

# The Future of CRM

**Ravi Mistry** Principal Pre-Sales Consultant

**Richard Touch** Principal Pre-Sales Consultant

**Jay Fitzhenry** vCTO



# 01 CRM Inflection Point

Move away from “CRM as a system”  
toward “CRM as an intelligence platform”.

# Agentic AI is the new way of working.

**46%**

of leaders are using AI to automate workflows

**46%**

AI agents projected to be automating workflows by 2028

**80%**

of global workforce lack enough time

**275**

Average number of times employees are interrupted by a meeting, email or chat every day

**53%**

of leaders say productivity needs to increase

**58**

chats sent daily outside of typical 9 – 5 workday

# The technology landscape is fragmented.



Multiple disconnected systems, sometimes with multiple identity providers.



Proliferation of siloed systems with their own agents, uncontrolled.



Different interfaces, different guardrails, different governance and security models.



**AI is redefining how work gets done,  
transforming how **people, technology, and  
workflows** deliver results together.**

# Copilot.

## AI built for work



### It Starts with you

Define clear use cases for end users



### It understands your work

Integrate with your data and systems, grounded in how you work



### It gets work done

Connect with apps and tools used every day, taking an agent first approach



### Built for trust at enterprise scale

Interface with systems securely and through a standard governance model

At the heart of scalable AI is **security, operational integration and change management**, but the below are also important.



### Data

AI is only as scalable as the data behind it.



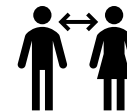
### Delivery Model

Moving from One-Off Pilots to Production



### Use Cases

Focus on high-value, repeatable scenarios.



### People & Skills

Upskill teams to adopt, adapt and manage AI solutions.



### Cost

Monitoring usage, performance and ROI

# 02 Keynote Recap



# The AI CRM Evolution

# The AI CRM Evolution

## Systems of record

- **Data repository**
- **Static information**
- **Customer interaction history**
- **Process automation**
- **Manual data collection and update**



## Systems of action

- **Decide and act (agentic AI)**
- **Full process management**
- **Smart summaries and actions**
- **Human in the loop**
- **Reduced admin overhead**


## Microsoft Vision

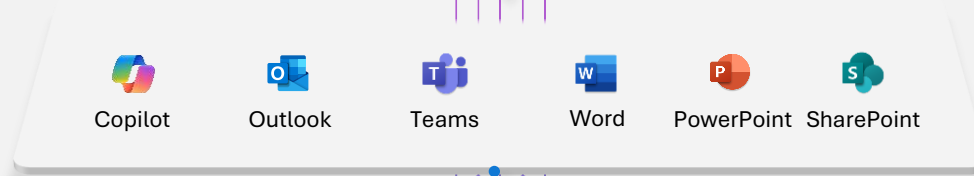
# Systems of action


---

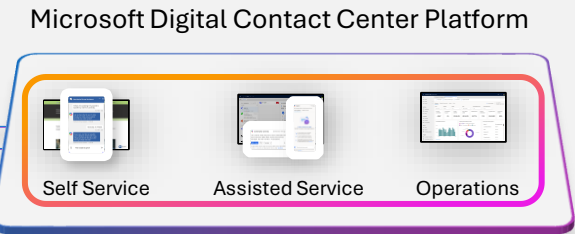
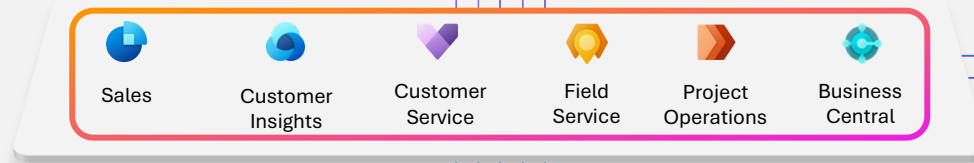
- Roadmap ≠ App Features & Modules
- Breaking Down App Barriers
- AI = Execution Layer


# Microsoft Business Applications

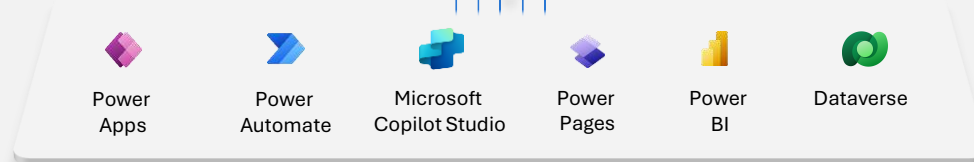
 **Modern Work**  
UI for AI




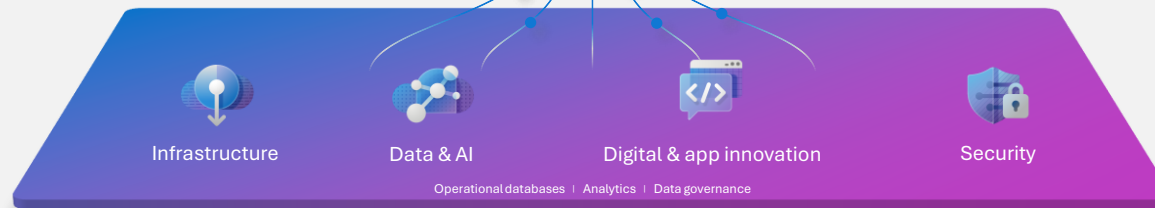
 **Dynamics 365**  
Unified CRM & ERP



 **Power Platform**  
Low Code > Pro Code



 **Azure**  
Microsoft Cloud





The Dynamics 365  
Family

# Sales



1

## Sales AI

Lead  
Qualification

Sales Research

Deal Close  
Agent

## App Features

Lead & Opportunity Management

Pipeline Forecasting & Analytics

Product Information from BC

Contact and Account Nurture  
(Sequences)

And so Much More.....



# Project Operations



3

## Project Ops AI

Copilot project status updates

AI resource recommendations

Predictive project risk insights

Copilot-assisted time entry

## App Features

Project planning & scheduling

Resource management & utilisation

Time & expense capture

Project accounting & billing

And so Much More.....



# Field Service



4

## Field Service AI

Schedule  
Optimisation

Remote assist

Predictive (IoT)  
Insights

## App Features

Resource scheduling optimisation

Mobile technician application

Asset & inventory management

Work order lifecycle

And so Much More.....



# Contact Center



5

## Contact Center AI

Intent Driven Routing

Knowledge Agent

Quality Evaluation

## App Features

Voice & digital channels

Workforce engagement management

Quality monitoring & recording

CRM-agnostic integration

And so Much More.....



# The Vision – The Future

## 01.

### AI Assistance

**Smart**

---

Summarise Anything in Seconds

Generate Content from Prompts

Trigger Workflows

## 02.

### AI Agents

**Smarter**

---

Act as a trained member of staff

Suggest Content, Next Actions

Review, Process and Update in the Background – Asks for Authorisation to commit changes

## 03.

### AI Autonomy

**Scary!**

---

Agent to Agent peering

AI Creating, Maintaining & Fixing Code and Data – Self Learning

Complex Reasoning, Multi-App Access, Multi-Skilled, Pre-Empting Change and Optimisation



**VIBE CODING**

# Vibe Coding & Generative Pages

## What Is "Vibe Coding"?

Describing what you want in plain English — and having AI write the code for you

*"Build me a canvas app that shows open cases by account, with a click-through to create a follow-up task — in Power Apps, using our CRM data."*

That prompt, today, in Copilot Studio / Power Apps → generates a working prototype.

### Natural Language → App

Describe the app you need. Copilot generates screens, data connections, and logic.

### Formula Suggestions

Type what you want to happen; Copilot writes the Power Fx formula.

### Flow Generation

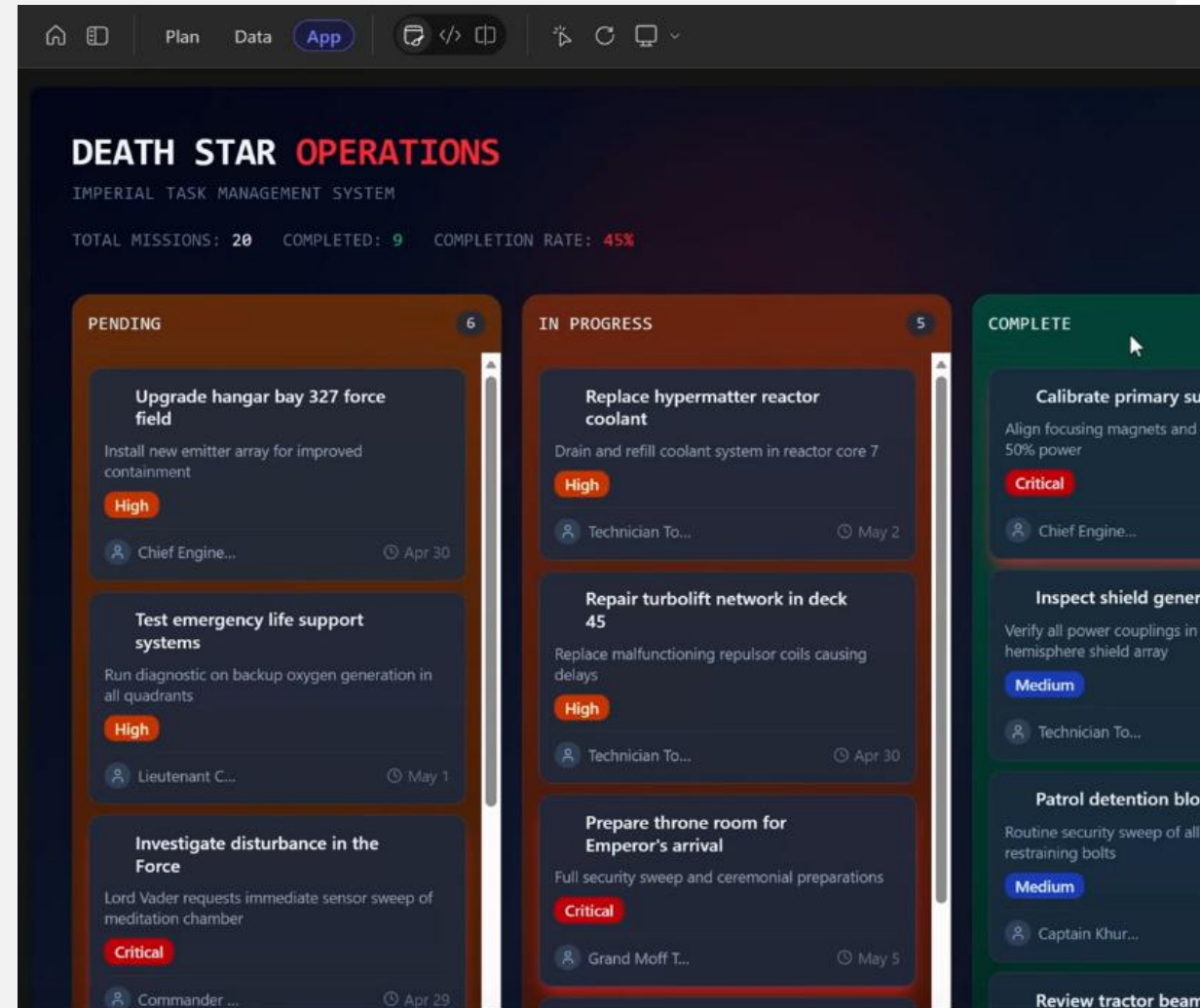
Describe a business process; Power Automate generates the cloud flow with connections.

# Vibe Coding & Generative Pages

## Quick Vibe Demo

### Building the Death Star

- Activity Kanban Board
- User Status / Productivity
- Operational Report



# Vibe Coding & Generative Pages

## Where it Works

---

- **Rapid Prototyping – “Good Enough to Show” in minutes**
- **Low Complexity Workflow & Apps**
- **Empowers Self-Serve on Small Wins**
- **Generating Boilerplate**
- **Reduces Developer Backlog**

*Non-Critical Requests*

## Where it Struggles

---

- **Complex Multi-Entity Logic**
- **Security & Row Level Access**
- **Governance – (Risk of) No Audit Trail**
- **Performance at Scale**
- **Maintenance – Who owns and supports Apps 12 Months later?**



**Moving Forward**

# CRM Envisioning Workshops

1

09:00 – 10:00

## Review Current State & Challenges

Your systems and processes  
+  
Gap-Fit Analysis and Mapping Requirements to 'App Layers'

2

10:15 – 11:15

## Explore Technology & Vision

Prioritise Development / Requirements Backlog  
+  
Key Milestones, Deadlines  
BAU + Business Pressures

3

11:30 – 12:30

## Project Roadmap & Key Metrics

KPIs that matter  
Est. Cost savings / Increased Revenue  
+  
High-Level Approach (Core Scope)

4

12:30 – 13:00

## Summarise & Confirm Next Steps

ROI summary  
Business case  
Recommendations  
Action plan

15-min breaks between sessions | 4 hours total

# CRM – From Paper Plan to Screen\*



## Week 1 - 3

“Day in the Life” Discovery Workshops → Statement of work + Art of Possible Playback

## Week 3- 5

Stakeholder review of outputs + Board presentation of CRM business case

## Week 5 - 12

Build, Test, Showcase & Iterate D365 App Pilot

## Week 12+

Full CRM transformation programme in-flight



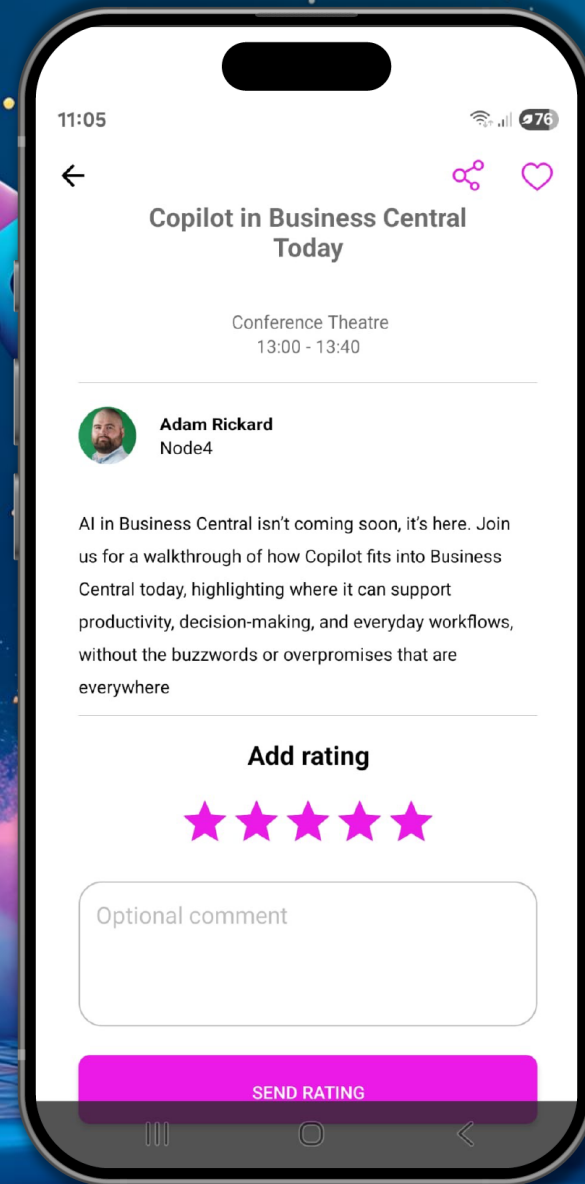
# Got Questions?

Let's connect after the sessions and with a drink



# Loved it? Learned something? Had opinions?

Head to the app and share your thoughts - stars and honest opinions encouraged



**Thank You.**

