

Inside Agentic Service

Why data, design and domain expertise matter



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Beyond the buzz

The reality of agentic AI in the enterprise

The Reality of Agentic AI in the Enterprise

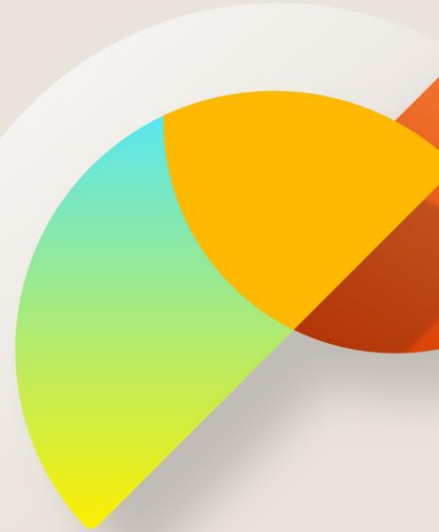
As organisations race to adopt AI in customer service, many overlook the foundational truth: intelligence isn't generated – it's designed. The success of AI agents doesn't just hinge on the strength of a model, but on the quality of data, rigour of system design and depth of domain expertise behind it.

With extensive data libraries and automated processes already in place, customer service teams are well-positioned to reap the rewards of AI transformation and give their organisations a strategic advantage. With agentic AI stepping into the spotlight, organisations can deploy AI-first agents into their service operations that will improve the customer service experience in a cost-effective manner.

The benefits of AI agents

Understanding the capabilities of AI agents is the first step to maximising their impact. Whether it's freeing human service reps from time-consuming tasks that hinder their ability to better solve customer issues, processing large amounts of data in seconds to provide actionable insights or ensuring your service centre's knowledge is up to date, the future is bright for agentic AI in customer service. Effectively incorporating AI agents into your customer service centre will require a clear vision, thoughtful planning and the right approach to data and workflows.

If you're looking to improve your customer experience (CX) and increase operational efficiency, keep reading for an in-depth look at how AI agents function and recommendations for successful implementation.



Beyond the buzz

The reality of agentic AI in the enterprise

When properly trained and deployed, they can:



Carry out tasks independently



Assist service reps to improve productivity



Help manage workflows under human guidance



Get smarter over time by learning from previous actions



Be customised to address specific needs

Discover how AI agents are reshaping business and giving birth to the '[Frontier Firm](#)'.

The data differentiator

Why AI agents are only as good as their inputs

As you look to implement AI-first solutions in your customer service centre, **laying the right groundwork will be essential**. Both generative and agentic AI are built on large language models (LLMs) that have the ability to analyse vast amounts of data in seconds.

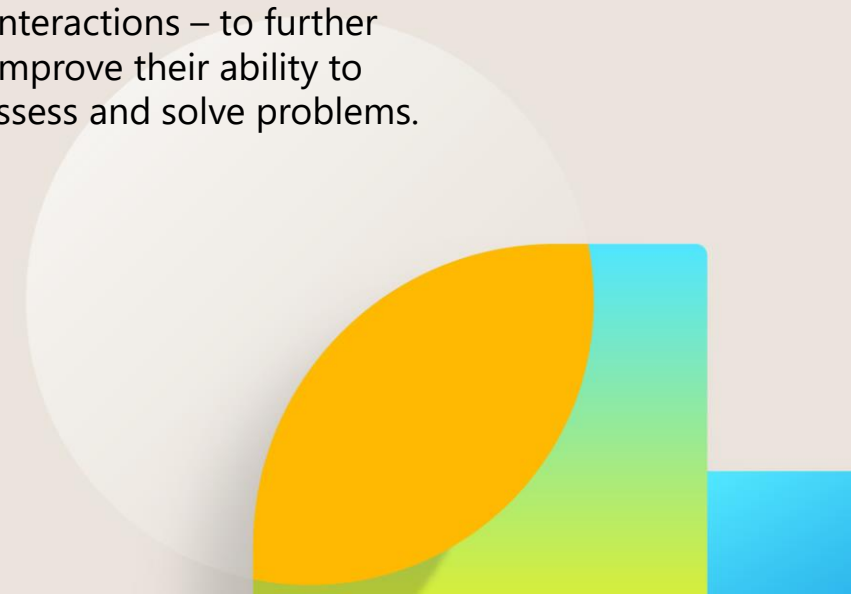
But in order to have a positive impact on customer experience, they will require much of that data to come from your organisation.

With sizable knowledge bases and a consistent stream of incoming customer data, customer service centres provide an ideal setting for AI to thrive.

That said, **the data needs to be high quality** in order for AI to work efficiently and accurately.

This is **especially crucial for AI agents in service centres**, which rely on good data to learn and improve as they carry out tasks and proactively analyses incoming queries.

Once trained, agents will then be able to leverage unstructured customer data – such as call transcripts, case summaries and customer interactions – to further learn and improve their ability to correctly assess and solve problems.



The data differentiator

Why AI agents are only as good as their inputs

The pillars of high-quality data

Clean

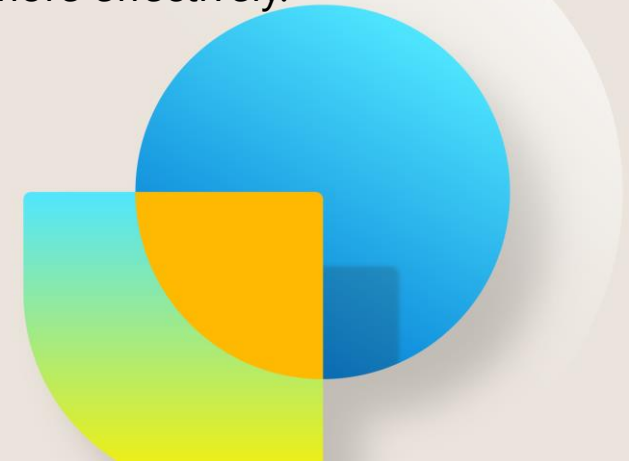
Data that is accurate and up to date helps ensure that AI agents will be properly trained and continue to acquire the right learnings once they're deployed.

Furthermore, clean data ensures that agents do not have access to sensitive or irrelevant information that can be improperly disseminated to customers and employees.

But if agents are trained on low-quality data that is inaccurate and out-of-date, they may derive incorrect learnings and will struggle to generate accurate insights from unstructured data in the future.

One of the key features that sets agentic AI apart from generative AI is its ability to not only learn from quality data, but also create it.

Whether drafting knowledge articles, building customer snapshots or summarising case notes, once AI agents are deployed into the service centre, they can become a valuable producer of quality data that service reps and other agents can harness to work more effectively.



The data differentiator

Why AI agents are only as good as their inputs

The pillars of high-quality data

Structured

Data that is written and formatted in a manner that is easy for agents to parse will help them work more efficiently and effectively as they serve customers and service reps.

Likewise, properly configuring data protection and privacy controls, applying the right sensitivity labels to data and organising data in a logical manner will help ensure agents can efficiently find the information they need, and doesn't access information you don't want them.

Focused

Often, knowledge bases and other relevant data resources will contain every solution to a problem that has been documented over time. This lack of curation and focus is less than optimal for AI, which must then try and determine which is the best solution of the bunch.

By providing agents with only the best, most up-to-date information and solutions, you will ensure that they learn efficiently and resolve issues faster.



Powered by learning loops

How to build smarter service with AI

Unlike generative AI tools that have static knowledge and must be manually retrained to get smarter, **AI agents are powered by self learning loops** that allow them to analyse their previous actions to continuously improve over time.

This cycle of growth in which agents take action, gather results and feedback, assess mistakes and improve, is also applied to every interaction they have – whether it's with a customer, a service rep or another agent.

Instead of just carrying out its assigned task with the same approach every time, it's proactively getting better with each passing day.

If an agent is tasked with maintaining knowledge bases, it will learn to identify patterns, spot errors and refine its decision making as it creates and updates more knowledge articles over time.

If it suggests an inaccurate solution today, **it learns from that mistake to avoid similar errors tomorrow.**



Domain expertise at scale

Prebuilt agents that understand real service work

Conversely, prebuilt AI agents stand as a battletested solution that can be quickly trained and deployed without the added development costs.

Microsoft Dynamics 365 agents at a glance:

Microsoft Dynamics 365 offers the best of both worlds with three prebuilt agents that work out of the box. This allows you to efficiently embed intelligence into your service operations with minimal lift, while providing the flexibility to customise agents so that they're better tailored to your needs as new use cases surface.

The **Customer Intent Agent** analyses past interactions between customer service representatives and customers. Using this data, it can understand what the customer wants and provide tailored solutions to customer issues while enabling new possibilities for self-service. While traditional chatbots and prompts require developers and support staff to update, the Customer Intent Agent updates itself continuously as it receives more data.

The **Customer Knowledge Management** helps scale knowledge with minimal effort from service reps. Organisations can use the **Customer Knowledge Management Agent** to autonomously create knowledge articles based on cases, conversations, emails and notes.

The **Case Management Agent** reduces handling time and improves customer satisfaction by simplifying and streamlining the process of creating cases, updating details, following up with customers and ensuring timely closures that can be time-consuming.

The **Quality Evaluation Agent** QEA is an AI-powered agent that automatically evaluates support interactions – cases or conversations – against predefined criteria. It helps organisations monitor human and AI agent behaviour, ensure compliance with service guidelines and improve engagement quality.



Why a unified platform wins

While it's possible to deploy AI agents onto your existing customer service platform, many existing solutions are fragmented and suffer from data siloing, which limits the ability of agents to capture a complete picture of the customer journey.

Getting the most out of AI agents in the service centre will require a platform that is built for AI from the ground up have the following characteristics:

Unified

An integrated customer service solution seamlessly connects all the different channels and touchpoints in your service centre, which in turn makes data universally accessible.

This is not just convenient for human reps – it makes it possible for agents to quickly and easily access the data they require so they can meet their full potential.



Flexible



Efficient



Secure

Transparent

Having a platform that offers visibility into how agents work is not only essential when it comes to ensuring they're not accessing and disseminating data they're not supposed to, but can also provide valuable insights into where those agents are having the biggest impact, and how they can be refined.

No platform is one-size-fits-all, and you should be able to tailor any platform to your needs. Whether it's having the ability to integrate third-party solutions like a custom CRM, or adding in custom tools to enhance features, customisability will ensure the work of AI agents are aligned with company goals.

When customer demand rises, you need a platform that lets you scale in a cost-effective manner as needs shift and quickly deploy additional agents that are ready for action.

Protecting your data is paramount when implementing AI-powered solutions. The platform that your agents run on should be built on a strong cybersecurity foundation offering shared responsibility, a Zero Trust approach and multi-layer protections.

The Microsoft advantage

Unified platform, composable intelligence

With **Microsoft Dynamics 365 Customer Service**, **Contact Centre** and **Field Service**, you can equip your organisation with an integrated customer service solution that's cost-effective, flexible and AI-ready.

Designed to help organisations reimagine the service experience with prebuilt, AI-first agents that are available out of the box, **Microsoft Dynamics 365** is the foundation you need to bring intelligence, automation and efficiency to every engagement, every engagement channel.

Offering a seamless experience across touchpoints, **Microsoft Dynamics 365's** agents will help your service team work more productively by providing real-time assistance and insights to service reps during calls, facilitating case management processes and managing knowledge bases. In turn, this will free service reps to focus on solving more complex problems and identifying sales opportunities that will drive revenue growth.

Microsoft Dynamics 365 is also built with the needs of your business in mind. Along with the ability to customise our prebuilt agents using Copilot studio, our platform offers the flexibility to integrate with proprietary and third-party solutions. We are also committed to providing a secure and transparent experience. Built on the principles of shared responsibility and Zero Trust, **Microsoft Dynamics 365's** multi-layer approach to security incorporates many industry-leading standards, while offering comprehensive data and privacy controls, assignable privileges and roles and complete visibility into how AI functions in your service centre.



Conclusion

Future-proofing with AI you can trust

Choosing the right AI solution is as pivotal as choosing to harness the advantages of agentic AI. The right customer service solution is customisable to your needs, backed by decades of experience with the agility to scale and innovate for the future.

"Tomorrow's top-performing contact centres will blend careful action with the right supplier solutions to make the most of the CCaaS opportunity.... Doing so will enable them to keep pace with constant changes in customer demands and fuel business growth."⁴

– Forrester Research

The Microsoft Dynamics 365 difference

Dynamics 365 offers a cloud-native, AI-first experience that brings advanced intelligence, automation and efficiency to every engagement channel. Here are some key advantages:

Seamless integration: Easily syncs with your existing CRM and other Microsoft Business Apps

Rapid deployment: Prebuilt agents – Case Management, Customer Intent and Customer Knowledge Management – get you set up quickly

Built to scale: Grow and scale with multi-language support, localisation and global data centres

Customisation: Build and refine custom AI agents based on your specific needs with Copilot Studio

⁴ 'A Recipe For Resilience In The Contact Centre', Forrester Research Inc. and Microsoft Inc., November 2024

Transform your operations with scalable intelligence

Sparking meaningful AI transformation in customer service is about more than utilising a few specific tools to improve a narrow range of processes.

Maximising your investment will require a holistic approach that considers how AI fits into the whole of your operations: from the contact centre to the field, and from case initiation to case resolution.

With **the right data and platform** in place, you can enable agents to work effectively across all parts of your service centre. With agents delivering new levels of efficiency as they complete tasks, human employees are free to devote more of their time and energy to ensuring customer satisfaction.

With **employees happy** with their roles and focused on meeting customer needs, those customers will remain a loyal source of revenue for your company. And in the end, that benefits your bottom line.

With Microsoft as your **trusted solutions partner**, you have access to more than just AI-powered tools – you're in command of affordable, abundant and scalable intelligence that's available on tap.

Ready to discover the AI-powered future of customer service?

[Learn more about Dynamics 365 →](#)

[Start your free trial →](#)

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