Speakers

coffee + DUNN
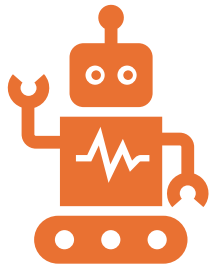
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What we'll cover

AI: What it is. What it's not.

The AI advantage for CE

AI beyond tech

Copilot features (CI-J + CI-D)

Q&A

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AI: What it is, what it isn't
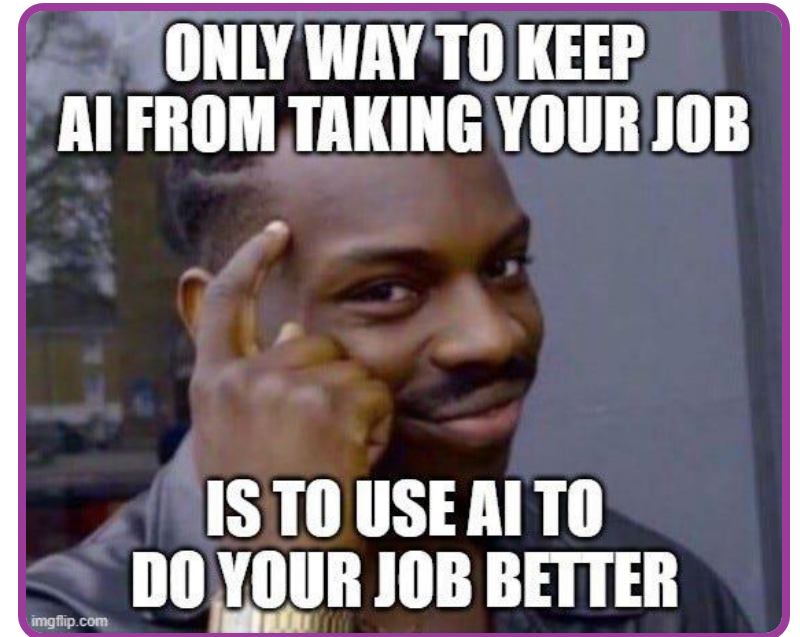
What it isn't: the final draft
What it is: your starting point

What it isn't: staff augmentation
What it is: a resource for your team

What it isn't: an easy button
What it is: a problem-solver (when used well)

ONLY WAY TO KEEP
AI FROM TAKING YOUR JOB

IS TO USE AI TO
DO YOUR JOB BETTER

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The AI advantage for CE

Leading consulting companies estimate that organizations can benefit significantly from generative AI

Efficiency

29% of sales time can be automated[1]

3-5% productivity lift[2]
(total sales expense)

99% of sellers would reinvest time saved from AI on work tasks[3]

Effectiveness

+50% jump in lead-to-sale conversion rate[4]

3-15% of revenue uplift for players that invest in AI[4]

2X lift in cross-selling and up-selling rate[4]

[1]Bain & Company. How Generative AI Will Supercharge Productivity. August 2023.
[2]McKinsey. The economic potential of generative AI: The next productivity frontier. June 2023.
[3]Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include Financial Services, Professional Services, Manufacturing, Retail, Technology, and Healthcare.
[4]McKinsey. AI-powered marketing and sales reach new heights with generative AI. May 2023.

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Beyond the technology

Assemble your A(I) team
Include voices across disciplines—from executive sponsors to technical, from sales to marketing stakeholders + champions.

Good data? Good results.
Remember: Usable marketing, sales, and customer service data is critical to Copilot success.

Sound the (adoption) horn!
Build awareness, training and feedback into the plan to continuously drive engagement and usage.

Put pen to paper: make a plan.
Define business goals and success measures, begin building your training outline and communication plan.

Start small w/Copilot.
Train user groups and communicate progress both across and upward to keep the momentum.

Apply your learnings.
What worked? What didn't? Use your KPIs to test add'l scenarios to ensure investments are achieving Copilot success.

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Before we get started...

work-in-progress

wurr-kin-PRAH-gruhss | Noun

an unfinished project that is still being added to or developed

The Connected Experience

Ellen
Marketing Leader

- Leads a team of three

- Tasked with increasing attributable revenue growth

- Unsure about AI but wants to explore

Hannah
Marketing Specialist

- Focuses on day-to-day execution

- Responsible for all email campaigns

- Needs to reduce time to deployment

- Has been secretly using ChatGPT

Mia
Marketing Analyst

- Owns audience development + analysis

- Charged with providing ongoing (+ on-demand) reporting on marketing performance

Kevin
Sales Manager

- Manages pipeline

- Works with marketing on upcoming sales needs

- Only slightly annoys marketing by saying, "Where are my qualified leads?"

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# The Connected Experience

Campaign Strategy
Ellen and her team plan a campaign to cross sell new services to commercial customers.

Analysis
During their quarterly review, Marketing identifies a decrease in the number of leads generated for some of their campaigns offering services to commercial customers.

Targeting
Knowing she will need to utilize data outside of Dynamics to create a targeted audience, Ellen recruits Mia to unify her data in Customer Insights - Data to generate a segment

Mia
Marketing Analyst

Kevin
Sales Manager

CI-Data Metrics
Mia reviews CI – Data Metrics to determine how successfully the campaigns have been driving increased customer ACV.

Ellen
Marketing Leader

Execution
Powered by Customer Insights - Data, Ellen's team can create personalized journeys for the targeted audience.

Hannah
Marketing Specialist

Interaction
The customer receives a series of marketing emails and is interested in learning more about performance tools for his business; he engages with the CTA.

Marketing + Sales Collaboration
Kevin receives an email about the form the customer submitted. He begins engaging with the prospect and creates an opportunity. The customer purchases additional services.

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Copilot in action: CI-Journeys

Copilot in Action: D365 CI-Journeys

Next-generation AI helps marketers efficiently develop + deliver the right message at the right time
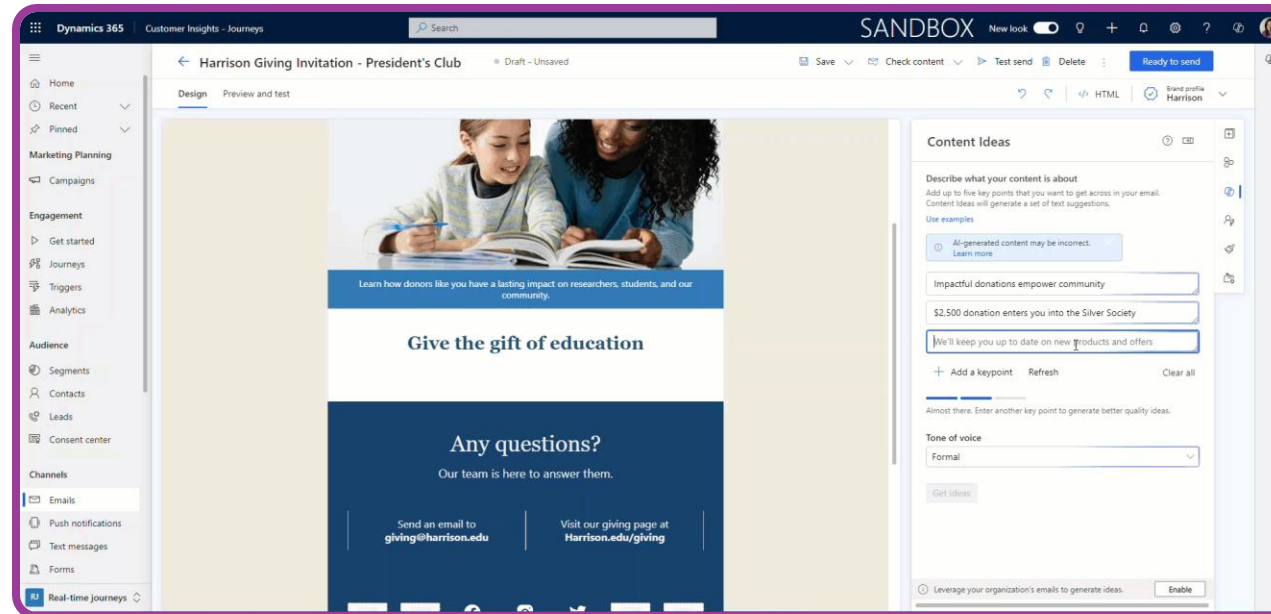
Brainstorm new content

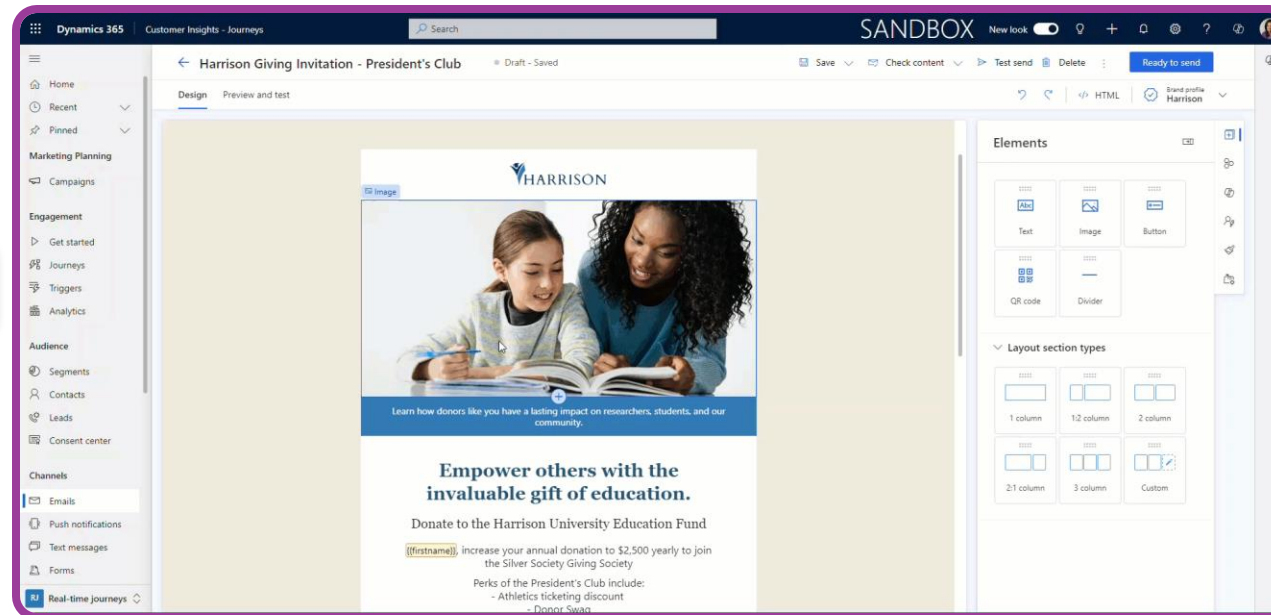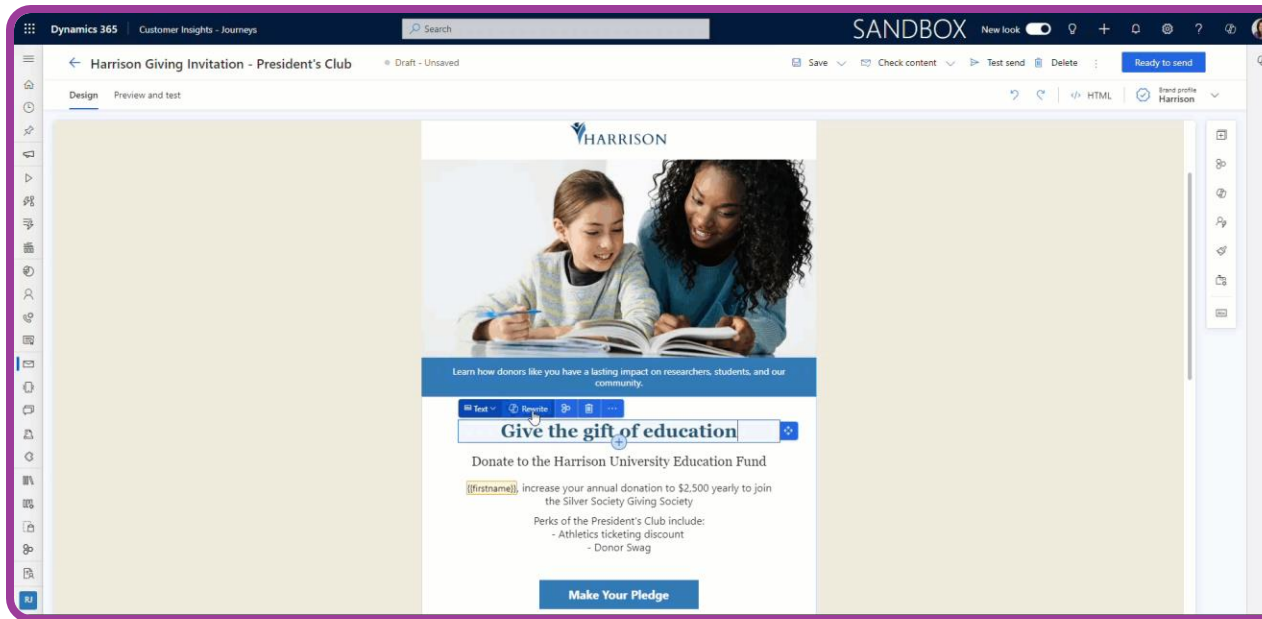Use Content Ideas as a starting point for your email mesaging

Copilot in Action: D365 CI-Journeys

Next-generation AI helps marketers efficiently develop + deliver the right message at the right time

Brainstorm new content

Get new image recommendations

Serve up recommended images based on email copy

Copilot in Action: D365 CI-Journeys

Next-generation AI helps marketers efficiently develop + deliver the right message at the right time

Brainstorm new content

Get new image recommendations

Rewrite email + form messaging

Shorten, lengthen, or update the tone of your message with Content Rewrite

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Copilot in Action: D365 CI-Journeys

Next-generation AI helps marketers efficiently develop + deliver the right message at the right time

Brainstorm new content

Get new image recommendations

Rewrite email + form messaging

Create audiences w/natural language

Use natural language as your first building block for audiences

Copilot in Action: D365 CI-Journeys
Next-generation AI helps marketers efficiently develop + deliver the right message at the right time

Get new image recommendations

Create audiences w/natural language
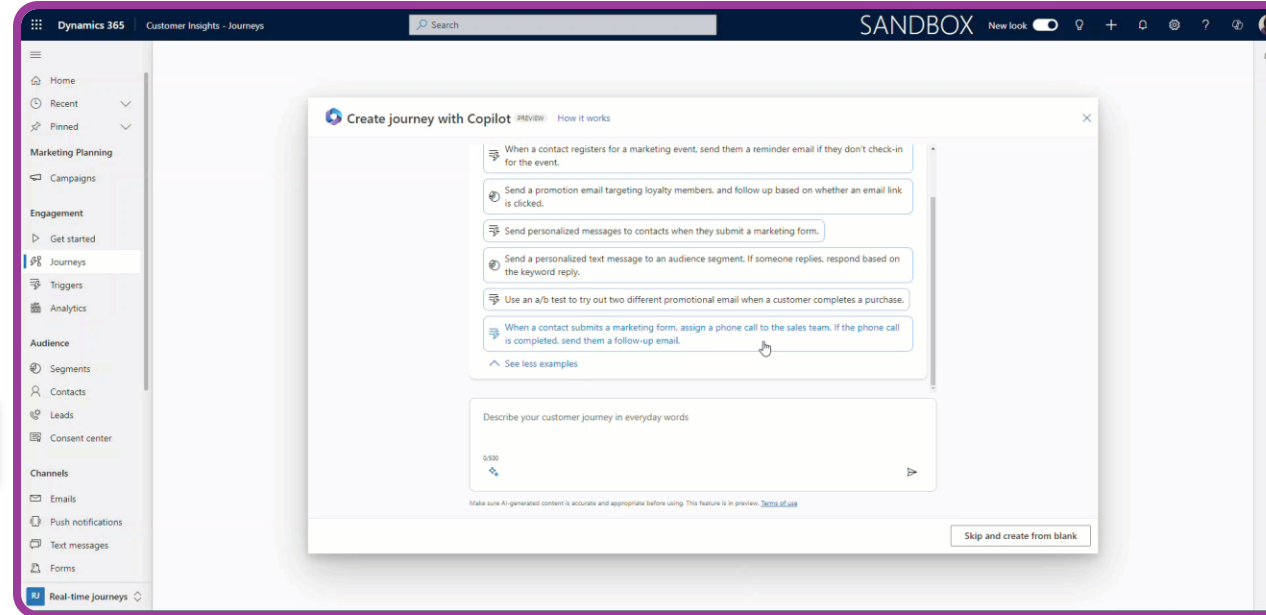
Brainstorm new content

Rewrite email + form messaging

Create AI-assisted journeys

Create multi-touchpoint journeys for both customers + internal activities

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Copilot in action: CI-Data

Copilot in Action: D365 CI-Data

AI helps drive personalized experiences with targeted segmentation + robust insights

Understand data quality
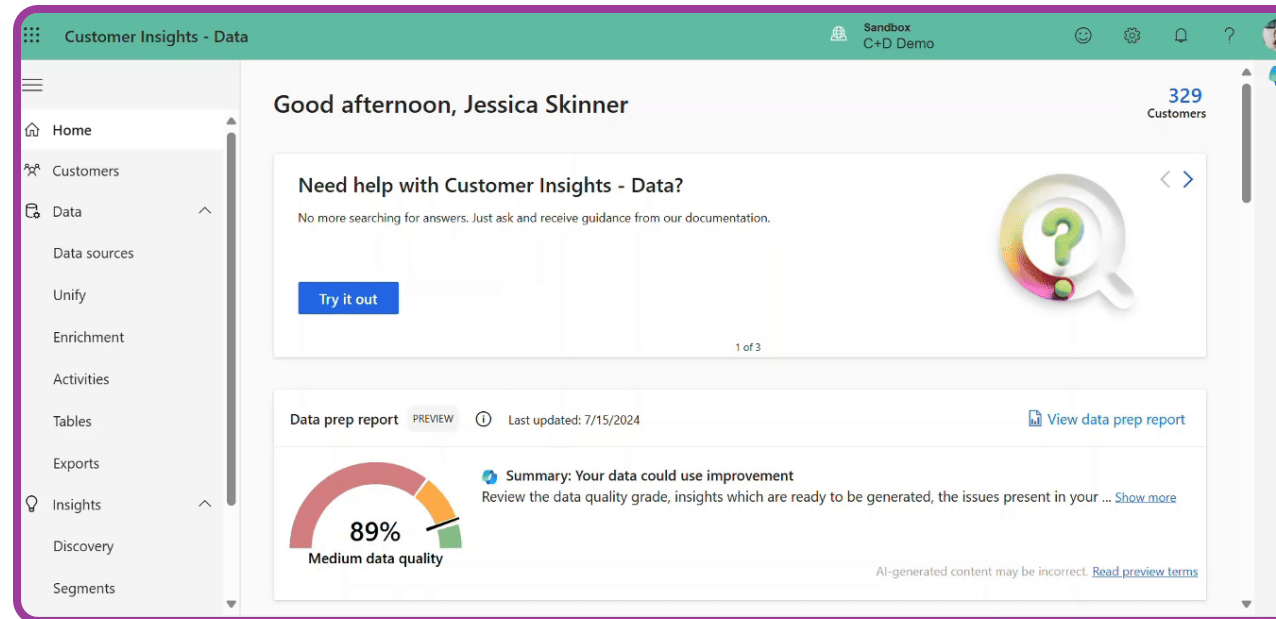
Understand overall quality and readiness of your data to produce insights

Copilot in Action: D365 CI-Data

AI helps drive personalized experiences with targeted segmentation + robust insights

Understand data quality

Tap into data insights

Customer Insights - Data

Sandbox
C+D Demo

Send feedback

Discover insights about your customers in natural language (preview)

Generate insights about your customers by simply asking a question in natural language. If you are not familiar with your data in Customer Insights - Data yet, learn more about your data tables and columns. ⓘ

Enter a specific question about your customers →

AI-generated content can have mistakes. Make sure it is accurate and appropriate before using. Read terms of use

Share my questions with Customer Insights - Data to optimize answer quality.

Tips for better results:
- Use names of specific columns and data. For example, "How many subscriptions were activated last year? Use the ActivateDate column in the ServiceSubscription data table."
- Append additional or clarifying information. For example, "Which customers live in GA? GA is referring to the state Georgia in the United States."

Try one of these suggested questions to get started

How many donors have an estimated net worth greater than $1 million?

How many donors are currently active in their respective roles?

See more examples

Use natural language to gain insights about customer profiles without IT support
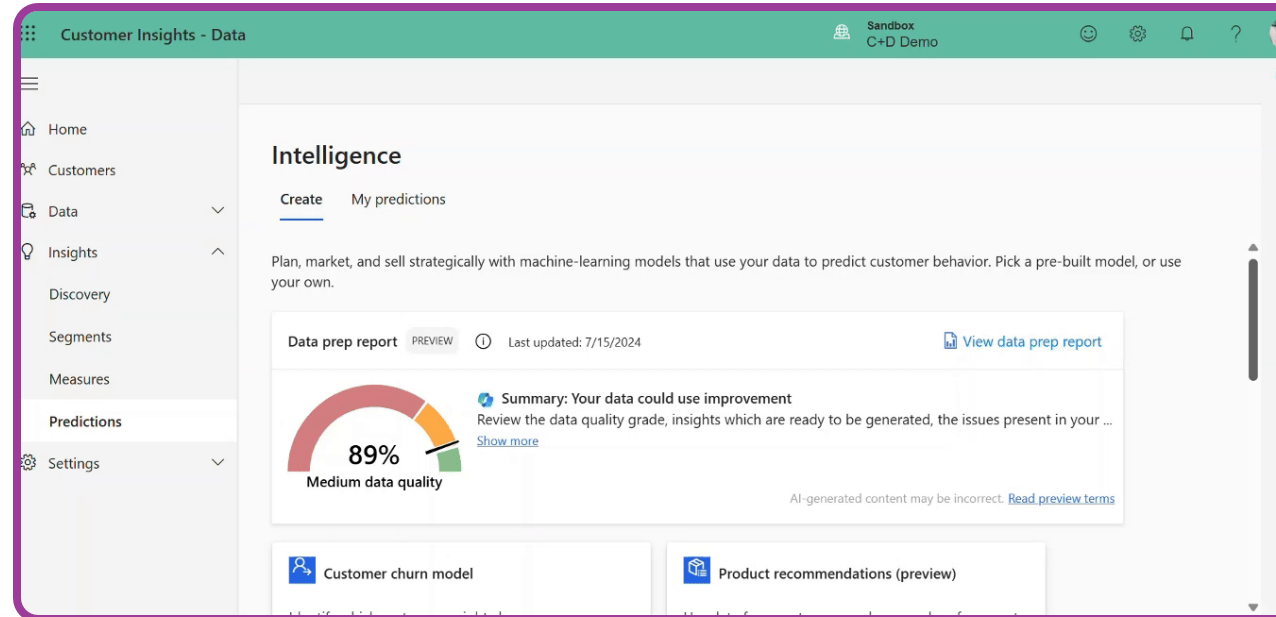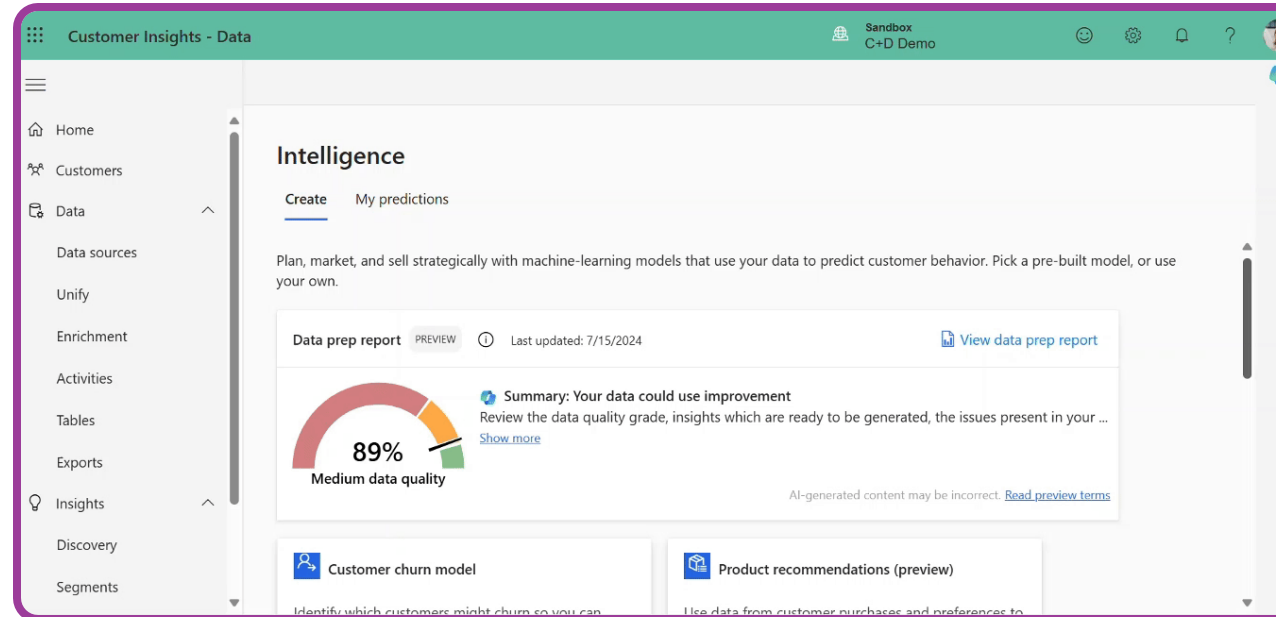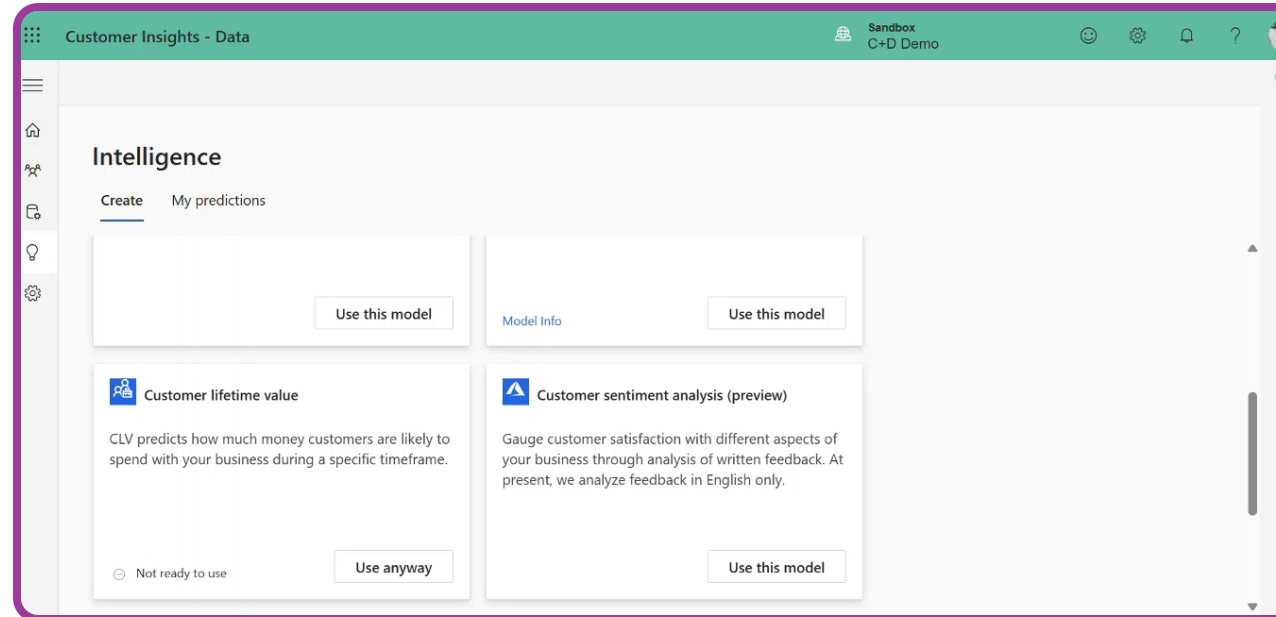
Copilot in Action: D365 CI-Data

AI helps drive personalized experiences with targeted segmentation + robust insights

Understand data quality

Predict CLTV + customer churn

Tap into data insights

Customer Insights - Data

Sandbox
C+D Demo

Intelligence

Create   My predictions

Plan, market, and sell strategically with machine-learning models that use your data to predict customer behavior. Pick a pre-built model, or use your own.

Data prep report PREVIEW ⓘ Last updated: 7/15/2024   📊 View data prep report

Summary: Your data could use improvement
Review the data quality grade, insights which are ready to be generated, the issues present in your ...
Show more

89%
Medium data quality

AI-generated content may be incorrect. Read preview terms

Customer churn model

Product recommendations (preview)

Home
Customers
Data
Insights
   Discovery
   Segments
   Measures
   Predictions
Settings

Use predefined models to make valuable predictions about your data

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Copilot in Action: D365 CI-Data

AI helps drive personalized experiences with targeted segmentation + robust insights

Understand data quality

Predict CLTV + customer churn

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Predict product recommendations

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- Home
- Customers
- Data
  - Data sources
  - Unify
  - Enrichment
  - Activities
  - Tables
  - Exports
- Insights
  - Discovery
  - Segments

Customer churn model
Identify which customers might churn so you can

Product recommendations (preview)
Use data from customer purchases and preferences to

Create product recommendations based on purchase behavior and patterns

Copilot in Action: D365 CI-Data

AI helps drive personalized experiences with targeted segmentation + robust insights

Understand data quality

Predict CLTV + customer churn

Analyze customer sentiment

Tap into data insights

Predict product recommendations

Customer Insights - Data

Sandbox
C+D Demo

Intelligence

Create   My predictions

Use this model

Model Info   Use this model

Customer lifetime value

CLV predicts how much money customers are likely to spend with your business during a specific timeframe.

Not ready to use   Use anyway

Customer sentiment analysis (preview)

Gauge customer satisfaction with different aspects of your business through analysis of written feedback. At present, we analyze feedback in English only.

Use this model

Analyze customer sentiment and identify opportunities for improvement

Resources

Copilot in CI-J:
Microsoft Learn

Copilot in CI-D:
Microsoft Learn

Copilot:
Coffee + Dunn Blog

Thank you

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