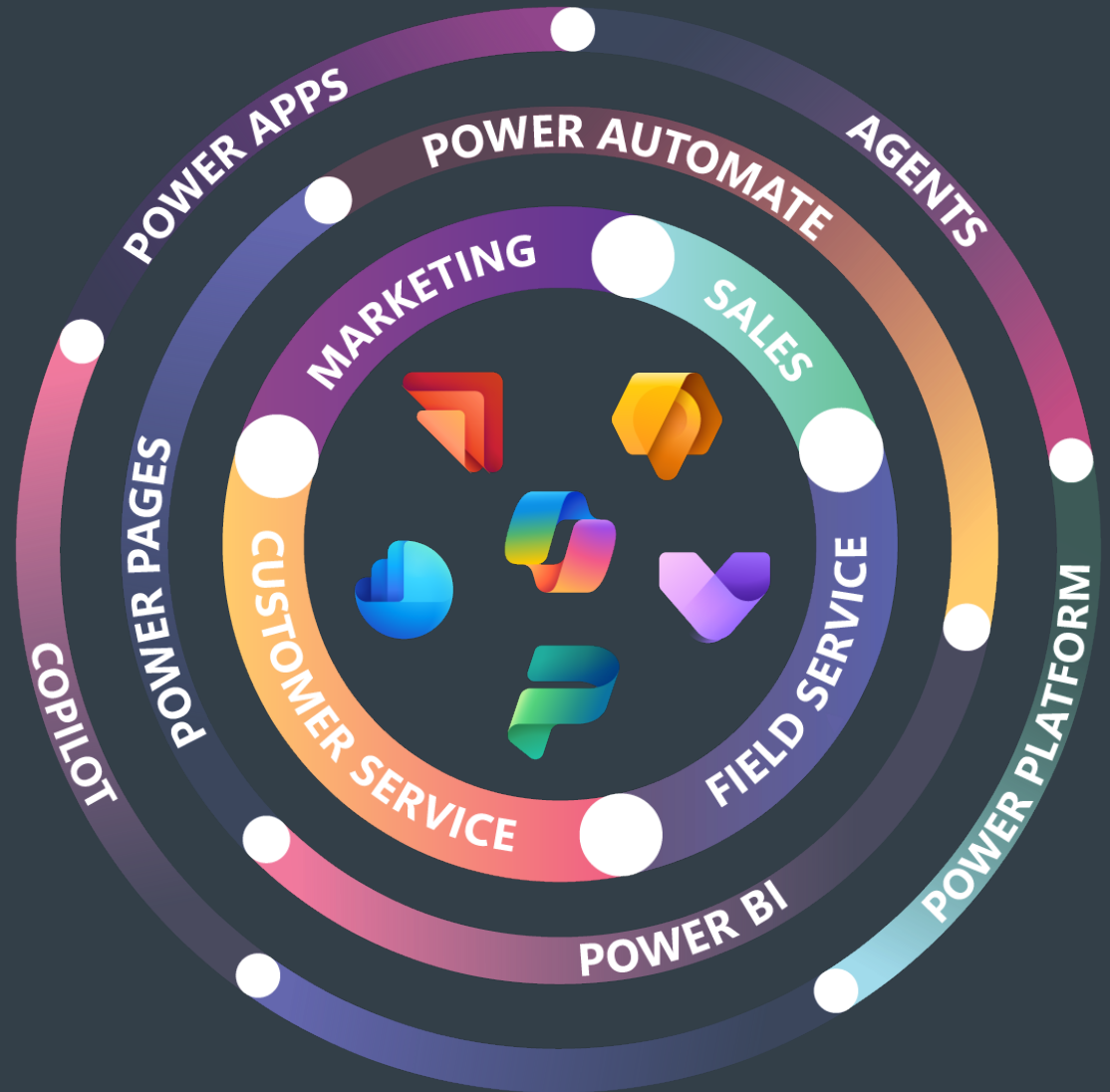


CRM connect

Transforming Customer Self Service with an AI-Embedded Portal



What We'll Cover Today

- The challenges with traditional customer support
- The shift to self-service and AI
- What an AI-embedded portal looks like
- A live demo of a real-world solution
- How you can start small and scale
- Q&A



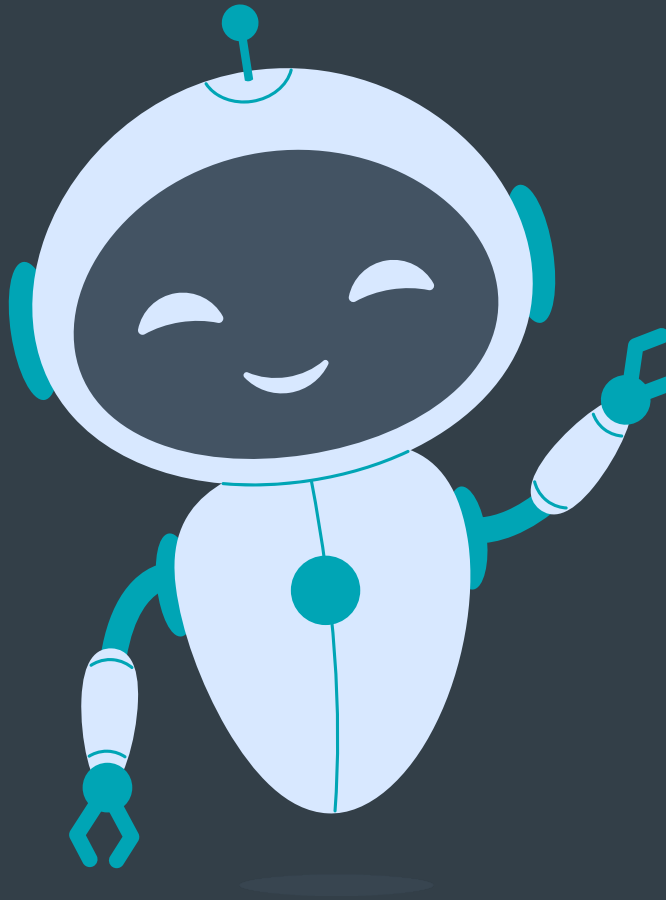
Customer Service Can Be Too Reactive



Most organisations are still heavily reliant on traditional, decentralised support channels like email and phone.

While effective, these channels create bottlenecks, slow response times, and increasing pressure on internal teams.

The Problem



Key Challenges

- High volume of repetitive queries
- Customers waiting for simple answers
- Information spread across multiple systems
- Support teams stuck in reactive mode

The Cost of Inefficient Support

These challenges don't just affect support teams — they impact the entire business.

Business Impact

- Rising operational costs
- Increased workload on staff
- Limited ability to scale

Customer Impact

- Delayed responses
- Frustration & poor experience
- Reduced trust & retention

"Support becomes a cost centre instead of a growth enabler."

Customer Expectations Have Changed

Today's customers expect instant, seamless experiences — similar to what they receive from modern digital platforms. Waiting hours or days for a response is no longer acceptable.

What Customers Expect:

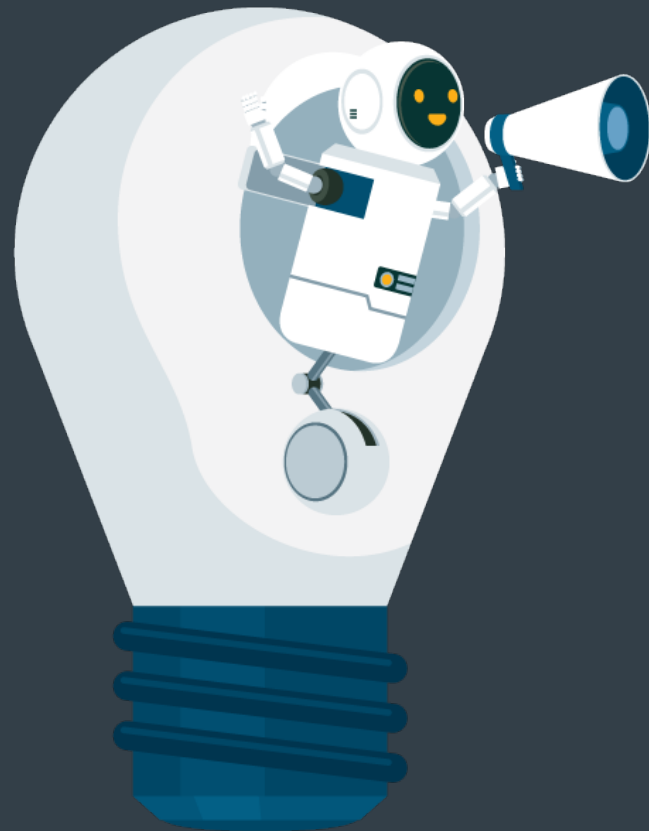
- Immediate answers
- 24/7 availability
- Self-service options
- Simple, guided experiences



What Enables This:

- AI-powered conversations
- Unified data access
- Modern portal experiences

From Resource Reliance to Self-Service



Instead of relying on support teams for every interaction, organisations can empower customers to resolve their own queries quickly and efficiently.

What This Looks Like:

- Customers check invoices and shipment ETAs instantly
- Access contracts and documents anytime
- Track and manage support requests
- Get guided help through AI

An AI-Embedded Customer Portal

By combining Power Pages with AI capabilities, organisations can deliver a seamless, intelligent self-service experience that connects customers directly to the information and support they need.

How It Works:

Portal Layer

- Secure customer access
- Centralised experience

Data Layer

- Dataverse / Business systems
- Real-time information

AI Layer

- Conversational interface
- Guided assistance & automation

"One experience. One platform. Multiple outcomes."



A Connected, Scalable Platform

Rather than replacing existing systems, this approach enhances them — making data more accessible and interactions more intuitive.



Frontend

- Power Pages portal
- Responsive user experience



Data

- Dataverse
- Business Central
- Other Data Sources



AI

- Copilot Studio agent
- Natural language interactions

"AI doesn't replace systems — it unlocks them."

Start Simple. Expand Over Time.

You don't need a full transformation on day one. The most successful implementations start small and evolve.



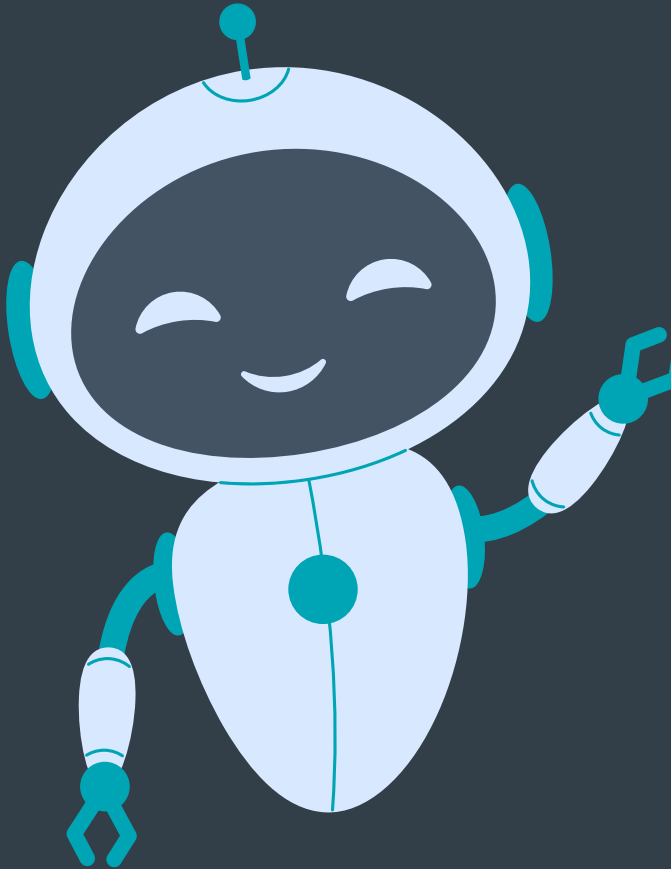
"Value is delivered early — and grows over time."



DEMO

What This Delivers

This approach doesn't just improve support — it transforms how organisations operate.



Efficiency

- Reduced support workload
- Faster resolutions

Experience

- Better customer satisfaction
- Always-on support

Scalability

- Grow without increasing headcount
- Reusable across departments



"Do more with less — without compromising service."

This Is Just the Beginning

Once the foundation is in place, the possibilities expand rapidly.

Future Opportunities:

- Multi-department AI agents
- Internal employee portals
- Supplier management portals
- Predictive support
- Automated workflows

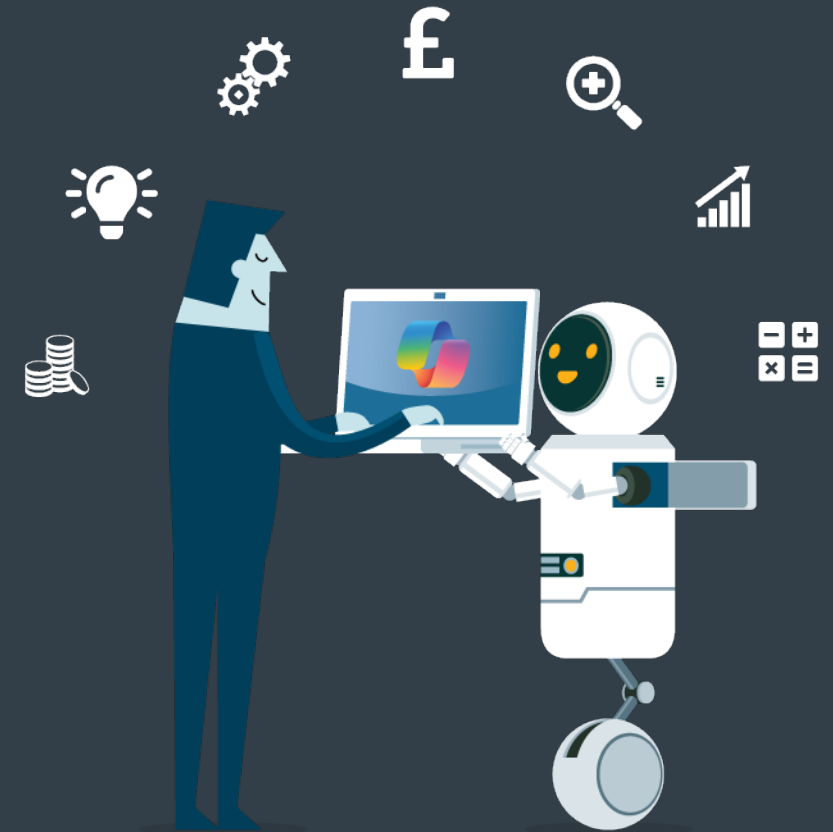
"The question isn't if — it's how quickly you start."



What's New in Power Pages?

Let us explore the new features outlined in Wave 1 2026

- Power Pages are becoming more accessible to build for non-developers: AI code development tools and natural language
- Power Pages Security Agent – proactively secure your website
 - Automated scheduled, security scanning
 - Real-time traffic monitoring
 - Helps with configuring complex roles and permissions for your end users
- Greater depth of insights from within the Power Platform Admin Centre





Q&A

Thank you!



CRM

connect

FOR ALL THINGS DYNAMICS 365 CRM & POWER
PLATFORM

