

Leadership in the AI Era

How to Empower Your
Workforce for the Future



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Who this is for:

Business and IT leaders who oversee CRM and ERP usage within their organizations and need strategies for navigating AI adoption.

Estimated reading time:

19 minutes

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Chapter 1

Navigating AI in CRM and ERP

2023 was a breakout year for AI, which has quickly become integral to everyday business operations. In a recent IDC global survey of business leaders and decision makers, 71% of respondents said their organizations are already using AI—and 22% said they plan to start within 12 months.¹

Infusing AI into customer relationship management (CRM) systems and enterprise resource management (ERP) systems allows organizations to streamline processes, improve data analysis, enhance decision-making, and optimize resource allocation. That makes a huge difference to the bottom line. In fact, PricewaterhouseCoopers predicts that AI could boost global GDP by up to 26% by 2030.³

To succeed with AI, the right technology is key—and so is buy-in from employees. This e-book is your roadmap of actionable strategies for workforce readiness and training, with practical guidance for bridging the gap between AI's potential and practical applications.



Chapter 2

The strategic imperative: AI for business leaders

AI is ushering in a new era of innovation—one where technology becomes more intuitive, conversational, and intelligent, augmenting human ingenuity across a range of tasks and processes. Its integration into CRM and ERP systems presents unprecedented opportunities for businesses to optimize operations and drive growth across industries.

Infused into CRM systems, AI can be used to:

- **Access real-time support and information** on customer preferences, products, and inventory to improve customer service.
- Retrieve and contextualize the customer insights necessary to **generate and personalize customer experiences at scale.**

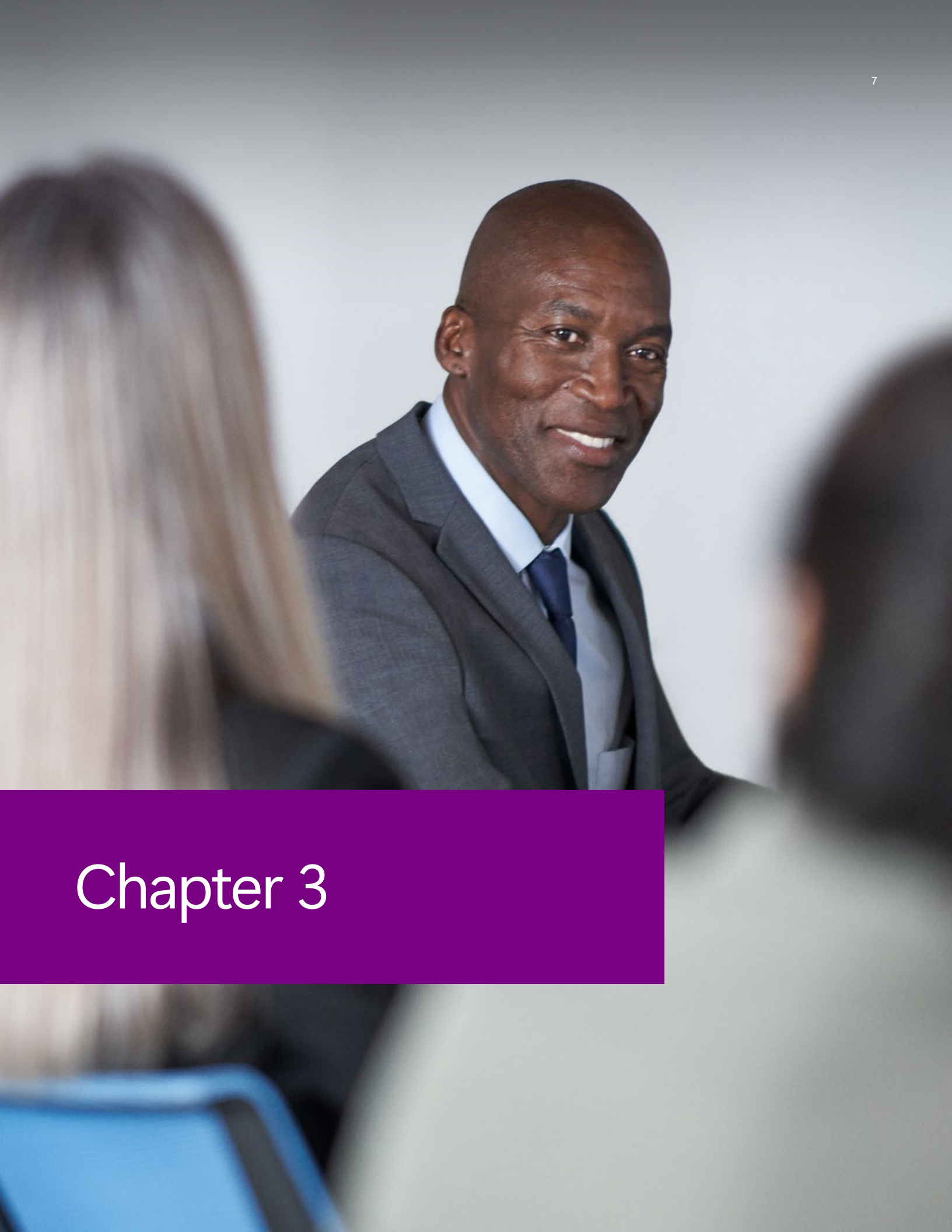
- **Close more deals** with advanced lead scoring and **build customer loyalty** with targeted promotions and offers.

Within ERP systems, employees can use AI to:

- **Improve decision-making** and **forecast revenue** with predictive analytics.
- **Automate and optimize workflows** to streamline processes and boost productivity.
- **Mitigate risk and detect fraud** with AI-powered analytics.

These are just a few of the benefits you can expect when you introduce AI.

As AI becomes increasingly essential for competitive and efficient operations, look for vendors that infuse AI into their entire product suite to ensure that everyone can benefit as you ramp up AI usage across your organization.



Chapter 3

Practical strategies for AI adoption

You play a crucial role in shaping your organization's approach to AI adoption, and there's more to it than simply securing the right technology. You also need to empower employees to use AI—otherwise, even the greatest tech solution won't make an impact. Here are two strategies that can help you encourage employees to embrace AI:

Strategy #1:

Build a growth mindset and foster an AI-ready culture.

- **Encourage top-down buy-in and support.**

When leaders champion AI, it sends a powerful message. Leaders should highlight and reward AI innovation within teams to reinforce workforce empowerment and set the standard for employee engagement with AI.

- **Create a diverse AI council.**
Made up of advocates from IT, change management, executive, and risk management teams, an AI council can help define the vision, goals, and roadmap for AI adoption, as well as oversee the governance, ethics, and compliance of AI solutions.
- **Prioritize data privacy, security, and ethical standards.**
Transparency builds trust. Be clear about how AI systems use and protect data and what measures are in place to prevent misuse or abuse. Establish and communicate guidelines for ethical and responsible AI use. Openly discuss what AI can and can't do, and help employees recognize when it's best to rely on AI versus human expertise.
- **Respect divergent attitudes.**
Employees may have varying viewpoints about new AI initiatives—some enthusiastic, others skeptical. Tailor your support, training, and communications to acknowledge all perspectives.



Find inspiration for your own AI ethics policies in **Microsoft's responsible AI standards**

Strategy #2:

Establish a flexible learning and development program.

- **Create personalized learning paths.**
Offer a mix of online courses, workshops, webinars, and hands-on projects so employees can pursue educational opportunities that match their career ambitions, learning preferences, and schedules. AI-powered learning platforms can be a friendly introduction to AI.
- **Encourage cross-functional collaboration.**
Building AI-savvy teams requires varied expertise. An AI user community can support peer-to-peer experimentation and discovery.
- **Embrace challenges and learning from failure.**
Foster a culture of curiosity and innovation that encourages employees to try new things, ask questions, and learn from mistakes.
- **Measure and reward progress.**
Use metrics like completion rates, skills acquisition, project outcomes, and employee satisfaction to assess the effectiveness of your AI adoption program and identify areas for improvement. Incentives and recognition can motivate participation and excellence, so showcase innovative and impactful use cases of AI within your organization.

A proven AI adoption guide

See how the Microsoft Digital team deployed Copilot for Microsoft 365.

 **Explore the guide**

Chapter 4

IT's role in AI adoption

Successfully implementing AI requires careful planning and collaboration across your organization, especially with the IT department.

IT leaders play a pivotal role in facilitating AI adoption and should closely engage with employees and leaders throughout the process. Key initial IT support includes:

- **Establishing necessary infrastructure** to support AI deployment and operation, including hardware, software, and network capabilities.
- **Managing and curating the data essential for AI systems**, ensuring it is of high quality, relevance, and diversity for effective training and testing.
- **Developing APIs or middleware** to enable seamless communication between AI systems and existing software components like CRM and ERP systems.
- **Designing scalable architectures** capable of meeting both current and future performance demands.

Once these elements are in place, IT will also:

- **Implement robust security measures** to safeguard systems across their entire lifecycle.
- **Monitor and maintain AI systems** to ensure continued smooth operation and value delivery.
- **Provide comprehensive training and support** to AI users, including clear documentation and ongoing technical assistance.
- **Automate routine tasks across departments** to enhance productivity and enable focus on more strategic, high-value tasks that require human judgment and creativity.

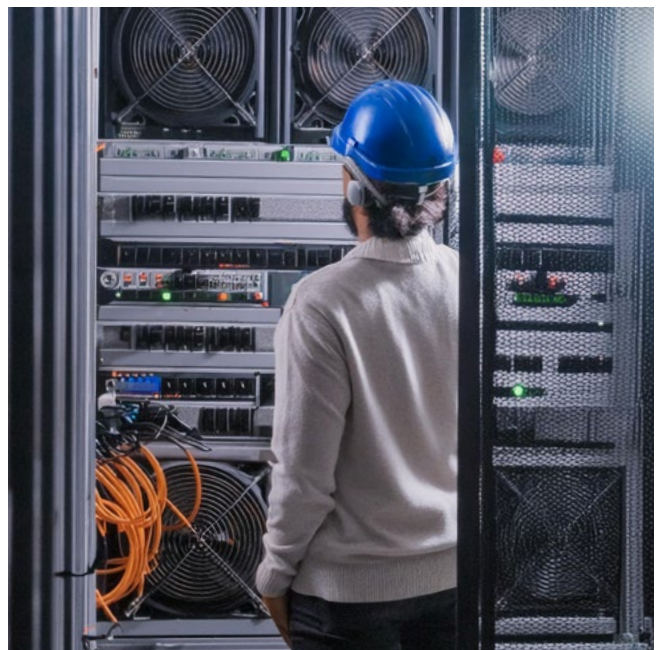


Image produced with the help of AI

Practical guidance for IT gatekeepers

Align IT initiatives with broader business goals, ensuring they have a clear implementation plan. Before investing in AI, define the problem it addresses, its strategic alignment, and how success will be measured.

Start small, then scale gradually to test and adjust AI solutions in real-world scenarios. Deploy them initially to specific workflows, then expand to more complex applications.

Establish robust data governance policies. Quality, quantity, and availability of data are crucial for AI performance. Implement governance frameworks that define roles, responsibilities, and rules for data collection, storage, and usage. Invest in data quality initiatives to ensure accuracy.

Collaborate closely with business leaders, data scientists, and domain experts. Customizing and optimizing AI requires domain knowledge. Engage stakeholders to understand needs, expectations, and feedback, ensuring AI solutions meet requirements and deliver value.

Vendor evaluation checklist for IT leaders

To make sure you select the right AI vendor for your organization, consider factors like:

- ✓ **Expertise and experience.**
Choose vendors with proven track records and credentials in delivering AI solutions.
- ✓ **Scalability and flexibility.**
Solutions should be ready to accommodate current and future needs and demands, as well as adapt to different scenarios and contexts.
- ✓ **Compatibility** with existing IT infrastructure, systems, and data sources.
- ✓ **Performance and accuracy of AI models.**
Speed and reliability are key to delivering the expected outcomes and results.
- ✓ **Data privacy and security.**
Verify that vendors adhere to best practices and compliance standards for data protection, such as GDPR, HIPAA, or SOC 2, and offer transparent and accountable data processing and storage.

Chapter 5

How AI has empowered real employees

The 11-by-11 tipping point

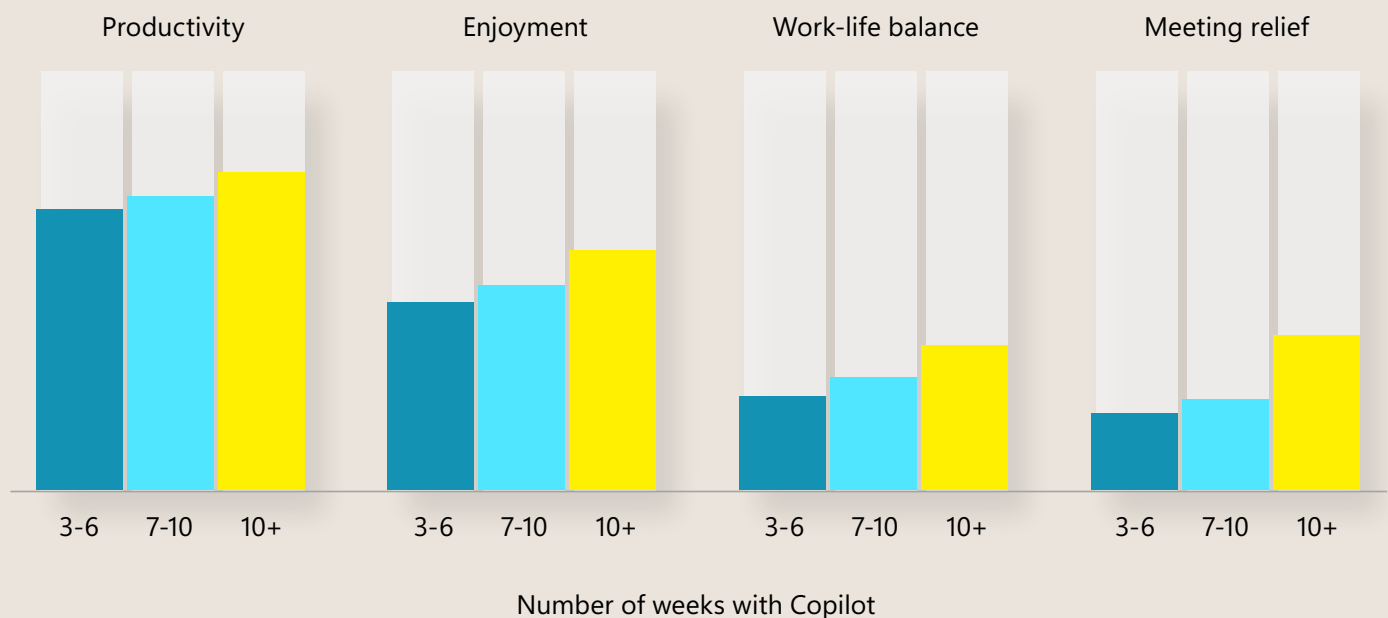
A study of 1,300 early adopters of Copilot for Microsoft 365 across different functions and industries revealed how AI can boost work productivity and enjoyment in surprisingly short time frames.⁴ Copilot helped people with tasks like summarizing documents,

writing job descriptions, and recapping meetings. The study found that saving just 11 minutes a day with Copilot led people to see its value and get in the habit of using it regularly.

After using Copilot for 11 weeks, people reported improvements in four key work areas: productivity, enjoyment, work-life balance, and meeting relief. This is the “11-by-11 tipping point”: the moment when AI’s benefits deeply integrate into employees’ work routines.

To reach this point in your own organization, find easy AI wins that save 11 minutes a day—and encourage employees to stick with it for 11 weeks.

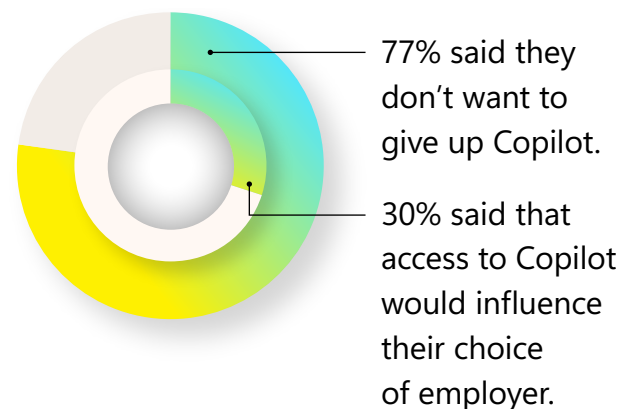
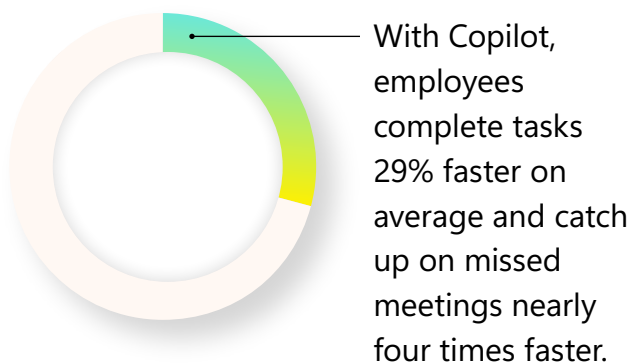
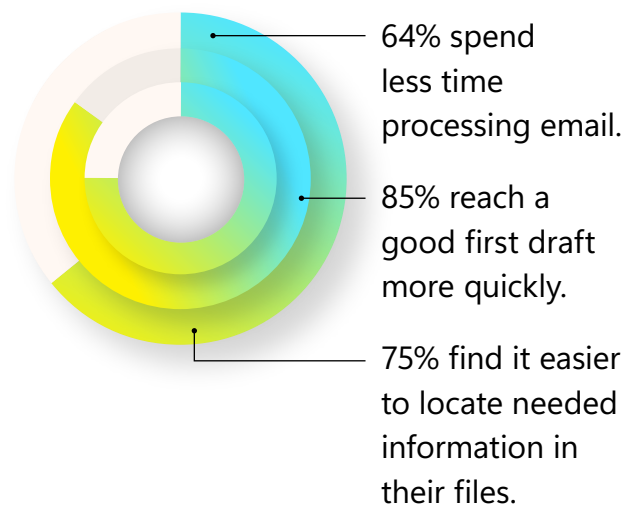
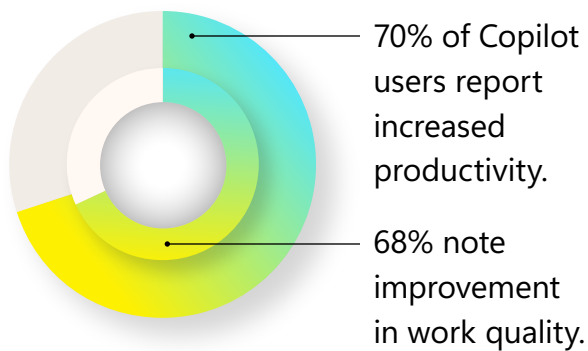
Respondents that reported improvements after using Copilot



The positive impact of generative AI at work

A combination of surveys and experiments with the earliest users of Copilot for Microsoft 365 illuminates how generative AI transforms work in terms of productivity, quality, creativity, and time savings.

Key statistics include:



Generative AI can transform work processes and address common pain points across different functions, like finding information, identifying opportunities, simplifying reporting, and troubleshooting issues. To realize the full potential of Copilot, employees need to build a daily habit and rethink how they work, with a focus on gaining the skills and expertise needed to perform better and faster.



Our people
are seeing
immediate
productivity
improvements
with Copilot.

Kate Johnson
CEO,
Lumen Technologies

An AI transformation with Dynamics 365

When Belimo transitioned to Dynamics 365, it marked a significant shift in CRM engagement among employees. Infusing AI into their CRM system automated manual tasks and streamlined processes.

The platform's intuitive design and AI-powered insights enabled employees to quickly access customer information and provide proactive service. The result was a workforce that was not just more productive, but also more satisfied with their work, as they could see the direct impact of their efforts on customer satisfaction and business success.

Dynamics 365 empowered Belimo's workforce by:

- Automating tasks, allowing more time for innovation.
- Fostering collaboration across departments.
- Providing AI-powered analytics for informed decisions.
- Enabling focus on high-value initiatives.

Dynamics 365 didn't just improve Belimo's CRM system; it reshaped the company culture, making every employee a key player in the journey towards excellence and innovation.





We have created a customized workflow that shows employees which steps are mandatory and what is optional in a given workflow. The ability to seamlessly visualize process flows helps employees take the right steps and work effectively.

Uli Fischer

Senior Project Manager,
Belimo Automation



Chapter 6



Continue your AI journey

Welcoming AI into the workplace isn't just about efficiency. It's also about empowering every employee to focus on the work that truly matters, transforming businesses from the inside out. By 2025, more than a quarter of the workforce will belong to Generation Z,⁵ a tech-savvy cohort that prioritizes meaningful impact over mundane administrative tasks—making AI indispensable in elevating the impactful work that defines an organization.

The adoption strategies in this guide are designed to secure buy-in at every level, fostering an AI-centric culture that is the cornerstone of competitive advantage. Microsoft's commitment to enhancing every person's and organization's capabilities with AI is embodied in Dynamics 365, which infuses AI into CRM and ERP systems to offer everyone the benefits of this technology. Dynamics 365 uses built-in insights, predictive intelligence, and workflow optimization to help you deliver intelligent, personalized services and connected experiences.

The true secret to adopting AI lies in empowering the workforce—enabling leaders and employees alike to realize the full potential of AI. Dynamics 365 can be your partner in this journey, providing the tools and insights necessary to thrive in an AI-augmented future.



Learn more about the transformational AI capabilities in Dynamics 365

Source:

¹ "New Study Validates the Business Value and Opportunity of AI." Microsoft Blog, November 2, 2023.

² Goetz, Michele. "Predictions 2024: Generative AI Transitions From Hype to Intent." Forrester blogs, October 26, 2023.

³ PricewaterhouseCoopers LLP. "PwC's Global Artificial Intelligence Study: Sizing the prize." PricewaterhouseCoopers LLP.

⁴ Microsoft WorkLab, "AI Data Drop: The 11 by 11 Tipping Point." September 2023.

⁵ Bieler, Dan. "Ready Or Not, Gen Z Is Already In Your Workforce." June 7, 2023.

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