REPLY

Copilot in D365 Customer Insights Journeys | Advanced

DYNAMICS 365 CUSTOMER INSIGHTS JOURNEYS – DYNAMICS 365 COPILOT

AI-powered Customer Experience • Dynamics 365 Customer Insights Journeys • Dynamics 365 Copilot

Level up on your Copilot skills! This session moves towards custom development, focusing on creating and refining use cases beyond the standard Copilot capabilities.

Consulting, training and development with 💓 made in Germany within the 🏃 Reply Group.

Copilot out-of-the-box capabilities
## in Customer Insights Journeys

Simplify audience targeting

Describe your target segments to Copilot and quickly build, review, and modify customer segments.

Tailor content quickly

Generate tailored content and headlines, branded emails, and captivating images for any segment with Copilot.

Create journeys easily

Simplify journey creation with Copilot by defining your business goals, target audience, or desired flows.
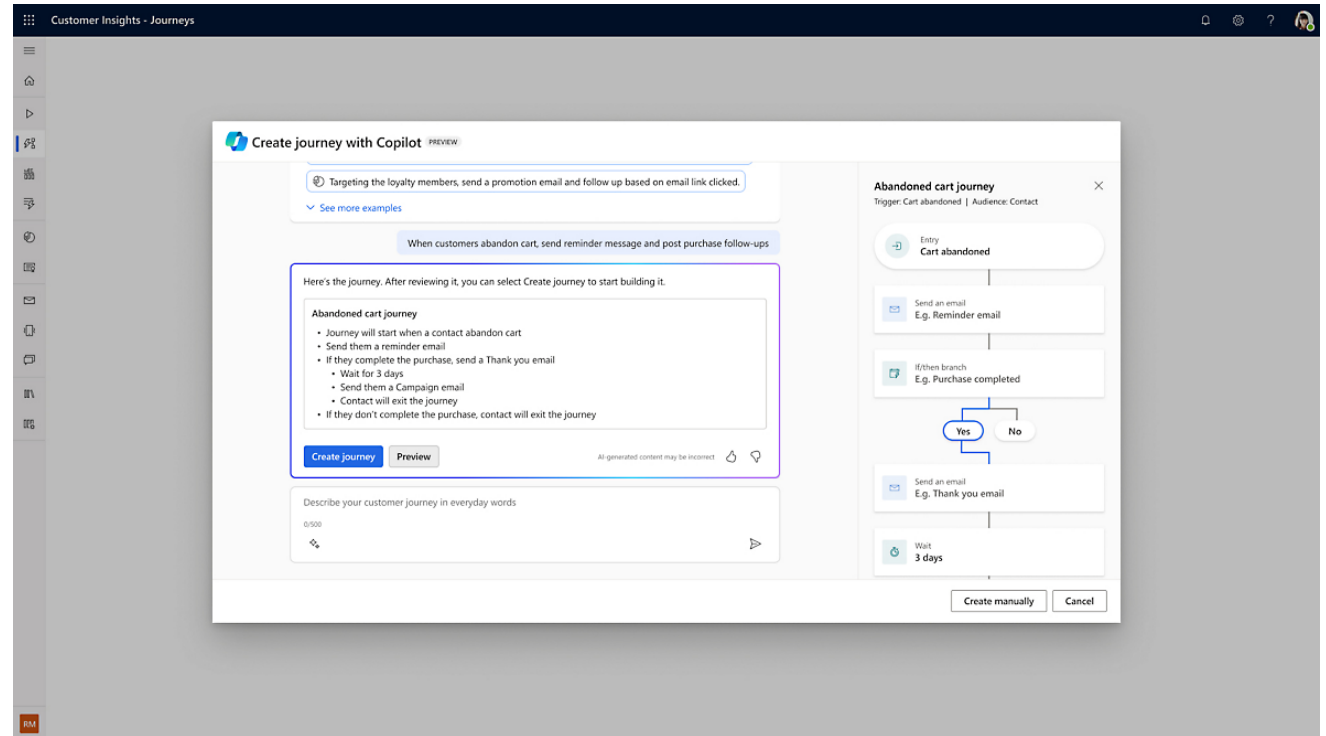
How to apply AI capabilities to your business?

(1) Business Value Assessment

Identify the marketing use cases you want to realize with AI.

- **Imagine and define** the future state of your processes.
- **Prioritize** key initiatives.
- **Align** business value goals to technology.

(2) Activation / Implementation*

Activate Dynamics 365 Copilot:

- **Choose** the appropriate **AI capabilities**
- **Identify** relevant **data sources** and **prepare/clean** the data if needed
- **Train** and **test** the functionality / **enable** users
- **Activate** and/or **integrate** into your business and marketing processes

Recommendation: When applying AI models always start with a PoC.

(3) Monitor and Evaluate Performance

Continuously monitor and evaluate the performance of the AI capabilities to **ensure it is meeting business goals** and adjust as needed.

Dynamics 365 Copilot

- Designed to help users navigate and interact with D365 more efficiently.
- Integrating the tool into the D365 applications and training the system to understand user commands and provide relevant responses.

*While Dynamics 365 Copilot out-of-the-box capabilities can be configured, activated and are ready to use within a view minutes, the development and training of e.g. own AI models can take more time – always start with asharp use case, conduct a proof of concpe (PoC) and compare outcomes with the initial business expectation.

Workshop offerings

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Beginners

Copilot for Beginners | D365 Customer Insights Journeys

3-hour-workshop, available in German and English

Focus:
- Introduction to Copilot in Dynamics 365 Customer Insights Journeys
- Understanding the scope and benefits of your Copilot license
- Practical use of AI features to enhance customer journeys

Outcome:
Overview of AI functionalities (Copilot) in Customer Insights Journeys and classic use cases

Target Audience:
Marketers and Dynamics 365 Customer Insights Journeys users new to AI

②

Advanced

Copilot in D365 Customer Insights Journeys | Advanced

4-hour-workshop, available in German and English
Building on the workshop *Copilot for Beginners*

Focus:
- Design thinking for developing new use case ideas
- Exploration and refinement of identified use cases
- From the requirement to the technological implementation of an AI-supported marketing use case

Outcome:
Understanding of the use of the Microsoft toolkit for the implementation of (complex) use cases

Target Audience:
- Graduates of the workshop *Copilot for Beginners*
- Dynamics 365 Customer Insights Journeys users who are familiar with the standard AI functionalities of the system

What are you waiting for?

- Do you want to **evaluate** a project idea?

- How can I **digitize, automate and streamline** my marketing and sales **processes**?

- Do you have questions about **opportunities** for **customer experience** management based on the Microsoft Dynamics 365 ecosystem?

- What is needed to drive **business outcomes**, improve **operational efficiency**, and create **exceptional customer experiences**?

- How can we enhance our customer journey, such as through **chatbots**, self-service **portals**, or **AI-powered** recommendations?

- Do you need **best practices** and hands-on support from our motivated experts?

BOOK AN APPOINTMENT

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