



The future of selling: Unlocking growth with agentic CRM

Reimagining the sales funnel with
Microsoft Dynamics 365 and Copilot



It's time to transition to a CRM of action

Always on and readily available AI intelligence has evolved CRMs to operate in the flow of how sellers work. As you look to modernize your sales and service operations with AI, Zenzero can help you realize the benefits of making this transition with Microsoft.

With Microsoft, you activate AI that works on your behalf to support **improved productivity, customer engagement, and revenue.**

Why Microsoft for agentic transformation

Microsoft brings it all together—platform productivity, and AI—to power the next era of customer experience.



One cloud, one platform, one vendor

Deliver end-to-end sales experiences on the Microsoft Cloud to connect channels, roles, and datasets through one trusted platform.



Open, flexible integration

Bring AI and automation to the tools you already use by integrating with Microsoft 365, third-party systems, and your existing investments.



Market and AI lead

Rely on a proven leader in sales and AI with the scale, security, and innovation to support your complete CRM journey.



The shift in how CRM supports users in the flow of work

Old user requirements

- Manually enter and update CRM records.
- Jump between multiple tools to serve customers.
- Significant time is spent researching, finding, and preparing customer content.
- Rigid experiences lock users into inflexible workflows.



User-first CRM experiences

- Automated CRM updates become a byproduct of everyday work.
- AI and agents embed directly into the personal flow of work.
- Unified customer data and agents generate ready-to-use content.
- Flexible operating model adapts to every user and every workflow.

What to look for in an agentic CRM of action

As you prepare your organization to make the shift to an agentic CRM, there are five key characteristics that a solution should offer.

Human-centered UX, not system-centered

- Simple interfaces are natural language-friendly.
- It's task aligned so users can focus on selling, supporting customers, or analyzing scenarios.

Works where you work

- Agentic capabilities show up across tools, devices, and surfaces.
- Agents meet users in their flow of work for consistency and continuity across environments.

Proactive and outcome-driven

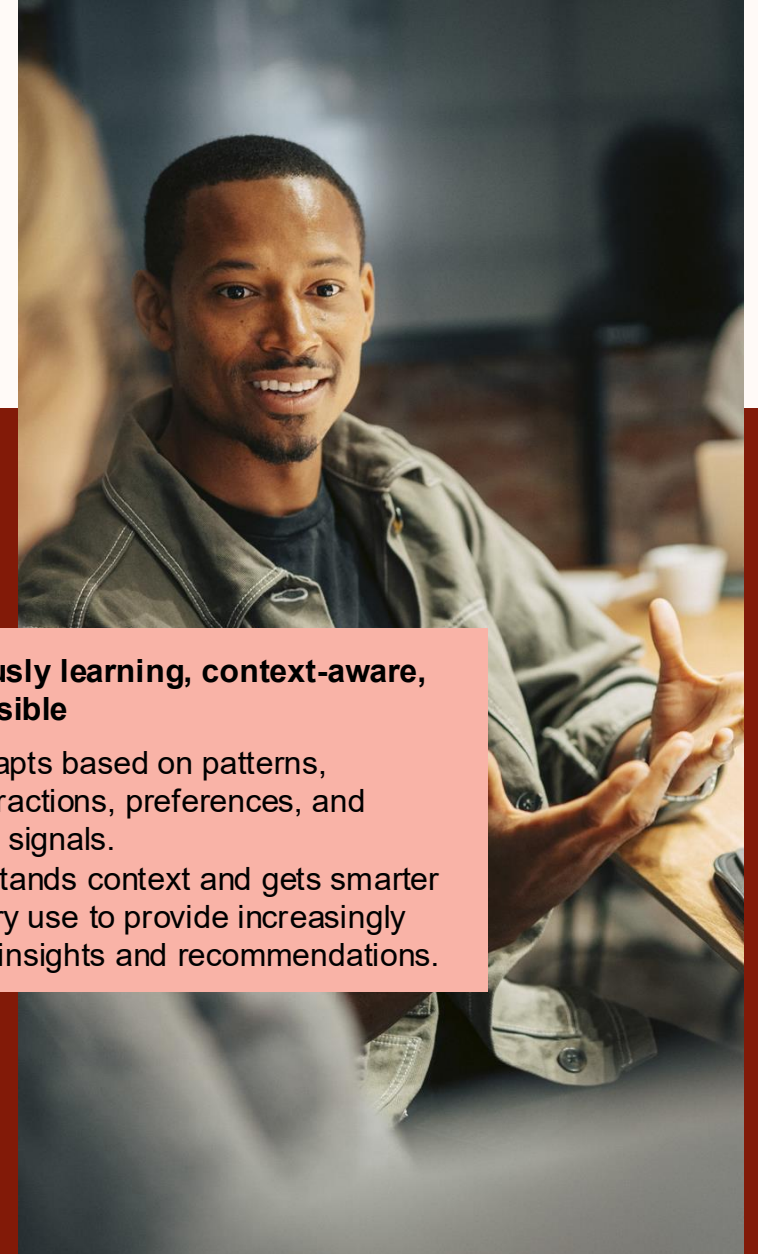
- Agents anticipate what needs to happen next, rather than reacting to user input.
- Agents identify risks early, recommend paths to resolve issues, and drive towards outcomes.

Modular, composable, and extensible

- It's built from modular components and reusable capabilities.
- Assemble, extend, and customize agents and experiences to fit your unique processes without rewriting the whole system.

Continuously learning, context-aware, and extensible

- CRM adapts based on patterns, past interactions, preferences, and real-time signals.
- It understands context and gets smarter with every use to provide increasingly relevant insights and recommendations.

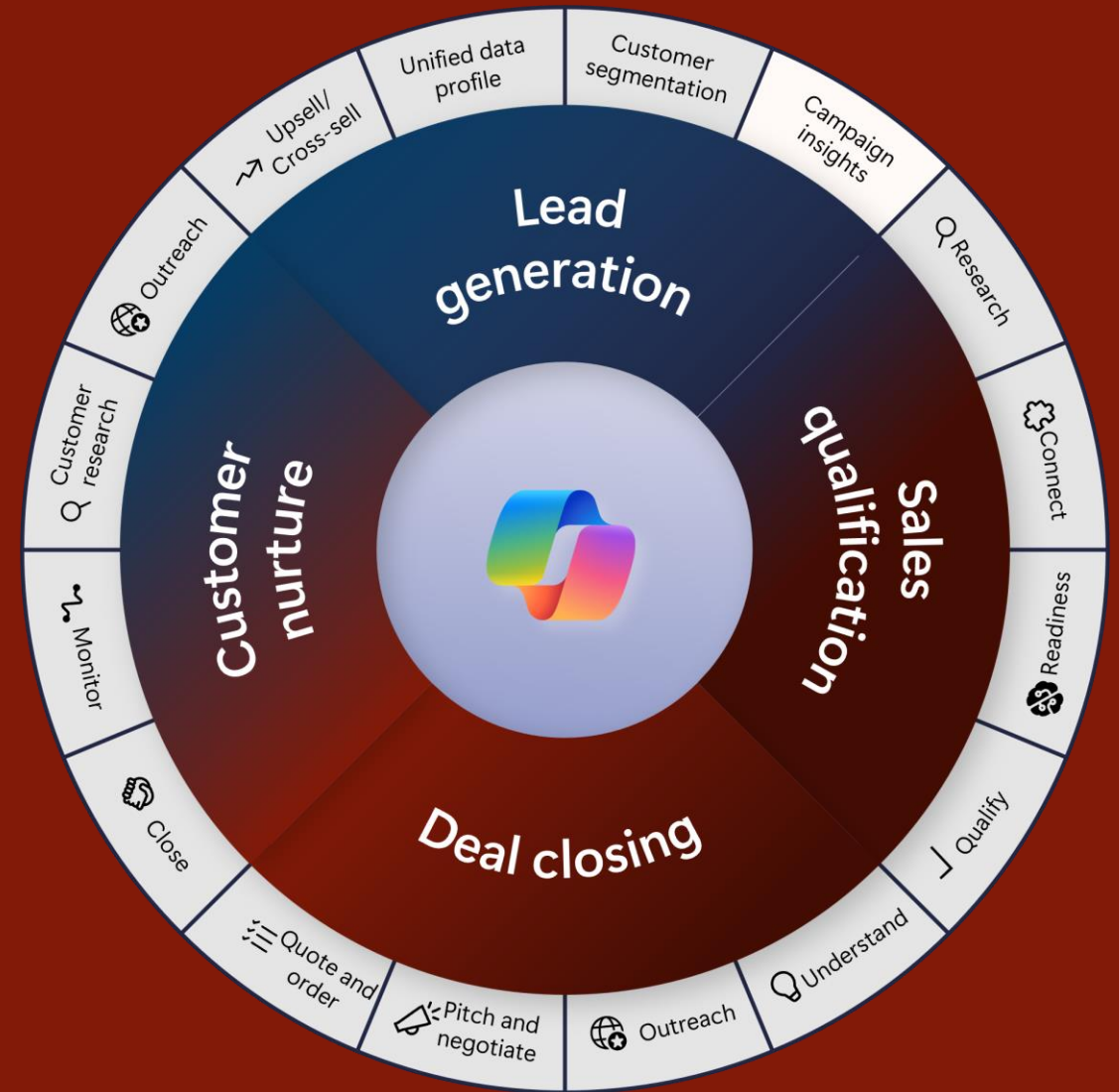


Transform your organization with an agentic CRM

Microsoft Dynamics 365 Sales, powered by Microsoft Copilot, enables you to accelerate growth with AI that goes beyond automation and transforms how your team builds and nurtures customer relationships. Dynamics 365 Sales enables you to:

- ✓ **Empower teams with a connected business platform** by seamlessly integrating into your sales, service, and marketing solutions within the Microsoft ecosystem to boost productivity and enable your teams to focus on what matters most.
- ✓ **Drive results that matter** by reimagining your sales process with built-in AI that goes beyond automation to guide your team with insights, recommended actions, and prebuilt sales agents that deliver real results.
- ✓ **Build trust with your customers using a secure and compliant agentic CRM solution** that is grounded in enterprise-grade security, compliance, and responsible AI to protect customer data at every touchpoint.

In this e-book, we'll take a closer look at how you can benefit from these capabilities at each stage of the sales funnel.



Generate leads with AI-powered customer engagements

Let's start at the top of the funnel. Microsoft Dynamics 365 Customer Insights enables teams to be more strategic by delivering memorable and personalized experiences from the first interaction.

Unify real-time customer data for richer profiles with Dynamics 365 Customer Insights to get a holistic view of customers, to eliminate data silos, and to know your customers end to end.

Tailor campaigns to improve conversions by targeting the right audience with AI-generated insights and segmentation.

Get access to AI-powered engagement scores from marketing campaigns and automate handoffs of qualified leads between marketing and sales for faster and more consistent customer experiences.

Select customer data from multiple sources

Customer Insights - Data

Unify

Save source columns Select tables and columns

Describe the customer data to be unified

Choose the tables and columns to be unified, specifying primary keys for each table and a descriptive type for each column. [Learn about customer data](#)

41 Mapped columns 8 Unmapped columns

Intelligent mapping [What's this?](#)

Tables

CRM Contacts

CRM ContactsDV

POS POSCustomers

Website WebsiteUsers

Select the primary key

Review mapped columns

Column	Type
City	Location.City: Recommended ty...
ContactId	ID: Recommended type
Country	Location.Country: Recommende...
DateOfBirth	Person.BirthDate: Recommende...
Email	Identity.Service.Email: Recomm...
FirstName	Person.FirstName: Recommend...
FullName	Person.FullName: Recommend...
Gender	Person.Gender: Recommended t...

Next

Save and close Cancel

Fully customize criteria before unifying data

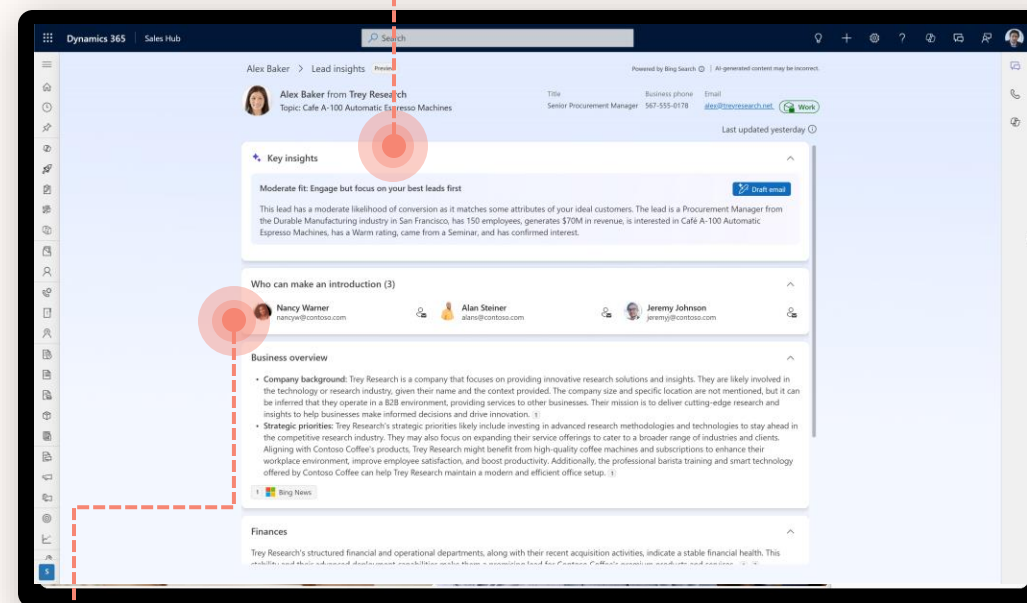


Qualify and prioritize sales leads with agentic AI

Now that your team has leads in the pipeline, Sales Qualification Agent in Dynamics 365 Sales helps them qualify leads faster and more accurately.

- ✓ Work autonomously to research inbound leads in the pipeline from multiple data sources.
- ✓ Synthesize customer data from first- and third-party sources to eliminate several hours of manually researching for insights. This time can then be used on converting the right leads into real opportunities.
- ✓ Convert priority leads to confirmed sales meetings with personalized outreach that moves top opportunities to the next stage quickly.

AI-powered insights
on every lead



Connections to top leads
rooted in customer data



Close more deals and boost sales outcomes

Copilot in Dynamics 365 Sales is your partner in bringing deals over the finish line.



Stay on top of your pipeline using Copilot to surface open tasks for priority opportunities.

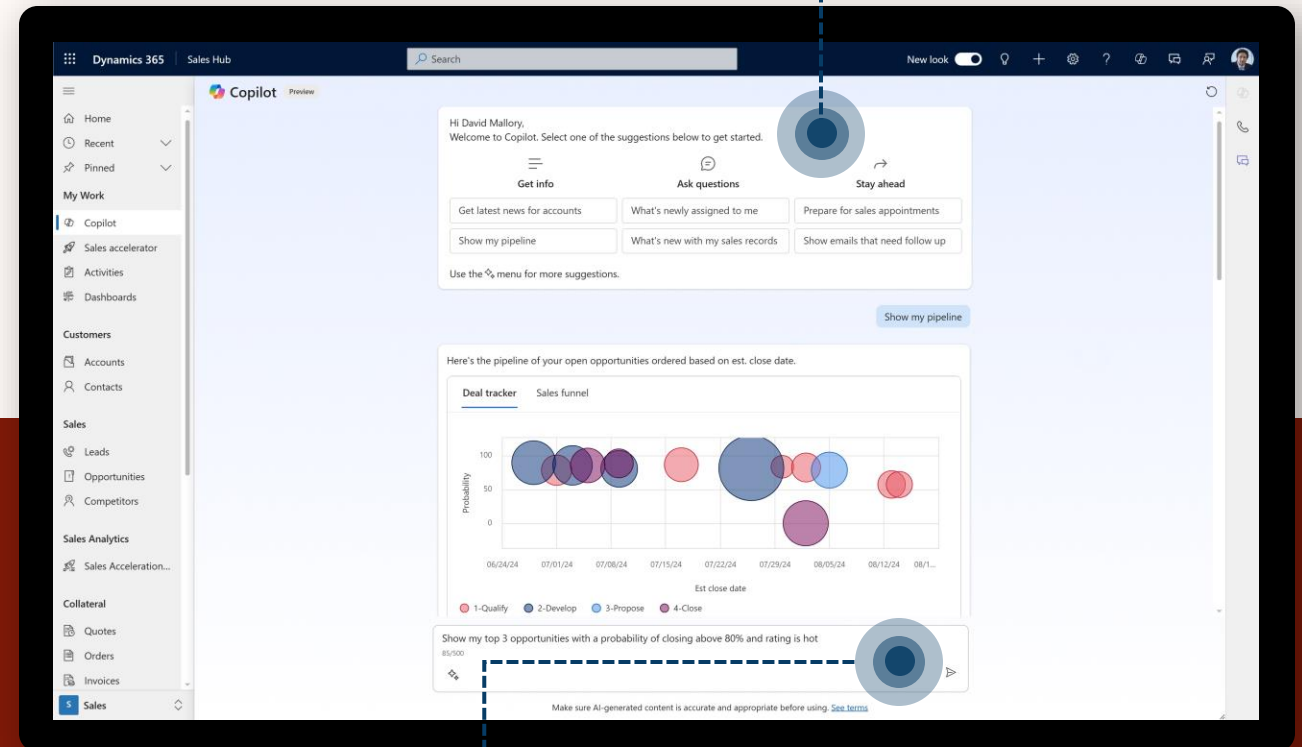


Forecast sales to predict revenue and track performance against goals with AI-powered suggestions every step of the way.



Enhance customer interactions across the sales journey with real-time insights to build strong customer relationships and move deals forward with confidence.

AI-powered suggestions for every step in the deal cycle



Chat with Copilot to catch up on pipeline



You can also take an agentic approach to winning more deals faster using Sales Close Agent to prioritize opportunities.



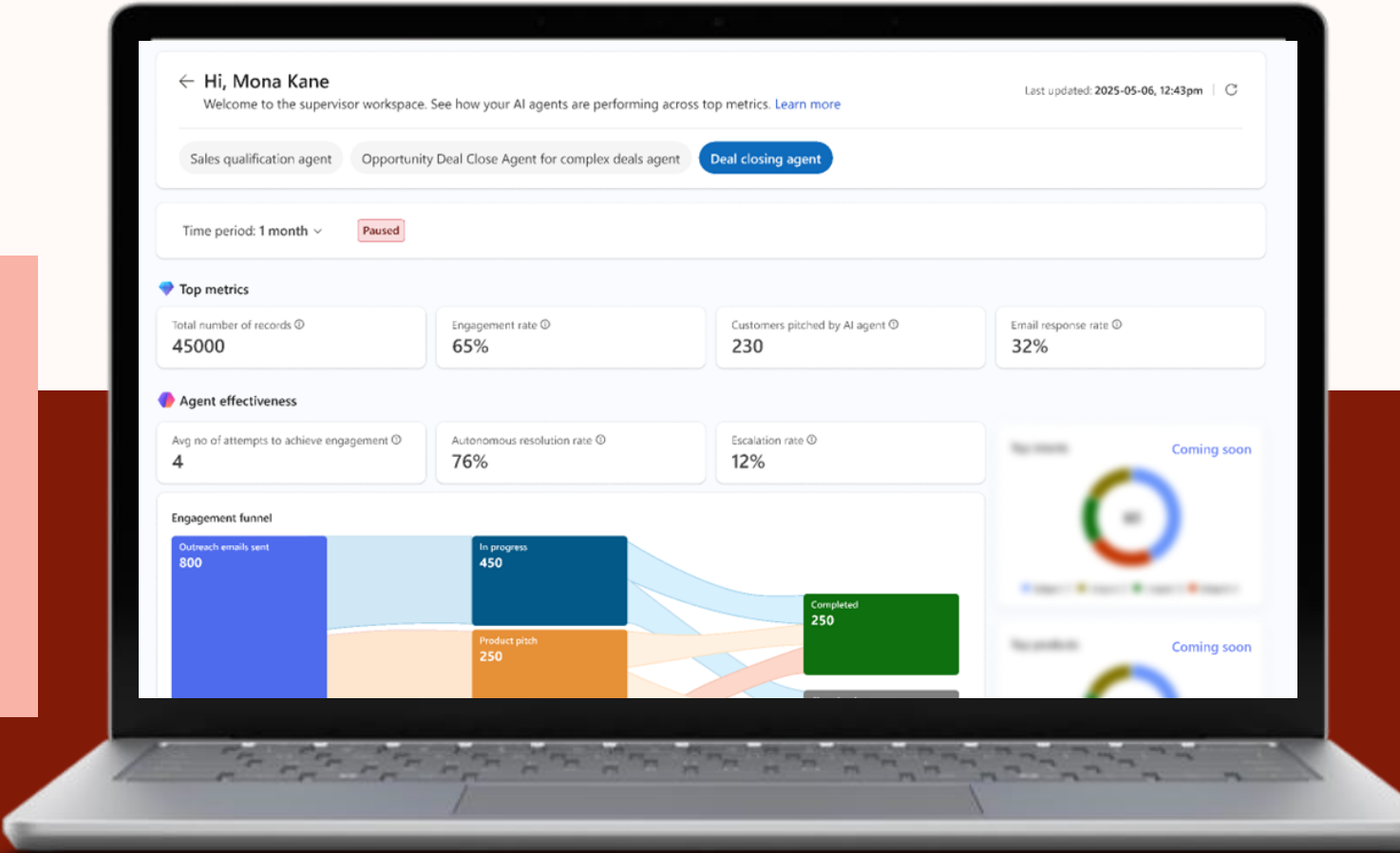
Analyze opportunities and prioritize high-value pursuits.



Proactively identify risks and prompts for seller action.



Autonomously complete low-complexity transactions without seller involvements.

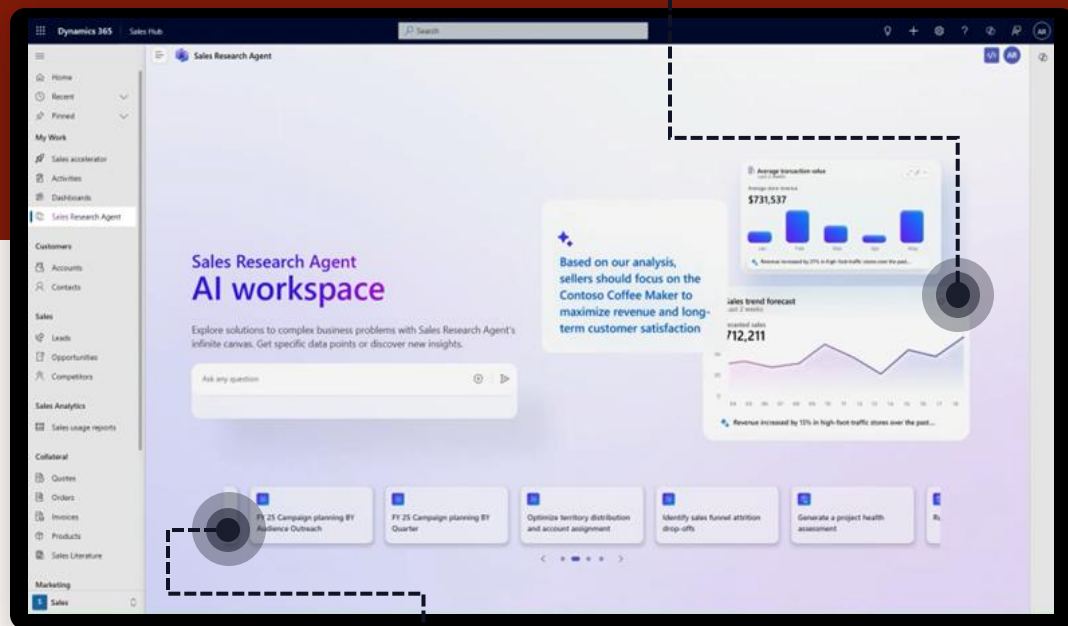




Nurture customer relationships with data-backed decisions

Agents in Dynamics 365 Sales provide support even after you close a deal to maintain a strong connection with your accounts. [Sales Research Agent](#) can turn raw data into insights so you can nurture relationships long after the deal is done.

Receive AI-powered pipeline assessments



Gather deep research insights from multiple data sources for new and existing customers.

Identify potential pipeline risks and get AI-powered next steps to stay one step ahead in building trust and driving growth.

Create action plans for your team based on territory mapping.

Use research insights to plan your interactions





Agentic selling is already driving real business impacts

Businesses that have already integrated AI into their selling process and CRMs are seeing an impact on the bottom line. For example, Microsoft sellers with high Copilot and agent usage are seeing **increased sales, better close rates, and higher revenue.**

10%+

increase in sales lead/opportunity conversion¹

20%+

increase in close rates using Copilot²

9%+

higher revenue per seller²

We're here to help you experience these types of benefits. Zenzero can support you in implementing agentic CRM solutions in Dynamics 365 to unlock the full value of CRM AI transformation.

1. Based on Internal Microsoft data; Jan–March 2025. A sales lead is a potential customer who has expressed interest in making a purchase, while a sales opportunity is a qualified sales deal derived from that lead.

2. Internal Microsoft sales team data based on 30 SME&C sellers from pilot of Sales Agent. AI Is Already Changing Work—Microsoft included, Microsoft, 2024.

Reimagine sales and realize results

The future of sales isn't extending your team to accommodate siloed data and complex workflows—it's equipping them with the power of AI. Microsoft offers the products and aligned goals to support the shift to an agentic CRM empowers your sales team to sell smarter, faster, and more effectively.

When you make the move to agentic CRM solutions in Dynamics 365 with us, you can transform your CRM into a growth engine that offers employees and customers a unified, seamless experience.

**Ready to transform your CRM? Contact
Zenzero to accelerate growth with Dynamics
365.**

