

AI 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 **AI 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.

- **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.

Enabling real-Time, AI-Driven Sales

- **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.

- 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

AI 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 AI

AI 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 AI-enabled 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 AI 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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