

Copilot Onboarding Guide for Contact Centers

How to successfully deploy Copilot in Dynamics 365 Customer Service

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About this guide

This is a practical guide for businesses and professionals preparing to implement Copilot in Dynamics 365 Customer Service within their support organization operational frameworks. This guide describes best practices, strategies, and key milestones to ensure a successful deployment process.

CIOs, IT decision-makers, customer service executives, operations managers, and technology leaders should use this guide to evaluate their current operations and create a plan to smoothly integrate Copilot capabilities.

You can look at the implementation process in three stages:

1. Prepare your organization
2. Onboard your users
3. Optimize your implementation

Responsible AI

There are three fundamental promises we make with the Microsoft Cloud:

- Your data is your data. That means it is yours to own and control.
- Your data is not used to train or enrich the foundation AI models used by others.
- Your data and AI models are protected at every step by the most comprehensive enterprise compliance and security controls in the industry.

Make sure you design your system to keep data secure, designing for Responsible AI and compliance with General Data Protection Regulation (GDPR) and other policies and standards. For example, [Microsoft's responsible AI principles](#) include fairness, reliability and safety, privacy and security, inclusiveness, and transparency and accountability.

Learn more: [FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform - Dynamics 365 | Microsoft Learn](#)

Learn about Copilot features

The best way to test and measure the Copilot's success is through real scenarios, real agents, and real customers in the production environment. This is why starting quickly with a pilot or initial phase and gradually rolling out the Copilot is the recommended approach. You can closely monitor the results and feedback during the initial phase.

The name 'Copilot' and not 'Autopilot' was chosen for a good reason. Essentially, Copilot acts as an assistant to the agents. While it proves useful in some situations, there are instances when questions or requests become too complex, requiring human expertise. However, even in these scenarios, business operations continue seamlessly, thanks to the human agents.

While generative AI has presented numerous possibilities, these are the customer service-related Copilot features available today. The first two features require a knowledge base, and the summarization features leverage existing data in your CRM.

- **Ask a question:** Provides contextual responses to the agents' questions through a conversational interface. Copilot's responses are based on both internal and external knowledge sources provided by your organization during setup.
- **Write an email:** Helps agents quickly create email responses based on the context of the case, reducing the time users need to spend creating emails.
- **Summarize a case:** Provides agents with a summary of a case right on the case form, so they can quickly catch up on the important details of a case.
- **Summarize a conversation:** Provides agents with a summary of a conversation at key points throughout the customer journey such as virtual agent handoffs, transfers and on demand.

Prepare your organization

To unlock the full potential of this solution, it's important to engage stakeholders early in the process. Find out how they measure success, how they manage their organizational knowledge, and what processes they use.

Here are some key activities you'll want to perform before you implement Copilot:

- Identify metrics to measure your success
- Create a knowledge management strategy
- Set up your tools and infrastructure

Identify metrics to measure your success

Set business goals to determine which metrics will help you measure your success.

You can gather metrics in one or more of the following ways:

- Use out-of-the-box reports in Dynamics 365 Customer Service Historical Analytics. You'll see these reports when you turn them on in Customer Service admin center with Copilot enabled.
- Incorporate feedback from Dataverse tables. In Dynamics, go to **Advanced Settings** → **Advanced find**, and create custom views.
- Create custom Power BI reports using a scripting language such as SQL to extract data from Dynamics.
- Engage with the Microsoft product team to explore how your organization can capture and use Copilot metrics. Contact D365experiment@microsoft.com for more information.

However you choose to gather metrics, it's crucial to establish a success matrix for Copilot. Most enterprise customers follow a standard process for introducing new tools or features. While this approach is recommended and applicable to almost all new Dynamics features, the success

criteria for the Copilot need to address several specific factors, due to its unique functionalities and impact:

- **Time Efficiency:** Measure the amount of time Copilot saves agents in performing their tasks. This can be quantified by comparing the time taken to complete tasks with and without the assistance of the Copilot.
- **Relevance and Helpfulness of the Copilot Responses:** This point is crucial because evaluating the Copilot's responses isn't as straightforward as just saying they're right or wrong. Their effectiveness should be measured with a percentage that shows how relevant and helpful these responses really are. You can evaluate a response from Copilot by categorizing it as one of the following:
 - **Totally Irrelevant:** The response does not address the agent's inquiry at all and provides no useful information for handling customer queries.
 - **Partially Helpful:** The response offers some relevant information but may not fully equip the agent to resolve the customer's issue, possibly requiring further clarification or additional resources.
 - **Mostly Helpful:** The response provides substantial information and guidance towards resolving the inquiry, with minimal need for further action.
 - **Completely Helpful:** The response fully equips the agent with the necessary information and resources to address and resolve the customer's issue without any need for additional support or clarification.
- **Agent Satisfaction and Ease of Use:** Assess how user-friendly and intuitive Copilot is for customer service agents. Agent satisfaction with the tool can be a key indicator of its usability and effectiveness in a real-world setting.
- **Impact on Customer Satisfaction:** Monitor changes in customer satisfaction metrics. This can be done through surveys or customer feedback analysis to see if there is a noticeable improvement attributed to the implementation of Copilot.
- **Return on Investment:** Consider the overall costs versus the benefits of implementing Copilot. This evaluation is crucial, as it is important to test and evaluate any feature intended for user adoption. It's essential to remember that Copilot is not a new product but a feature within Dynamics 365 Customer Service, which incurs no extra cost for most customers.

Adjust your knowledge management strategy

Copilot provides a brand-new way to leverage knowledge content, and you'll want to make sure the content is consumable by Copilot to ensure accuracy. Before agents can use Copilot to answer questions and draft emails, you need to ensure Copilot is using accurate knowledge content.

Good knowledge hygiene is key to bringing Copilot capabilities to life. For Copilot to successfully ingest, index, and surface the right knowledge asset, it's important to ensure each asset meets defined ingestion criteria. Also, preparing knowledge assets for Copilot ingestion is not a finite process. It is essential to keep ingested knowledge assets in sync with upstream sources and use proper curation and governance practices.

The 6Ds framework provides a well-tested roadmap for deploying Enterprise content on private LLMs: [ChatGPT & AI: 6 Tips for Managing Support Content \(microsoft.com\)](https://microsoft.com/en-us/ai/chatgpt-6-tips-for-managing-support-content)

While every organization has its own unique systems, we aim to provide a general set of best practices for creating and maintaining your Copilot corpus. The following is a general list of must-haves for high-performing knowledge content:

- Intuitive title and description
- Separate sections with descriptive subheadings
- Use plain language and avoid technical jargon
- No knowledge asset attachments; convert them into individual knowledge assets
- No excessively long knowledge assets; break them into individual knowledge assets
- No broken or missing hyperlinks in the content body
- Descriptions for all images; Copilot cannot read text on images
- No customer or personal information about employees, vendors, etc.
- A review process for authoring, reviewing, and publishing articles
- A log of all actions related to ingesting, checking, and removing knowledge assets

If you're storing knowledge assets in Dataverse, they should always be the latest version and in *Published* status.

If a knowledge asset has multiple sections that apply to different audiences, it is best practice to create multiple assets and tag each with its appropriate audience.

Tag knowledge content

You can create structured content tags that will help your organization categorize and label content for version control, easy updates, retrieval, and ingestion. Tags will also help agents quickly understand what the content is about. For example, you can define a set of tags for function (e.g., training, reference, troubleshooting) and business area (e.g., orders, billing, promotions). Standardizing tags without getting too granular will make your content easier to manage in the long term.

Filter knowledge content

Administrators can enable email filtering to improve the quality of Copilot responses. For example, some organizations send automated emails that appear on the customer timeline but aren't necessary for summarization. On the Summaries page of the Customer Service admin center, you can specify up to 10 email addresses to exclude. Emails from those addresses will not be included in the case and conversation summaries.

Set up your tools and infrastructure

Ensure your contact center environment is prepared to use Copilot by making sure your solutions are optimized to use it.

- Configure Customer Service admin center with Copilot features your organization will use
- Map custom fields for case and conversation summaries

- Set up app profiles for agents
- Set up security roles for Copilot users
- (Optional) Use integrated search providers
- (Optional) Use Copilot in custom forms and apps

Configure your environment

Customer tenants for live deployments have a configuration with multiple environments, typically in this manner:

DEV → TEST → PRE-PROD → PROD

Following our best practices and guidance, many customers create unmanaged solutions in lower environments (DEV), and export managed solutions in higher environments, as part of their Application Lifecycle Management (ALM) Copilot in Customer Service should be part of the same process when moving the configuration between environments.

Learn more: [Solution concepts - Power Platform | Microsoft Learn - Managed and unmanaged solutions](#)

Help pane settings

This item is configured from the Customer Service admin center, under the **Productivity** section. There are 3 settings that can be configured from this panel:

- Global Copilot help pane settings

☐ Make Copilot available to agents
Agents can chat with AI for help with answers. [Learn more](#)

Specify whether they can also use AI during a customer chat to identify questions and get answers, or for help with email responses. [Learn more](#)

- ☐ For customer chat (preview): Identify customer needs and get a response during a customer chat [See preview terms](#)
- ☐ For email: To write an email response [Manage data](#)

- Knowledge sources (trusted web sites)

Include trusted webpages as sources ⓘ

Web searches are powered by Bing (preview)

By adding a web address, you're allowing Copilot to use Bing. Your search data can be stored and processed outside of your tenant's geographic region or compliance boundary. Your use of Bing is governed by [Microsoft Services Agreement](#) and the [Microsoft Privacy Statement](#).

+ Add web address

- Transcript of agent interactions

Agent experience data

Record how agents are working with the AI Copilot to understand its impact on customer service. Recorded data can be used by your organization to analyze knowledge sources, and to build usage reports.

☒ Record transcripts of agent interactions with Copilot, agent actions, and agent feedback on AI suggestions.

Summaries settings

This item is configured from the Customer Service admin center, under the **Productivity** section. There are 3 settings that can be configured from this panel:

- Case summary
- Conversation summary
- Transcript of agent interactions

Custom case summary field mappings

This item is a subset of the **Summaries** settings, and can be accessed from the **Case summary** section:

Manage data for case summaries

The selected data gives Copilot contextual information and helps improve the quality of AI-generated case summaries.

What information do you want to include?

Edit the default selections to customize the information. Uncheck the item to omit it. For more succinct summaries, select only the most essential information.

Include	Description		Record type	Data field
☒	Customer	maps to	Select an entity	Select a data field
☒	Case title	maps to	Select an entity	Select a data field
☒	Case type	maps to	Select an entity	Select a data field
☒	Subject	maps to	Select an entity	Select a data field
☒	Case Description	maps to	Select an entity	Select a data field
☒	Product	maps to	Select an entity	Select a data field
☒	Priority	maps to	Select an entity	Select a data field
☒	Case notes	maps to	Select an entity	Select a data field
☒	Email content	maps to	Email activity	--
☒	Conversation Summary	maps to	Conversation Insights	--

Agent experience profiles

Agent experience profiles are relevant for Copilot as they allow an admin to enable different sets of copilot features for different groups of agents. Profiles are configured in Customer Service admin center, under the section **Agent experience** ➔ **Workspaces**:

Workspaces

Customize app experiences for agents and supervisors with session templates, productivity panel, channels, and more.

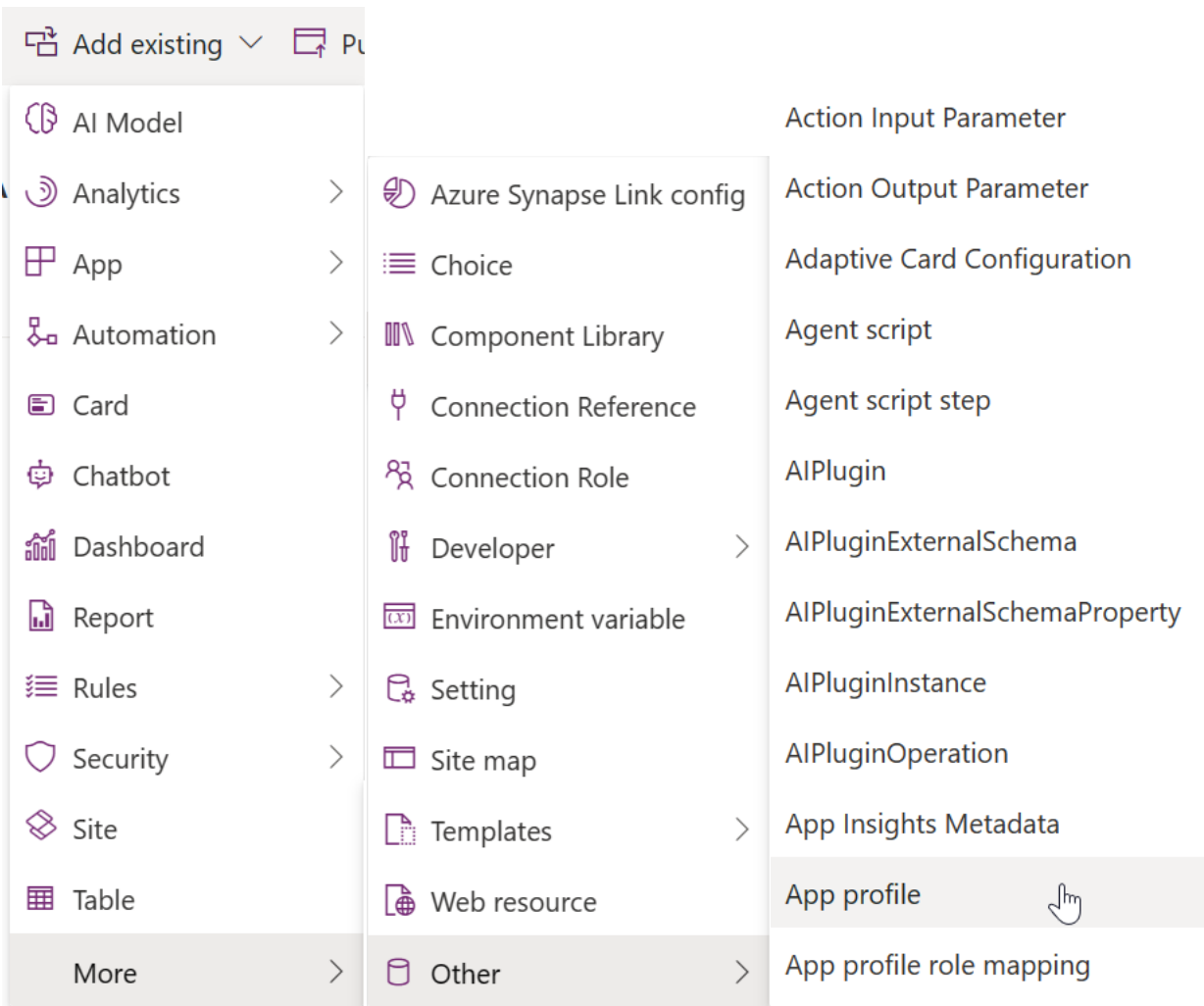
Agent experience profiles

Create targeted app experiences for agents and supervisors instead of building and maintaining custom apps.

[Learn more](#)

[Manage >](#)

Agent experience profiles are solution-aware and can be added as components in an unmanaged solution:



Once added to the unmanaged solution, profiles can be part of a standard ALM process and exported as managed in higher environments, where they will become read-only.

Copilot settings in agent profiles

This section describes our recommended approach to setting up agent profiles. You can find detailed setup steps in the user documentation:

- [Overview of agent experience profiles | Microsoft Learn](#)
 - [Configure agent experience profiles | Microsoft Learn](#)
1. For the pilot (or production) user group, clone (create a manual copy of) the existing Agent Experience Profile with necessary components (channels, inbox, etc). For this cloned profile, enable desired CS Copilot components.

Productivity pane ×

When the Productivity pane is on, you can customize it by choosing productivity tools. [Learn more](#)

Productivity pane ☒ On

Default Mode ☐ Collapsed

Productivity tools

Join a Teams call (preview)

Allow agents to invite customers to calls on Microsoft Teams. [Learn more](#)

☐ Join a Teams call (preview) Off

Smart assist

Make intelligent recommendations of knowledge articles, similar cases, and more based on real-time context. [Learn more](#)

☐ Smart assist Off

Agent scripts

Give step-by-step instructions to help minimize human error and provide consistent service. [Learn more](#)

☐ Agent scripts Off

Teams chats

Use Microsoft Teams to seamlessly collaborate on records. [Learn more](#)

☐ Teams chats Off

Knowledge search

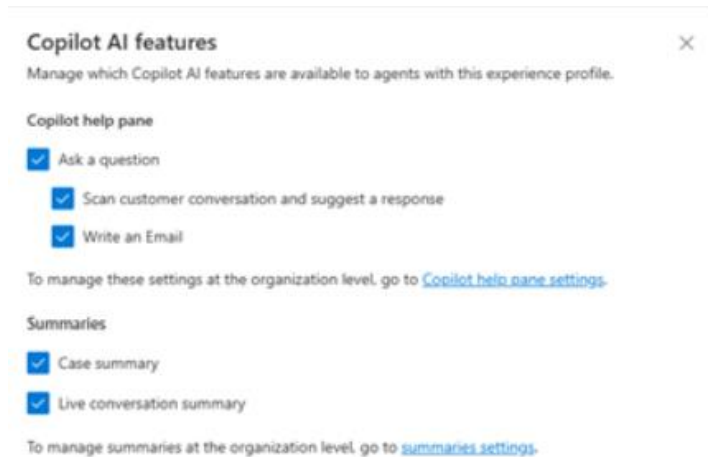
Let users search for relevant knowledge articles. [Learn more](#)

☐ Knowledge search Off

Copilot help pane

Get AI-powered help with solving customer issues. [Learn more](#)

☒ Copilot help pane On



2. Move pilot users from original profile into the new Copilot-enabled profile.
3. When testing is completed, move these users back to original profile and enable Copilot in that profile for general enablement of desired users.

Other existing profiles can remain as-is, with Copilot not enabled. Users in these profiles will not have access to or see Copilot in the UI, even when it's enabled in **Productivity** settings.

Caution: Users who are not part of a specific profile will fall back to a default profile, which is determined by the system based on components enabled and is one of the out-of-box default profiles. These default profiles are not editable and may have Copilot enabled by default. We recommend you ensure that all agents are included in a profile so that Copilot features are available only to those who are intended to have access.

Once you define agent experience profiles, for each profile it will be possible to configure two kinds of Copilot settings:

- Enable/disable Copilot in the productivity pane

Productivity pane		 Edit
Productivity pane	On	
Default mode	Collapsed	
Knowledge search	On	
Copilot help pane	On	
Agent scripts	On	
Teams chats	Off	
Join a Teams call (preview)	Off	
Smart assist	On	

- Enable/disable specific Copilot features

Copilot AI features		 Edit
Copilot help pane		
Ask a question	On	
Scan customer conversation and suggest a response	On	
Write an Email	On	
Summaries		
Case summary	On	
Live conversation summary	On	

These settings are currently not included in a solution when the parent profile is added as a component. As a result, when the parent profile is exported in a higher environment, the profile will miss all Copilot enablement flags. Because it is exported as managed, it will be read-only, locking any admin from configuring Copilot in the target environment.

The underlying Dataverse table is `msdyn_appcopilotconfiguration`.

Security roles

For Customer Service Copilot to work properly, users will need to have proper privileges. This can be done by assigning out-of-the-box security roles, or by adding the required privileges to custom security roles: [Enable Copilot features in Customer Service | Microsoft Learn - Assign roles and privileges](#)

Since security roles are fully solution-aware, this item can be easily included in ALM flows.

Integrated providers

If your knowledge base is handled by a third-party application, and you want to consume its corpus with Copilot in Dynamics 365 Customer Service, you can configure a connection to it as an integrated search provider: [Manage integrated search providers | Microsoft Learn](#)

The configured providers are saved on the msdyn_integratedsearchprovider Dataverse table.

Copilot in custom forms and apps

For customers that include the case summary in a custom case form, or enable Copilot features in custom model-driven apps, we provide following documentation:

[Configure copilot features for custom case forms and custom apps | Microsoft Learn](#)

Custom forms can already be included in an ALM flow, so any changes to the form that are required to add Copilot are automatically included in the solution with the form itself.

Application settings are already solution-aware and can also be included in an unmanaged solution to be part of the ALM flow:

[Use settings to provide customized app experiences - Power Apps | Microsoft Learn](#)

Onboard your users

Here are some key activities you'll want to perform before you implement Copilot. You may want to drive some of these operations concurrently depending on your organization's timeline and goals.

- Create a change management strategy
- Analyze your corpus of knowledge
- Train your agents to use Copilot effectively
- Create a champion network
- Create a testing strategy

Create a change management strategy

To ensure a smooth transition as your agents begin working with Copilot, a change management plan is crucial. Work with each line of business that will be using Copilot and gather questions and concerns. Different lines of business will use Copilot in different ways. Try to involve as many teams as possible in your initial pilot phase. You can use first impressions and initial experiences with Copilot to help you create appropriate messaging and training materials to ensure your teams are using Copilot effectively.

For more tips and ideas for socializing this new technology with your agents, refer to the **Prepare for (big) change** section of [Generative AI in Microsoft's Customer Service and Support](#).

Fine-tune your corpus of knowledge

As you begin to onboard your first set of users, pay close attention to the quality of knowledge articles. Copilot is only as good as its sources. You may discover some content is used more or less frequently than expected, and some content is more or less useful than expected. Take this opportunity to revisit your knowledge content and make adjustments.

This is an especially critical time to gather feedback from your agents about which content is helpful. Some issues to check for:

- Content standardization
- Obsolete content
- Invalid content
- Conflicting content
- Incomplete content
- Content compliance

Train your agents to use Copilot effectively

It may be tempting to use Copilot as a traditional search engine, but vague search terms and keywords aren't as effective here. You'll want to train agents to ask questions as if they were speaking with a colleague. When you provide specific prompts, Copilot responds with a more relatable, relevant answer.

Prompts are how you ask Copilot to do something for you, like answer a question, summarize a case, or create an email response. Your prompt should include four key ingredients:

- **Goal:** What response do you want? (Example: Write a step-by-step procedure.)
- **Context:** Why do you need it and who is it for? (Example: For users of the SmartBrew coffeemaker to clean their machine)
- **Source:** Which sources should Copilot use? (Example: Look in company knowledge base)
- **Expectations:** How do you want Copilot to respond? (Example: Use casual, simple language)

When leveraging Copilot for answers, agents should use the following best practices:

- Converse with Copilot in natural language
- Provide as many details as possible
- Pay attention to grammar, spelling, and punctuation
- Do not rely on document location to provide context
- Avoid interrupting and type "new topic" when switching tasks

For more information, refer to [Learn about Copilot prompts - Microsoft Support](#)

Create a testing strategy

The introduction of a new tool like Copilot to customer service agents must be well-tested and validated. In the era of AI and generative AI, organizations face the critical question of how to build their testing strategy for these innovative tools.

In the pilot phase of Copilot, you will document the results and collect feedback from your agents. The best candidates for the pilot phase are the highly skilled agents. They have the expertise to deal with customer questions efficiently, allowing them to give thorough feedback without affecting the normal call center functions. Moreover, they help ensure Copilot is used properly, avoiding any incorrect or unverified information being passed from Copilot to customers.

During the pilot phase, you need to keep track of your success metrics and aim for ongoing improvement. This mainly involves improving the knowledge base articles. Copilot is not a magic tool; its performance depends on the quality of the information it can access. Providing Copilot with clear and complete knowledge articles will help it to produce clear and correct results.

Optimize your implementation

Gather feedback from your agents

You can use the helpful response rate (HRR) to gather initial agent feedback. HRR is the number of positive (thumbs-up) ratings for each interaction divided by the total ratings (thumbs up + thumbs down). You can correlate this feedback with the knowledge assets Copilot cites in its responses. Gather more detailed feedback by creating a system that enables users to request reviews, report issues, or suggest improvements.

Measure ongoing performance

While knowledge management is an ongoing process, so is its measurement. You'll want to periodically track usage and performance to ensure Copilot is useful to agents and identify areas for improvement.

Tracking analytics

First, measure the performance of your knowledge content based on the purpose you outlined at the beginning. You can view some metrics directly within your Customer Service environment.

If you built your own Copilot interaction reports, you can see measurements such as number of page views for each knowledge asset, the age of the asset, and whether the agent used the cited asset. The asset age is based on the date it was ingested by Copilot, so it's important to ensure publication and ingestion cycles align.

Serving business processes

Some other key metrics that you'll want to consider will be more closely tied to your organization's business processes. Some examples include:

- Number of cases related to a knowledge article
- Number of escalations prevented
- Time saved when agents access these articles
- Costs saved from reduced escalations and troubleshooting time

Overall, introducing and expanding Copilot capabilities in your CRM is an iterative and ongoing process. Include stakeholders from every role to ensure your organization is using Copilot to help solve the right problems and enhance the agent experience.