# AI Agents Activation - Dynamics 365 Sales and Service

## Proof of Concept

**Duration:** 1, 2, or 3 Days [ Remote | Onsite ]
**Difficulty Level:** 200 - Intermediate

## Description

This offering helps customers to activate first-party agents for Dynamics 365 Sales and Service. It includes guidance and preparation for agent usage as well as working directly with the customer to enable and configure the agents in a Dynamics 365 environment.

## Objectives

- Accelerate AI Adoption: Help organizations use a clear, step-by-step plan to quickly add AI agents into Dynamics 365 Sales and Service workflows.
- Enable End-User Readiness: Give business users clear information about first-party agents to help them start and use AI features easily.
- Drive Business Value and ROI: Match technical work with business goals to get clear results, like better sales productivity, stronger customer engagement, and more efficient operations.
- Foster Innovation and Continuous Optimization: Encourage innovation with hackathons, pilot projects, and workshops, helping organizations build new AI-based ideas and improve current processes for lasting results.

## Outcomes

- Accelerated Time-to-Value: Organizations achieve faster deployment of AI-powered sales and service workflows through guided assistance.
- Enhanced Sales Productivity: AI agents automate lead research, qualification, and personalized outreach, enabling sales teams to focus on high-value interactions.
- Improved Customer Engagement: Intelligent service agents streamline case resolution and deliver proactive support.
- Measurable ROI and Business Impact: By integrating AI agents into Dynamics 365 workflows, businesses realize tangible benefits such as reduced operational costs, improved service metrics, and stronger revenue growth.

## Methodology

### Learn by example

Collaborate with a Microsoft engineer to understand key concepts and best practices, and apply them in a real-world deployment scenario.

### Hands-on

Partner with a Microsoft engineer to configure and deploy a Dynamics 365 Sales or Service Agent.

## Scope

This offering includes activation for a single first-party agent in Dynamics 365 Sales or Dynamics 365 Service.

## Agenda

- Kickoff & Vision Alignment
- Admin & Technical Enablement
- Agent Configuration and Deployment
- Next Steps & Roadmap

## Agents Covered

(Choose one or more, this will help to determine required duration)

- Sales Qualification Agent

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# Delivery outline

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<tr><td colspan="2"><strong>Requirements</strong></td></tr>
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**Participants**
- Business Decision Makers
- IT Decision Makers
- Dynamics 365 Sales & Service Administrators
- Sales Managers & Service Leads
- AI Champions / Power Users

**Skill Requirements**
- Dynamics 365 Expertise, AI and Copilot general Knowledge.

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**Time Commitment**
- One, two, or three full-day engagement with relevant roles

**Delivery Requirements**
- Customer owned Microsoft tenant prepared for Proof of Concept
- Computer connected to Microsoft tenant

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| Education | |
|---|---|
| Kickoff & Vision Alignment | • Introduce Microsoft's Agentic AI stack with Dynamics 365 focus.<br>• Align on business objectives, governance, and readiness for AI adoption. |
| Admin & Technical Enablement | • Review current configurations and deployment practices Dynamics 365 Sales agents.<br>• Discuss usage, administration, architecture, and governance for Dynamics 365 agents. |
| Agent Configuration and Deployment | • Work directly with a Microsoft resource to deploy a Dynamics 365 agent in your environment.<br>• Explore prioritized use cases for AI agents in sales and service workflows. |
| Next Steps & Roadmap | • Deliverables: Enabled and configured Dynamics 365 agent.<br>• Outline follow-up activities: AI Agents Governance, Champions program, and optimization roadmap. |

*If you are interested in this engagement for your organization, contact your Microsoft Account Representative.*

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