Copilot Activation Assessment for Dynamics 365 Service.
1-week engagement.

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Business First.
Technology Second.

THAT'S THE POINT

In this deck

Microsoft is releasing new AI functionality within their Dynamics 365 suite each month. This is a fast-moving landscape in the era of AI.

Velrada run this Copilot Assessment engagement for our Dynamics 365 Customer Service customers to help them plan for new AI capabilities for users.

Allow us to discover where these capabilities can deliver value into your organisation and foster an understanding of how it will benefit users, improve processes, and customer experiences.

Some of these new AI capabilities in Dynamics 365 are automatically activated for your users, so you would want to be prepared. Some of opt-in and require activation manually, so you might want to know what capabilities are being paid for but not leveraged.

During this engagement, we will discuss the challenges that your current Dynamics 365 users are facing to author a summary of potential solutions that use the latest platform capabilities to overcome them.

Contents:

1) Overview of Copilot Capability with Dynamics 365 Customer Service

2) Our Activation & Assessment Engagement

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2022 Partner of the Year Finalist Microsoft Dynamics 365 Customer Service & Field Service Partner of the Year Award
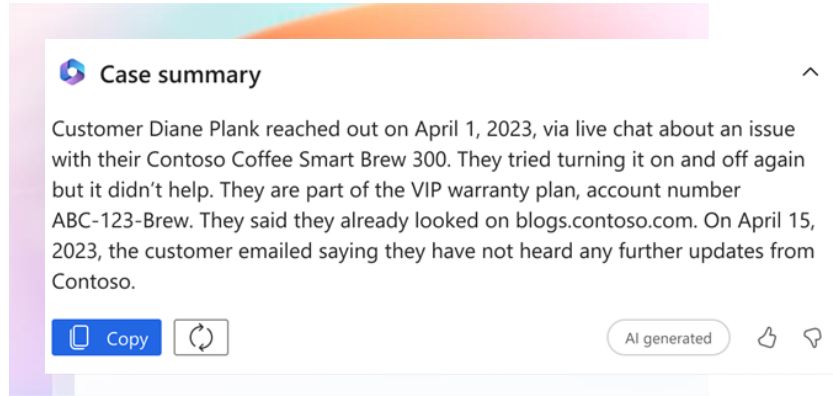
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2023/2024 INNER CIRCLE
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Business and Industry Solution Winner

Overview of Copilot capability in D365 Service

Two Dynamics 365 Service Copilots

## FOUNDATIONAL UNDERSTANDING OF THE TECHNOLOGY

COPILOT IN D365 SERVICE

Overview
- AI-enriched features and capabilities within the Dynamics 365 Customer Service solution.
- Leverage the Copilot chat with suggested prompts in the sidebar of the standard user interface.
- View generated summaries within the standard forms.

Licensing
- Included within D365 Customer Service
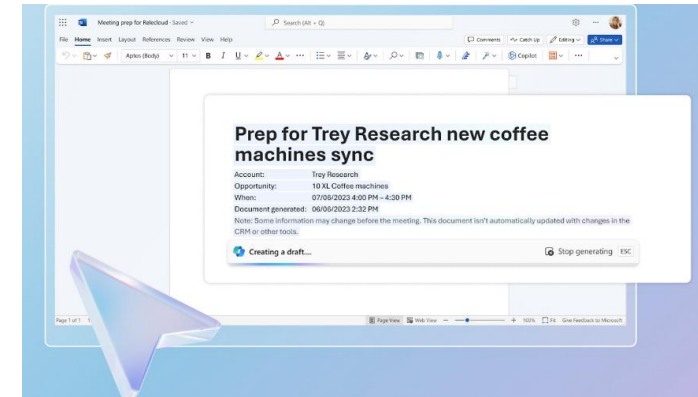
COPILOT FOR D365 SERVICE

Capability
- Interact with your Dynamics 365 data from within Microsoft 365.
- Generate documents within Microsoft Word, Excel PowerPoint using data found in Dynamics 365.
- Summarise & generate e-mails within Microsoft Outlook.
- Summarise meetings in Microsoft Teams and send directly into Dynamics 365 Customer Service.

Licensing
- For existing 'Copilot for Microsoft 365 customers, there is an add-on for Copilot for Service.
- Procuring the full Copilot for Service includes a Copilot for Microsoft 365 license.

Copilot in Dynamics 365 Service

USE AI TO ACCURATELY SUMMARISE & GET UP TO SPEED

Summarise Cases

Quickly get up to speed on a case with highlights from the Case, associated timeline records (notes, emails and conversation summaries) and who has worked on it. This information helps agents quickly determine the best next steps.

A case summary is valuable during case collaborations, transfers, and final resolutions when support agents are documenting what occurred throughout the case lifecycle. They are especially valuable in accelerating the administrative tasks surrounding multiday or long running cases.

Summarise Conversations

The ability to summarise a conversation is available with digital messaging and voice channels used with Dynamics 365 Customer Service. This allows for wrap-up notes to decorate the conversation record and summarise the interaction against the case.

Copilot in Dynamics 365 Service

## ASK YOUR DATA QUESTIONS & GET REFERENCED ANSWER

Ask questions

When the Customer Service Agent signs in to any of the Customer Service agent apps, Copilot opens in the right-side panel with the "Ask a question" tab ready.

Copilot acts as your partner, helping to answer questions without your having to search for the information.

Use the responses

If the agent is satisfied with the response Copilot provides, they can use the whole thing or a part of it to answer the customer's question:

- Copy part of Copilot's reply into your chat or read from it during a voice conversation. Select the copy icon to copy the entire response to the clipboard.
- When the agent are in an active digital messaging conversation, they can select "**Send to customer**" to open an editing window where they can revise the response and send it to the customer. Agents can also change customer keywords to prompt Copilot to generate a more accurate response.
- Select "**Check sources**" to see the knowledge base or website links from which Copilot drew the response. Agents can use this supplemental information as a resource or share it with the customer.
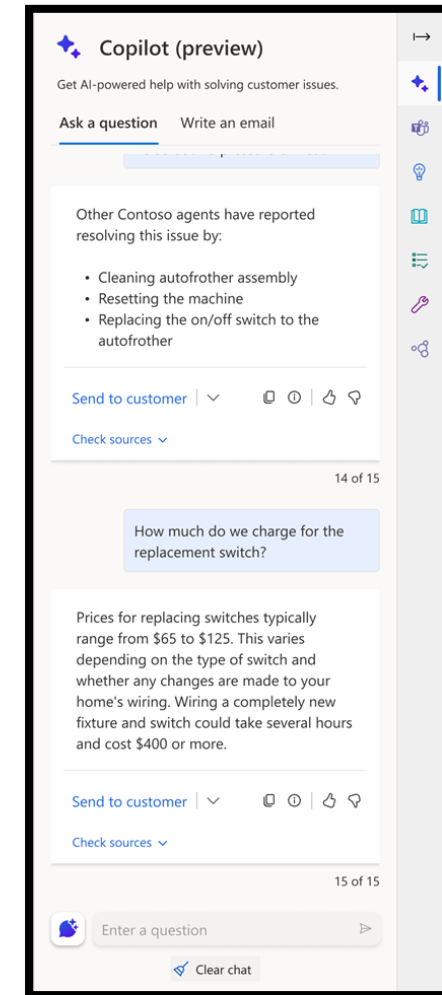
Copilot in Dynamics 365 Service

IMPROVING THE EFFICENCY & QUALITY OF EMAIL COMMUNICATIONS

Write an email with Copilot

With Copilot, agents can draft email replies to customers quickly and be more effective in solving customer issues. When the agent drafts the email, Copilot presents predefined prompts such as:

- Suggest a call
- Request more information
- Empathize with feedback
- Provide product/service details
- Resolve the customer's problem

When the agent selects one of the predefined prompts, Copilot generates a suggested reply.

Agents should always review the response and make any necessary changes, and then select **Copy to email** to copy the entire response to their draft.

Or select part of the response and use the right-click menu to copy and paste the selection.
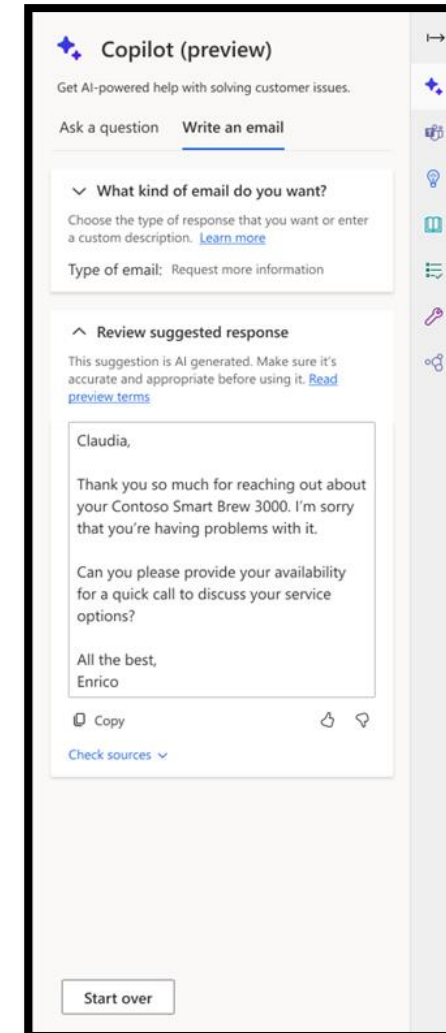
Copilot in Dynamics 365 Service

## USING AI FOR REAL-TIME ASSISTANCE TO RESOLVE ISSUES

Draft a chat response

Agents can select the one-click response generation button at the Conversation control panel and at the Copilot pane.

Copilot analyses the context of the conversation and the latest customer question or message and drafts a response to send directly to the customer.

Agents don't need to manually type the question.

Copilots work on Knowledge Articles

Copilot's knowledge-based capabilities like ask a question, write an email, and draft a chat response, are dependent on high-quality and up-to-date knowledge articles for grounding. Without these knowledge articles, users are more likely to encounter Copilot responses that aren't factual.

To minimise the likelihood of seeing non-factual responses from Copilot, it's important that the organizations employ robust knowledge management practices to ensure the business knowledge that connects to Copilot is of high-quality and up-to-date.
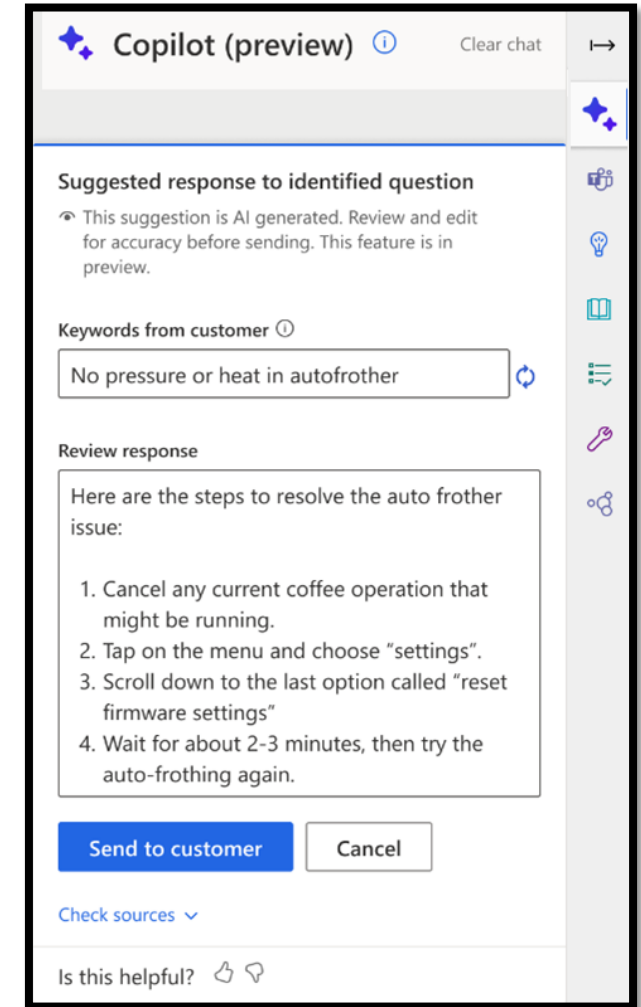
Overview of Key Benefits

THE VALUE OF COPILOT IN YOUR SERVICE FUNCTION

Copilot & AI Capability provide reprieve to the following common <u>challenges</u> faced in Customer Service:

- Emails and phone calls are the first step taken for answers by the customer.

- Large majority of an agent's day is devoted to e-mail.

- Repetitive e-mails are commonly composed from scratch.

- Time spent searching for past correspondence, answers, chats, documents and account details.

- Volume of data to search through in knowledge base to find an appropriate answer to the query or issue.

- Time spent devoted to recapping conversations and summarising outcomes. Some of which are inaccurate or missing details.

<u>Advantage</u> your Service team with Copilot & AI Capability within the software they use daily:

- Promote usage of a Copilot to provide answers or AI-infused triage before escalating to a human agent (via both e-mail and voice channels).

- Generative AI to produce e-mail responses modelled from templates, context and tone.

- Integrate into Knowledge Base for consistency of answers.

- Resolve higher volumes of cases.

- Improve workflows & management of workloads.

- Automatically summarise cases & conversations.

- Leverage Dynamics 365 Service data and processes from within Microsoft 365 – Word, Excel, OneNote, Teams, Outlook, etc.

| Reduce e-mail fatigue | Improve quality of customer engagement | Drive efficiency in your service function |

Our Activation Assessment Engagement.

Our Assessment Process

ACTIVATING COPILOT CAPABILITY AROUND DYNAMICS 365 SERVICE

Velrada perform this engagement across 3 sessions and provide a final deliverable with outcomes & a roadmap.

1

Session: Getting Up to Speed on AI Landscape
Engaging session to bring the customer up to speed with the estate of technologies and solutions available in the Microsoft Ecosystem.

2

Session: Discovery Workshop
Collaborative workshop designed to discover the current usage of Dynamics 365 Customer Service within the organisation. This will identify the current licensing model, userbase, workflows that will benefit from Copilot capability, and approach to introducing it.

3

Report: Assessment Outcomes & Roadmap
Velrada will take the discussion and decisions from the discovery workshop and curate an approach to activating the Copilot "in & for" Dynamics 365 Customer Service. This includes licensing, training, communications, performing a pilot, benefits, and next steps.

4

Session: Playback Session
Velrada will take you through our assessment outcomes & roadmap deliverable in a final session.

What comes next
Work with Velrada through the next stage for **Activation**. We can support implementation & change management in turning on in-product capabilities and producing tailored Copilot workloads

Engagement Overview

ACTIVATING COPILOT CAPABILITY AROUND D365 CUSTONMER SERVICE

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Engagement Length

Delivered typically across 1 week:

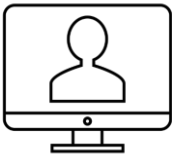- Workshop 1 – Intro to Microsoft Platform AI *(90 mins)*
- Workshop 2 – Discovery Workshop *(120 mins)*
- Workshop 3 – Roadmap Playback *(90 mins)*

Investment

- Engagement start at AUD $19,500 (excl. GST)
- Available in both fixed-price and time & materials
- Not inclusive of Microsoft licensing
- Microsoft funding can be available – *if applicable*

Session Delivery

Engagement can be delivered either:

- In person (your office or Velrada's)
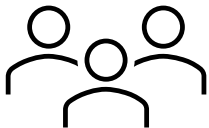- Remotely using Microsoft Teams

The final assessment report will be delivered as a PDF.

Pre-Requisites

- Client must be prepared for participating in discovery & design workshops
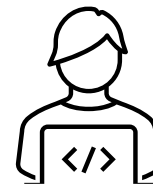- Ability to showcase current usage of Dynamics 365

Client Participants

The engagement is collaborative & benefits from your input by:

- IT strategy & architecture leadership
- D365/Power Platform leads/owners
- Critical process owners – benefiting from AI

Velrada Resources

Our experienced resources utilised in this engagement:

- Delivery Manager
- D365 Consultant– *Copilot & AI specialisation*

Progress is impossible without change.

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PROGRESS IS THE POINT

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