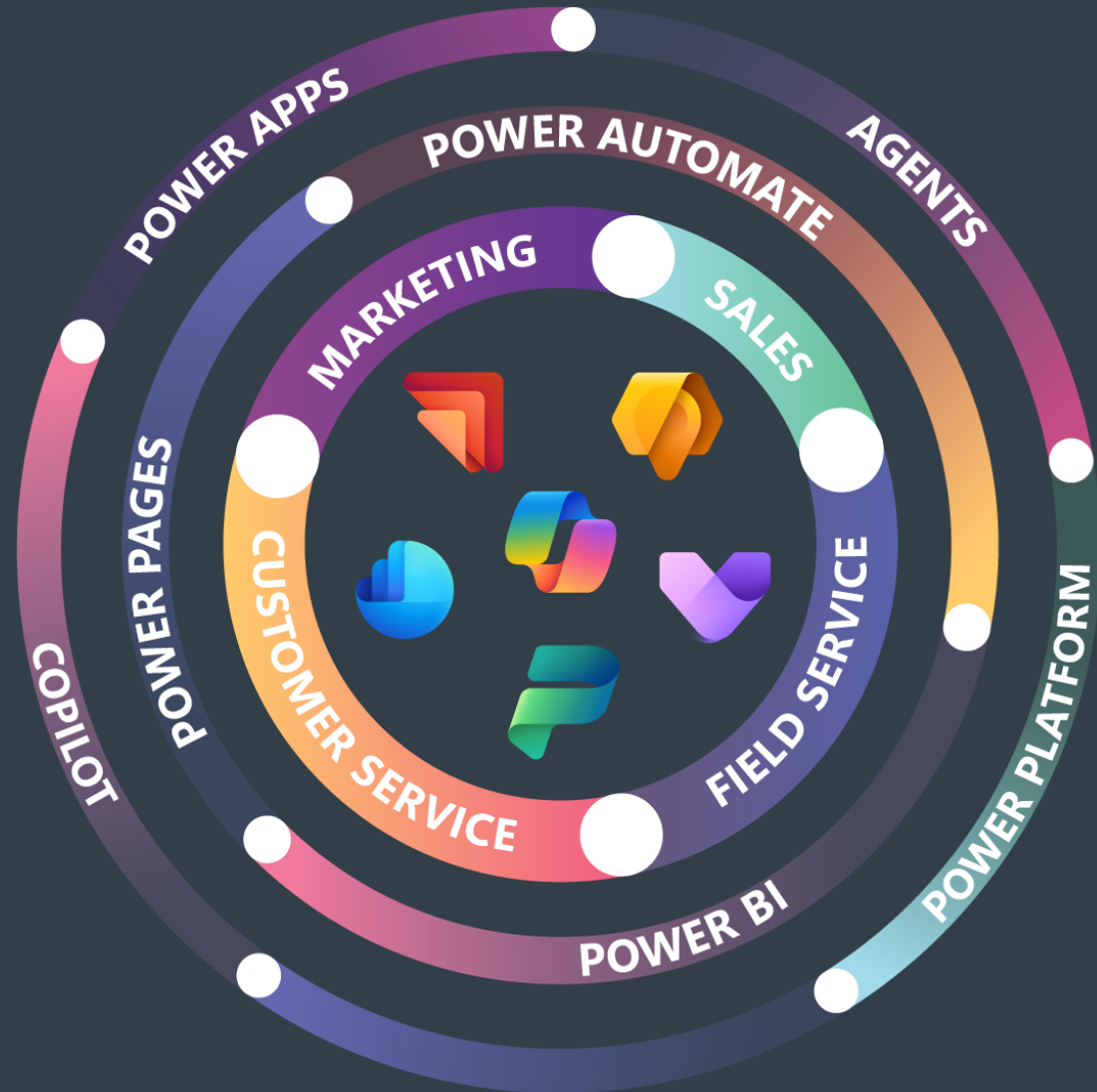







# CRM connect

How Fast Can We Build an Agent?  
The 45-Minute Challenge



# What We'll Cover Today

-  **Planning the Agent**  
Understanding the use case and user journey
-  **Building the Core**  
Creating the agent, topics and actions
-  **Connecting Systems**  
Using Dataverse, flows and business data
-  **Deploying the Experience**  
Embedding into portals and scaling further
-  **Q&A**  
Any questions



# What Actually Is an AI Agent?

An AI agent is more than just a chatbot. It combines conversation, business logic, automation and data access into a guided experience.

## Conversation Layer

Natural language interaction

## Knowledge Layer

Websites, documents, FAQs, data

## Action Layer

Flows, approvals, record creation

## Integration Layer

CRM, ERP, APIs and external systems



*"Good agents don't just answer questions — they perform tasks."*

# Why Are AI Agents Suddenly Everywhere?

AI agents are rapidly becoming part of modern business applications because they help automate repetitive activities while providing faster, more natural interactions for users.

## What Businesses Want

- Reduce repetitive tasks
- Faster support responses
- Lower operational workload
- Better customer experiences
- 24/7 availability

## What Users Want

- Instant answers
- Simplicity
- Less navigation
- Natural interactions

*"The interface is shifting from menus and forms to conversations."*



# The 45-Minute Build Plan

# What We're About To Build

## We Will Build:

- ✓ AI-powered support assistant
- ✓ Knowledge-driven responses
- ✓ Automated support case creation
- ✓ Portal-integrated customer experience
- ✓ Dataverse-connected business process

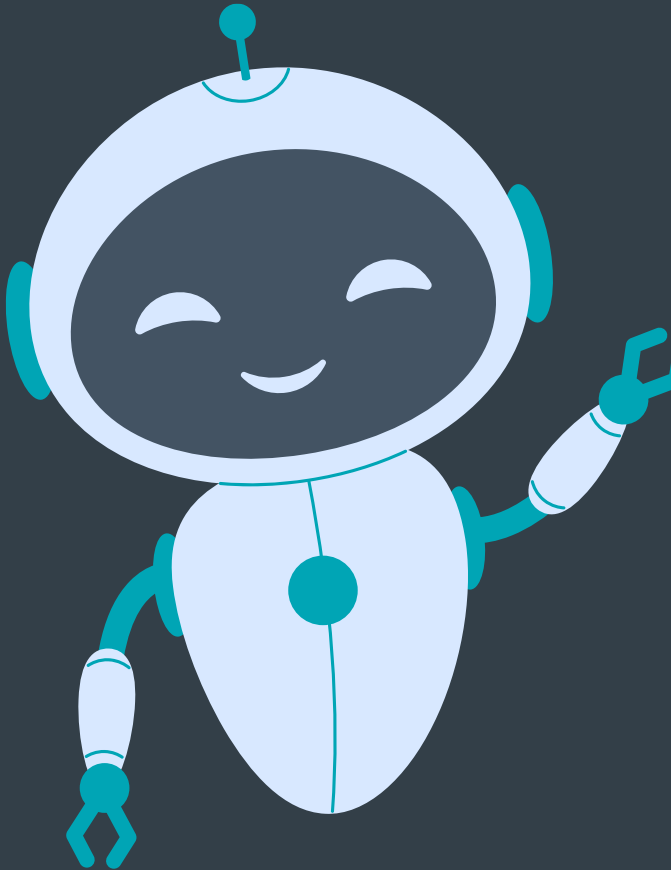


## Live Demo Flow

1. Ask a question
2. AI searches knowledge
3. User still needs help
4. AI gathers details
5. Flow creates case
6. Case appears in Dataverse

*"Good agents don't just answer questions — they perform tasks."*

# Can We Really Build One in 45 Minutes?



## **0–10 Minutes**

Planning & setup

## **10–20 Minutes**

Topics & generative answers

## **20–30 Minutes**

Actions & automation

## **30–40 Minutes**

Portal integration

## **40–45 Minutes**

Testing & refinement

*“Production-ready solutions still require governance, security and tuning.”*



# DEMO

# What Actually Takes Time?

## Fast

- ✓ Agent creation
- ✓ Portal embedding
- ✓ Basic flows
- ✓ Knowledge setup

## Slower

- ⚠ Governance
- ⚠ Security
- ⚠ Permissions
- ⚠ Data quality
- ⚠ Conversation refinement
- ⚠ User testing & scenario validation
- ⚠ AI safety and response reviews

# Multi-Department Possibilities

Once the core AI platform, knowledge structure, and automation approach are established, the same model can scale across both internal and external business scenarios.

## Example Departments:

- Customer Service
- Sales
- HR
- IT Helpdesk
- Finance
- Operations

## Internal Agents

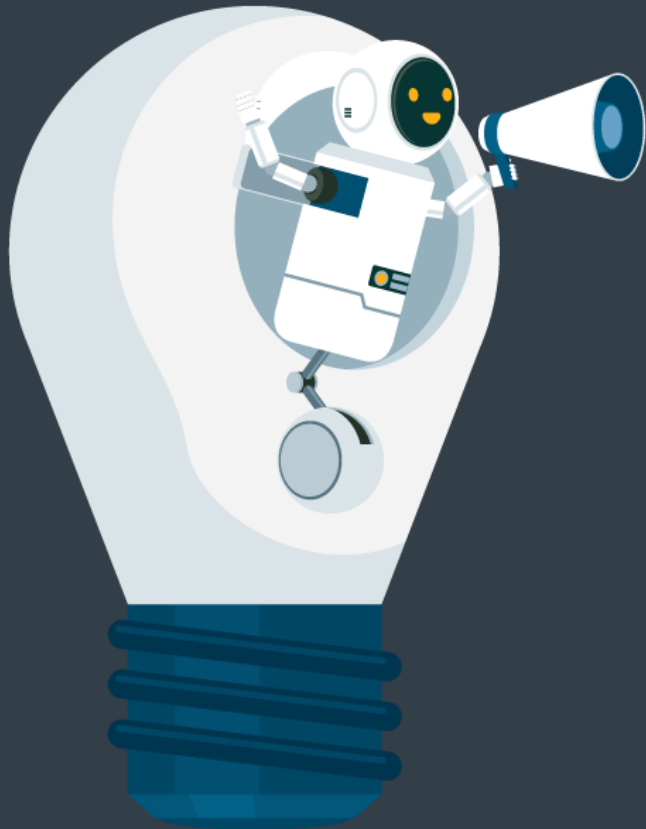
- IT support
- HR assistant
- Finance queries
- Internal knowledge search

## External Agents

- Customer support
- Self-service portals
- Order & invoice queries
- Booking and request handling

*"One platform. Multiple agents. Shared capabilities."*

# Governance & Security



AI solutions must still follow the same governance and security principles as any enterprise system.

## Focus Areas:

- Authentication
- Data permissions
- Auditability
- Environment strategy
- AI governance policies

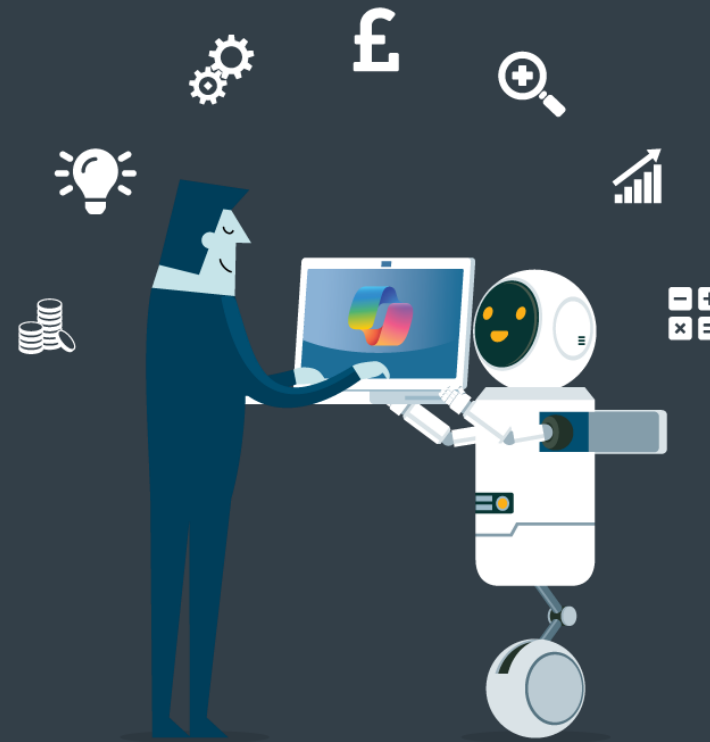
*"AI should enhance security — not bypass it."*

# Where This Is Going

AI agents are evolving rapidly from support assistants into intelligent operational interfaces.

## Future Direction

- Autonomous workflows
- Multi-agent collaboration
- Voice interfaces
- Proactive AI assistance
- Deep business integration



*"Today we build assistants. Tomorrow we orchestrate digital workforces."*

# Key Takeaways



- ✓ Building an agent is faster than most expect
- ✓ Real value comes from integrations and actions
- ✓ Start with one focused use case
- ✓ Good knowledge = better AI responses
- ✓ Governance and testing matter
- ✓ AI agents can support both customers and employees
- ✓ The same platform can scale across multiple departments



“Start small. Prove value. Scale intelligently.”



# Q&A

*Thank you!*



CRM

**connect**

FOR ALL THINGS DYNAMICS 365 CRM & POWER  
PLATFORM

