Copilot in Dynamics 365 Customer Service

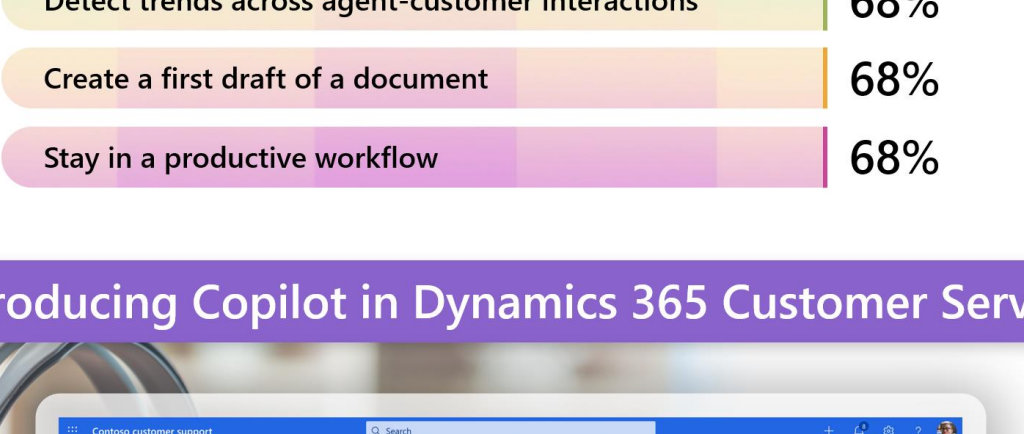Transforming your agent experience with generative AI

- **Dynamics 365 Customer Service** lets you take customer requests from any channel, handle multiple sessions at a time, interact with multiple apps without losing context, and enhance your workflow with modern productivity tools—all so your people can deliver the best service experience possible to your customers.
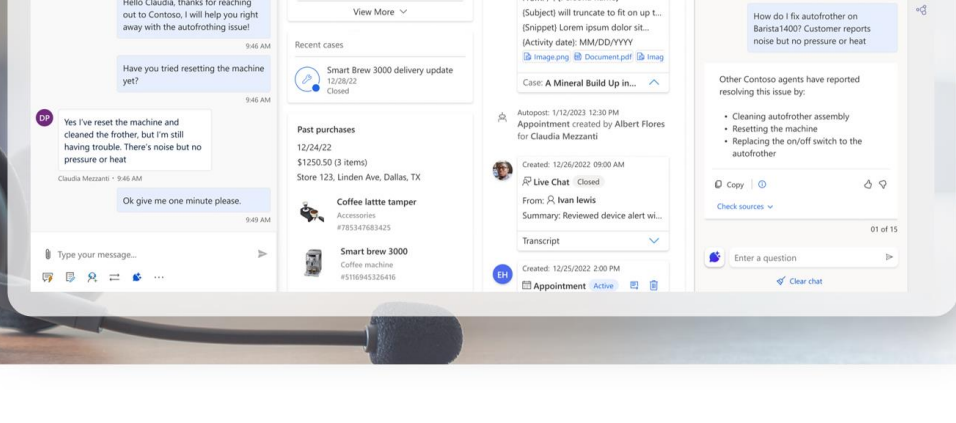
- **Copilot in Dynamics 365 Customer Service** provides real-time assistance to help you automate time-consuming tasks, resolve issues faster, and handle cases more efficiently so you can keep your focus on the customer experience.

The impact of AI on customer service teams

How customer service teams say AI would improve their performance the most[1]

Find the information they need	75%
Intelligently route issues to appropriate agents	70%
Detect trends across agent-customer interactions	68%
Create a first draft of a document	68%
Stay in a productive workflow	68%

Introducing Copilot in Dynamics 365 Customer Service

Copilot in Customer Service capabilities

Transform your agent experience with these five tools

Conversation Summary and Case Summary

What they do

Conversation Summary and Case Summary give you fast, automated recaps of chats and long-running cases. Conversation Summary includes the steps you took to solve the case, while Case Summary relays key details like case title, product, and priority. You can then copy and paste those summaries into peer chats to quickly brainstorm solutions with expert colleagues.

How they help you

With less time spent reviewing and writing summaries, you can spend more time doing what you love: serving customers. Not only is your time better spent, but Copilot summarization features can help you meet customer case quotas more efficiently.

> Now the whole process [of summarizing and sharing cases] is taking **15 minutes or less**, where it used to take 30 or 40 minutes. You're getting your best engineers to more customers."
>
> — Michael Simmons, Support Escalation Engineer
> Microsoft Seattle, USA[2]

Ask a Question

What it does

With Ask a Question, Copilot acts as your everyday assistant to find the right answers without searching through disparate knowledge sources, like internal documentation and external wikis. Simply ask Copilot a question using natural language in a chat-based interface, then edit the answers to personalize. You can also ask Copilot follow-up questions and probe for better responses. The solution lists the knowledge sources so you can respond to customers with confidence.

How they help you

Resolving customer issues has a domino-effect on your day as an agent. If you're bogged down in research on one problem, all your other cases and customers suffer too—not to mention your own productivity. Ask a Question keeps your day moving. It's also helpful for onboarding new hires, who won't have the quick intrinsic knowledge of veteran agents.

79% of leaders believe knowledge management and insights are extremely or very important to achieving their org's goals.[3]

Write an Email

What it does

Writing a good email takes time. Emails must be succinct with the right details and tone. Copilot automates much of this effort with Write an Email. Copilot automates much of this effort with Write an Email. You can choose from a set of predefined prompts to guide Copilot to create the exact email you want. Copilot then produces a baseline email draft, which, just like Ask a Question, you can further edit and customize before copying it into the Dynamics 365 email interface.

How they help you

Write an Email helps you serve more customers and connect with existing customers faster. The feature takes the heavy lifting out of responding to or closing inquiries, improving both customer satisfaction and your own efficiency.

> Whenever you communicate with a customer, you want to be sure you're picking the right words. It **saves so much of my time** by having Copilot ready to translate my thoughts and my way of speaking into the right tone."
>
> — Joiah Nadrack, Support Escalation Engineer
> Microsoft Charlotte, USA[2]
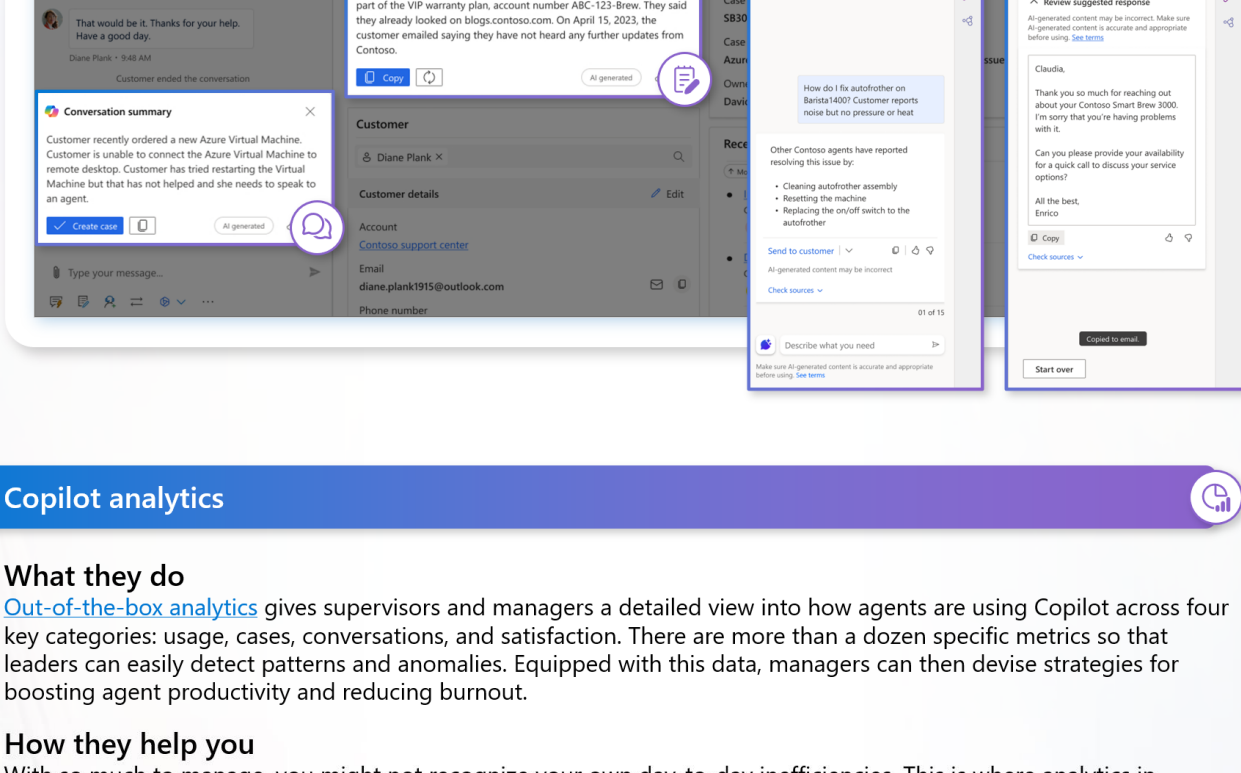
Copilot analytics

What they do

Out-of-the-box analytics gives supervisors and managers a detailed view into how agents are using Copilot across four key categories: usage, cases, conversations, and satisfaction. There are more than a dozen specific metrics so that leaders can easily detect patterns and anomalies. Equipped with this data, managers can then devise strategies for boosting agent productivity and reducing burnout.

How they help you

With so much to manage, you might not recognize your own day-to-day inefficiencies. This is where analytics in Copilot, along with supportive leadership, can help. Uncovering these areas for improvement serves both you and your customers: you'll feel more accomplished at work while giving your customers the best possible experience.

55% of contact center reps spend 6-12 weeks training and onboarding new agents.[4]
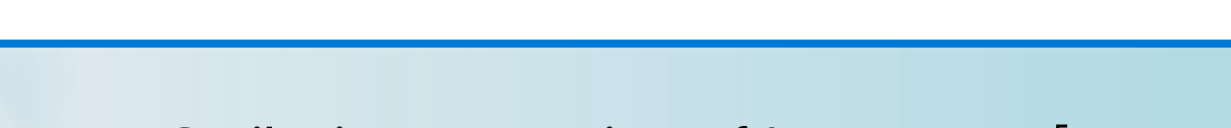
Surface agent insights around Copilot usage, adoption, productivity, and more

Copilot impact on Microsoft's own agents[5]

| Microsoft agents are **serving more customers**	Microsoft agents are **faster when helping customer**	Microsoft junior agents are **becoming super agents**
9-12% increase in number of cases and chats support agents manage	**12-16%** decrease in Average Handle Time for chat cases	**13%** increase in cases resolved without the need for assistance from peers
9% faster First Response rate	**7.5%** reduction in Days to Close	**13%** reduction in Days to Solution

> It's helping me with a **much better work-life balance.** Devoting more time to building connections with my team, building connections with my peers, [and] personal development as well."
>
> — Mayte Cubino Gonzalez, Director of Engineering Support, Microsoft Lisbon, Portugal[2]

Introducing Copilot for Service

Generative AI for your existing contact center solution

Copilot for Service in Salesforce

Copilot for Service in Outlook
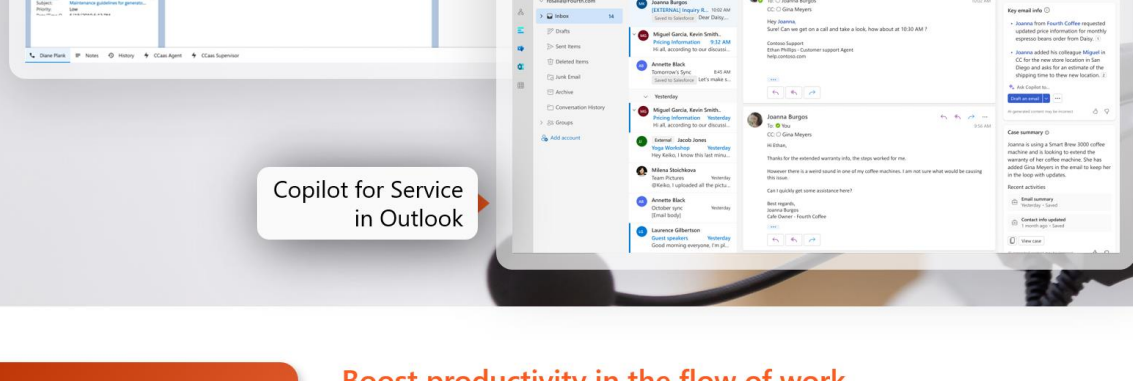
Copilot for Service uses generative AI to connect with your existing contact center systems and organizational knowledge sources. By synthesizing vast amounts of data, Copilot for Service provides relevant, timely guidance in your flow of work.

Learn more on the Copilot for Service website

Boost productivity in the flow of work

Get many of the same Copilot in Customer Service capabilities, like summaries, Ask a Question, and Write an Email, to gain efficiencies in your day-to-day work from productivity tools like Outlook, and Teams, and directly in existing agent desktops.

Connect trusted knowledge sources

Use out-of-the-box integrations with services such as Salesforce, ServiceNow, and Zendesk and connect to trusted knowledge sources like public websites, SharePoint and offline files.

Infuse generative AI into contact centers

Point and click to get set up, then customize with additional topics and automated workflows using Microsoft Copilot Studio—no coding required. Plus, extend the solution with more than 1,000 connectors to eliminate expensive integration efforts.

A day in the life of an agent

with Copilot in Dynamics 365 Customer Service*

Get case context

Ethan, an agent at Fourth Coffee, receives a follow-up email from his long-time customer Joanna about extending the warranty of her coffee equipment. Using Copilot in Customer Service, Ethan quickly generates a case summary in Outlook that includes past email and CRM records from his working case to get up to speed.

Quickly respond

Equipped with this context, Ethan asks Copilot for help in drafting an email response. Copilot presents five predefined topic prompts, and Ethan selects "Request more information." Copilot then suggests a draft, which Ethan tweaks for a more personal touch before sending.

Recap the chat

Later that day, Joanna sends Ethan additional details over Teams chat. They finalize the warranty extension, but Joanna mentions her espresso machine is acting up. She gives him more details and, after they say goodbye, Ethan asks Copilot in Customer Service to generate a conversation summary.

Keep improving

Later that week, Ethan's manager Zoe is conducting her quarterly review of Copilot in Customer Service analytics. Her team's case throughput is low, so is their daily Copilot usage. Zoe knows Ethan is a big fan of Copilot, so she asks him to be a more vocal champion in the coming quarter.

Close the case

Jose sends his solution to Ethan, who closes the case in Customer Service to draft a follow-up email to Joanna, this time selecting the "Resolve the customer's problem" prompt. He sends the email and, after hearing the solution worked, officially closes Joanna's case.

Find answers fast

Ethan copies that summary and sends it to his colleague Jose, a hardware expert. Jose leverages Copilot in Customer Service to ask questions about the espresso machine issue that will supplement his own knowledge. Copilot quickly browses disparate knowledge sources to produce answers that help Jose solve the problem.

*If Ethan had Copilot for Service, these tasks could be completed in his existing agent desktop and productivity tools by pulling information from contact center systems like Salesforce, ServiceNow and Zendesk, and trusted knowledge sources.

A quick note on security and privacy

Copilot is built on Microsoft's comprehensive approach to security, compliance, and privacy. It inherits all the same policies and processes as Dynamics 365, as well as those used at your company.

You control your data	We process your data responsibly	We secure and defend your data

Read our security and privacy blog and FAQ to learn more

> In any conversation about AI, there are fears about what it can do. I'm proud to be working with Microsoft, a company that's **responsible about how it's used,** and show how it can improve our work in an innovative way."
>
> — Michael Simmons, Support Escalation Engineer, Microsoft Seattle, USA[2]

Visit the Dynamics 365 Customer Service website to learn more