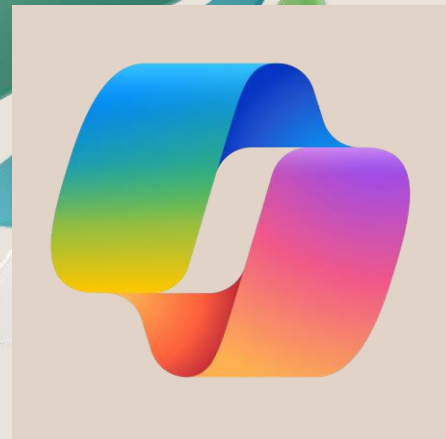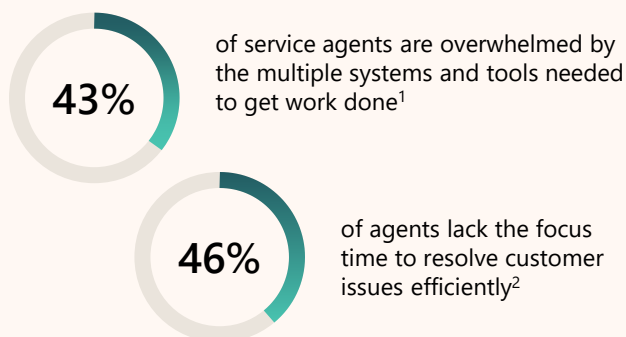Microsoft

Modernize your contact center with a Copilot designed for service

Transform service with the AI-powered virtual assistant that helps agents resolve customer issues more efficiently

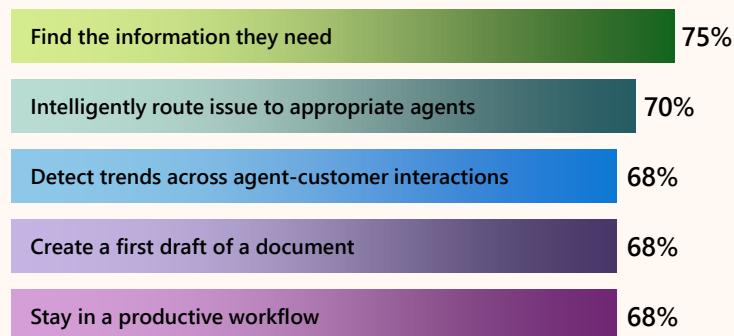## The service agent role is more demanding than ever

43% of service agents are overwhelmed by the multiple systems and tools needed to get work done[1]

46% of agents lack the focus time to resolve customer issues efficiently[2]

Top challenges

1. Increased workload and customer demands
2. Disparate tools and knowledge sources
3. Systems and tech modernization hurdles

What do agents want from AI?

Agents are more likely to adopt and use tools that solve their most critical challenges. Surveyed customer service professionals said that AI tools and technologies would have a positive impact on their performance, reducing time and effort to complete common workday tasks.

Share of respondents who agree AI would help them...

Find the information they need	75%
Intelligently route issue 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%

Maximize agent productivity in the flow of work

Copilot brings your customers and contact center together with next-generation Microsoft integration with your CRM, knowledge base and productivity applications—including Microsoft 365 and popular customer service platforms, such as Dynamics 365, Salesforce, ServiceNow and Zendesk.

Stay in the flow of work

Enable agents to access Copilot in Outlook and Copilot in Teams to summarize cases, update CRM records, and draft emails.

Get answers in moments

Empower agents to respond to customers with generative AI-powered answers from knowledge base articles, documentation, agent handbooks, and other sources.

[1] Gartner. Gartner for Customer Service - The Connected Rep: Deliver better customer service by enabling reps with technology, 2023. [2] Work Trend Index 2023, Survey question: If artificial intelligence (AI) could help you with each of the following activities, how much of a positive impact do you think it would have on your performance at work?

Copilot can transform agent productivity

We surveyed 6,500 Microsoft service agents who used Copilot in Dynamics 365 and a control group of 5,000 who did not use Copilot[1]. The findings were impressive.
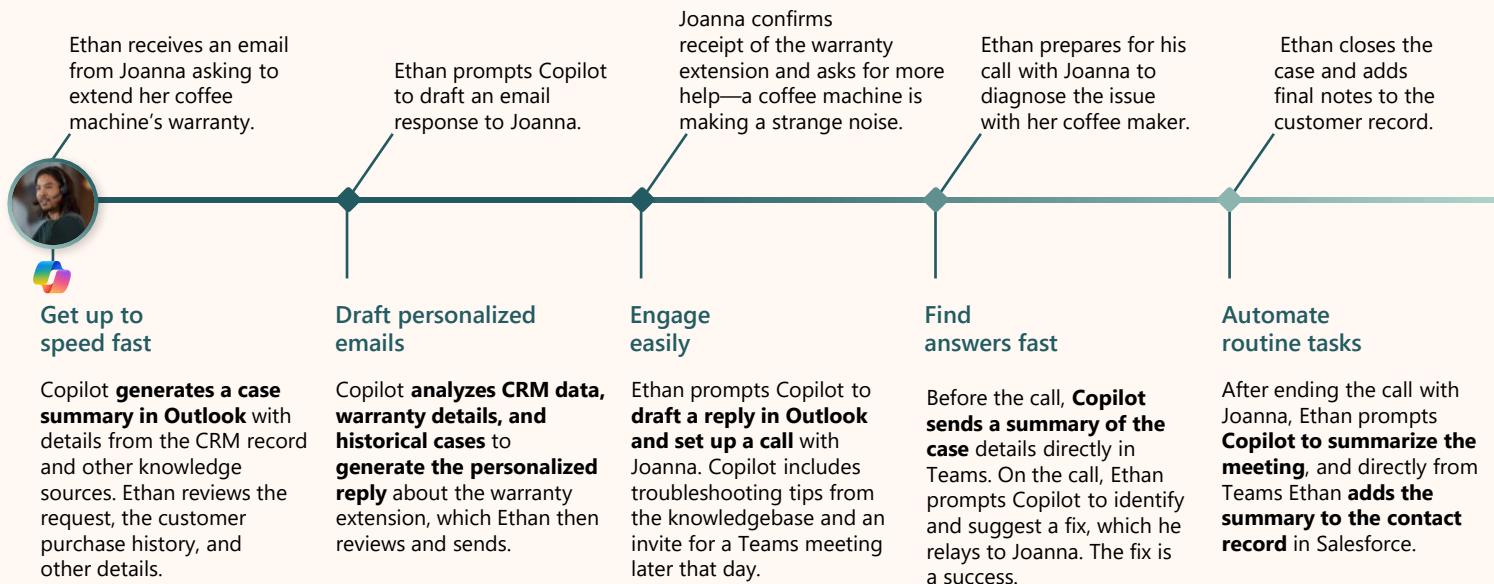
12-16%
reduction in time spent resolving a case

13%
decrease in the need for peer assistance

9-12%
increase in managed cases and chats

An agent's day-in-the-life with Copilot

Ethan, a service agent at coffee machine supplier Fourth Coffee, is contacted by a retail store owner, Joanna, about extending the warranty on a coffee machine. Copilot provides guidance at every step, helping Ethan to understand the need, access information and expertise to resolve the issue, and effectively communicate with the customer with exceptional service.

Ethan receives an email from Joanna asking to extend her coffee machine's warranty.

Ethan prompts Copilot to draft an email response to Joanna.

Joanna confirms receipt of the warranty extension and asks for more help—a coffee machine is making a strange noise.

Ethan prepares for his call with Joanna to diagnose the issue with her coffee maker.

Ethan closes the case and adds final notes to the customer record.

Get up to speed fast

Copilot **generates a case summary in Outlook** with details from the CRM record and other knowledge sources. Ethan reviews the request, the customer purchase history, and other details.

Draft personalized emails

Copilot **analyzes CRM data, warranty details, and historical cases** to **generate the personalized reply** about the warranty extension, which Ethan then reviews and sends.

Engage easily

Ethan prompts Copilot to **draft a reply in Outlook and set up a call** with Joanna. Copilot includes troubleshooting tips from the knowledgebase and an invite for a Teams meeting later that day.

Find answers fast

Before the call, **Copilot sends a summary of the case** details directly in Teams. On the call, Ethan prompts Copilot to identify and suggest a fix, which he relays to Joanna. The fix is a success.

Automate routine tasks

After ending the call with Joanna, Ethan prompts **Copilot to summarize the meeting**, and directly from Teams Ethan **adds the summary to the contact record** in Salesforce.

As Customer Zero for our solutions, we've been using Dynamics 365 Copilot in our own customer support organization—**11,500+ Microsoft service agents participated in evaluation of Copilot in Customer Service.**

"What Copilot helps me do is get through the administrative tasks faster so I can move on to the next call. Now the whole process is taking 15 minutes or less, where it used to take 30 or 40."

Michael Simons

Support Escalation Engineer, Microsoft

Copilot in Dynamics 365 Customer Service
Empower agents with generative AI and automation to provide better customer experiences using Microsoft Dynamics 365 Customer Service.

Microsoft Copilot for Service
Copilot for Service includes Copilot for Microsoft 365 and extends your existing contact center with generative AI to enhance service experiences and boost agent productivity.

→ Take the first step with guidance and resources at the Microsoft AI website.