SmartAI Dynamics 365 Agent

Where AI Meets Enterprise CRM

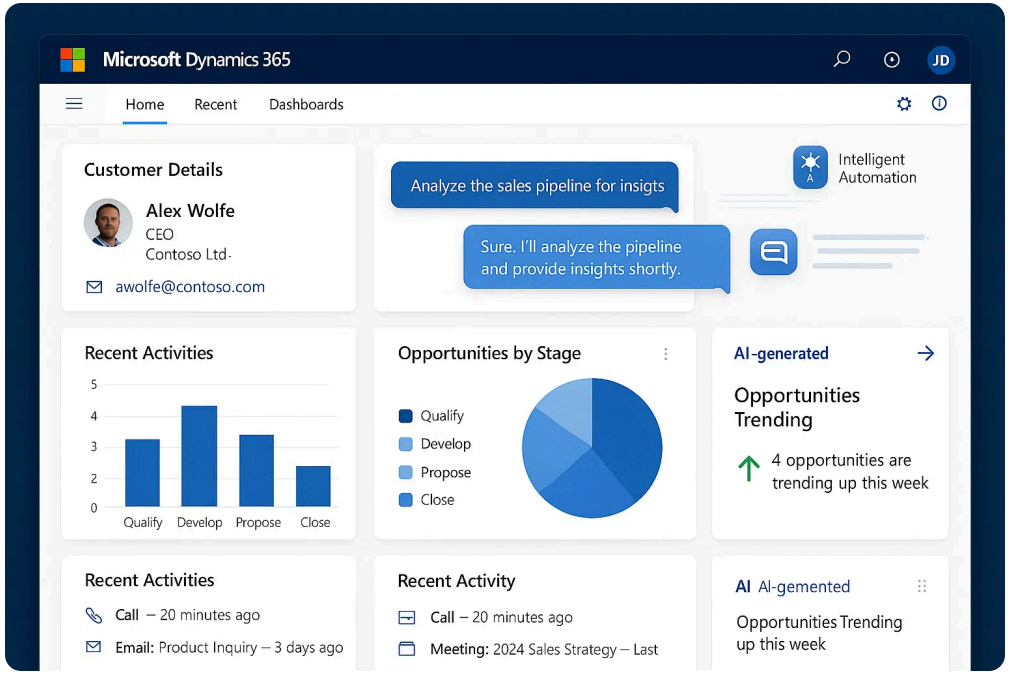
Executive Summary

Our vision is to empower every enterprise with an intelligent, conversational CRM that works as fast as you think.

SmartAI Dynamics 365 Agent is an **AI-powered conversational platform** that transforms Microsoft Dynamics 365 into a natural language-driven, intelligent CRM.

It removes complexity, reduces costs, and accelerates decision-making for sales, service, marketing, and operations teams.

With **multi-agent AI**, built-in LLM support, and seamless integration, it empowers users to work faster, smarter, and more securely—delivering measurable ROI within weeks.



Targeted Agents & Use Cases

Sales Agent

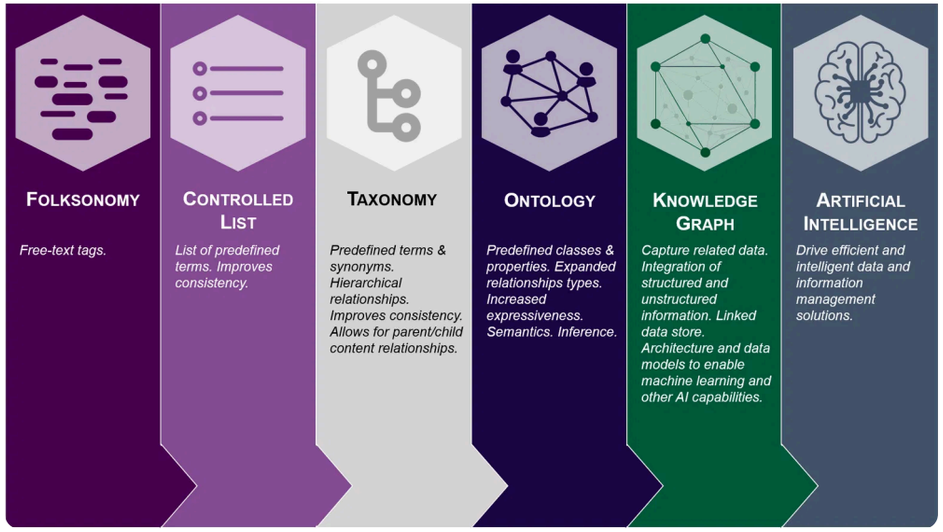
Smart quotes, pipeline insights, upsell recommendations

Customer Service Agent

Faster resolution, SLA monitoring, sentiment analysis

Marketing Agent

Campaign intelligence, customer segmentation, engagement insights



Example Scenarios

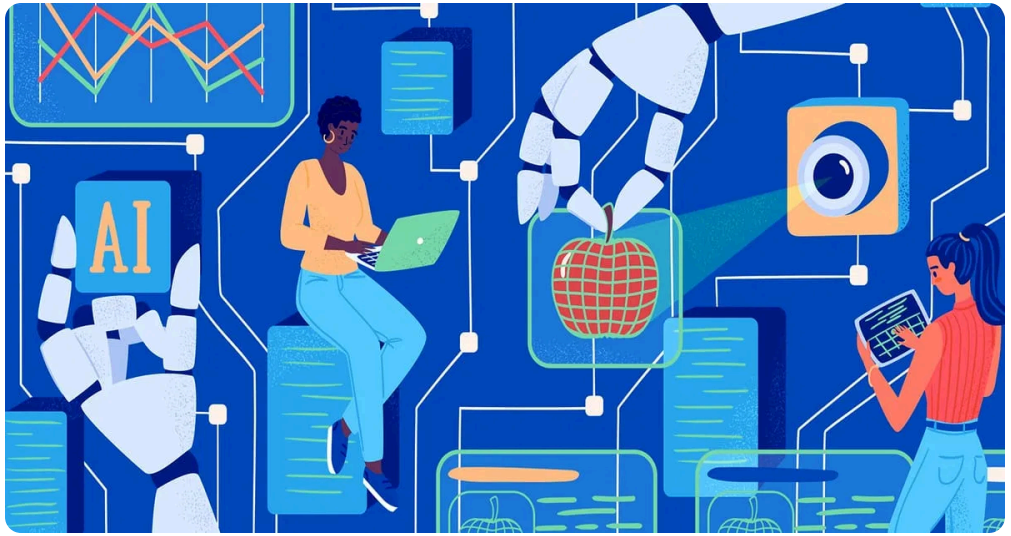
"Provide me the complete experience history of customer ABC with our products and services."

"Compare purchase history of customer XYZ and recommend the most competitive winning quote."

"Summarize the profile of customer ABC, as I am meeting them tomorrow."

Primary Value Drivers

Value Driver	Business Impact	ROI Metrics
Operational Efficiency	80% faster data retrieval	Minutes vs. hours
User Experience	Zero-training, natural language interface	95% adoption
Data Accuracy	AI validation & error prevention	99.7% accuracy
Process Automation	End-to-end automation	75% cost reduction
Customer Satisfaction	Real-time responses	40% faster resolution



Key Benefits & Features

- **Intuitive Interface:** No technical expertise needed.
- **Empower All Users:** Sales, service, marketing, management.
- **No Developer Dependency:** Built-in LLM support.
- **Native Language Interaction:** No SQL, FetchXML, or coding.
- **AI-Powered Insights:** Churn prediction, opportunity scoring.
- **Multi-Entity Queries:** Unified, consolidated views.
- **Real-Time Reporting:** Beyond static dashboards.
- **Reduced IT Dependency:** Lower costs, faster operations.
- **Scalable & Adaptable:** Across industries and modules.
- **Enhanced Productivity:** Instant, personalized insights.
- **Data-Driven Decisions:** Accurate, real-time reports.
- **Security & Compliance:** RBAC, GDPR, Microsoft cloud trust.

Measurable Outcomes & ROI

Process	Typical Before	Potential After	Expected Improvement
Quote Generation	45-90 min	5-15 min	**70-85% faster***
Case Resolution	2-7 days	1-3 days	**40-70% faster***
Information Search	1-4 hrs/day	15-60 min/day	**50-80% reduction***
User Onboarding	1-3 weeks	2-5 days	**60-85% faster***

Sources: *McKinsey Global Institute, Salesforce State of Sales Report (2023), Microsoft Dynamics 365 Customer Success Stories, Industry AI implementation benchmarks*

> **Important:** Results may vary based on organization size and current processes. Validate through pilot programs.

Return on Investment

Positive ROI typically achieved within 6-12 months**

*** Based on Forrester Research: "The Total Economic Impact of AI in CRM" (2022)*

Industry Use Cases

Manufacturing

Predictive maintenance, defect detection, supply chain optimization, and production scheduling with real-time analytics.

Healthcare

Patient case tracking, compliance reporting, treatment recommendation, and healthcare provider coordination.

Finance

Automated KYC, risk analysis, fraud detection, and personalized financial advisory services.

Retail

Personalized customer experience, demand forecasting, inventory management, and omnichannel engagement.

Get Started Today

Ready to Revolutionize Your Dynamics 365 Experience?

Proof of Value

- 30-day pilot with your Dynamics data
- ROI assessment with your metrics
- Dedicated success manager

Success Guarantee

- Improved efficiency
- Faster decision-making
- Measurable ROI within 60 days

Contact us for a personalized demo & ROI workshop