

# **Dynamics 365 Copilot:** The first AI assistant for CRM and ERP

Downloadable blog



# Exploring Microsoft's AI-powered Dynamics 365 Copilot and how HCLTech can bring it to life in your organization

In a recent blogpost, we shared exciting news about Microsoft Power Platform Copilot, an AI-powered assistant that makes developing apps, automations and bots even simpler and more streamlined than it already was with the low-code suite of tools. That was the first in a series of Copilot posts, so keep an eye out for more in the coming weeks. Today, we're exploring the Dynamics 365 version of Microsoft Copilot and how HCLTech's Business Applications practice can help you implement it your own organization. We'll also touch on our commitment to promoting responsible, safe and ethical AI strategies.

---

Dynamics 365 Copilot is an AI-powered assistant that helps users in sales, service, marketing and supply chain management be more organized and productive.

It is powered by the latest advances in generative AI, meaning that it learns from users' past interactions and adapts its suggestions accordingly. The more you use Copilot, the smarter it becomes, helping you create personalized experiences for your customers with AI-generated emails and conversations, as well as resolve issues using real-time data. By learning and collecting your customers' needs and preferences, Copilot is capable of delivering tailored interactions that meet their unique needs.

Per the latest "Microsoft Business Trend Survey 2023," 89% of employees feel more fulfilled when they can use AI and automation tools to do their jobs, so why not enable your employees to use Dynamics 365 Copilot to automate tasks, generate ideas and get insights in both CRM and ERP? Dynamics 365 Copilot is a digital assistant in the truest sense of the word. It works alongside users, providing guidance and suggestions as they work.

Let's look at how it works for each of the workloads mentioned.

**Dynamics 365 Customer Service Copilot**

**Dynamics 365 Customer Insights Copilot**

**Dynamics 365 Marketing Copilot**

**Dynamics 365 Supply Chain Center Copilot**

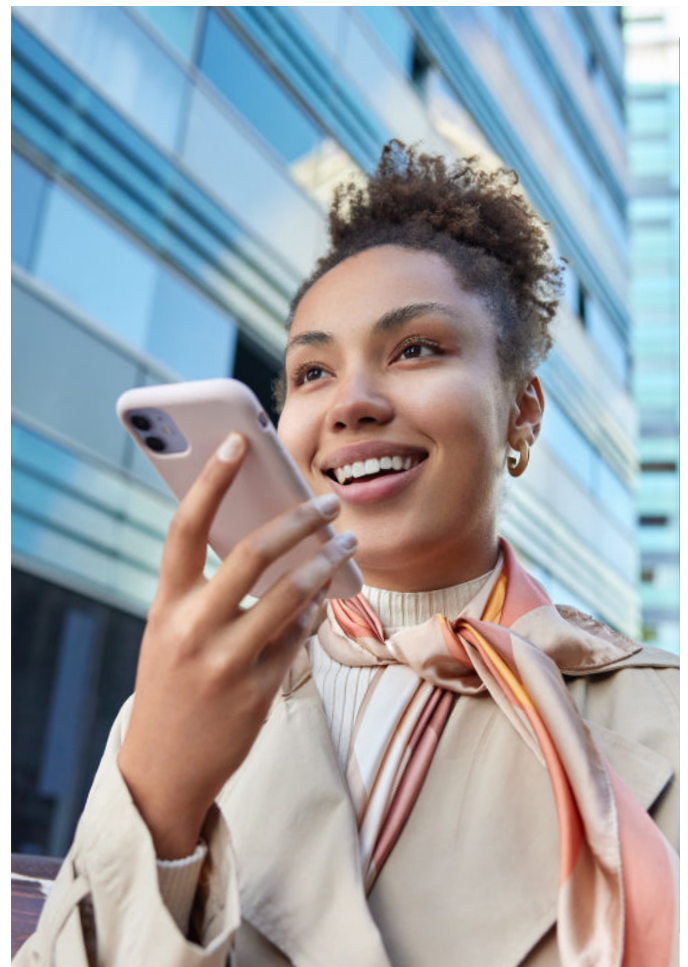
**Dynamics 365 Business Central Copilot**

## Dynamics 365

### Customer Service Copilot

It provides 24/7 assistance, helping agents find resources, handle cases more efficiently and automate time-consuming tasks like:

- **Responding to questions:** Copilot provides agents with the information they need to answer customer questions quickly and accurately.
- **Composing emails:** It suggests content to empower agents to write clear, concise and persuasive emails
- **Drafting chat responses:** It provides suggestions to start and continue chat conversations.
- **Summarizing cases:** It identifies the key points and takeaways to help agents provide clear and concise case summaries.





## Dynamics 365

# Customer Insights Copilot

You may have a lot of data about your customers, but it's all siloed in different systems. You can't see the big picture and it's hard to make informed decisions about how to reach your customers and grow your business. Plus, analyzing customer data has traditionally been a complex and time-consuming process that requires specialized skills and knowledge. That's where Customer Insights comes in – and more specifically, Dynamics 365 Customer Insights Copilot. It can help you gain new perspectives by querying and analyzing customer data in near-real-time using natural language.

## Dynamics 365

# Marketing Copilot

Customers don't buy the way they used to. In the past, they might have seen an ad for a product on TV, gone to the store to buy it and then taken it home. But today's customer is more digital than ever, researching products online, reading reviews and comparing prices across multiple channels before making a purchase. This makes it hard for sellers to understand where and how buyers make purchase decisions. Hence, concepts like customer value optimization (CVO) and customer lifetime value (CLV) are growing in importance across industries.

To reach today's customers, you need to be where they are. That means having a strong online presence and marketing your products across multiple channels. You also need to understand the customer journey and create marketing campaigns that meet them where they are in their buying process.

Dynamics 365 Marketing Copilot can process large amounts of data much faster than humans. This allows your marketing team to get insights from customer data quickly, enabling you to make better decisions about your marketing campaigns. It will identify patterns and trends in customer data that would be difficult or even impossible for humans to uncover, empowering you to make accurate predictions about customer behavior.

## Dynamics 365

# Supply Chain Center Copilot

You already know that without clear visibility into your inventory levels, it is difficult to track demand, manage production and ensure that orders are fulfilled on time.

What you may not know is that Dynamics 365 Supply Chain Center Copilot can predict the impact of changes in demand, supply and costs by monitoring external events and trends that could impact your organization and empowering you to take the necessary steps to mitigate any potential risks.



## Dynamics 365

# Business Central Copilot

Writing engaging product descriptions for a large volume of similar products is time-consuming, challenging and redundant. But a boring product description won't sell your product. Good news: Dynamics 365 Business Central Copilot accelerates the process with AI-generated product descriptions pulled right from your inventory management system.

It also makes it easier than ever before to get your products online. Simply upload a picture to Business Central and Copilot will generate marketing copy for you based on your product attributes. Then, with just a few clicks, you can publish your products to your online store.



# It's a great time to start using AI in your business



There you have it: a sneak peek into the features offered in Dynamics 365 Copilot that can help businesses of all sizes and industries overcome a variety of challenges. HCLTech is deeply invested in AI across the board – and Microsoft Copilot specifically, so as it continues to develop and evolve, we'll maintain our position at the front of the revolution.

It is a great time to start using AI in your business – for many reasons, but perhaps none more compelling than the fact that your competitors are already (or will be very soon) adopting this technology and you don't want to get left behind. Don't worry: HCLTech can help. And as use of AI expands, rest assured that we are in lockstep with our partners in developing and implementing governance strategies and organizational change management systems, ensuring we approach AI responsibly and ethically – and always with a focus on compliance, security and privacy.

**Let's gear up and face the all the AI challenges and opportunities together.**

**Filter**

Explore by Keyword

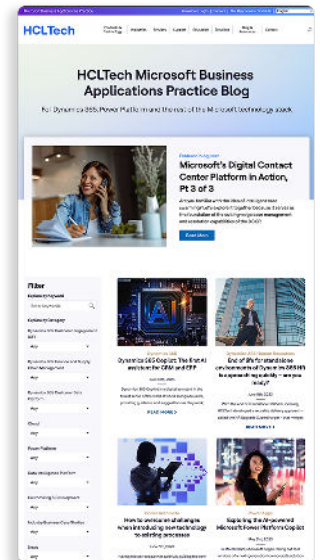
Explore by Category

Dynamics 365 Customer Engagement (CE)

Any

Dynamics 365 Finance and Supply Chain Management

Any



Look for more **Copilot** blogs

[Explore the blog](#)

# HCLTech | Supercharging Progress™

HCLTech is a global technology company, home to 211,000+ people across 52 countries, delivering industry-leading capabilities centered around Digital, Engineering and Cloud powered by a broad portfolio of technology services and software. The company generated consolidated revenues of \$11.79 billion over the 12 months ended June 30, 2022. To learn how we can supercharge progress for you, visit [hcltech.com](https://hcltech.com).

[hcltech.com](https://hcltech.com)

