



Accelerate – Value Realization from Copilot for Customer Service with Dynamics 365

Generative AI is not just a technology change...

- It is a major shift and change in people and their mindset.
- It's a journey of the unknown and we need to build the mindset, skillset and ability to manage this change.
- You need a **digital cultural shift** in order to embrace and foster this new culture of AI being embedded in our everyday work.
Organisation's need to foster a culture of continuous learning and adaptability around AI and data.



What trends are we seeing?

[How Copilot Turns Everyone Into a Manager \(microsoft.com\)](https://microsoft.com)

Getting your organization ready for generative AI isn't about developing your employees' technology skills. It's about developing your employees' **people skills**.

[Microsoft's Chief People Officer shares how AI will impact workers \(fastcompany.com\)](https://fastcompany.com)

Fundamental **management skills** are key to tap into the full potential of an AI copilot. Collaborating with a copilot requires the ability to clearly communicate, set context and parameters, define expectations, analyze results, and provide feedback.



Why Dynamics 365 Copilot?



Is there a
problem we are
trying to solve?



What does
success
look like?



How will Copilot
benefit your
organization?



How will
Copilot benefit
employees?

Top 5 Obstacles to Productivity

01

Having
inefficient
meetings

02

Lacking
clear goals

03

Having too
many
meetings

04

Feeling
uninspired

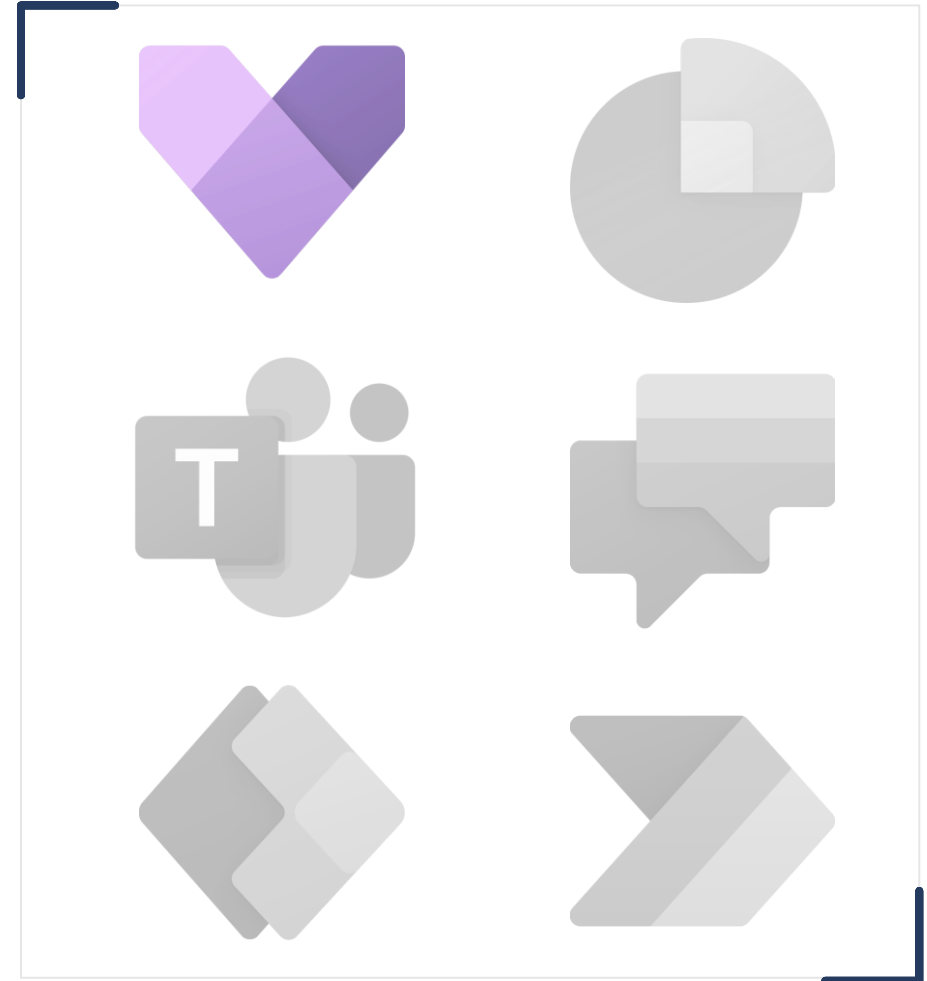
05

Not easily
finding the
information
I need

[Microsoft WorkLab Work Trend Index, May 2023](#)

Which Copilot is this?

- The Customer Service Copilot is designed to specifically improve service teams capabilities with the power of AI.
- This is not the [Copilot for Dynamics 365 Sales](#).
- This is not the Copilot for Model Driven Apps.
- This is not the Copilot for Microsoft Teams.
- This is not the Copilot for Power Apps and Power Automate.



Future of Customer Service



System Capabilities



Ask a
question



Write an
email



Draft a chat
response



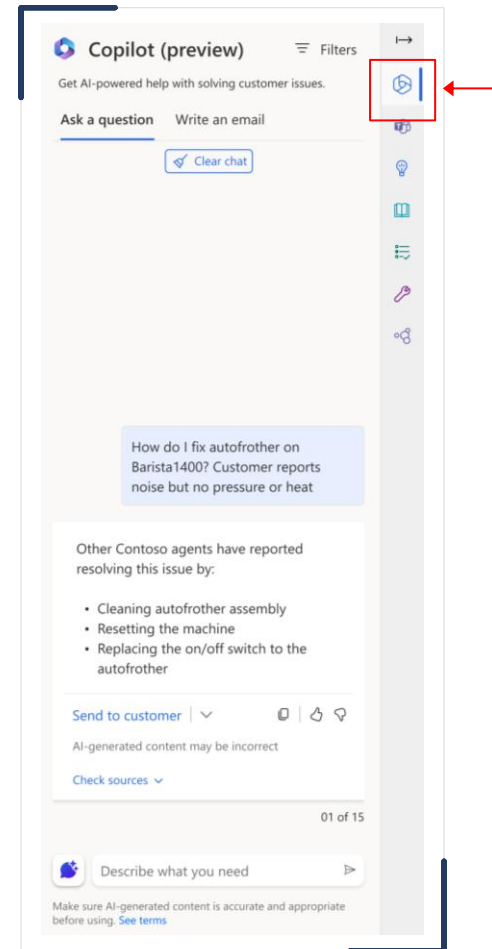
Summarize
a case



Summarize a
conversation

Copilot Help Pane

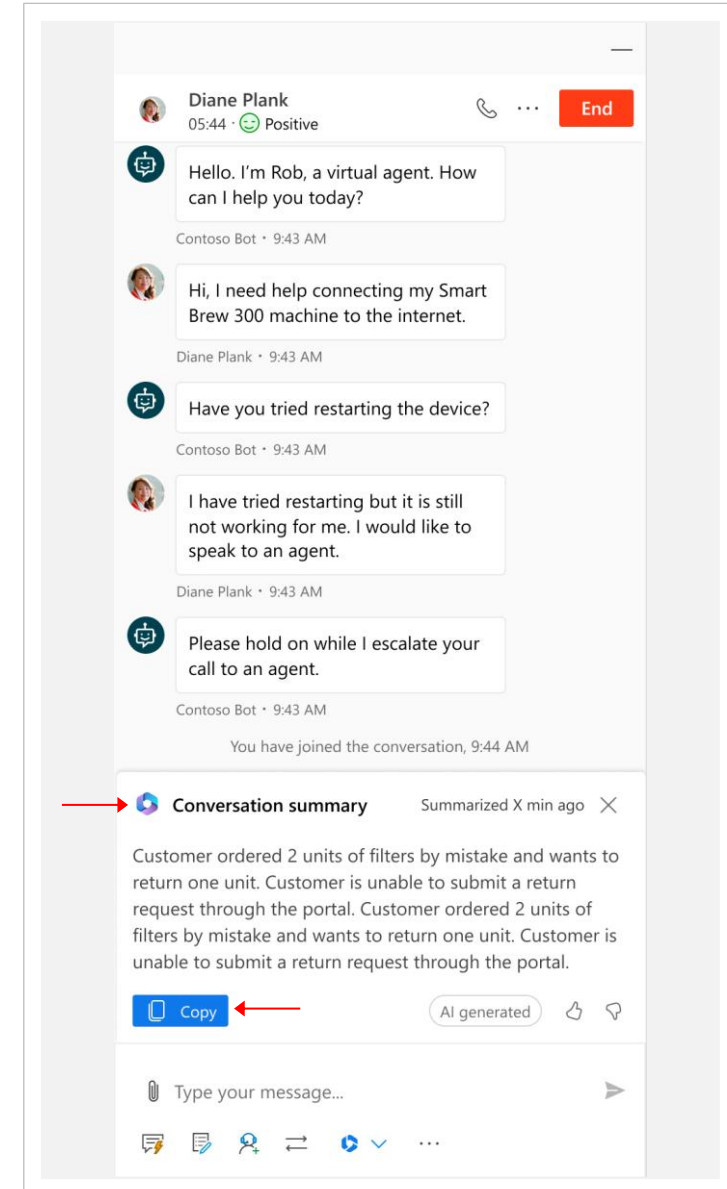
- Knowledge chat for support content discovery
- Agents can leverage a powerful, conversational interface to ask questions, ask follow ups and gather answers from their organization's knowledge sources.



Copilot summarization and analytics capabilities

Live conversation summaries

Support agents can have automatic **conversation summaries** delivered to them accelerating wrap ups and handoffs.



Copilot summarization and analytics capabilities



Get a jump start on cases

Support agents can get a 60 second summary of a long running case including the notes, emails and conversations in the timeline shaving minutes off their ramp up.


Details


Attachments (4)



Related

 **Case summary** 


Customer Diane Plank reached out on April 1, 2023, via live chat about an issue with their Azure Virtual Machine where they can no longer connect via remote desktop. They had made a recent change to the port range in their VM from the network security group settings, but otherwise they mentioned they had not made any other changes. On April 2, 2023 the networking support team also evaluated the case. They are part of the VIP support plan, account number ABC-123-Contoso. They said they already looked on learn.microsoft.com.


 Copy





AI generated  


Timeline

 Search

 Enter a note

 Created: 5/11/2022 10:00 AM

 Email Status

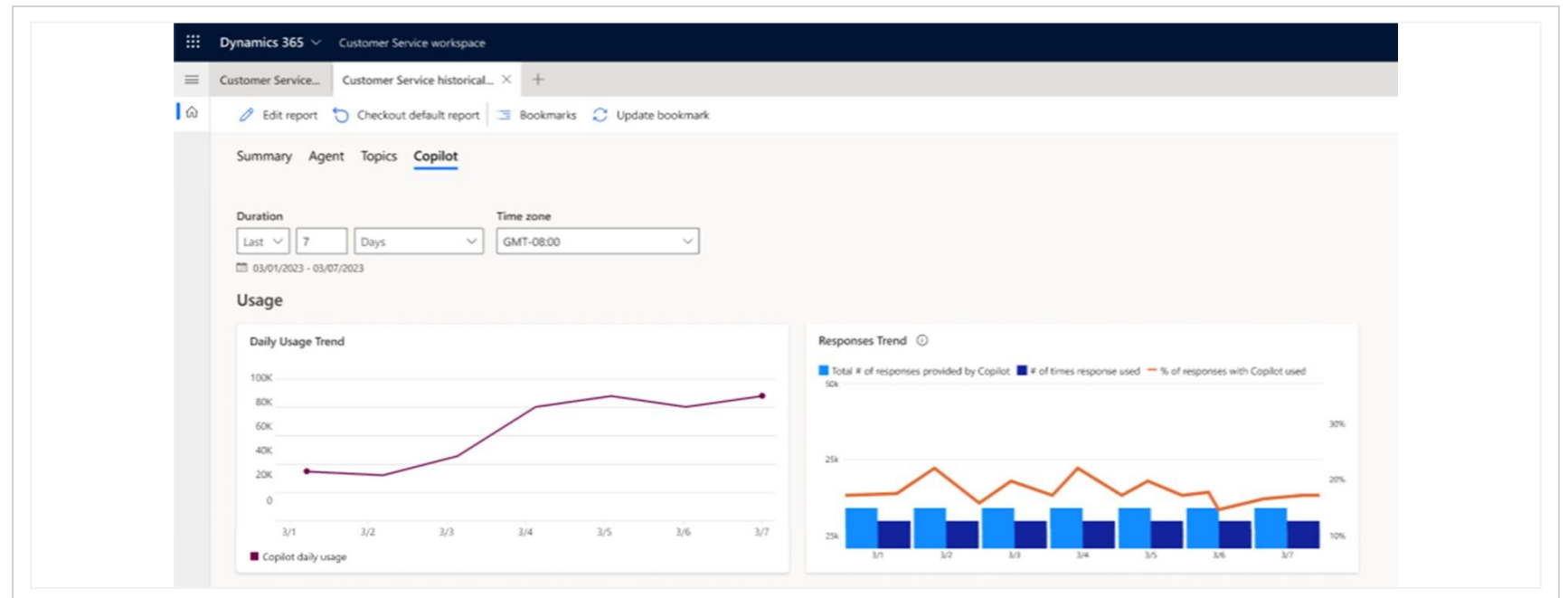
From:  Diane Plank

Issue detected for your Azure

Copilot summarization and analytics capabilities

Review agent productivity improvements

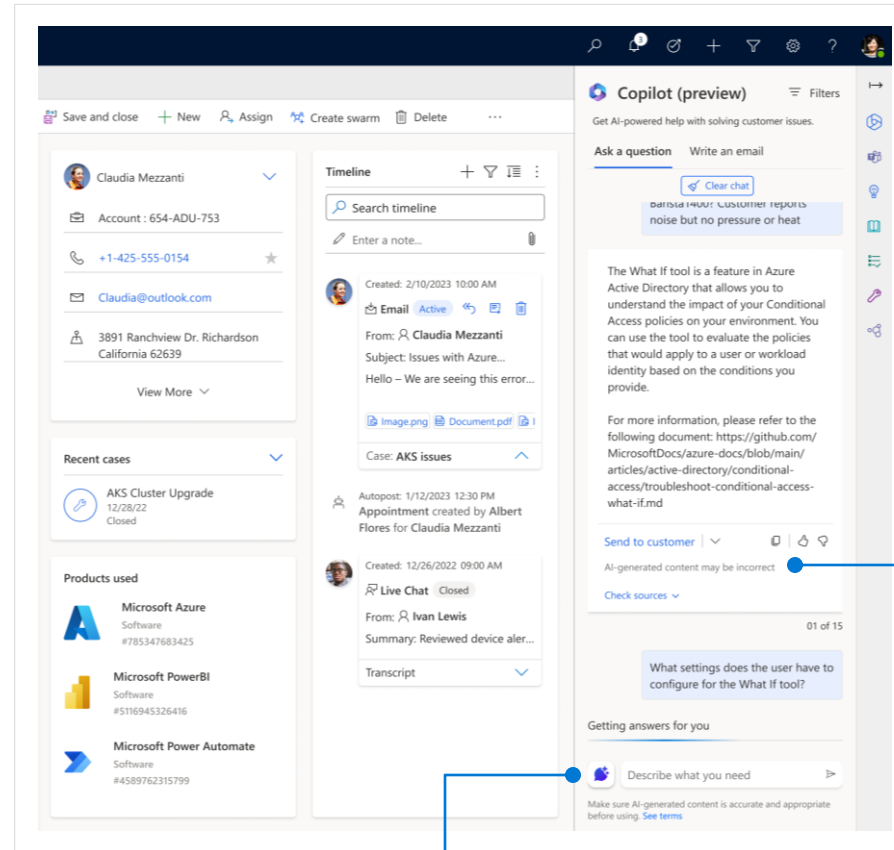
Support managers have a detailed view into Copilot usage by agent groups, and how it's impacting key support metrics including handle times, throughput and more through intuitive out of box reports.



A conversational expert, at your fingertips

Agents no longer need to spend time searching through multiple web pages, Wiki's, knowledge articles.

They receive answers instantly and can continue to ask questions.



Naturally conversational, channel independent

Agents can leverage a powerful, conversational interface to ask questions, ask follow ups and gather answers from their organization's data. How they use it, is up to them.

Powerful search paired with responses drafted by generative AI

Leveraging the power of internal document search, Copilot finds the right information no matter where it is so that it always has the **latest knowledge**. Add on generative AI to synthesize, and the result is rich, masterfully crafted responses.

Celebrate every thumbs up, and learn from every thumbs down

Copilot is only as good as the content it's grounded with. By making feedback signals available in each customer's Dataverse instance, you can always review and understand how to improve content.

Deliver better email service in way less time

In seconds, Copilot can draft contextual customer service emails that would take several minutes from scratch. The more complex and contextual your email, the bigger your time savings.

What kind of email do you want?

Choose the type of response that you want or enter a custom description. [Learn more](#)


Suggest a call

Request more information

Empathize with feedback

Provide product/service details

Resolve the customer's problem

 Describe what you want

Draft replies with a click

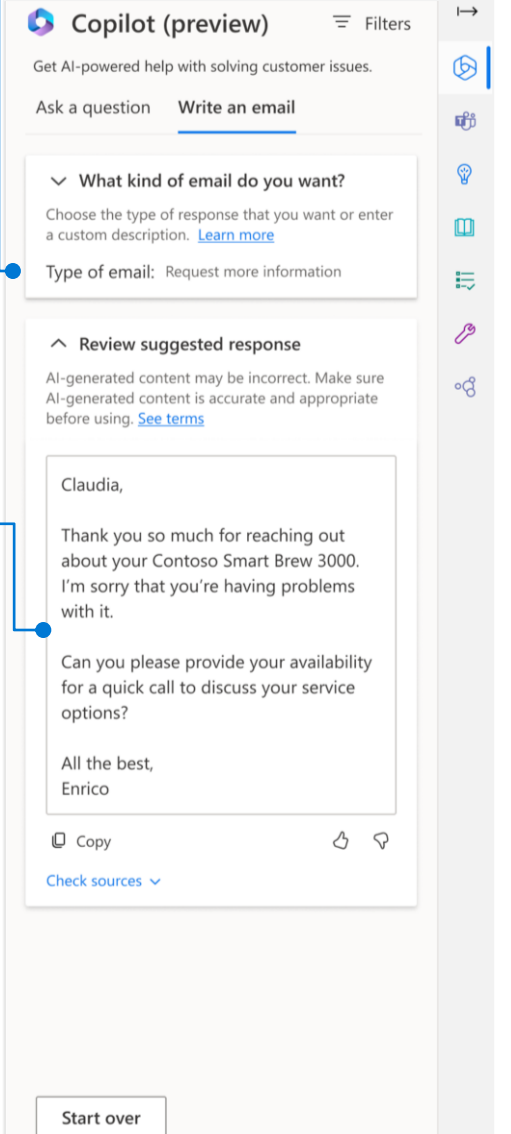
Select from the pre-defined intents and your email is drafted. You can also provide your own custom intent.

Fine-tune your intents

Whether you've used a pre-defined intent or provided a custom intent, you can refine it to craft the perfect response to your customer.

Craft personalized, contextual emails in just seconds.

Copilot uses the context of your email conversation, and case details to produce personalized, contextual emails. It's never been easier to solve your customer's issues.



The screenshot shows the Copilot (preview) interface. At the top, it says "Get AI-powered help with solving customer issues." Below this are two tabs: "Ask a question" and "Write an email". The "Write an email" tab is active. Underneath, there's a section titled "What kind of email do you want?" with a subtext "Choose the type of response that you want or enter a custom description. [Learn more](#)". Below this, it says "Type of email: Request more information". There's a "Review suggested response" section with a warning: "AI-generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. [See terms](#)". The main content area shows a drafted email: "Claudia, Thank you so much for reaching out about your Contoso Smart Brew 3000. I'm sorry that you're having problems with it. Can you please provide your availability for a quick call to discuss your service options? All the best, Enrico". At the bottom, there are "Copy" and "Check sources" buttons, and a "Start over" button at the very bottom.

Wrap up that last conversation, fast with Copilot

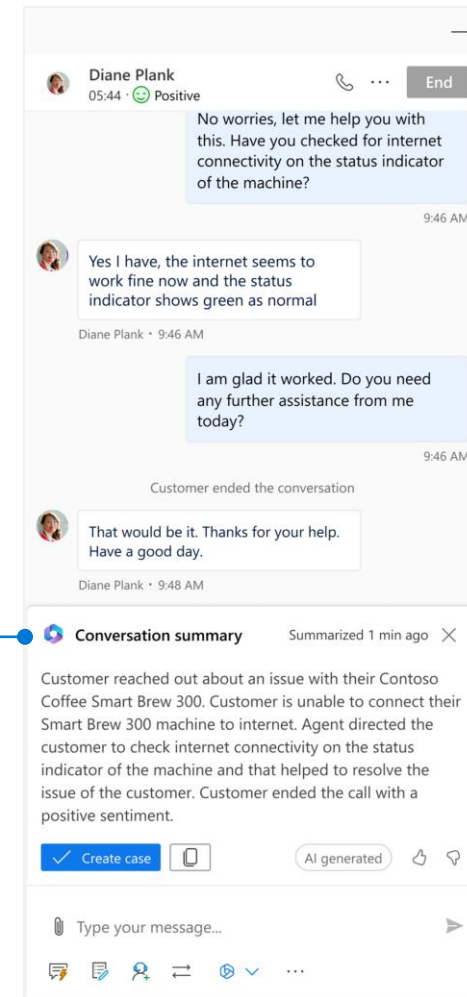
AI-generated summaries help agents quickly wrap up conversations, share context with colleagues, and catch up on what happened. Teams don't have to spend time writing summaries or skimming conversations to get context.

Always available when you need it.

Whether it's at the handoff from a virtual agent, during a consult, or at the end of the conversation, conversation summaries capture the most important highlights meaning agents no longer need to scroll up through the conversation or ask a customer the same question twice.

Copilot powered conversation summaries.

Deliver automatic summaries of conversations to your agents in the structure and style that makes sense for your organization.



Mocks for illustrative purpose only

Get up to speed on a case, fast with Copilot

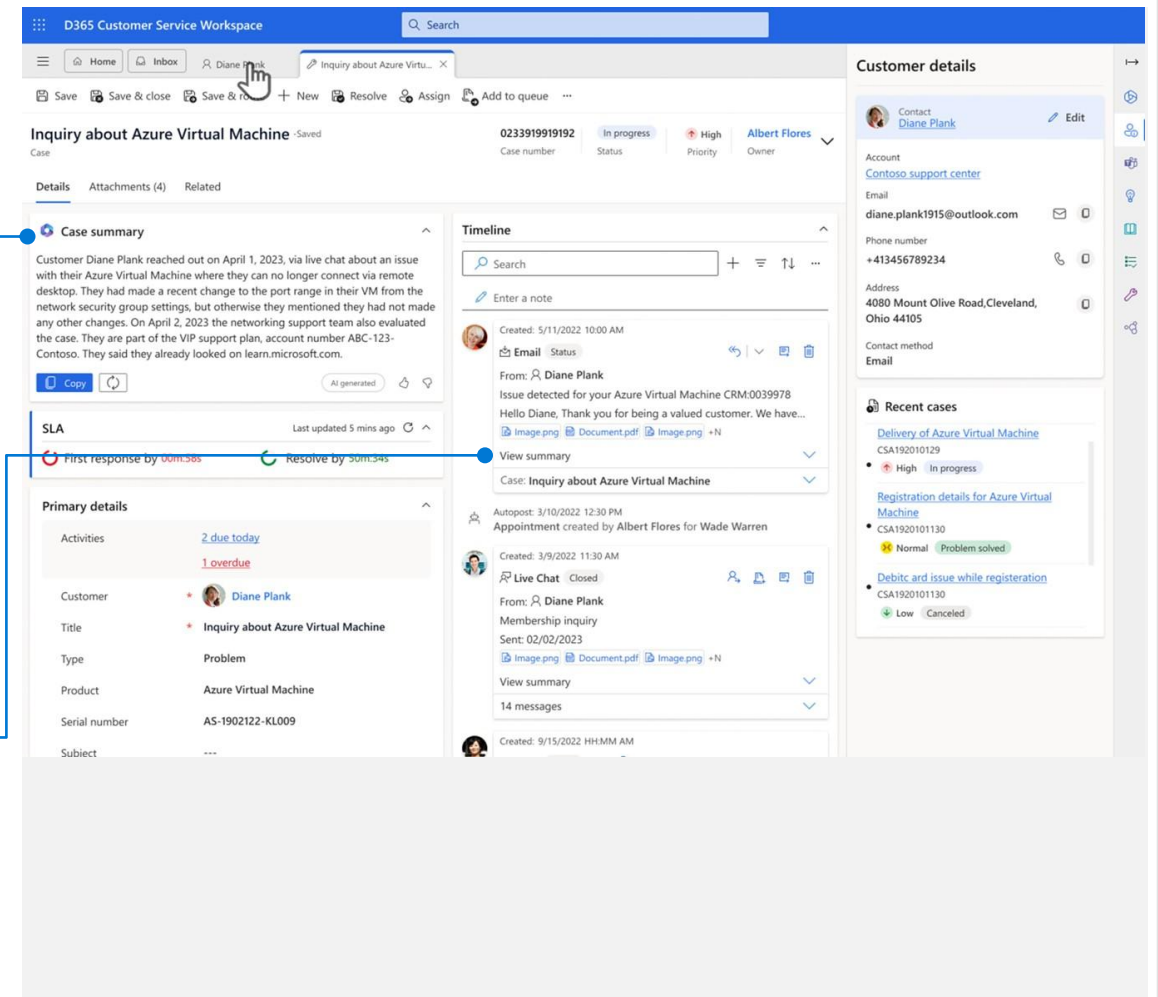
AI-generated summaries help agents quickly wrap up conversations, share context with colleagues, and catch up on what happened. Teams don't have to spend time writing summaries or skimming conversations to get context.

Available in a single click on any case form

You and your colleagues can get a summary of a case in any case form by simply opening the summary when you need it and collapsing when you don't.

Capturing the history in the timeline

Case summaries use key case fields, the notes, emails and conversations captured in the timeline as input so that anyone on the team can pick up right where the case was left off.



Mocks for illustrative purpose only

Understand how Copilot is being used and benefiting your business

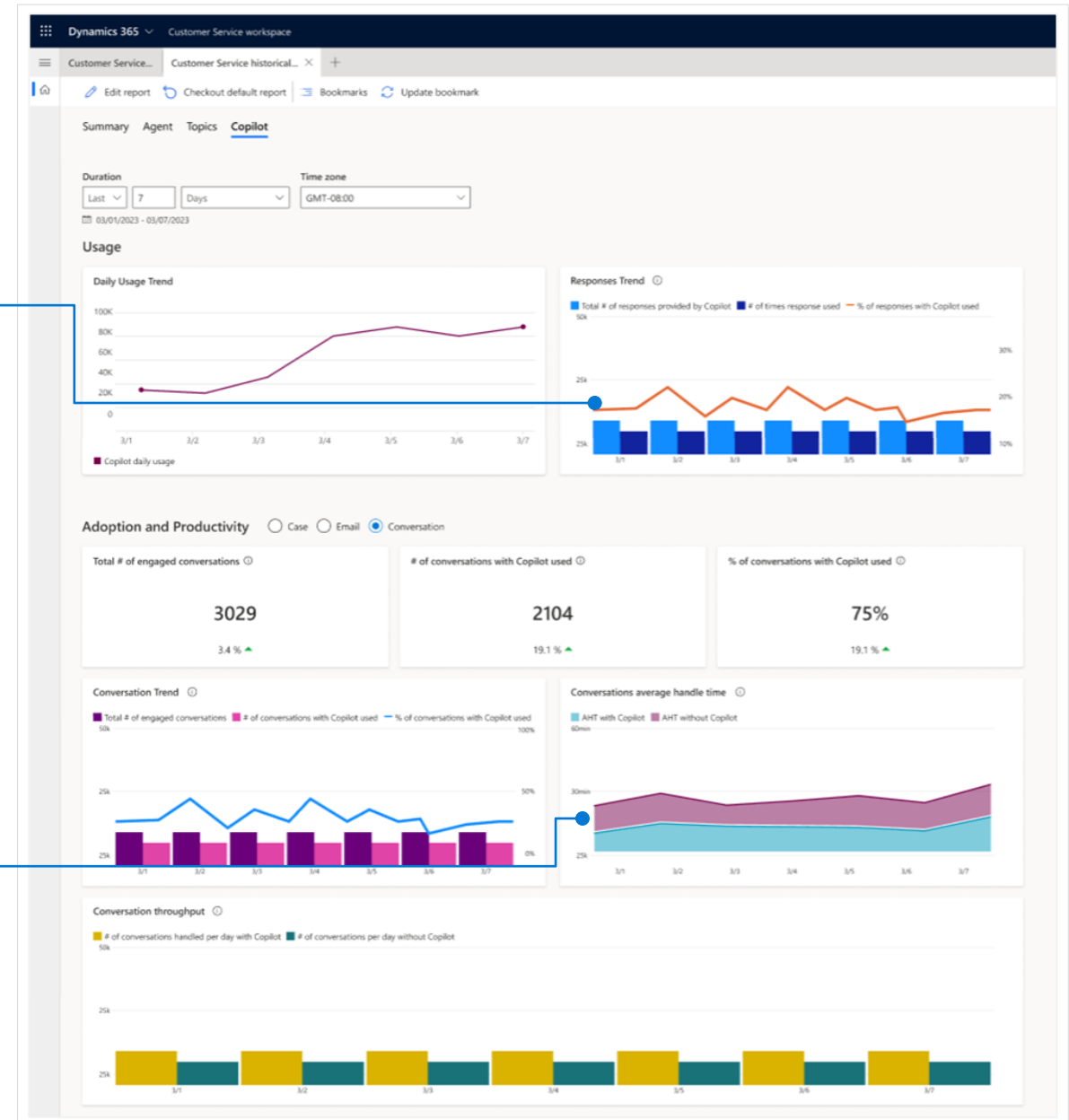
View Copilot usage alongside your primary operational metrics such as AHT, throughput and more

Adoption of Copilot generated responses by agents

Review how often are agents attempting to use Copilot, and how often do they end up utilizing a response, summary or email generated by Copilot

Understand agent productivity improvements

Agents should be able to improve how efficiently they are able to handle customer conversations, cases or emails thanks to Copilot.



Mocks for illustrative purpose only

Navigate multiple cases quickly

Work multiple cases and handle conversations in a tabbed browser like experience.

Dynamics 365

Customer Service workspace

SANDBOX

Home

Bob requesting paternity leav...

Average order shipment time ...

Contact information reque... X

Save

Save & Close

Save & Route

Refresh

New

Resolve Case

Cancel Case

Assign

Add to Queue

Queue Item D

Contact information requested (sample) - Saved

Case · Case for Multisession experience ▾

Summary

Details

Related ▾

Case Title *

Contact information requested (sample)

Customer *

Alpine Ski House (sample) X

Subject

Information

Priority

Normal

Case Status

In Progress

Product

Case Summary

Timeline

Search timeline

Enter a note...

Recent

Auto-post on Case Contact information requested (sample): 5/2/2023, 10:57 AM
Case created by Ali Youssefi for Account Alpine Ski House ...

Keep context of related records to each case

Work multiple cases and handle conversations in a tabbed browser like experience.

The screenshot displays the Dynamics 365 Customer Service workspace in a 'SANDBOX' environment. The interface features a top navigation bar with the Dynamics 365 logo and 'Customer Service workspace'. Below this is a breadcrumb trail: Home > Bob requesting paternity leav... > Average order shipment time ... > Contact information reque... The main content area is divided into two panes. The left pane, titled 'Alpine Ski House (sample) - Saved Account', shows the 'Summary' tab with 'ACCOUNT INFORMATION'. This section includes a contact card for 'Paul Cannon (sample)' with a 'PC' icon, an email field containing 'someone_h@example.c...', and a business phone field containing '555-0107'. The 'Account Name' field at the bottom is set to 'Alpine Ski House (sample)'. The right pane, titled 'TIMELINE', contains a 'Timeline' section with a search bar and a 'Recent' list. The first item in the recent list is an 'Auto-post on Case Contact information requested (... 5/2/2023, 10:57 AM)' created by 'Ali Youssefi for Account Alpine Ski House ...'. The interface uses a clean, modern design with a dark blue header and a light gray background.

Smart Assist to quickly find relevant cases and KB

Use tools such as Smart Assist to boost productivity.

The screenshot displays the Dynamics 365 Customer Service workspace in a 'SANDBOX' environment. The main interface shows a case titled 'Bob requesting paternity leave information' - Saved, with a case number 'CAS-01035-G6J8X4' and a creation date of '9/19/2023 8:13 AM'. The case is assigned to 'Ali Youssefi'. The left sidebar contains fields for Case Title, Customer (Bob EMEA HR Manager), Subject (HR - Europe, Middle East and Africa), Priority (Normal), Case Status (In Progress), and Product. The right sidebar, titled 'Smart assist', features 'Knowledge article suggestions' and 'Similar case suggestions'. The 'Knowledge article suggestions' section lists three articles related to 'Bonding Leave' for different regions (NAM, APJ, EMEA), each with a confidence score and relevance indicators. The 'Similar case suggestions' section shows a case titled 'Question on paternity leave' resolved on 9/18/2023 by Ali Youssefi, with a confidence score of 85%.

Bob requesting paternity leave information - Saved
Case · Case for Multisession experience

CAS-01035-G6J8X4
Case Number

Origin

9/19/2023 8:13 AM
Created On

Ali Youssefi
Owner

Smart assist

Knowledge article suggestions

Bonding Leave - NAM
This article describes the benefits of Parental (Bonding) Leave for an employee.
① • 75% confidence • Relevant? Yes No

Bonding Leave - APJ
This article describes the Parental (Bonding) Leave for an employee.
① • 74% confidence • Relevant? Yes No

Bonding Leave - EMEA
This article describes the benefits of Parental (Bonding) Leave for an employee.
① • 73% confidence • Relevant? Yes No

Similar case suggestions

Question on paternity leave
Resolved • 9/18/2023 • Ali Youssefi
Customer confirmed
① • 85% confidence • Relevant? Yes No

Introducing Customer Service Copilot

The screenshot displays the Dynamics 365 Customer Service workspace interface. The top navigation bar includes the Dynamics 365 logo, the workspace name 'Customer Service workspace', and a 'SANDBOX' label. The right side of the header features a 'New look' toggle and various utility icons. Below the header, a breadcrumb trail shows the current case: 'Bob requesting paternity leave information'. A secondary breadcrumb trail indicates the user's role: 'Bob EMEA HR Manager'. The main toolbar contains actions such as 'Save', 'Save & Close', 'Save & Route', 'Refresh', 'New', 'Resolve Case', 'Cancel Case', 'Assign', 'Add to Queue', 'Queue Item Details', and 'Share'. The case details section shows the title 'Bob requesting paternity leave information - Saved', the case number 'CAS-01035-G6J8X4', the origin '---', the creation date '9/19/2023 8:13 AM', and the owner 'Ali Youssefi'. The left sidebar contains a form for case details, including fields for Case Title, Customer, Subject, Priority, Case Status, Product, and Description. The right sidebar, titled 'Smart assist', provides knowledge article suggestions and similar case suggestions. The main content area displays the case summary and a timeline of recent activities.

Case Details:

- Case Title: Bob requesting paternity leave information
- Customer: Bob EMEA HR Manager
- Subject: HR - Europe, Middle East and Africa
- Priority: Normal
- Case Status: In Progress
- Product: ---
- Description: ---

Case Summary:

Timeline:

- Recent**
- Modified on: 8:15 AM**
Note modified by Ali Youssefi
Sent initial email to contact
Sent email requesting more information from Bob
View more
- Modified on: 8:15 AM**
Email from: Ali Youssefi (Active)
Initial Response
Dear Bob EMEA HR Manager, Thank you for reaching out to us regarding your request for paternity leave information. We would b...
View more

Auto-post on Case Bob requesting paternity leave information: 8:13 AM
Case created by Ali Youssefi for Contact Bob EMEA HR M...

Smart assist:

- Knowledge article suggestions**
- Bonding Leave - NAM**
This article describes the benefits of Parental (Bonding) Leave for an employee.
75% confidence • Relevant? Yes No
- Bonding Leave - APJ**
This article describes the Parental (Bonding) Leave for an employee.
74% confidence • Relevant? Yes No
- Bonding Leave - EMEA**
This article describes the benefits of Parental (Bonding) Leave for an employee.
73% confidence • Relevant? Yes No
- Similar case suggestions**
- Question on paternity leave**
Resolved • 9/18/2023 • Ali Youssefi
Customer confirmed
85% confidence • Relevant? Yes No

Deep Dive: Case Summary



Contoso Coffee uses Dynamics 365 Customer Service for managing internal cases. In this scenario Bob, a manager based in Europe, is requesting more information regarding upcoming bonding leave.



Bob has sent an email to Contoso Coffee HR support for help and has received a response with his case identifier.

Deep Dive: Case Summary (Continued)



The support agent has reviewed the initial email and replied to Bob with an email drafted by Customer Service Copilot.

Modified on: 8:15 AM

Email from: Ali Youssefi

Active

Initial Response

Dear Bob EMEA HR Manager,

Thank you for reaching out to us regarding your request for paternity leave information. We would be happy to assist you with this matter.

In order to provide you with the most accurate and helpful information, could you please provide us with the following details:

- How long are you planning to take paternity leave for?
- When are you planning to take your paternity leave?
- Are you planning to take your paternity leave all at once or in multiple periods?

Once we have this information, we will be able to provide you with the necessary information and guidance to help you with your paternity leave request.

Thank you for your cooperation and we look forward to hearing back from you soon.

Best regards,
Ali Youssefi

Modified On: 8:15 AM



View less

Deep Dive: Case Summary



The support agent has created a note detailing that he has reached out to Bob.

Modified on: 8:15 AM

 **Note modified by**  Ali Youssefi

Sent initial email to contact
Sent email requesting more information from Bob

Modified On: 8:15 AM

View less



Deep Dive: Case Summary



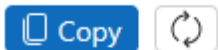
The support agent now has a case summary available showing details from both the email and the notes created.



This is helpful for case transfer, historical analysis and feedback.

Case Summary

Bob, an EMEA HR Manager, has reached out to request information regarding paternity leave. In response, the support team has requested more information from Bob, including the duration and timing of his leave, as well as whether he plans to take it all at once or in multiple periods. Once this information is provided, the support team will be able to provide Bob with the necessary guidance and information to help him with his paternity leave request.



AI generated



Intended Usage



Customer service representatives can use Copilot's knowledge-based responses to save time from searching knowledge articles and drafting responses. Copilot summaries are designed to support agents in quickly ramping up on cases and conversations.



Content generated by Copilot in Customer Service isn't intended to be used without human review or supervision.

Knowledge Base best practices



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 minimize 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.

Grounding and Semantic Search



Copilot uses an approach called **grounding**, which involves adding additional information to the input to contextualize the output to your organization.



It uses **semantic search** to understand the input and retrieve relevant internal organizational documents and trusted public web search results, and guides the language model to respond based on that content.

Summarize and Expand



Asking Copilot to “**summarize the response**” will result in a concise answer to the question.



Asking Copilot to “**Provide more details**” will result in a more detailed answer to your question. If the response is truncated, typing “**continue**” will display the remaining part of the response.

Summary

Copilot in Dynamics 365 Customer Service helps agents to complete tasks related to conversations, cases, and email more easily.

With the Copilot report in Customer Service historical analytics, supervisors and customer service managers can identify the impact that Copilot is having across their customer service operation.

