SPECIALIZED AI & CX SYSTEMS INTEGRATOR

# Microsoft Dynamics 365 Contact Center *& Contact Center AI*

CCaaS implementation, legacy contact center migration, service-representative assistance and Copilot Studio agents — integrated around your customers, operations and governance.

**From strategy and pilots to production outcomes.**

| 01 | 02 | 03 |
|---|---|---|
| **Advise** | **Implement** | **Run** |
| Priorities, architecture and business case | Configuration, integration and adoption | Quality, cost and continuous improvement |

MICROSOFT PLATFORMS WITHIN THE DELIVERY SCOPE

Microsoft Dynamics 365

**For enterprise decision-makers**

CX and contact center leaders, CIOs, COOs, enterprise architects and finance teams.

**Inside this briefing**

Services, reference architecture, governance, four industry case studies and a business-case-led delivery plan.

Platform marks identify technologies, not certifications or endorsement. Case studies are anonymized client stories; outcome figures are typical industry benchmarks, not audited client results.

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SERVICES

# Modernize the operation. Make AI useful at every interaction.

Pronix.ai aligns contact center transformation with service quality, cost-to-serve and operational control — rather than starting with a product deployment.

## One coordinated portfolio of services

### Dynamics 365 Contact Center implementation

Design voice and digital journeys, routing, queues and service workspaces. Integrate CRM and systems of record; configure supervision, reporting and adoption.

### Legacy CCaaS / ACD migration

Inventory call flows, numbers, carriers, recordings and integrations. Build a dependency-led migration with staged validation, fallback and rollback criteria.

### Contact Center AI & representative assistance

Configure supported knowledge assistance, summaries and workflow automation. Validate accuracy, escalation, accessibility and operating ownership before release.

### Copilot Studio agent services

Design conversational and task-oriented agents grounded in governed knowledge. Integrate authorized actions; test permissions, fallback and live-agent handoff.

THE BUSINESS LENS

## Automate the routine. Protect the consequential.

Prioritize repeatable requests and knowledge retrieval. Preserve human judgment for sensitive, complex or high-value interactions. Measure successful resolution — not containment alone.

### CX leadership

Define journey quality, successful resolution and representative adoption.

### IT & security

Validate identity, integration, data residency and supportability.

### Finance & operations

Build a fully loaded cost model and agree benefits ownership.

Feature availability depends on configuration, licenses, region and release. “Copilot for Service” in earlier materials refers to service-assistance capabilities; verify current Microsoft product naming during scoping.

ARCHITECTURE & GOVERNANCE

# Connect the journey. Govern the AI.

A reference delivery design — tailored to your CRM, telephony, data boundaries and operating model.

## Reference architecture

| | |
|---|---|
| **Customer channels** | Voice and digital entry points → identity checks, consent and accessible interaction design. |
| **Contact center** | Dynamics 365 Contact Center → queues, routing, service workspace and supervisor visibility. |
| **AI & assistance** | Copilot Studio agents + supported Copilot features → approved knowledge, authorized actions and context-aware handoff. |
| **Integration** | Dataverse, Power Platform connectors and APIs → CRM, EHR, order management or banking services, subject to access and interface availability. |
| **Control plane** | Identity, environment policies, telemetry, evaluations, release gates, retention settings and accountable service owners. |

## Controls that belong in the delivery plan

### Data & access

Least-privilege access, environment separation, connector policies and data classification. Review residency, retention and processor terms for every component.

### AI quality & safety

Use approved knowledge sources, evaluation sets and exception handling. Test grounded responses, sensitive intents and human escalation; monitor quality after release.

### Operational resilience

Validate carrier dependencies, routing parity and failover. Rehearse recovery and rollback; agree incident ownership and support coverage.

### Regulated workflows

Map healthcare, privacy, financial and payment requirements to the actual data flow. Document control ownership; platform selection is not a compliance certification.

**Executive decision: agree which actions AI may complete, which require approval, and when a representative must take over — before configuring automation.**

INDUSTRY CASE STUDIES

# Four industry case studies. One governed delivery discipline.

Anonymized client engagements — the challenge, what was delivered, and typical outcomes.

**ANONYMIZED CLIENT ENGAGEMENTS — CLIENT NAMES WITHHELD UNDER CONFIDENTIALITY. OUTCOME FIGURES ARE TYPICAL BENCHMARKS, NOT AUDITED CLIENT RESULTS.**

HEALTHCARE PROVIDER 01

## Simplify patient access and prior authorization

INTEGRATED DELIVERY NETWORK · US

Scheduling, referral and prior-authorization calls sat in separate queues and systems. Patients repeated information across transfers, and staff chased payer status by phone after every visit.

### WHAT WE DELIVERED

- Unified voice and digital intake into Dynamics 365 Contact Center queues with caller context from the EHR
- Copilot Studio agents grounded in approved scheduling and authorization procedures
- Authorized scheduling and payer-status actions connected through governed connectors
- Clinical judgment and exceptions routed to qualified staff with full interaction history

### PLATFORMS

DYNAMICS 365 · COPILOT STUDIO · POWER PLATFORM

### TYPICAL OUTCOMES FOR THIS SCOPE

| 38% | -28% | -45% |
|---|---|---|
| routine inquiries self-served | intake handle time | post-call documentation |

HEALTHCARE PAYER 02

## Make member service clearer and more connected

REGIONAL HEALTH PLAN · US

Members called repeatedly for benefits, claims status and ID cards while representatives worked across fragmented claim and plan systems with no unified member view.

### WHAT WE DELIVERED

- Interactions routed with member and plan context into a single service workspace
- Assistance grounded in approved plan and benefits content, reviewed before each release
- Identity verification required before any account-specific response
- Appeals, grievances and uncertain answers escalated to specialists with full history

### PLATFORMS

DYNAMICS 365 · COPILOT STUDIO · DATAVERSE

### TYPICAL OUTCOMES FOR THIS SCOPE

| 42% | +14pt | 35% |
|---|---|---|
| Tier-1 containment | first-contact resolution | faster seasonal ramp |

BANKING 03

## Modernize customer service with controls intact

SUPER-REGIONAL BANK · US

Aging telephony and disconnected servicing screens slowed routine support, and identity, recording and escalation controls were applied inconsistently across lines of business.

### WHAT WE DELIVERED

- Migrated queues and service workspaces to Dynamics 365 in phased waves with fallback routing
- Representatives assisted with approved knowledge and automated call summaries
- Step-up authentication and recording controls preserved through cutover
- Consequential account actions require explicit approval before execution

### PLATFORMS

DYNAMICS 365 · COPILOT STUDIO · MICROSOFT AZURE

### TYPICAL OUTCOMES FOR THIS SCOPE

| 52% | -48% | -50s |
|---|---|---|
| routine inquiry containment | after-call work | caller verification |

RETAIL & ECOMMERCE 04

## Support peak demand with governed agent assist

OMNICHANNEL SPECIALTY RETAILER · US

Order, delivery and return questions spiked sharply each season, and seasonal representatives gave inconsistent policy answers across voice and digital channels.

### WHAT WE DELIVERED

- Authenticated order and delivery lookup connected to self-service and agent desktop
- Approved policy guidance surfaced in context during live interactions
- Refund and exception permissions restricted by role and value threshold
- Disputed requests escalated with the complete interaction and order history

### PLATFORMS

DYNAMICS 365 · COPILOT STUDIO · POWER AUTOMATE

### TYPICAL OUTCOMES FOR THIS SCOPE

| 64% | 50% | +11pt |
|---|---|---|
| WISMO & returns contained | faster onboarding | CSAT |

Outcome figures reflect typical Dynamics 365 Contact Center and Copilot programs of comparable scope; results for any engagement depend on baselines, scope and adoption.

IMPLEMENTATION & MIGRATION PLAYBOOK

# Move in controlled waves. Release on evidence, not dates alone.

A cross-industry delivery model for new Dynamics 365 Contact Center implementations and migrations from legacy CCaaS or ACD platforms.

## A gate-based path to production

01
### Assess & design
Inventory journeys, queues, telephony, recordings, integrations, data boundaries and licensing.

02
### Build & validate
Configure routing and workspaces; integrate approved systems; test identity, AI quality and failure paths.

03
### Pilot & cut over
Move selected journeys after acceptance; rehearse carrier changes, fallback and rollback.

04
### Stabilize & improve
Track defects, service quality, adoption and cost; tune only against approved evidence.

### Release gates
Architecture and security approval · integration and routing parity · accessibility review · AI evaluation thresholds · business acceptance · representative readiness · support ownership.

### Continuity plan
Carrier and number dependencies · recording continuity · fallback routing · cutover communications · incident command · rollback triggers · post-release observation.

### Control evidence
Access matrix · approved knowledge register · action permissions · evaluation results · retention decisions · change approvals · audit and exception records.

### Success measures
Journey completion · first-contact resolution · routing defects · escalation quality · representative adoption · service interruption · cost-to-serve · ongoing support effort.

EXECUTIVE PRINCIPLE

## Gate-based, not date-led.

Finalize production dates only after discovery, licensing and carrier validation. Availability, compliance and savings claims require evidence from the actual deployment.

The playbook is intentionally cross-industry. Industry-specific obligations, data boundaries and acceptance criteria are established during discovery.

DELIVERY & NEXT STEP

# A business case before a build. An operating model after go-live.

From strategy and pilots to production outcomes — with clear scope, accountable owners and measurable acceptance criteria.

01
**Advise**
Prioritize journeys, establish baselines, design the target and define a scoped business case.

02
**Implement**
Configure, integrate and validate; prepare representatives; release through acceptance gates.

03
**Run**
Monitor quality and cost, maintain knowledge and evaluations, and prioritize improvements.

## The CFO-ready business case

Model licenses, telephony and consumption, integration, implementation, adoption and ongoing support. Compare benefits against a measured baseline; include transition costs and sensitivity ranges. No savings or payback is assumed in this brochure.

### Can we keep our existing CRM?

Dynamics 365 Contact Center may be used with existing CRM systems. The integration path, embedded experience and feature coverage require assessment.

### How quickly can we go live?

Scope and readiness determine the schedule. Agree a release plan after reviewing data, integrations, licensing and telephony dependencies.

START WITH A DISCOVERY CONVERSATION

## Bring your priority journey.

Discuss your service baseline, platform estate and constraints — then define the next decision and a practical implementation scope.

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Product references: Microsoft Learn — Dynamics 365 Contact Center, Copilot Studio and Microsoft 365 Copilot for Service overviews. Capabilities, naming, licensing and regional availability may change; verify during scoping. Microsoft product marks belong to their respective owner. No Microsoft certification or endorsement is asserted. Case studies are anonymized client stories; outcome figures are typical industry benchmarks, not audited client results.