Al Agents in CRM

Transforming Sales with Intelligence and Automation







Introduction

In today's hyper-competitive and customer-centric landscape, sales teams face pressure to close deals faster, personalize engagement, and deliver consistent value.

This transformation can't be powered by tools alone—it requires intelligent automation and real-time insights embedded directly into the CRM workflow.

Microsoft Dynamics 365 Sales, enhanced by Al Agents and Copilot, empowers sales teams to become faster, smarter, and more focused - eliminating repetitive tasks and enhancing decision-making with real-time, data-driven recommendations.







What are Al Agents in CRM?

Al Agents in Microsoft Dynamics 365 are digital assistants that operate within the CRM environment, driving efficiency and accelerating the sales cycle. They include:

- Copilot for Sales: Assists with CRM updates, email drafting, and real-time insights.
- Autonomous Agents: Execute end-to-end processes across sales, service, finance, and more without human input.

These agents are integrated with Microsoft 365, Dataverse, Power Platform, and Microsoft Fabric - drawing from a rich business context to deliver accurate, real-time outcomes.

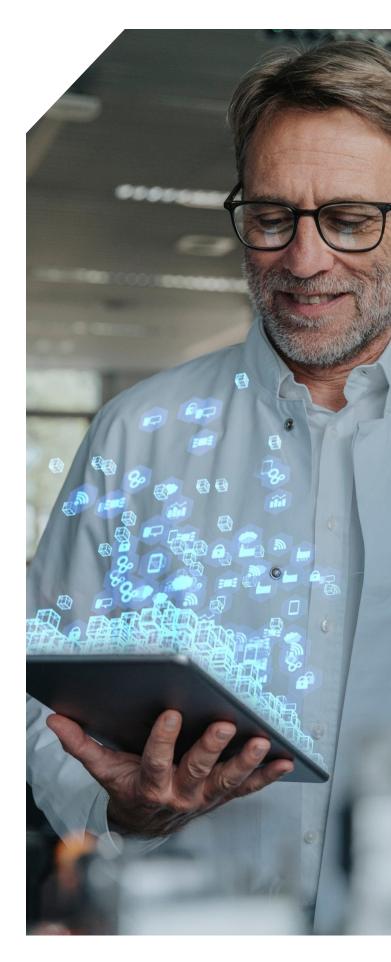
Enabling real-Time, Al-Driven Sales

Copilot for Sales is purpose-built to remove administrative friction:

- Email & Document Automation: Drafts outreach messages and presentations.
- **Predictive Insights:** Recommends the next best actions and lead prioritization.
- **CRM Data Updates**: Keeps data fresh without manual input.
- Seamless Integration: Works within Outlook, Teams, and other Microsoft apps.

Autonomous Agents go further - handling entire workflows such as:

- Lead qualification
- · Opportunity scoring
- Sales report generation
- End-to-end service or finance process execution.





Unified AI-Ready Architecture

The true power of CRM AI Agents is unlocked through modern, connected data platforms:

- Data Integration: Connecting sales data with operational, service, and behavioral data
- Real-Time Decisioning: Instant insights from streaming data sources
- Automation & Governance: Ensures compliance, security, and transparency
- Copilot Studio: Enables businesses to create custom agents and workflows

This architecture positions AI Agents as not just assistants - but intelligent, autonomous partners in driving business growth.

Use Cases Driving Business Impact

1. Lead Conversion Optimization

Al surfaces patterns from successful deals, identifies high-potential leads, and recommends optimal outreach timing.

2. Sales Cycle Reduction

Routine tasks like follow-up emails, meeting summaries, and opportunity tracking are automated, cutting administrative time.

3. Dynamic Content Generation

Sales presentations and product proposals are automatically created and personalized, enabling rapid, tailored responses.

4. Full-Funnel Visibility

Agents continuously update CRM data, providing leadership with real-time pipeline intelligence and forecasting accuracy.

Building Trust in Al

Al Agents are only as effective as the data and governance behind them. Our approach ensures:

- Secure, governed data environments
- Auditable decision-making and transparency
- Compliance with enterprise and industry regulations
- Training and change management for user confidence.





Next Steps: From Pilot to Scale

Microsoft is actively funding pilot and deployment programs to accelerate adoption of Copilot and Autonomous Agents. Early engagement not only accelerates value - but positions your business as a leader in generative Alenabled sales transformation.

Why Akkodis

Akkodis delivers intelligent CRM solutions built for impact:

- Industry-specific use cases tailored to sales roles
- Rapid deployment aligned with Microsoft's roadmap
- Custom Copilot and Autonomous Agent builds via Copilot Studio
- Training and enablement through Akkodis Academy
- Strategic consulting from Akkodis Advisory

This end-to-end approach ensures AI is not only deployed, but adopted, scaled, and continuously improved.



Get in Touch

Learn how Akkodis can help you can Transform your CRM with Al Agents:

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Engineering a Smarter Future Together

Leveraging the power of connected data to accelerate innovation and digital transformation.



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