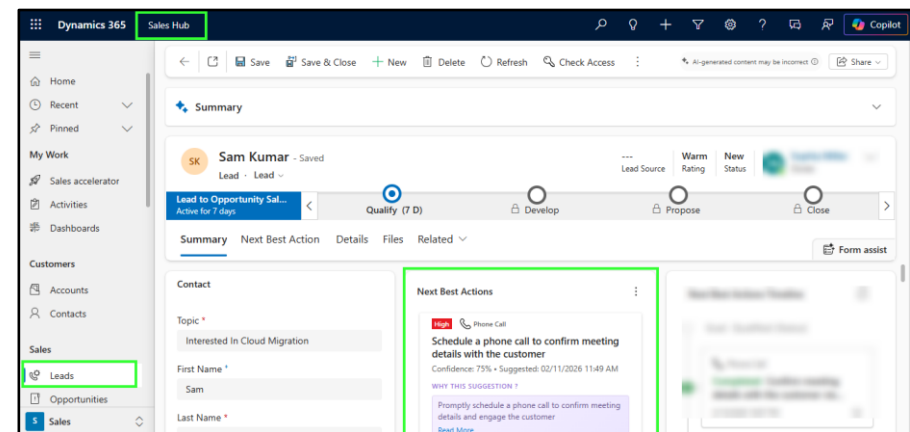
Deployment Models: Online

Who needs it?

Organizations using Microsoft Dynamics 365 CRM often struggle to consistently prioritize leads, opportunities, cases, and custom entities. Sales and customer service teams can lose momentum due to fragmented workflows, delayed follow-ups, or missed signals from customers. Businesses require an intelligent solution that recommends the right action, through the right channel, at the right time, and in the right context, enabling faster deal progression, higher conversion rates, and improved customer satisfaction. Next Best Action is designed for these organizations, offering AI-powered, explainable guidance directly inside Dynamics 365, helping teams act decisively and efficiently, while constantly mentoring new CRM users to achieve their desired goals.

Context-Aware Recommendations

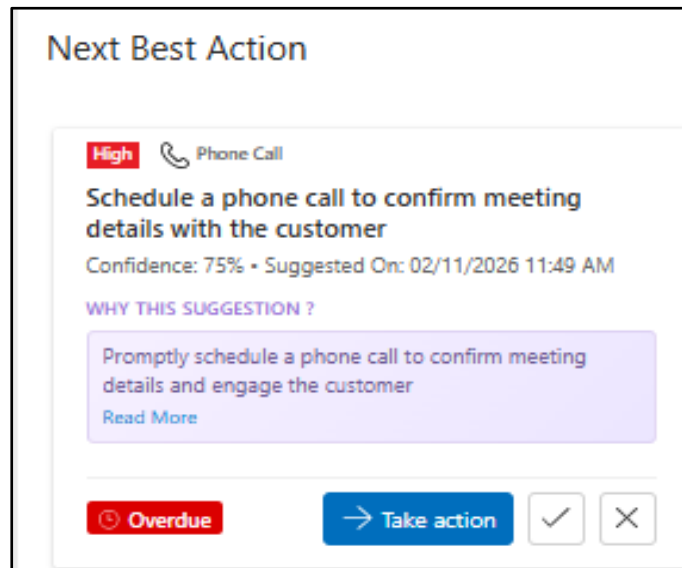
Analyze CRM activities, communications, and engagement signals to provide actionable next steps in real time, ensuring no opportunity is overlooked.



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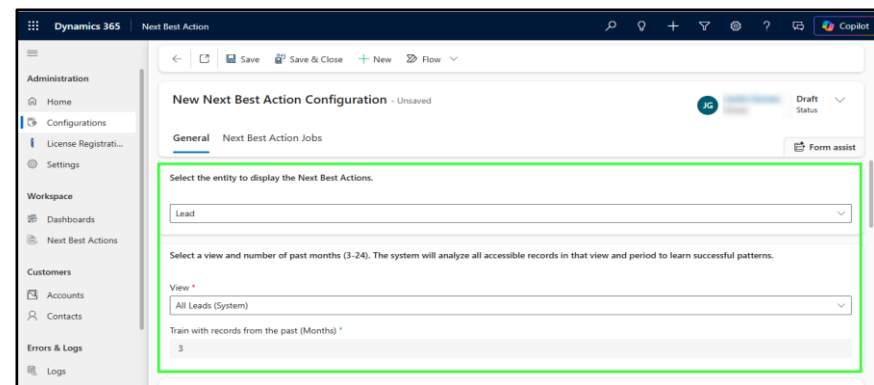
Actionable NBA Cards

Displays recommendations in user-friendly cards with options to take action, mark complete, or dismiss, with rationale provided to support informed decisions.



Personalized Next Best Actions

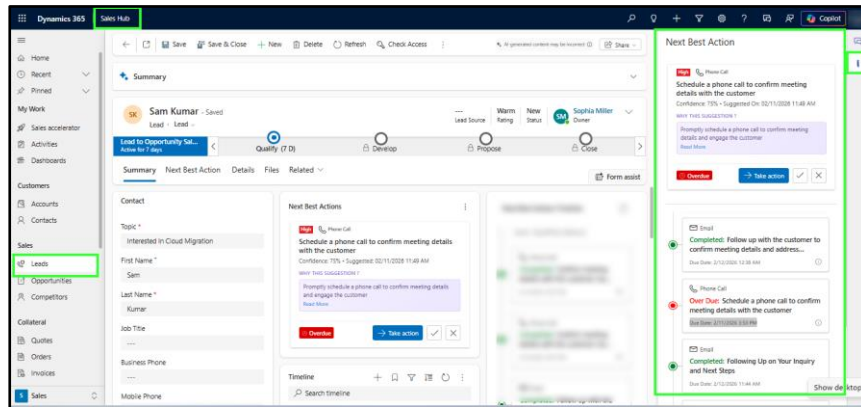
Leverages historical patterns and activity types to suggest best actions tailored to each lead, opportunity, case, or custom entity for optimized engagement.



Action Tracking and Progress Monitoring

Tracks actions in a timeline and digest emails, ensuring visibility, timely follow-ups, and goal-focused productivity.

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