



# Dynamics 365 Customer Engagement with Intelligent Agent Automation



**Reimagine customer engagement with an AI-powered CRM that never sleeps.** Dynamics 365 Customer Engagement with Intelligent Agent Automation brings together Microsoft Dynamics 365 Customer Engagement and three purpose-built AI agents developed in Microsoft Copilot Studio to transform how organizations interact with customers. By embedding intelligent, autonomous agents directly into your CRM, this offering enables always-on customer engagement, faster response times, and smarter data-driven interactions—so your teams can focus on high-value work while AI handles routine conversations, follow-ups, and data enrichment behind the scenes.

## Implementation Approach

Vervint's experts lead a focused discovery phase to understand customer interactions, operational challenges, and service goals. We collaborate with stakeholders to map current processes and identify high-impact automation opportunities that deliver early, measurable value.

Vervint delivers Dynamics 365 Customer Engagement implementations aligned to Microsoft best practices. Our consultants configure sales, service, and marketing modules, define security roles, design custom entities, and integrate Dynamics 365 with existing systems to support end-to-end processes.

Vervint designs and builds AI-powered agents using Copilot Studio, creating intelligent conversation flows with generative AI, Topics, and Entities. Power Automate connects agents to Dynamics 365, orchestrates workflows, and manages background processing, with all agents tested and validated before production deployment.

## Expected Outcomes

- 60-70% reduction in routine inquiry response time
- Improved customer satisfaction scores from faster resolution
- Reduced service team workload for repetitive tasks
- Better data quality through automated enrichment

## Deliverables

- A configured Dynamics 365 Customer Engagement environment
- Three operational Copilot Studio agents w/ Power Automate workflows
- Documentation of conversation flows and business logic
- Training materials for administrators and end users
- Support transition plan.

Vervint

<https://www.vervint.com>

[melissa.engle@vervint.com](mailto:melissa.engle@vervint.com)

616-574-3500



# Why Dynamics 365?

## Modern applications

Modern applications that deliver new experiences and connect with a business' existing systems to allow organizations to digitally transform their way. Applications that use mixed reality, the ability to take an application that overlays on the reality in front of the user, that guides them through a business process like never before. Connect to information from social networks, mobile devices, and micro-applications to drive intelligence and inform a more effective business process.

## Unified data and processes

Unified data and processes that enable business without silos. Centralized data enables disparate groups to work together effectively with a single, trusted view of processes, relationships, and data. Data connectors allow thousands of systems to bring their data to a single network.

## Intelligence that delivers

Intelligence that delivers actionable insight. Data in the new world includes social, relationship, and productivity information in addition to insights generated by business systems. The right solution requires a unified approach that allows companies to automatically leverage their data to decide and act in real-time with expanded analytics, predictive algorithms, and automated AI.

## An extensible environment

An extensible environment that enables change. The right solution establishes a data, communication, and application environment that makes it easy to evolve and extend existing business operations, while introducing technologies that enable users to create solutions where no solution exists and to expand data analysis.

## Key use cases



### Sales

Respond to changing business requirements with a flexible platform to rapidly create new solutions and ensure old solutions are never truly finished.



### Service

Understand your customers better and respond more quickly by accessing internal and external relationship data.



### Finance and operations

Increase your return on investment with Microsoft's agile and efficient cloud solution.



### Talent

Extend your virtual team and coordinate faster with a consolidated view of team members, activities, and responsibilities.



### Marketing

Gain end-to-end visibility by connecting data from external markets, social, and legacy sources.

## Microsoft Dynamics 365

Transform on your terms with Microsoft Business Applications. Enable people to do their best work. Gain actionable insights. Thrive with solutions expressly built for change. Unlock next.

Learn more at [www.dynamics365.com](http://www.dynamics365.com)

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