The Work Behind Better Service

FIRST PARTY AGENTS IN DYNAMICS 365 CUSTOMER SERVICE

Four business challenges. Four focused demonstrations.



MEET YOUR

Presenters



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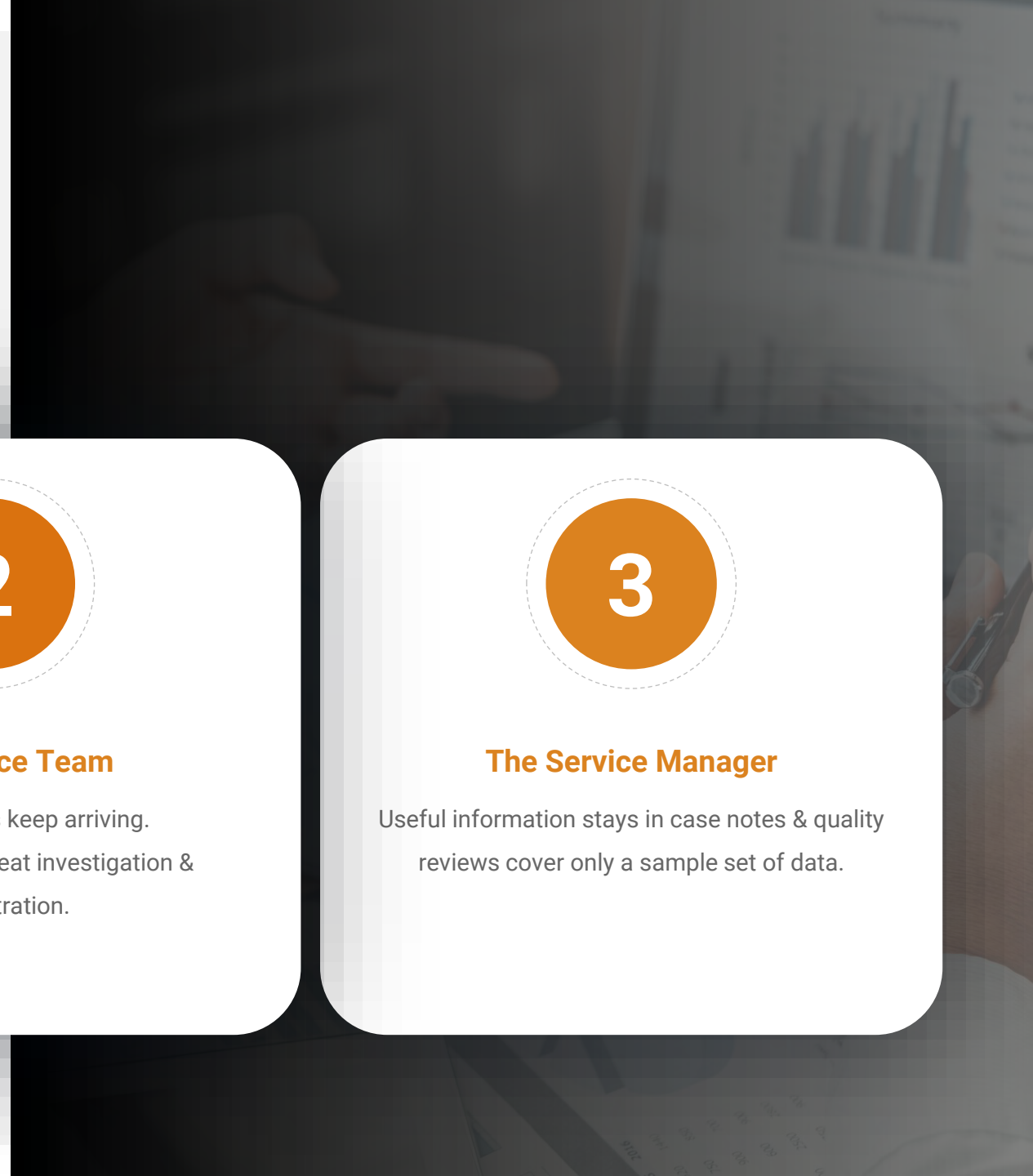
MICHAEL PACIFICO

Director,
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THE SCENARIO

One Service Team, Recurring Inefficiencies



1

The Customer

Inquires about a recent recall.

2

The Service Team

Similar requests keep arriving. Representatives repeat investigation & administration.

3

The Service Manager

Useful information stays in case notes & quality reviews cover only a sample set of data.

AGENDA

Our Story in 60 Minutes

The Why

Case Creation

Understanding why customers contact us.

The Triage

Service Execution

Moving the case forward.

The Next Time

Equip the Team

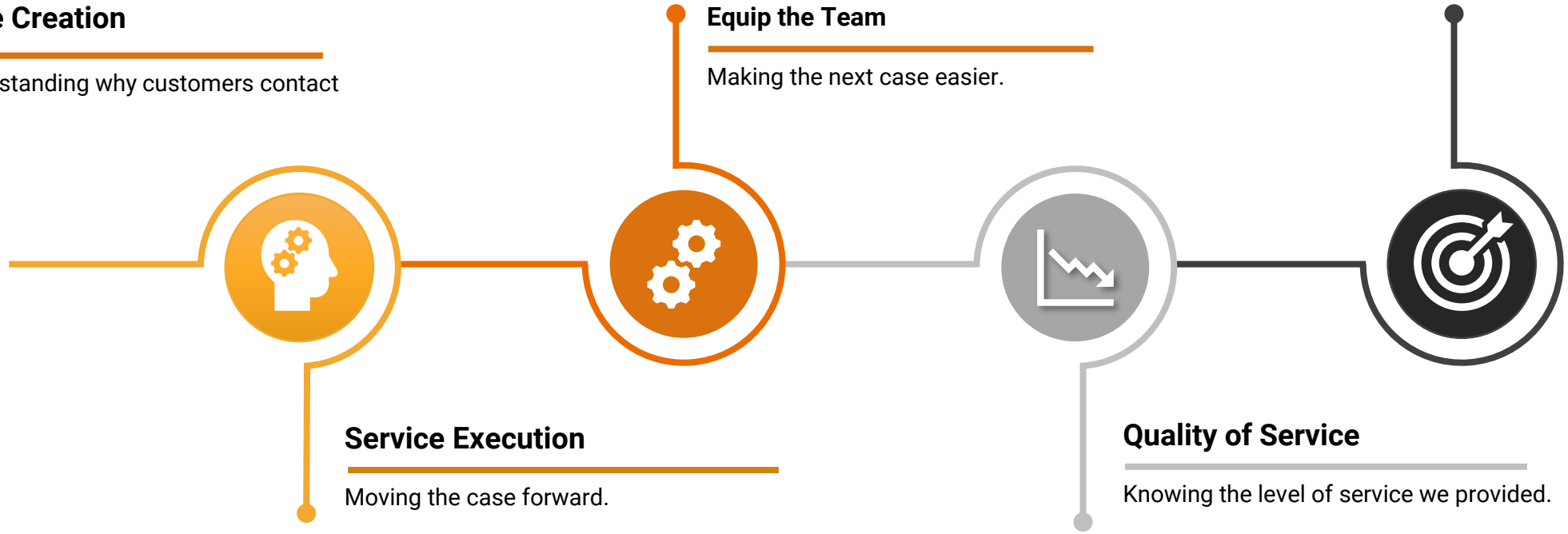
Making the next case easier.

The Outcome

Quality of Service

Knowing the level of service we provided.

Enable Your Agents



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CHAPTER 1: THE WHY

Understanding the Need

“We keeping seeing similar inquiries, but don’t describe them consistently.”

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THE WORK OF

Interpreting a Request

01

Traditional Approach

Read past interaction, assign categories & work out the next question.

02

Business Friction

Inconsistent data entry & repeated clarification make patterns harder to see.

03

Agent Contribution

Discover recurring intents & support relevant questions & solutions.

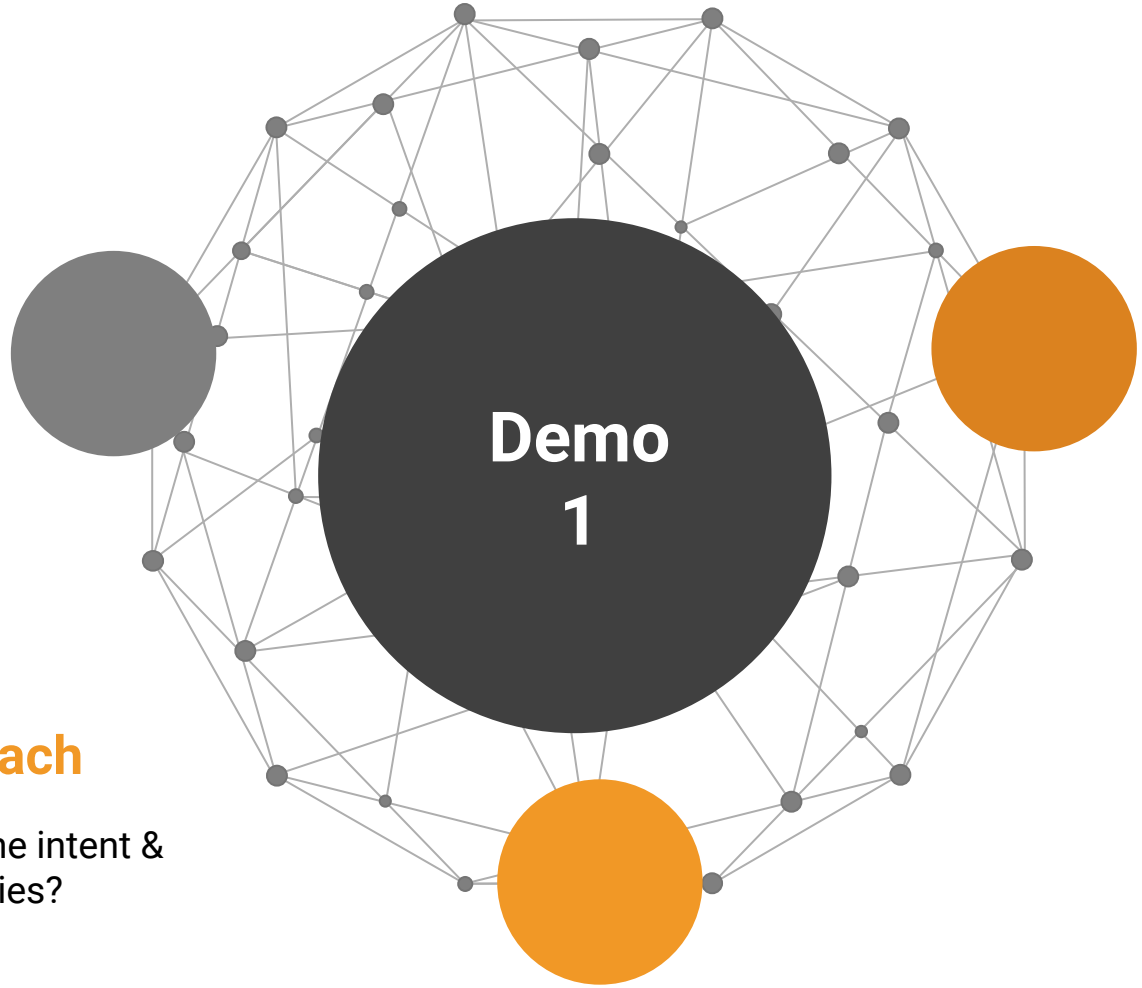
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A CLEARER PATH TO

Understanding the Need

Business Question

- Is this a new recall inquiry or a familiar need expressed differently?



D365 Customer Intent Agent

- An intent, its supporting context and configured questions or solutions.

Technical Approach

- How do we curate the intent & decide where it applies?

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CUSTOMER INTENT AGENT ENABLED

What Changes for the Team

Work Accelerated

Less manual efforts organizing recurring needs & preparing relevant questions.

Human Ownership

Review intent definitions & the knowledge attached to them.

Collect Evidence

Accuracy of the agent's ability to identify the need and reduce follow-ups.

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CHAPTER 2: THE TRIAGE

Moving the Case Forward

“The conversation has moved on. The Case record still needs to catch up.”

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THE WORK OF

Getting to Resolution

01

TRADITIONAL APPROACH

Create or update the Case, chase missing details, & prepare follow-ups.

02

BUSINESS FRICTION

Administrative work interrupts resolution & leaves inconsistent records.

03

AGENT CONTRIBUTION

Supports Case maintenance & configured resolution or follow-up activities.

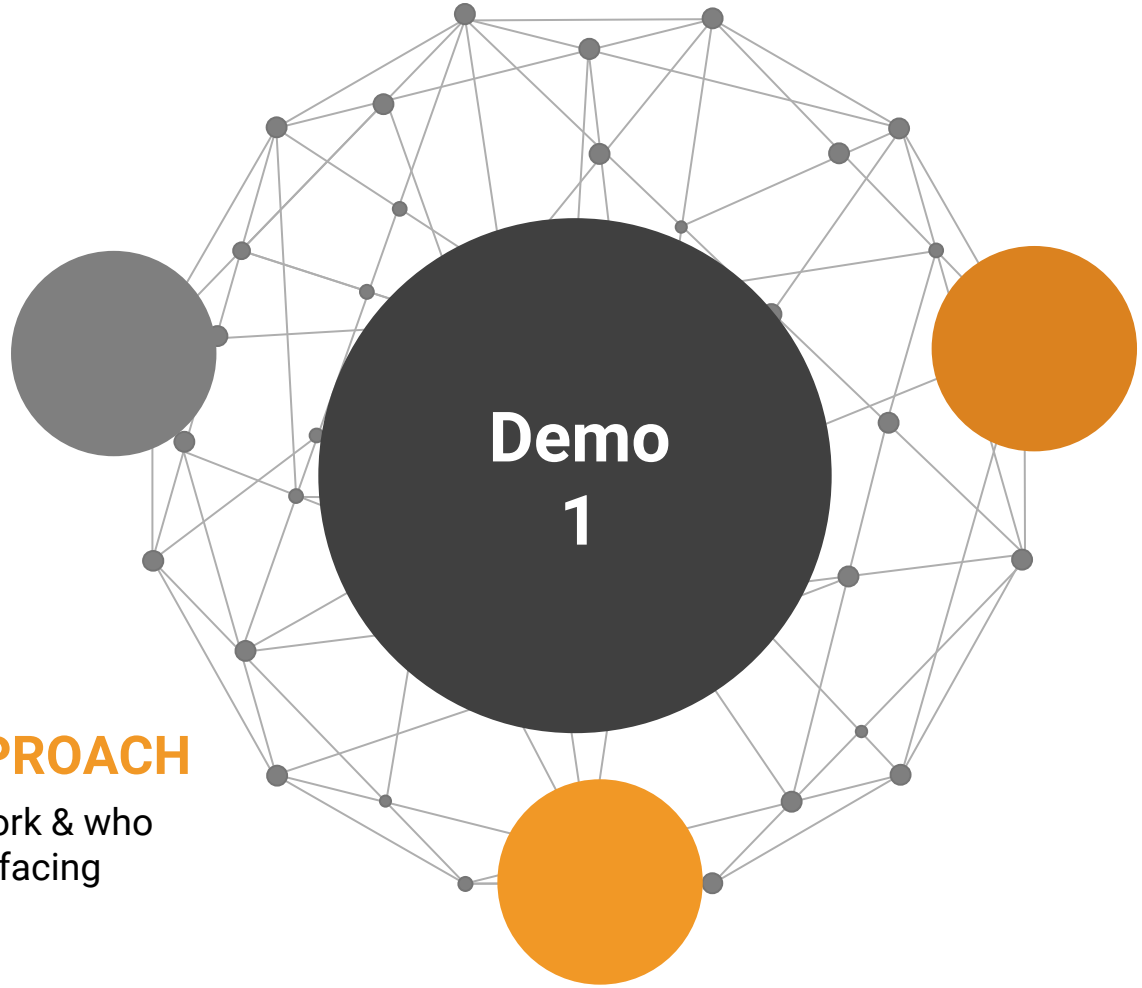
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A CLEARER PATH TO

Reducing Case Administration

BUSINESS QUESTION

- Can the case progress with less repetitive work?



D365 CASE RESOLUTION AGENT

- Case updates & a supported next step or drafted response.

TECHNICAL APPROACH

- What triggers the work & who approves customer-facing actions?

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CASE RESOLUTION AGENT ENABLED

What Changes for the Team



WORK ACCELERATED

Less manual record maintenance & response preparation.

HUMAN OWNERSHIP

Set eligible cases, approval requirements, & the route to further help.

COLLECT EVIDENCE

Accuracy of the agent's ability to reduce the case work & reopen rates.

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CHAPTER 3: THE NEXT TIME

Making the Next Case Easier

“We handled a similar scenario last week. Why are researching it again?”

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THE WORK OF

Preserving a Solution



01

Traditional Approach

Find a resolution & potentially write a separate knowledge article.

02

Business Friction

The next case arrives before anyone documents the answer.

03

Agent Contribution

Uses the Case & its interaction content to create a Knowledge Article draft.

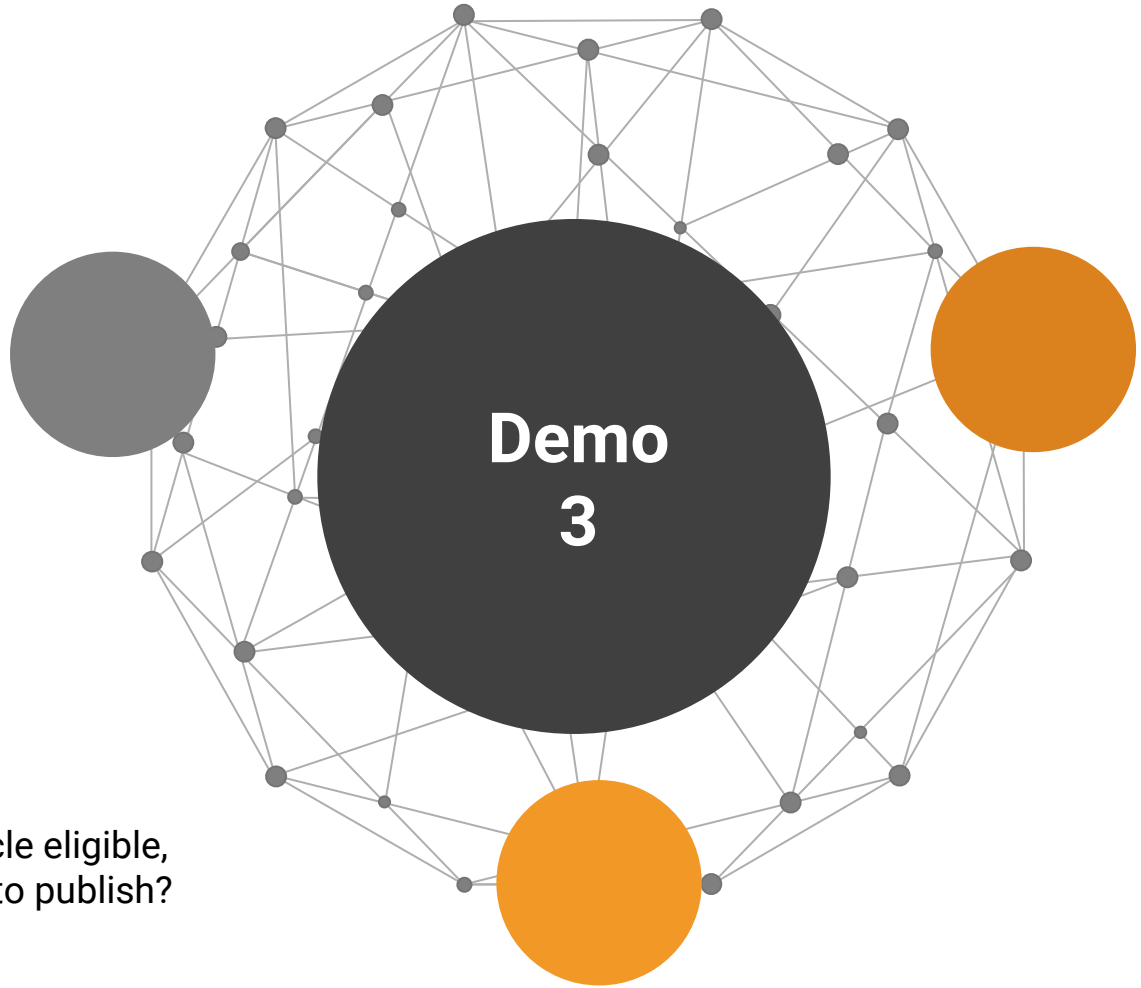
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A CLEARER PATH TO

A Solution Others Can Reuse

Business Question

- Can a resolved case become useful knowledge with less authoring effort?



D365 Knowledge Management Agent

- Source content, a generated draft article and the review experience.

Technical Approach

- What makes an article eligible, accurate and ready to publish?

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CUSTOMER KNOWLEDGE MANAGEMENT AGENT ENABLED

What Changes for the Team



Work Accelerated

Less effort preparing an article from service records.

Human Ownership

Check accuracy, remove customer-specific details and manage publication.

Collect Evidence

Reduction in manual authoring and usefulness of generated articles.

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CHAPTER 4: THE OUTCOME

Monitoring the Service Quality

“We can see closed cases. Can we see the quality of the experience?”

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THE WORK OF

Reviewing Service Quality

01

Traditional Approach

Sample selection, read the history, score the interaction and discuss coaching.

02

Business Friction

Review capacity limits coverage and delays useful feedback.

03

Agent Contribution

Evaluates supported interactions using supervisor-defined criteria.

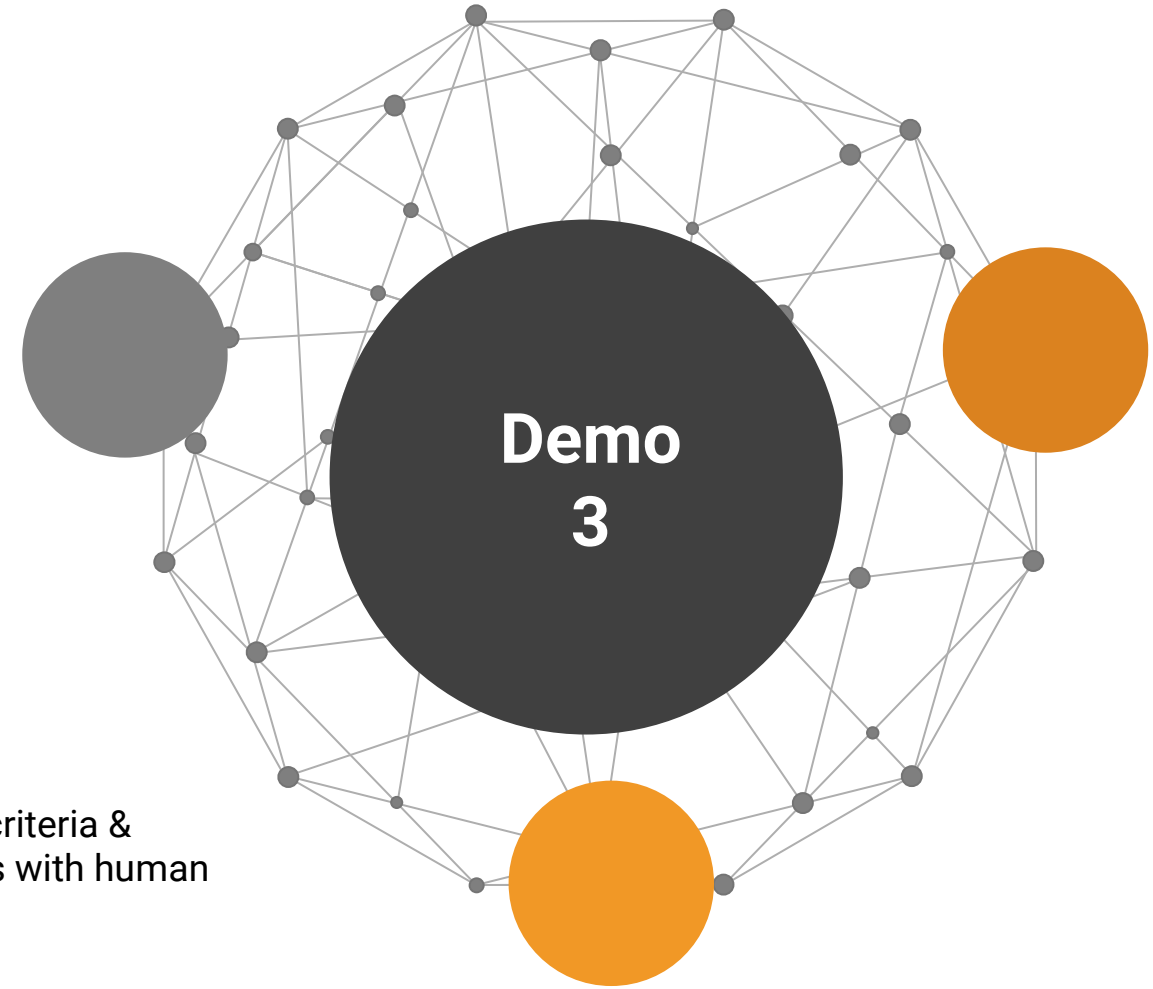
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A CLEARER PATH TO

Quality Evidence for a Supervisor

Business Question

- Where did this interaction meet our standards or need improvement?



D365 Quality Evaluation Agent

- A case evaluation, scoring details and supporting insights.

Technical Approach

- How do we define criteria & calibrate the results with human reviewers?

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QUALITY EVALUATION AGENT ENABLED

What Changes for the Team



Work Accelerated

Less manual effort completing an initial quality assessment.

Human Ownership

Define fair criteria and review disagreements before taking action.

Collect Evidence

Review evaluation time and reliability of coaching insights.

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FOUR CHAPTERS

Four Agent Options

Business Need	Agent	Directional Outcome	Human Responsibility
Understanding recurring needs	Customer Intent	**~15%** in avg. reduction in handling time	Curate intents and service guidance
Keeping cases progressing	Case Management	**~80%** reduction in post-interaction admin	Define authority and exceptions
Reuse useful solutions	Customer Knowledge Management	**~75%** reduction in article creation time	Review and maintain published content
Review service quality	Quality Evaluation	**5X+** more interactions reviewed	Calibrate standards and coaching

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A SUCCESSFUL PILOT

Aligning Business & Technology

Business Decision	Technology Decision
Which recurring work is worth improving?	Which first-party agent would best fit that work?
What does a good outcome look like?	Which records & sources can the agent use?
Who approves actions & handles exceptions	How will permissions & automations reflect those rules?
What would justify wider use?	How will we monitor quality, usage & consumption?

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Before You Activate an AI Agent

Activation is not simply turning on a feature. *It assigns a digital worker access to data, authority to act, and a budget to consume.*

01

START WITH THE WORK

Choose a recurring process with a clear owner, measurable friction, and a defensible outcome.

02

BOUND ACCESS

Define the runtime identity, approved records, knowledge sources, systems, and least-privilege permissions.

03

SET AUTHORITY

Decide what the agent may draft, update, send, publish, or close, plus approvals and exception paths.

04

VALIDATE READINESS

Confirm licensing, credits, region, language, channel, data movement, roles, and feature status.

05

MEASURE VALUE

Track accuracy, rework, escalations, cycle time, quality, and credits per completed business outcome.

Choose the right path

D365 FIRST-PARTY
When the process fits Microsoft's supported service pattern.

COPILOT STUDIO
When you need custom knowledge, integrations, actions, or rules.

MICROSOFT FOUNDRY
When custom orchestration, models, code, networking, or control justify more engineering.

Who owns it? • What can it see? • What can it change? • When must a person intervene? • How will we know it is working?

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YOUR NEXT STEP

AI Enablement Workshop

Turn today’s ideas into a plan with a complimentary workshop tailored to your organization.

01

Identify service scenarios where agents can add value

02

High-level assessment of data, process & governance readiness

03

Solidify your first-party agent enablement plan

Connect with us to schedule your workshop: Alex.Fredrickson@armanino.com

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