

Using Copilot Studio to Optimize Dynamics 365

Jessica Orton and Avanthi Hanumanula

Dynamics 365 Customer Experience Program
Microsoft

Agenda

- Introduction
- Customer Experience Program uses for Copilot in Dynamics 365
- Technical Implementation
- Customer Zero – How we are partnering with Product teams
- Responsible AI
- Q&A

Introduction



Jessica Orton



Avanthi Hanumanula

Customer Experience Program uses for Copilot in Dynamics 365

What is the Customer Experience Program?

- The Dynamics 365 Customer Experience Program includes Customer Success initiatives, Partner Success and engagement channels between the Product Group and Dynamics 365 customer and partner teams. The scope of the Customer Experience program includes:
- FastTrack engagements and Success by Design
- Self-Service and Partner Implementation portal
- Partner success and enablement programs
- Feedback gathering events



What have we implemented?

- Dynamics 365 Copilot
- Implementation Portal Copilot

The screenshot shows the Dynamics 365 Implementation Portal. The top navigation bar includes the Microsoft logo, the title 'Dynamics 365 Implementation Portal', and a 'Contact Us' button with a user profile 'Melisa Esposito'. A left-hand navigation pane lists various sections: Engagements, Home (selected), Projects, Create/Join Project, Migrations, Center of Excellence, Telemetry Insights, Setup Telemetry, Telemetry Recommendations, Data Consent, Help & Support, Knowledge Articles, Help, Contact Us, and Privacy & Cookies. The main content area welcomes the user and provides instructions on how to access projects and start a 'Go-live Readiness review'. It lists several capabilities of the portal, such as project data management, tailored guidance, project reviews, knowledge articles, and collaboration with the FastTrack team. Below this, there is a section titled 'My Go-live Readiness reviews' containing a table with one entry.

Name	Review	Project	Status Reason	Created On ↓
Project Review 2023/5/23	Finance and Operations Apps Go Live Readiness Review	SA Lab - Dynamics 365 Solutions Architecture	New	5/23/2023 6:24 AM

At the bottom right, there is an 'Open chat window' button and a chat icon.

Problems we are trying to solve

- **Improve data quality**
 - Automate or summarize latest updates
 - Discover impacted products and features
 - Identify or update risks with details
 - Go-live timelines
- **Improve discoverability of information and resources**
 - Finding relevant records
 - Projects, Customers, escalations
 - Research information on related products and features
- **Summarize information for leadership or groups outside of the organization**
 - Engagement Summary
 - Escalation Summary
 - Executive Summary
- **Simplify manual processes and tasks**
 - Onboarding
 - Project Reviews
 - Automatic Intelligent responses
 - Scheduling follow-up meetings



Unveiling the Sales Copilot Studio Bot for Dynamics 365

Overview of Sales Copilot Power Virtual Agents Bot

- Introduction of Sales Copilot Power Virtual Agents bot
 - Available for Dynamics 365
 - Offers new extension possibilities
- Impact on Teams
 - Revolutionizes interaction with CRM systems
 - Provides tailored experiences
- Limitations of Out-of-the-Box Copilot
 - Standard prompts often insufficient
 - Fails to meet diverse user requirements



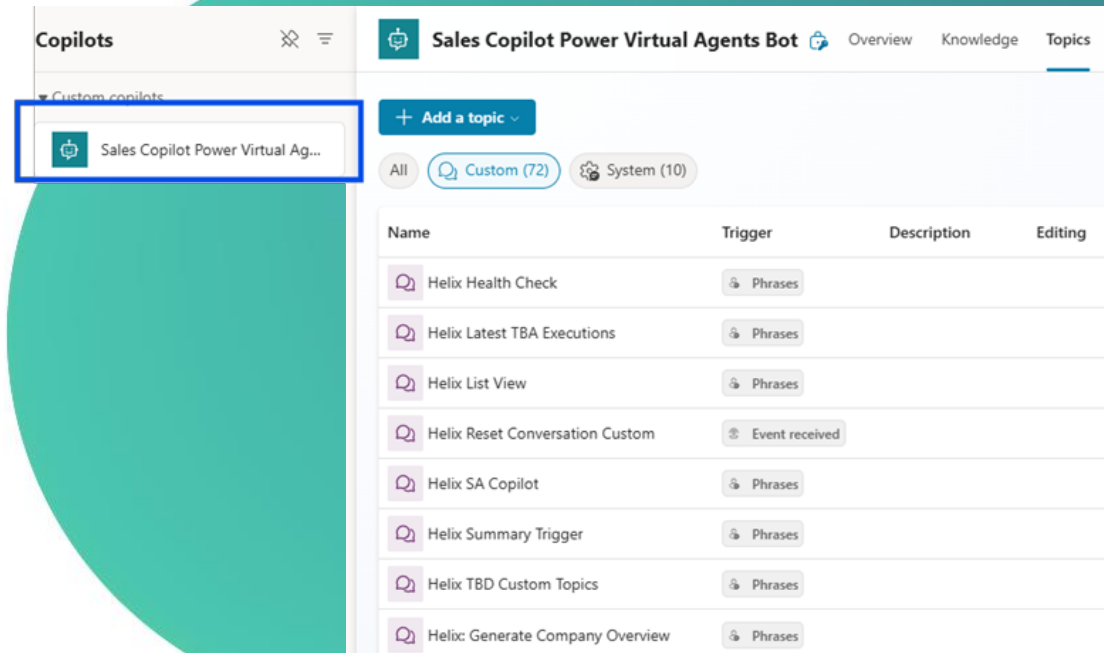
Tailoring Copilot Experience

- Tailored Copilot Experience
 - Integrate specific business logic
 - Automate routine tasks
 - Streamline complex processes



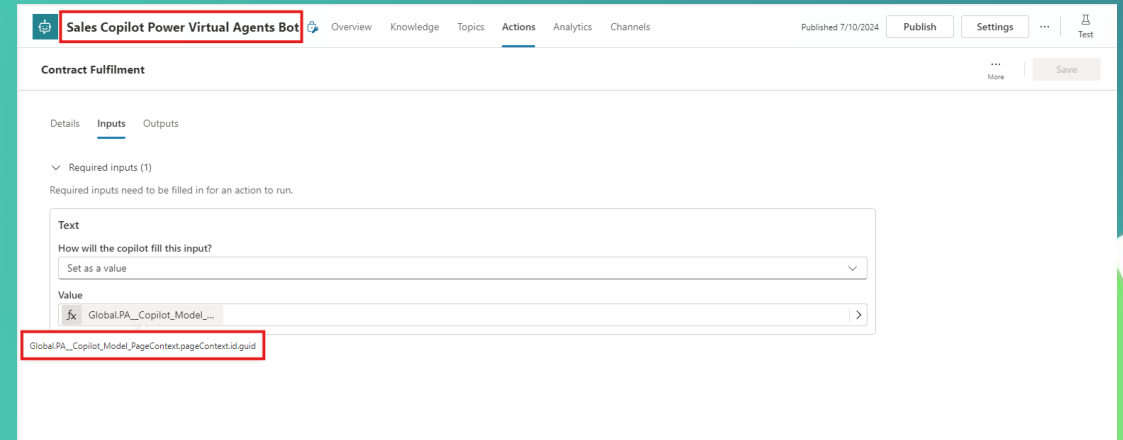
Configuration Simplicity

- Extending bot by creating custom topics to meet business requirements



Contextual Form GUID Integration

- Contextual Form GUID Integration
 - Bring the context form with GUID to the Flow
 - Ensure the GUID is correctly linked to the Bot
- Plugin Action in Power Automate
 - Based on input and output parameters
 - Automates actions within the flow
- Importance of This Integration
 - Streamlines processes
 - Enhances automation capabilities



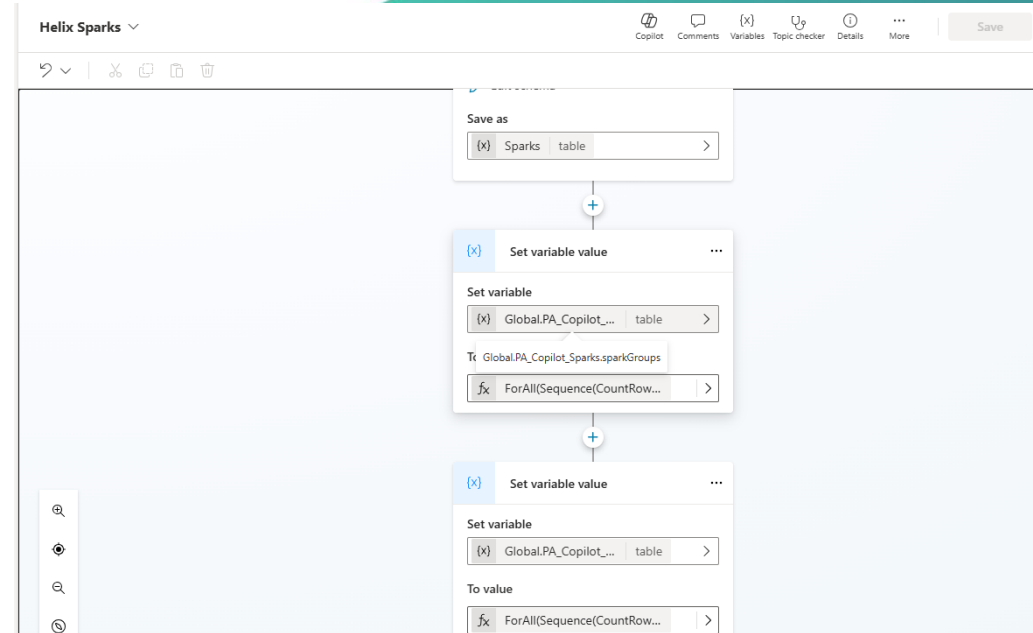
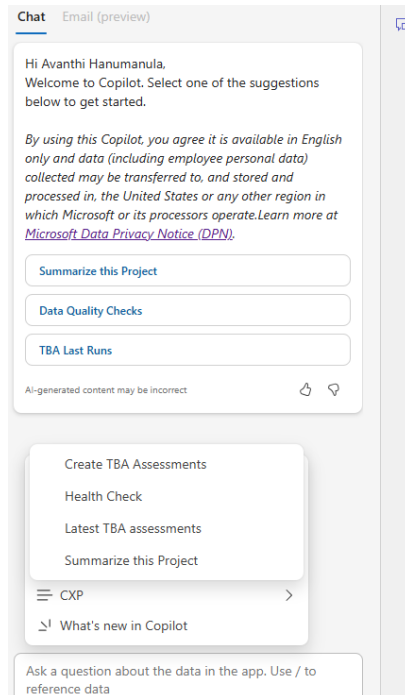
Applying Logic with Power Automate

- Apply Logic Using Power Automate
 - Create sophisticated workflows
 - Connect internal systems with external platforms
- Automate Tasks
 - Generating company overview
 - Scheduling Telemetry Based Assessments
 - Summarizing projects using multiple data points
- Streamline robust Processes
 - Automatic Go-Live tracker generation
 - Populating project details and status from teams meetings
- Bridge Disparate Systems
 - Ensure seamless data flow
 - Enhance operational efficiency



Guided Interface for Users

- Configuring sparkle menu



ALM & Analytics

- Bot components are solution aware
- Copilot Studio bots have in-built analytics to track adoption



Significance of the extendible Bot

Significant Milestone
for Dynamics 365
Users

- Introduction of customizable Sales Copilot Power Virtual Agents bot

Empowerment
Through
Customization

- Ability to tailor Copilot to specific organizational needs

Enhanced
Functionality and
Flexibility

- Improves productivity and responsiveness
- Ensures user-friendly CRM systems

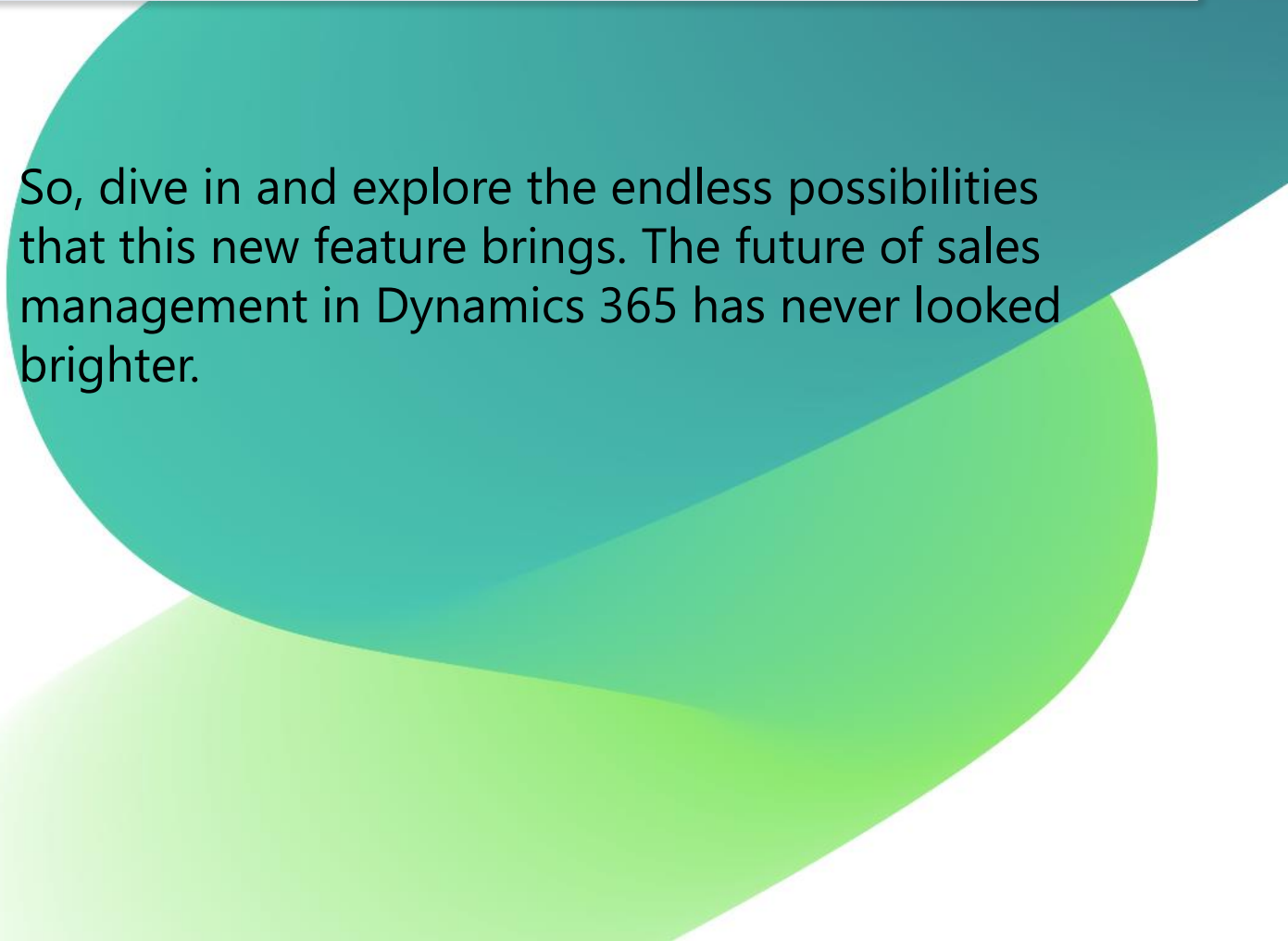
What cannot be done?

- Copilot embedded in Dynamics 365 cannot have custom adaptive cards





Future Prospects



So, dive in and explore the endless possibilities that this new feature brings. The future of sales management in Dynamics 365 has never looked brighter.

Customer Zero – How we are partnering with Product teams

Customer Zero – Partnering with Internal Teams

- **CoPilot Agents**

- Project Reviews automation
 - Identify and select categories based on responses
 - Risk
 - Issue
 - Assertion
 - Generate draft documents automatically for review
- Automated AI Email response
- Automated meeting invitation

- **Intelligent forms – Power Pages**

- Import documents or link to resources to provide data to simplify onboarding and manual data entry



Responsible AI

Responsible AI

- Defining standards and processes and building a community
- Our use cases we focus on:
 - **Clarity**
 - Define what scenarios and use cases are in-scope for this AI tool.
 - **Reliability**
 - How reliable does the system need to be?
 - What can go wrong?
 - Training and testing x10 compared to non-AI tools



Responsible AI

- Key points we review – Cultivate a culture of AI Risk management
 - **Identify Risks** – proactively discover potential harmful uses and missuses through assessments, reviews
 - **Evaluate Risks** – Analyze and test risks
 - **Mitigate Risks** – Take action to prevent risks from occurring through transparency, human review and oversight, technical mitigations and monitoring for incident detection and response





Q&A

References

- [Copilot in Sales: Extensibility Part 1 | FastTrack Dynamics 365 \(youtube.com\)](#)
- [Extending Copilot in Sales Part 2 | Dynamics 365 Bites \(youtube.com\)](#)
- [Text Operations - REST API \(Azure Azure AI Services\) | Microsoft Learn](#)