

AI + CX

Your guide to marketing, sales,
and service transformation

E-book

Designed for accessibility

Contents

Who is this for?

Enterprise decision makers (including CEOs and chief revenue officers) looking for strategic guidance on how new AI technology might help their marketing, sales, and service teams improve customer experiences.

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The AI imperative

People using AI for work isn't some far-off future state. Staying competitive today requires learning about and adopting AI-powered tools that help make work easier and more effective for people across your organization.

Plus, to remain relevant in your customers' eyes—and foster deep loyalty—it's up to you to raise the bar on how you attract, sell to, and support them, day in and day out. Customer

AI technology helps your entire business engage customers

Sales teams can use AI to analyze data, discover leads, and proactively engage customers with offers and recommendations they didn't realize they needed.

experience (CX) is at the center of that challenge. Meet it head-on by bringing AI capabilities into every customer interaction.

Large language models, powerful analytics, generative AI, automated workflows, on-the-fly content creation—the transformative potential of AI technologies to reshape CX is immeasurable. The newest AI features are more accessible, intuitive, and helpful than ever,

Marketing teams can get help from AI to tweak campaigns and create eye-catching content, based on customer data, that increases engagement.

empowering you to streamline operations, enhance customer engagement, and achieve sustainable growth.

We hope this e-book gives you confidence to explore, evaluate, and adopt AI-powered solutions, and helps you understand how to cultivate a culture of continuous innovation within your CX systems.

Service teams can use AI—every chance they get—to deliver personalized experiences that build loyalty and drive revenue.

Definitions

AI

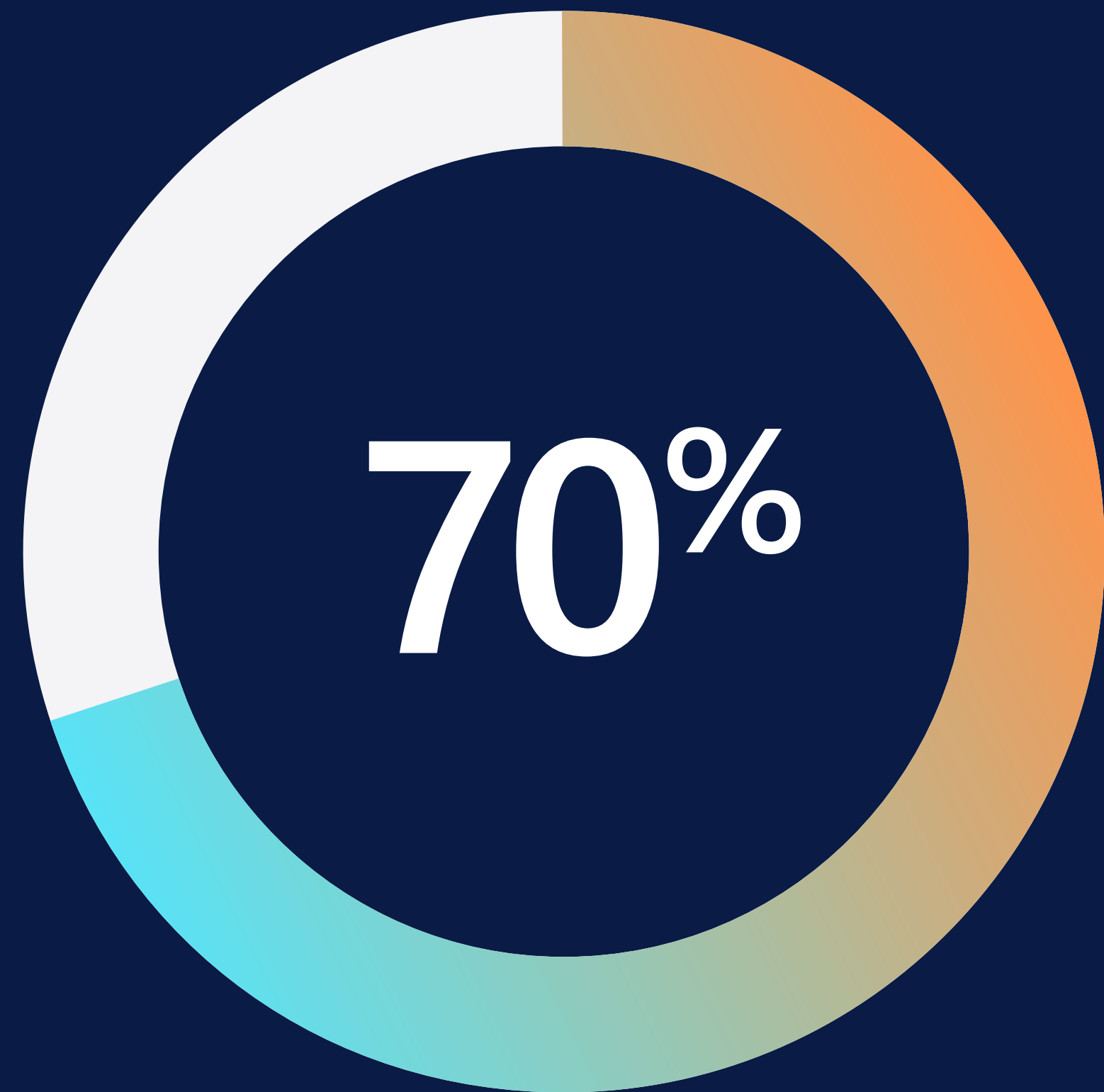
Artificial intelligence—technology that gives computers the human-like abilities of hearing, seeing, reasoning, and learning.

Large language models

Models that mimic the way humans communicate by learning patterns and relationships in a language.

Generative AI

AI that creates something new out of the patterns and structures that it's learned, including pictures, music, code, and product designs.



“By 2025, 70% of enterprises will have operationalized AI architectures due to the rapid maturity of AI orchestration platforms.”¹

¹ Gartner®, Become an AI-First Organization: 5 Critical AI Adoption Phases, Svetlana Sicular, Bern Elliot, 11 October 2023. Graphic created by Microsoft based on Gartner stat. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

Chapter 1

AI + marketing



Marketing momentum starts with a big idea, often sparked by a single data point or insight. The result: A campaign that builds your brand and solidifies your business's position in customers' minds.

Using AI-powered tools and platforms, marketers can get to thinking big faster and meet measurable marketing goals more efficiently. They can optimize resources, lean into data-driven trends, and engage customers around the clock with content that turns heads and drives sales.

Your marketing teams can use AI to:

- **Personalize at scale.** Use AI-powered analytics to sort through huge datasets and help tailor messages that redefine your brand experience and make your customers feel seen and heard.
- **Optimize campaigns.** Spend your marketing dollars most efficiently by deploying predictive analytics to help analyze historical market trends and suggest data-driven campaigns that lead to measurable impact.
- **Co-produce content.** Get help from generative AI tools to develop compelling, targeted copy that resonates with your audiences.



"Outbound marketing messages from large organizations will be personalized using generative AI tools by 2025, up from less than 2% in 2022".²

AI-powered analytics

How it works:

Connects all your customer data to identify real-time insights about marketing campaign performance.

How it helps marketing teams:

Leads to stronger, more informed decisions about where your marketing budget will drive the most impact.

² Gartner®, Emerging Tech: Top Use Cases for Generative AI, Anushree Verma, Vibja Chitkara, 21 July 2023.

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Chapter 2

AI + sales



Predictive intelligence

How it works:

Uses AI to analyze sales and market trends that pinpoint approaches to engaging a specific customer or set of customers proactively.

How it helps sales teams:

Drives customer satisfaction by anticipating their needs so sellers stay ahead.

Strong insights spur stronger sales. When your sellers have an AI assistant to help drive their productivity, elevate key customer intelligence, and offer next steps, their next win always feels a bit closer at hand.

The latest AI features in sales solutions reshape processes and empower sellers to be more proactive and effective, leading to better leads, more engaged customers, and more efficient sellers.

Your sales teams can use AI to:

- **Close deal.**
Help your sellers stay focused and primed for productivity using AI-powered pipeline prioritization, content generation, and automated data capture.
- **Personalize customer relationships.**
Set up sellers to tailor interactions using AI-generated insights and recommendations to engage customers and improve their experiences.
- **Guide sales teams.**
Empower sellers to improve their performance and scale best practices using manager insights, sales sequence automation, and predictive forecasting.



Expected reduction in time spent prospecting and customer-meeting prep by B2B sales organizations by 2026, using generative AI-embedded sales technologies.³

³ Gartner®, Multidimensional CRM: How GenAI Will Revolutionize Sales Force Automation Platforms, Adnan Zijadic, 13 July 2023. Graphic created by Microsoft basis Gartner stat. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

Chapter 3

AI + service



AI-powered self-service

How it works:

Monitors, routes, and resolves less-complex cases on your digital channels around the clock.

How it helps service teams:

Handles the most repetitive cases, which guards against burnout and lets them focus on taking care of customers that need their skills most.

The number of ways customer loyalty can be won (and lost) is growing exponentially. AI can help service teams deliver exceptional experiences in person, online, on mobile devices, alongside agents and frontline workers, through contact centers, and across digital channels.

By giving your customer service teams access to AI, you're setting them up to serve customers wherever they are, identify the best agent or technician for each request, and empower

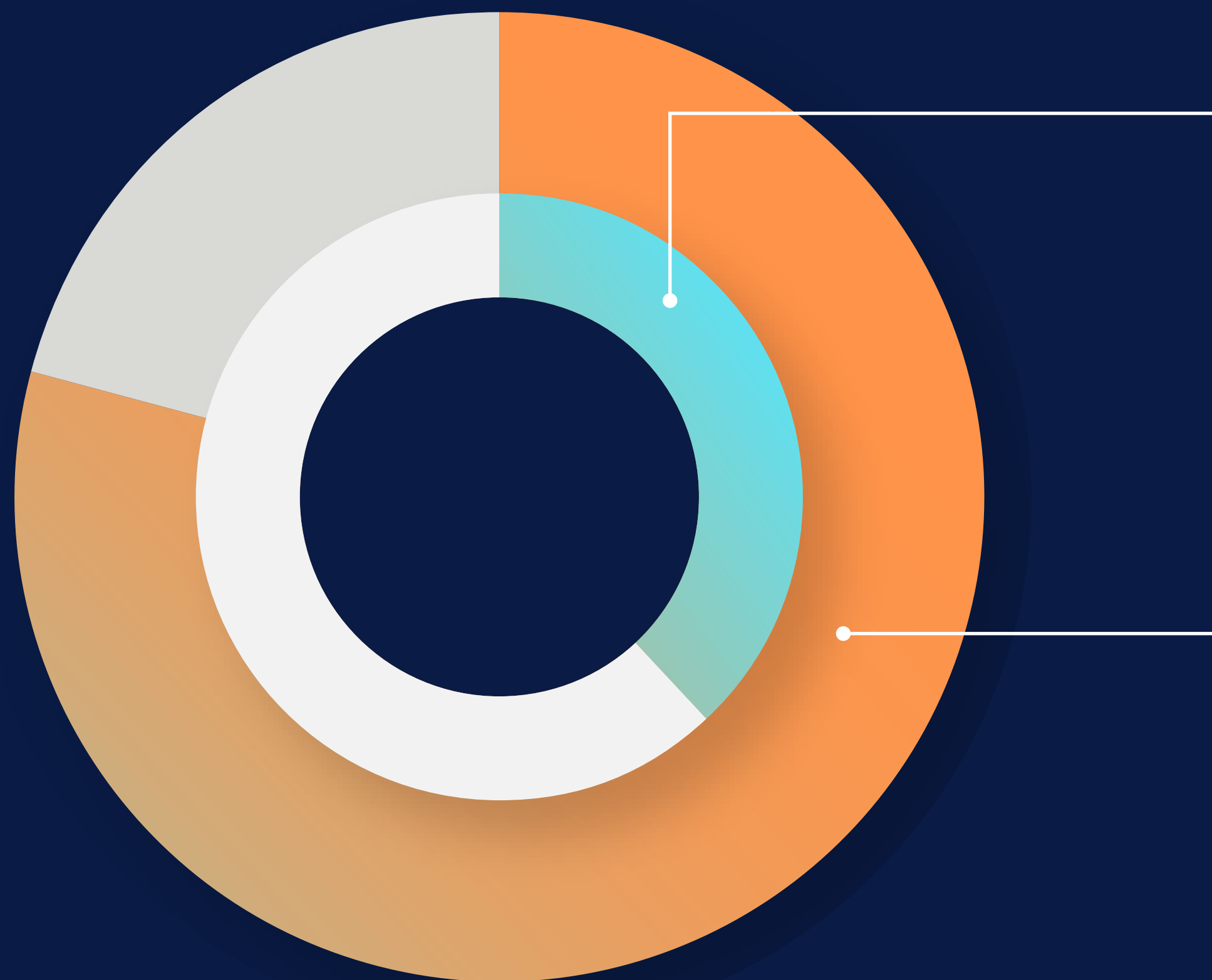
customers with automated self-service options that seamlessly transition into assisted service from agents and field technicians.

Your service teams can use AI to:

- **Deliver more empathetic service experiences.**
Reduce training time while helping agents understand customers and their issues faster, enabling your service teams to focus on personalizing interactions and building relationships with customers.
- **Resolve issues quicker.**
Gather relevant information across your organization's knowledge sources faster to quickly respond and resolve customers' inquiries.
- **Find productivity improvements.**
Identify how AI affects key support metrics, and then convert those findings into actionable strategies that enhance your service teams' performance.

While AI helps create endless opportunities to keep customers satisfied, your field service team can also use it to:

- **Boost frontline productivity.**
Enable technicians to quickly create summaries of key work order information while using natural language to update progress and complete tasks.
- **Streamline work order management.**
Create and schedule work orders in Outlook and get scheduling suggestions in Microsoft Teams.
- **Save steps to enhance efficiency.**
Get intelligent recaps of important details about status, priority, and booked resources from a work order—without pulling up the work order.



38%

Surveyed leaders who see improving customer experience and retention as the primary purpose of initiatives to deploy applications trained on language models.⁴

79%

Surveyed leaders who believe knowledge management and insight are extremely or very important to achieving their organization's goals for 2023.⁵

⁴ Gartner®, How Generative AI Can Help Meet Customer Experience Expectations, Leah Leachman, 3 August 2023. Graphic created by Microsoft basis Gartner stat. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

⁵ Gartner®, How Generative AI Impacts Knowledge Management, Haritha Khandabattu, Stephen Emmott, Darin Stewart, 29 November 2023. Graphic created by Microsoft basis Gartner stat. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

Chapter 4

How Microsoft used AI to help support customers



“Copilot provides us the support to offer the customer understanding while also sorting out their technical problems.”

Ric Todd

Director of Support Strategy, Microsoft

Microsoft has one of the largest customer support teams in the world, comprising tens of thousands of service agents. To help them speed up resolutions and increase collaboration, Microsoft replaced 16 different case management systems and over 500 individual tools with Dynamics 365 Customer Service.

Now, the support team uses the generative AI capabilities of Microsoft Copilot to better understand and engage customers while avoiding redundancies and working faster.

Using a single solution simplifies customer support for service agents, enabling them to quickly access information without repeatedly switching between multiple windows and tools. Plus, Copilot helps them troubleshoot customer issues by suggesting next steps and important information that keeps every conversation flowing. And it didn't take long to see the impact that has on the team's performance—Microsoft subsequently reported a **31% increase in first-call resolution**. Although generative AI can't replace human agents, Copilot offers guidance that empowers the Microsoft customer support team to connect with customers on a deeper level.

Chapter 5

How AI helped simplify Microsoft sellers' work



Like most other sales organizations, Microsoft sales teams have many responsibilities. To help reach more than 119,000 accounts worldwide, sellers needed to spend less time on tedious tasks and more time focusing on their customers.

But they were often stalled by admin duties like switching between as many as 40 tools per day to capture and update account information—wasting time, causing stress,

and increasing the amount of tech that IT was managing.

Microsoft turned to its own next-generation AI and automation technology and rolled out Microsoft Copilot for Sales to 35,000 employees. Now, Copilot helps Microsoft sellers prepare for meetings, write emails, and update their customer and account information without switching between different solutions—focusing their efforts and helping them close more deals.

The sellers dove in, most often using Copilot to generate email summaries and adjust CRM records within Outlook. And the results were immediate. Among Microsoft sellers using Copilot for Sales surveyed, 83% said it makes them more productive⁶ and 67% spent more time with customers thanks to Copilot for Sales.⁶

“[Microsoft Copilot for Sales] saves time, cuts down on redundant work, and lets our team work to their fullest”

Judson Althoff

EVP & Chief Commercial Officer, Microsoft

⁶ Microsoft-conducted study, November 2023. Study based on sellers who use Microsoft Copilot for Sales at least weekly. Deployed solution does not include Microsoft Copilot for Microsoft 365.

Chapter 6

How to choose the right AI solution



Definitions

Responsible AI

A human-centered approach achieved through research-driven best practices. The goal is to create trustworthy artificial intelligence systems that benefit people while mitigating harm.

[Learn more about responsible AI standards >](#)

Selecting which AI-powered CX solution to use is just as important as deciding to use one in the first place. Here are some key considerations when selecting a solution, along with how to prepare your organization to get the most out of it.

Look for an AI-powered CX solution that's:

- **Aligned with your business needs.** Do you want to increase seller productivity with tools that automate workflows and generate emails, summaries, and other content? Or is your immediate focus on helping marketers surface insights to improve customer engagement? Determine your priorities for making an impact with AI, and then shop accordingly.

- **Easy to learn.** People are more likely to embrace new technology if they can figure it out quickly. AI is no different. For example, features that let call center agents quickly access customer data using conversational language minimize onboarding time and boost satisfaction.
- **Easy to access.** Nothing seeds frustration quite like disjointed tools and processes. Look for a CX solution that provides AI-powered experiences embedded within everyday workflows, connects to customer data across the organization, and is tailored to specific marketing, sales, and service roles.

Beyond being suited to your business and easy to use, it's important that the AI-powered CX solution you choose to implement is:

- **Fuel for creativity and success.** The best ideas come from clear minds, unburdened by busy work that can be automated. You want AI tools to help ease your teams' duties and help people think more strategically. For example, sellers can use AI to quickly identify which

prospects are most likely to convert and get recommendations on how to best move each deal forward.

- **Designed to make life easier.** AI is a tool to amplify human ingenuity and lighten people's workloads. It should always be viewed as a tool to support CX—not provide the complete experience—and any solution promising otherwise should be viewed with skepticism.
- **Continually enhanced with new AI capabilities.** The provider should have a roadmap for integrating ongoing breakthrough AI advancements in areas such as vision and speech recognition and machine reading and translation.
- **Governed by clear, responsible standards.** Make sure the provider is transparent about ways its AI systems are rooted in fairness (how they make decisions), privacy (how they help keep my data secure), safety (how they function in new conditions or contexts), and inclusiveness (how accessible their systems are).



63,000+

Organizations that used Microsoft Copilot in its first six months of availability, including 3M, Prada Group, and Campari.⁷



Copilot

⁷ Microsoft survey of Copilot in Microsoft Dynamics 365 and Microsoft Power Platform users, April–September 2023.

Conclusion

Use AI to elevate customer experiences

Opportunities for your employees to forge deeper customer relationships have never been greater. With AI-powered CX solutions, your marketing, sales, and service teams can anticipate customer needs, personalize customer journeys, and focus on what matters most to your business.

Although it may seem like the convergence of AI and CX occurred quickly, Microsoft has been working to elevate customer experiences for decades and pioneering AI technologies such as Microsoft Copilot—most recently advancing Copilot features across more lines of business to help people do their very best work.

And we see an even brighter future for AI-powered CX solutions. Our vision for innovation includes combining predictive analytics and content generation with customer and market insights to usher in a new standard in customer experience excellence.

The cornerstone of this vision is accessibility. Automating tasks, generating ideas, and forming strategic insights shouldn't be aspirations; they should be achievable goals for all. Everyone can use Copilot and its next-generation AI capabilities as an essential companion in maintaining competitiveness and strengthening customer relationships.



[Learn more about Microsoft AI](#)

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