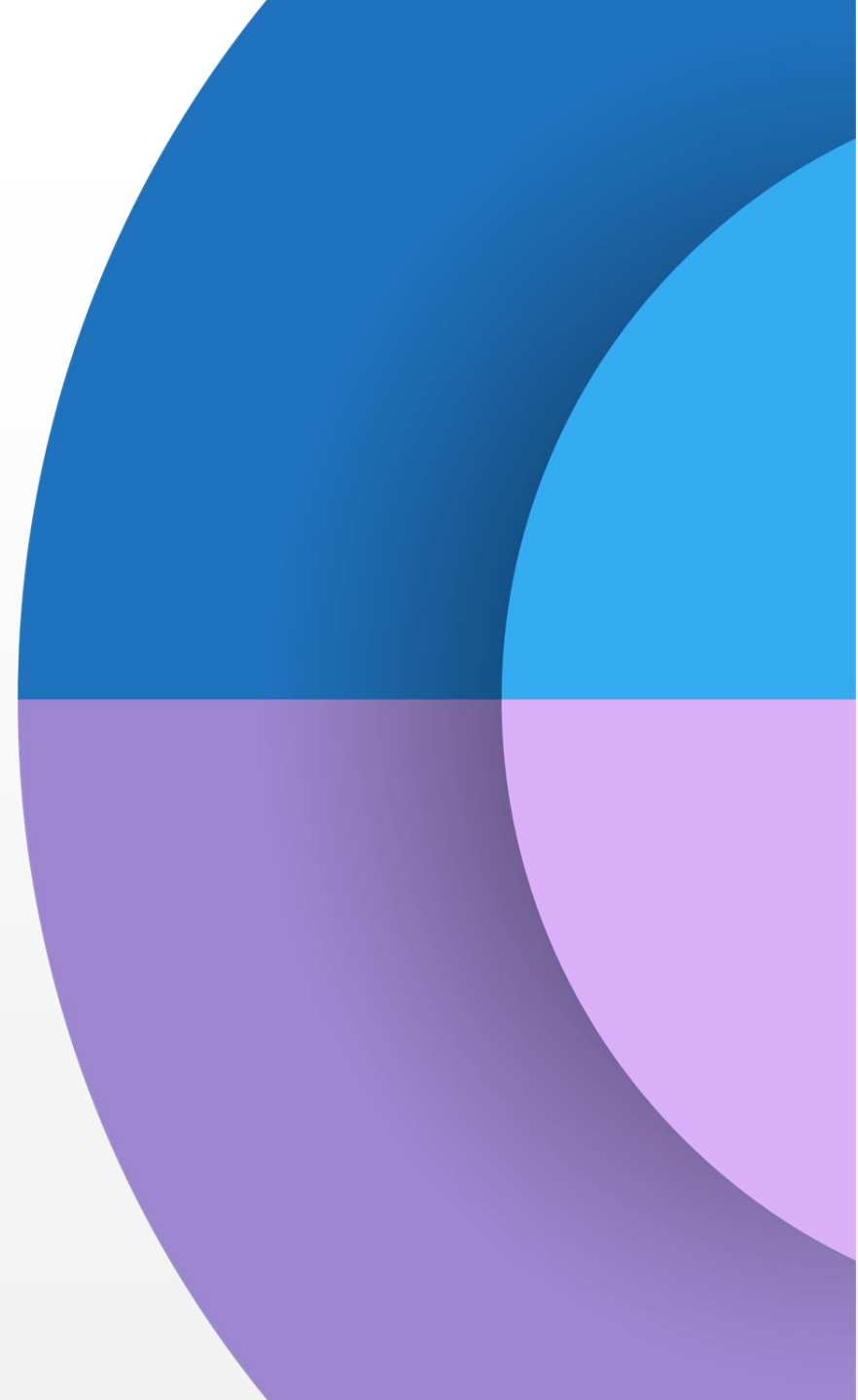




Turbocharge your school with  
**AI and Copilot Experiences**  
in the Power Platform and  
Dynamics 365

2024 SASBO Conference  
April 16, 2024



**500 million**

new apps will be built in the next 5 years  
– more than all apps built in the last 40 years!<sup>1</sup>

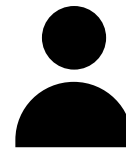
**5x**

Faster demand for mobile apps than IT  
departments can deliver.<sup>2</sup>

**86%**

of organizations struggle to find technical  
talent to build applications.<sup>3</sup>

# A growing demand for apps but not enough developers to build them



The global shortage of developers will  
increase from 1.4 million today to

**4 million in 2025<sup>4</sup>**

<sup>1</sup> IDC FutureScape: Worldwide IT Industry 2020 Predictions. Doc # US 45599219, October 2019

<sup>2</sup> Gartner, How to Deliver Enterprise Mobile Apps Faster – 2017

<sup>3</sup> Patrick Moorhead, [Microsoft goes all-in on hybrid Cloud and Edge at Ignite 2019](#), citing Indeed survey, Forbes.com, Nov 2019

<sup>4</sup> IDC, Quantifying the Worldwide Shortage of Full-Time Developers, Doc # US48223621, September 2021

# We need to build modern solutions to solve problems



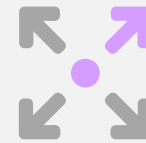
## Fast & Smart

Leverage AI Copilot, accelerate simple or repetitive tasks, use reusable components to move from idea to deployment faster.



## Secure & Governed

Build & scale with confidence & ease on platform with industry standards for governance, security and app lifecycle management.



## Extensible

Use the best tool for the job to get the best result. Have no limits.



## Data Connected

Start with Dataverse and connect to all your data with 1000+ ready-made connectors or create your custom connectors.

A comprehensive, intelligent platform

# AI and low code are the future

2021

 <1%

2025

 10%

The percentage of the world's data produced by **generative AI** will grow to 10% in 2025.<sup>1</sup>



More than 65% of app development **will be low-code** by 2024.<sup>2</sup>

<sup>1</sup> Source: Gartner® Press Release ,Gartner Identifies the Top Strategic Technology Trends for 2022, October 18, 2021. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

<sup>2</sup> Source: Gartner 2019 Magic Quadrant for Enterprise Low Code Application Platforms

# Microsoft Power Platform

Do more with less using the world's most complete set of integrated, low-code development tools



**Power Apps**

for  
web and mobile  
application  
development



**Power Automate**

for  
process  
or workflow  
automation



**Copilot Studio**

for  
chatbots and  
conversational  
agents



**Power Pages**

for  
building secure,  
data-centric  
business websites



**Power BI**

for  
data exploration,  
analytics and  
reporting



**Data  
connectors**



**AI Builder**



**Microsoft  
Dataverse**



**Power Fx**



**Managed  
Environments**

RAPIDLY BUILD WEB AND MOBILE APPS TO SOLVE YOUR BUSINESS CHALLENGES.



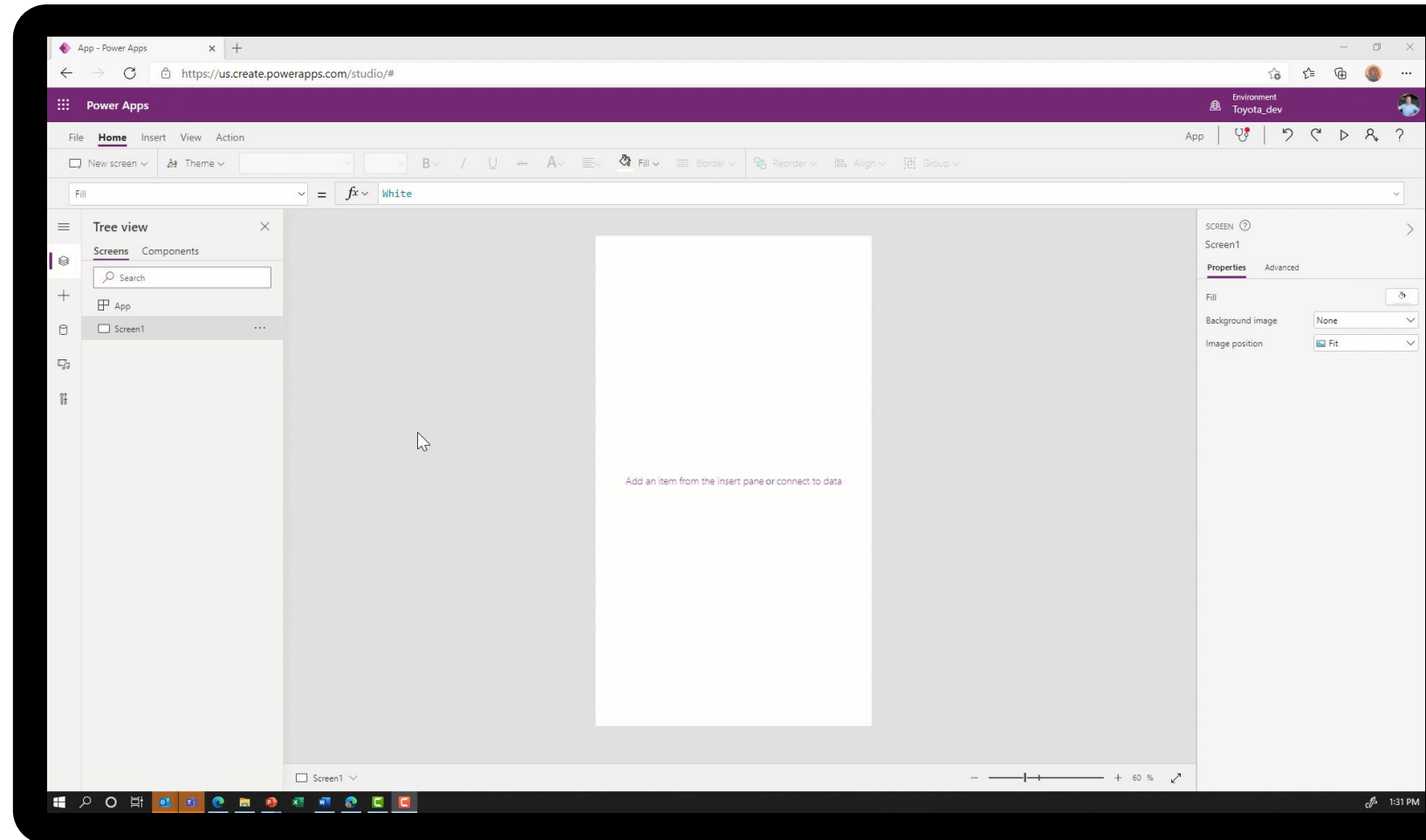
# Power Apps simplifies & accelerates development

Pixel perfect **visual app designer** enables you to build and deploy **professional looking apps faster**

Applications that work across **many form factors: Deploy once, use everywhere**

**Connect** to your **legacy line of business applications quickly and securely**

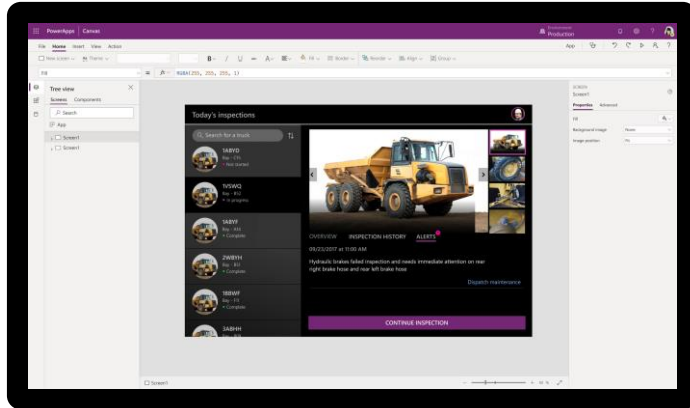
**Natively integrated** into **Microsoft Teams, Office, Dynamics 365**



# Power Apps



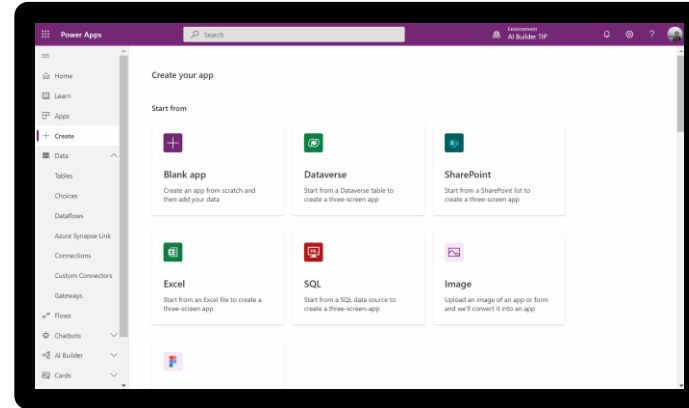
## Ideas



Makers only need to describe their goal using natural language and Power Apps will generate code.

Save time and build more complex solutions by using natural language to give commands.

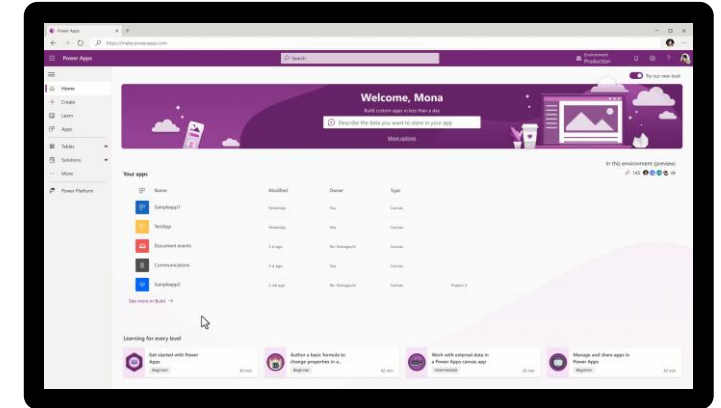
## Express design



Auto-generate working apps and data within seconds from images and design files.

Accelerate app development and enable anyone to easily create a new app to scale development.

## Copilot



Makers can build a complete app just by describing what they need in natural language.

Build, reimagine, and deploy business applications all through intuitive natural language.

HARNESS THE POWER OF LOW-CODE AUTOMATION

# Power Automate boosts productivity for everyone

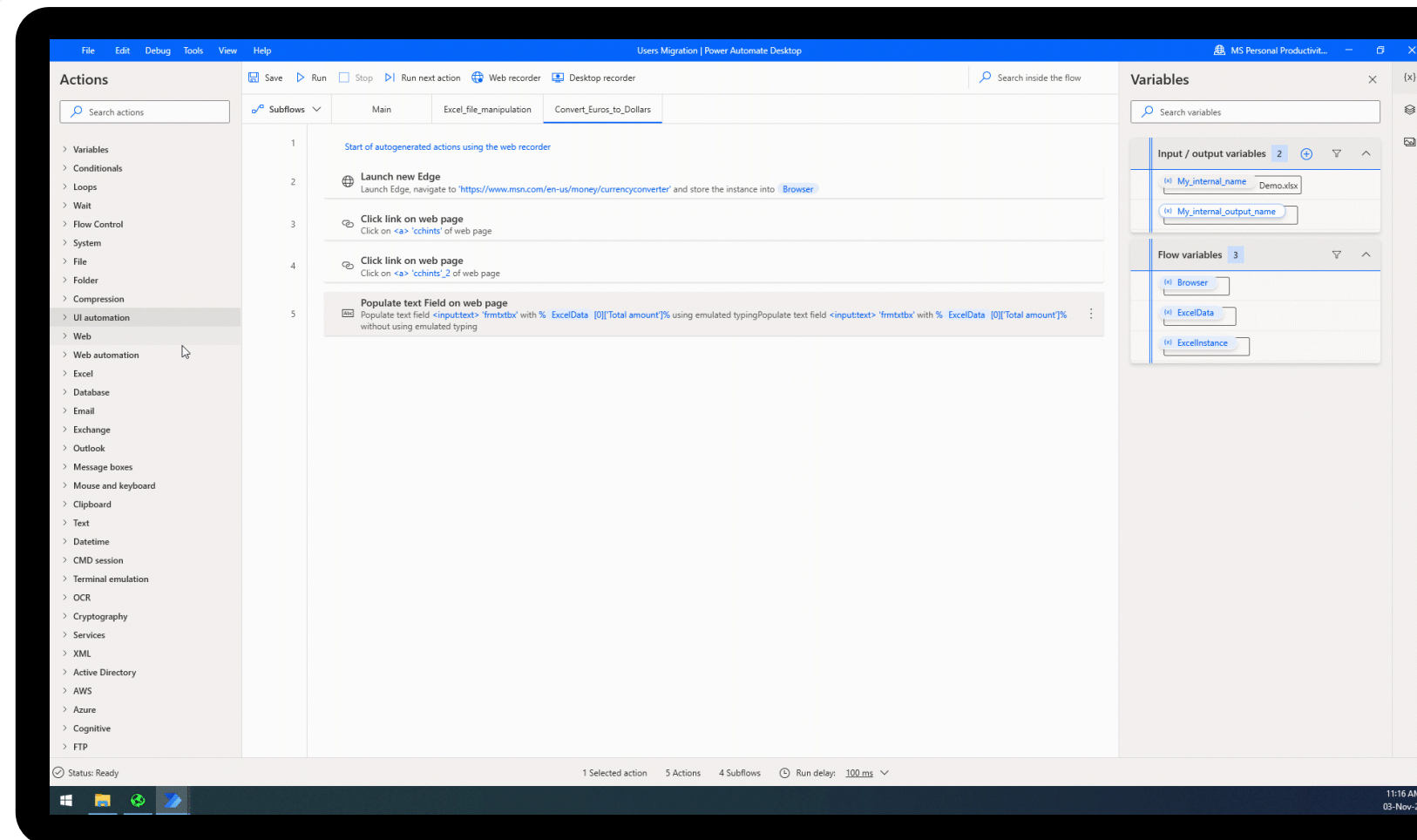


**Robotic Process Automation (RPA)** uses robots that emulate human actions to automate activities

**Digital Process Automation (DPA)** allows automation across native and 3rd party apps through cloud flows

**Business Process Automation (BPA)** connects business process flows to other systems with RPA and DPA

**Task/Process Mining** enables users to visualize processes and gain deep insights into opportunities to optimize





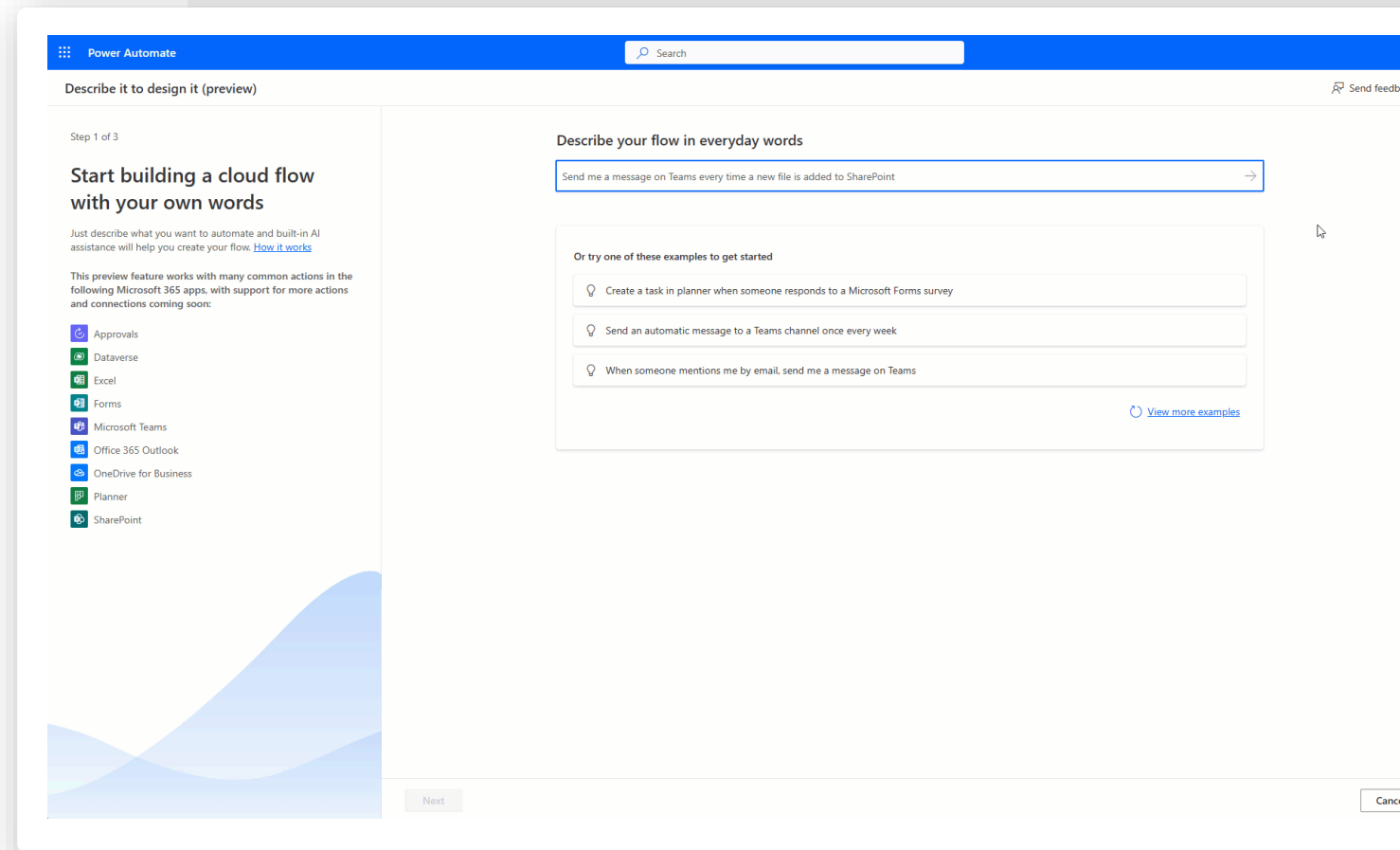
# Transform natural language to automation

Bring ideas to life with AI powered automation development



Now you can **describe what you want** to automate in a sentence, and an AI-based copilot will build your flow in seconds

This new way to create flows runs on OpenAI Codex, an AI model descendant of GPT-3 that can **translate natural language to code**, in this case, Power Automate cloud flows



CONNECT TO ALL YOUR INTERNAL AND EXTERNAL DATA SOURCES



# Over 1,200 Power Platform data connectors

Built-in connectivity to cloud services, content services, databases, and APIs

Seamless hybrid connectivity via the on-premises data gateway

Custom connectors as building blocks for citizen developers

Robotic Process Automation is the ultimate connector, if necessary



BUILD DATA-DRIVEN BUSINESS WEBSITES WITH EASE

# Power Pages



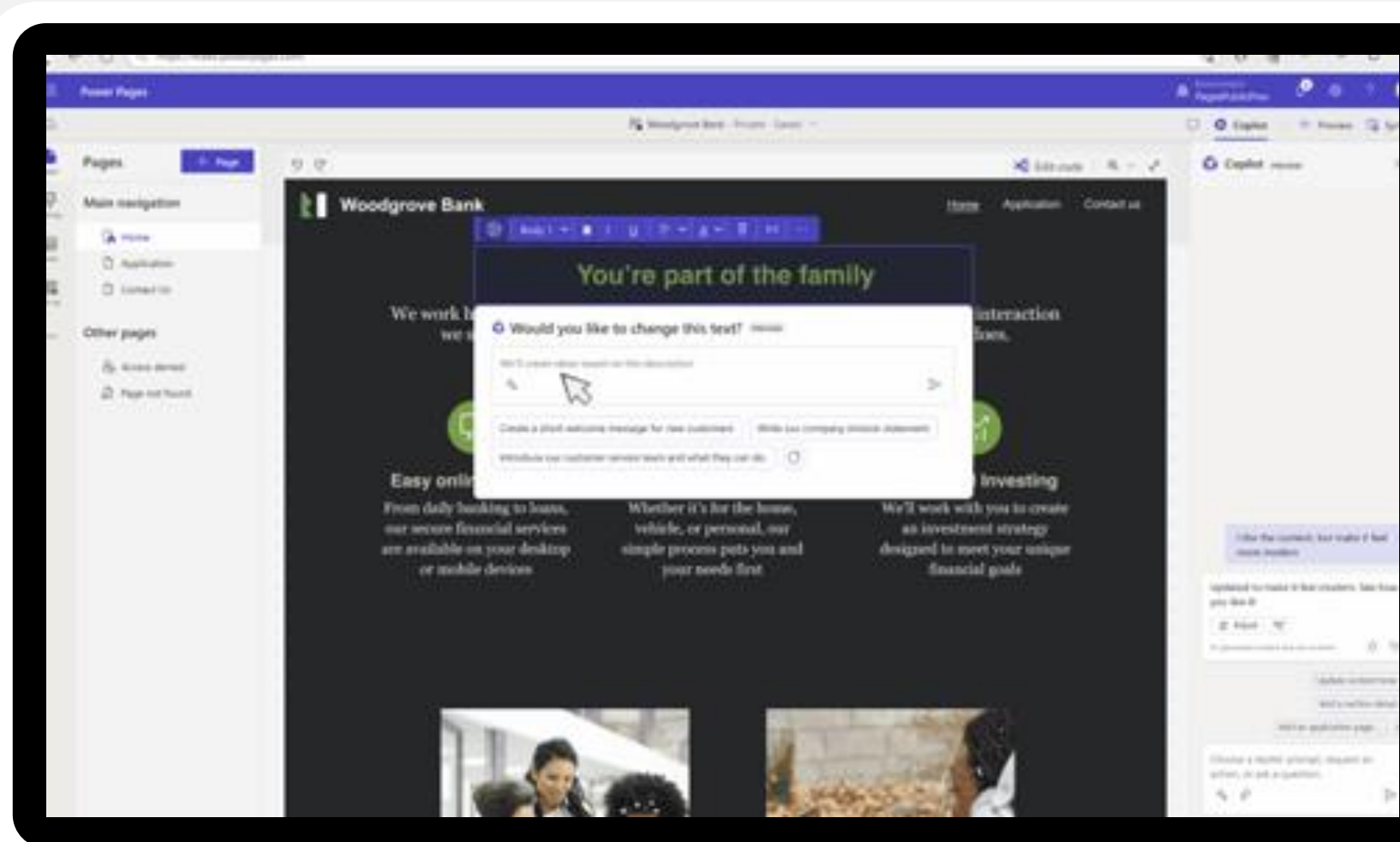
Enable everyone in your organization to **design and launch engaging websites** in minutes

Leverage **next-level AI with Copilot in Power Pages** – get suggestions, generate text, build forms, and chatbots on your website with natural language

Empower your developers with **advanced web design tools** and take your website to a whole new level

**One convenient dashboard** to manage all your web presence and meet most demanding requirements

Add dashboards, document sharing, chatbots, automation, and more for a smarter experience **with seamless integration to Microsoft ecosystem**



EMPLOY INTELLIGENT CHATBOTS FOR BETTER EXPERIENCE



# Copilot Studio

**Low-Pro code DIY platform** with an advanced authoring canvas

**Native generative AI** chats over knowledge sources, and helps bot authors create custom topics

**Easily connect, manage and transform data** with 1000+ pre-built connectors or call custom APIs.

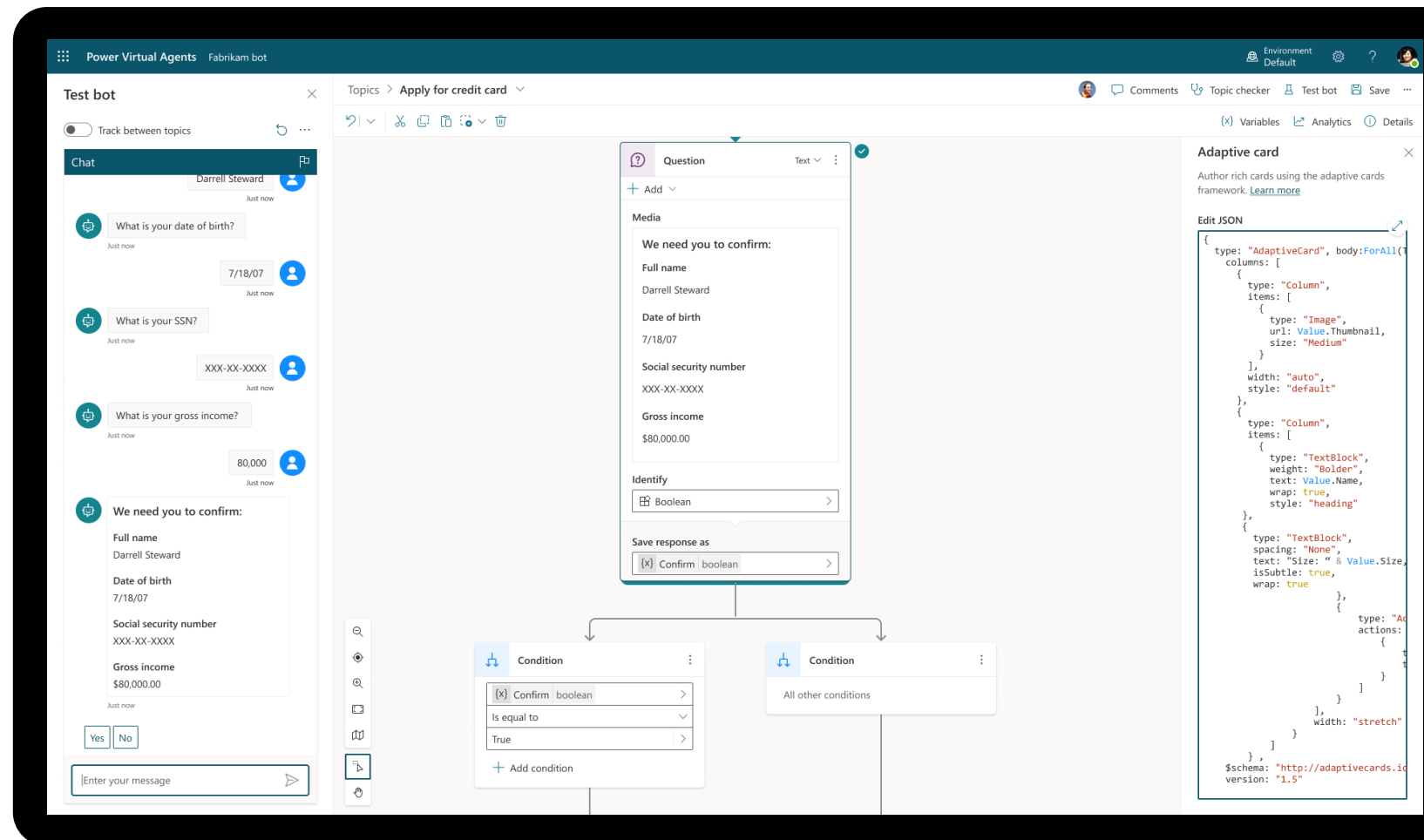
**Extend Microsoft experiences** across M365 Copilot, Teams, Power Platform, Dynamics

**Publish to channels** such as Teams, Facebook and websites and more in minutes

**Build, manage and maintain** bots from a single pane of glass

**No custom NL model training** needed

**Built-in analytics** that automatically tracks critical KPIs





# Create an HR copilot

HR Teams: Build chatbots to save time on repeatable processes

Create a copilot and connect it to the data you want

With Microsoft Copilot Studio, you can build or extend your own copilots

Point your copilot to the data you want it to access, and extend already existing solutions across your organization

Get data on what questions are most asked, and tailor your solutions, accordingly, allowing flexibility and saving you time

The screenshot displays the Microsoft Copilot Studio interface. On the left is a navigation sidebar with options: Home, Overview, Plugins, Entities, Generative AI, Publish, Analytics, Extend Microsoft Copilot (preview), Conversational plugins, AI plugins, and Settings. The main area is split into two panes. The left pane, titled 'Test chat', shows a chat history with a user asking 'Hi, Kayol I'm the Contoso bot. How can I help?' and 'What's the weather like where I'm flying next Wednesday?'. The bot responds with 'Miami' and a weather card for Miami, FL on April 23, 2023, showing 83°F and 'Sunny'. The right pane, titled 'Tracing mode', shows a flowchart of the bot's internal logic. It starts with a 'Dynamic chain log' explaining that tracing mode is active. This leads to another 'Dynamic chain log' stating that the user's question triggered a weather connector action. This action is detailed in a 'Get current weather' block, which shows inputs for 'DateTime' (April 23, 2023) and 'Location' (Miami, FL), resulting in an output of 'SEA, MIA, 7:55am, non-stop; SEA, MI'. A final 'Dynamic chain log' notes that this block is pre-filled. Below this is a 'Custom topic' block with a description and a list of phrases: 'What sunny places can I travel to?', 'Where are some sunny places you fly to?', and 'What sunny beaches do you go to?'.

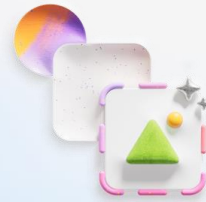
# Copilot in Power BI

Unlock the full potential of your data



## Supercharge Productivity

Let AI summarize actions for you, and optimize your time



## Uplevel Skills

Be better at what you're good at and master what you've yet to learn



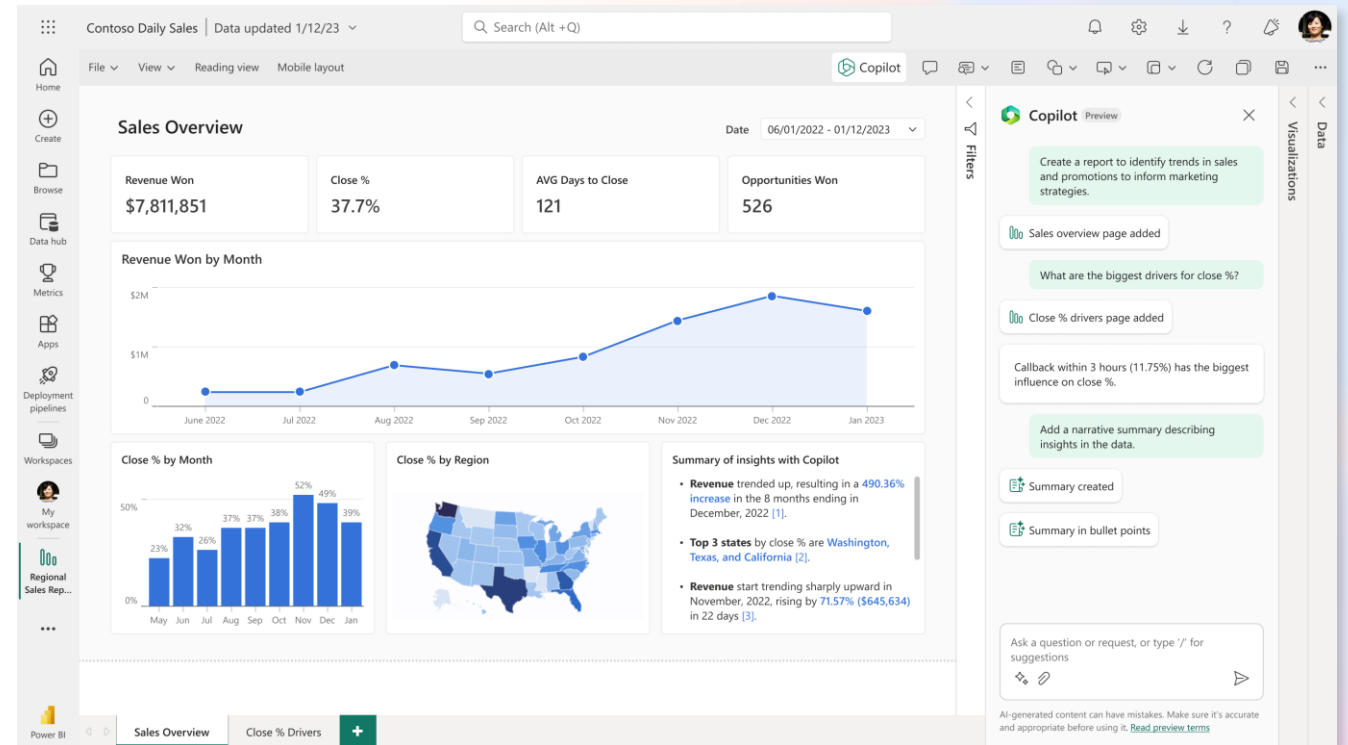
## Discover Insights

Harness the power of AI so you never have to start from scratch

## Data Exploration and Report Authoring

### Use Copilot to quickly create beautiful reports, answer questions, and share insights

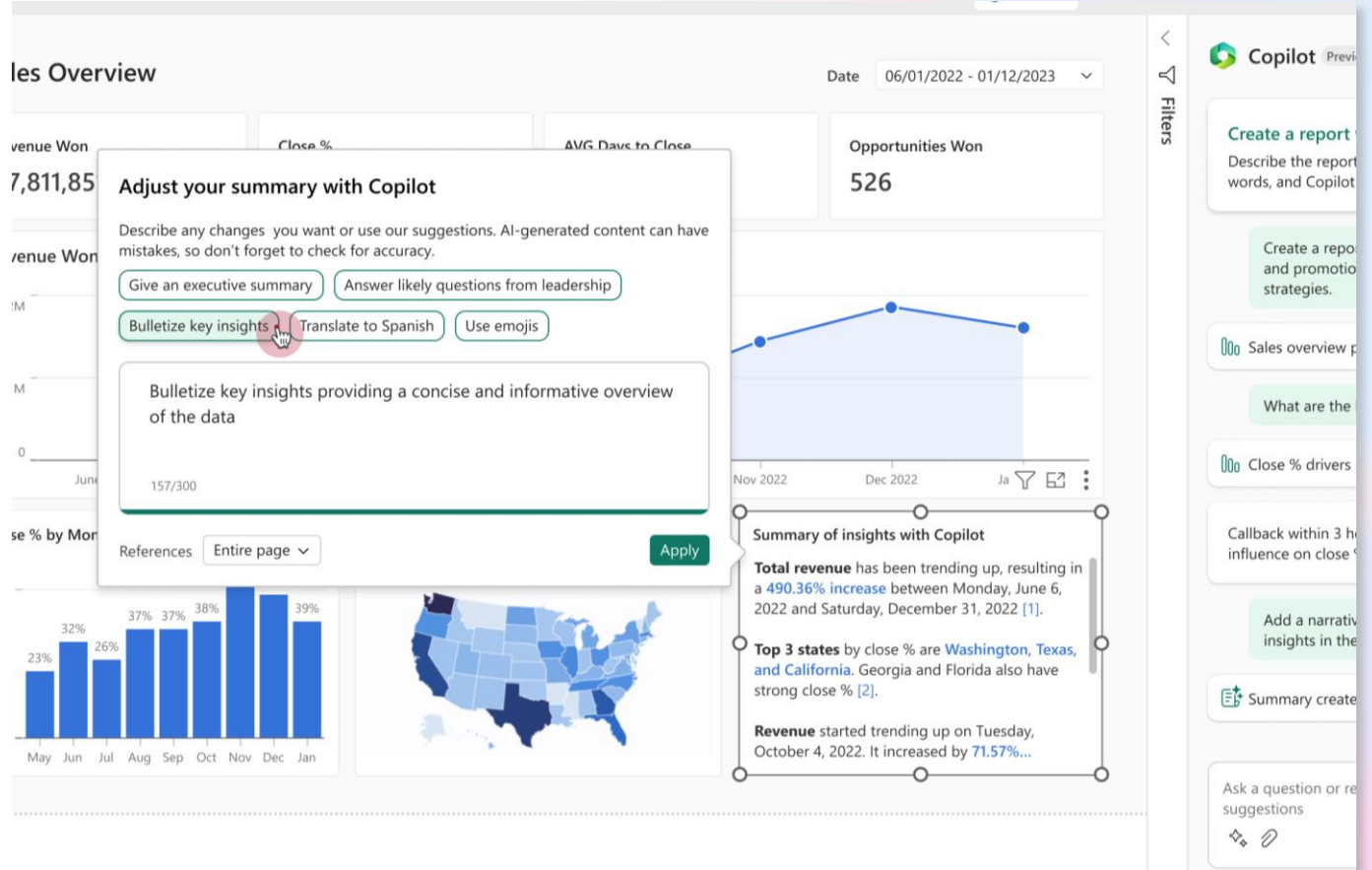
- Chat with **Copilot** to plan out the best way to dig into your data
- Let **Copilot** generate multiple report pages and visuals based on your needs
- Work with **Copilot** to adjust visuals, layouts and styling all through natural language
- Use **Copilot** to tap into Power BI's advanced AI features for finding and visualizing insights



## Data Summarization

### Use Copilot to find and share insights through dynamic text summaries

- Select data and let **Copilot** find and summarize insights
- Customize the output by telling **Copilot** just what you're looking for
- Let **Copilot** match the tone and formatting that will best connect with your audience
- Seamlessly integrate **Copilot** summaries into reports, emails, and PowerPoints



The screenshot displays the Power BI Copilot interface. A central dialog box titled "Adjust your summary with Copilot" is open, allowing users to customize their summary. The dialog includes a text input field with the prompt "Bulletize key insights providing a concise and informative overview of the data" and an "Apply" button. Below the dialog, a "Summary of insights with Copilot" is shown, featuring a bar chart of monthly revenue, a map of the United States, and a line chart of revenue trends. The summary text states: "Total revenue has been trending up, resulting in a 490.36% increase between Monday, June 6, 2022 and Saturday, December 31, 2022 [1]. Top 3 states by close % are Washington, Texas, and California. Georgia and Florida also have strong close % [2]. Revenue started trending up on Tuesday, October 4, 2022. It increased by 71.57%..."

les Overview Date 06/01/2022 - 01/12/2023

Revenue Won: 7,811,850

Close %: 526

AVG Days to Close

Opportunities Won: 526

Adjust your summary with Copilot

Describe any changes you want or use our suggestions. AI-generated content can have mistakes, so don't forget to check for accuracy.

Give an executive summary Answer likely questions from leadership

Bulletize key insights Translate to Spanish Use emojis

Bulletize key insights providing a concise and informative overview of the data

157/300

References Entire page

Apply

Summary of insights with Copilot

Total revenue has been trending up, resulting in a 490.36% increase between Monday, June 6, 2022 and Saturday, December 31, 2022 [1].

Top 3 states by close % are Washington, Texas, and California. Georgia and Florida also have strong close % [2].

Revenue started trending up on Tuesday, October 4, 2022. It increased by 71.57%...



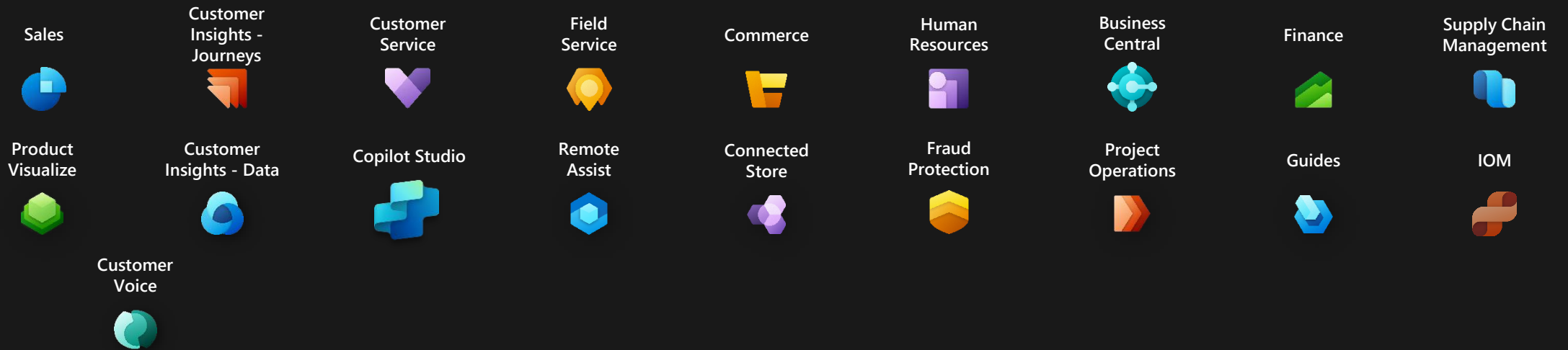
# Dynamics 365 stands above the rest

Dynamics 365 is the only portfolio of intelligent business applications that combines immediate impact with the flexibility to rapidly extend without limits

• Data + Intelligence + Security •

“CRM” - Customer Engagement

“ERP” - Connected Operations



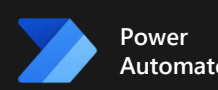
Microsoft Power Platform:



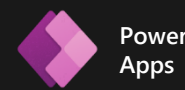
Power BI



Power Pages



Power Automate



Power Apps



Copilot Studio





# Turbocharge your workforce with a copilot for every job role

## Sales

- Recap sales meetings
- Contextual customer emails
- Auto-generated opportunity summaries

## Marketing

- Generate content ideas
- Natural language audience segmentation
- Simplify customer insights

## Service

- Create customer responses
- Enhance self-service bots
- Boost conversations

## Supply Chain

- Predict disruptions
- Summarize purchase order changes

## Finance and Operations

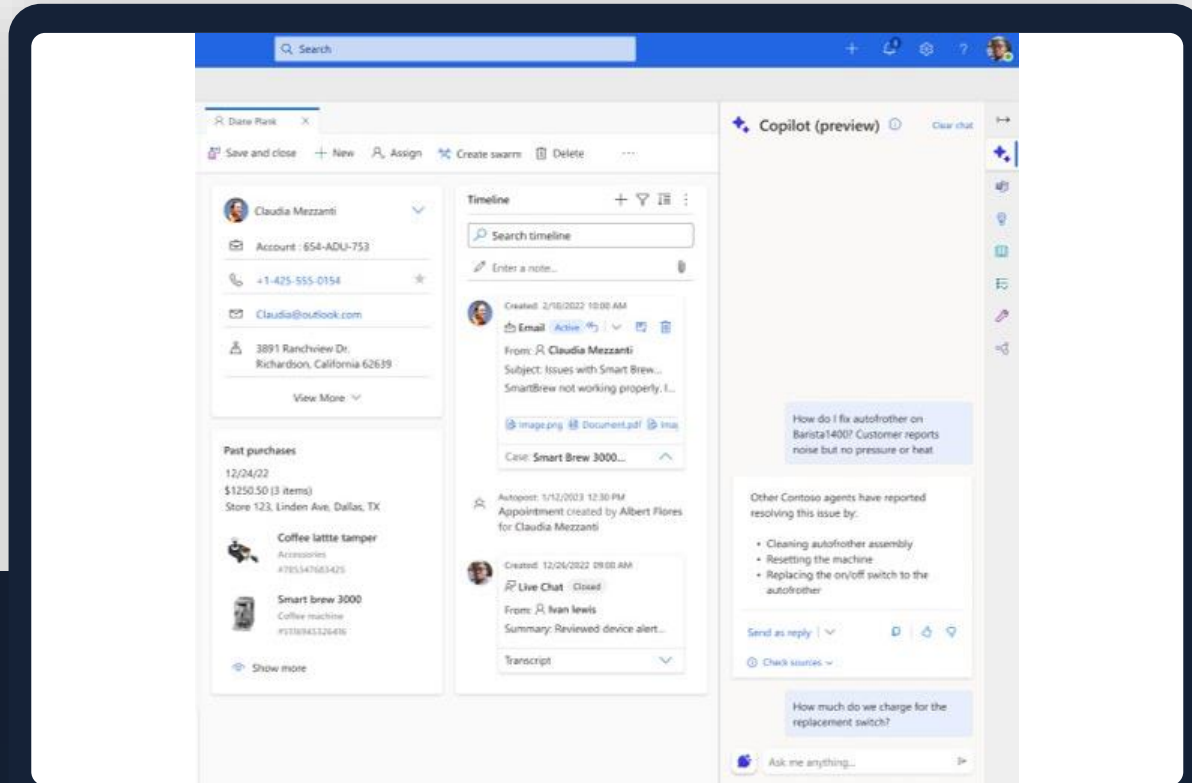
- Create product descriptions
- Risk assessment
- Collections workspace



Dynamics 365 Copilot

# Expand, Maintain Service Excellence

Leverage the power of automation Copilots to reduce risk



Behind the scenes



Power Apps



Power Virtual Agents



Service

- Search across all of your data for business content discovery and case summaries via Copilot
- Omnichannel Customer Service
- Craft responses grounded in your organizations data



Power Automate

- Process Mining large data sets
- Reduce onboarding learning curve
- Conversational AI bot connected to your knowledge repository

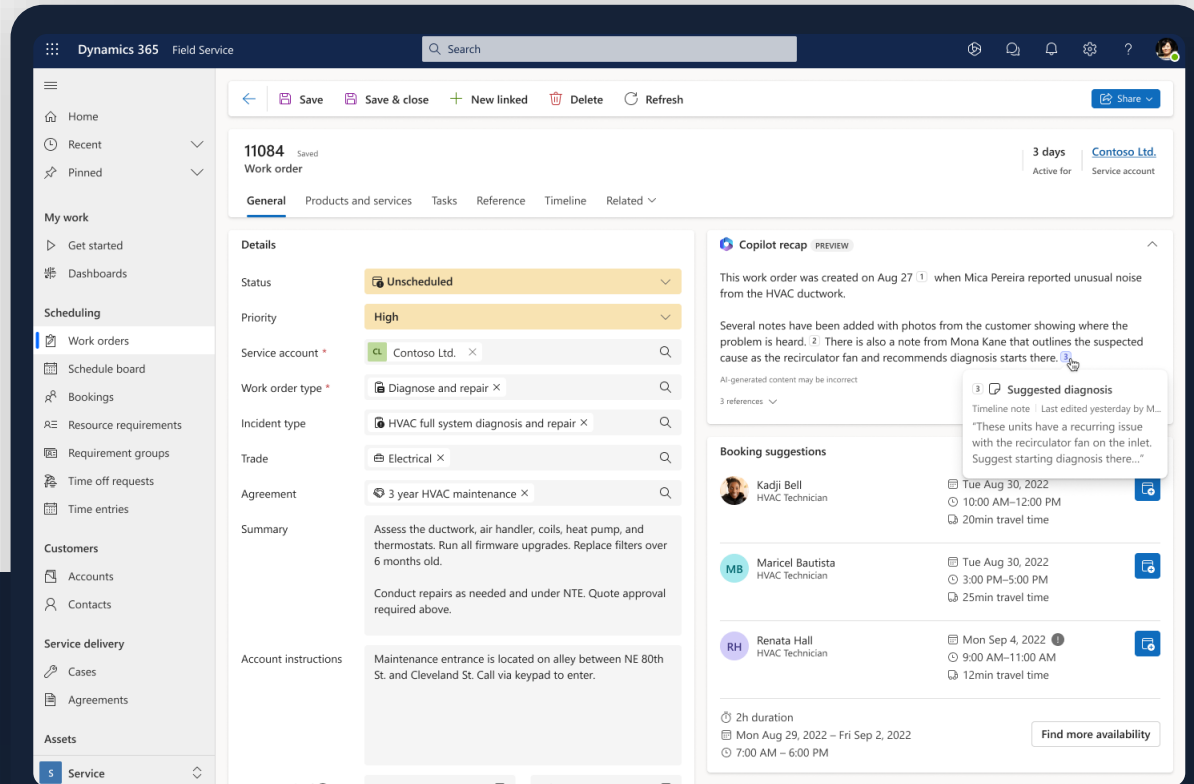


Project Operations

- Copilot driven issue and risk assessment by project
- Generation of project plans using organizational data
- Generation of project status reporting

# Relationship building; Customer Intimacy

Deepen relationships and provide an assistive and embedded experience with Copilot



Behind the scenes



- Copilot driven intelligent in-meeting suggestions
- Auto-summarizes opportunity and client data
- Sentiment Analysis; Conversational Intelligence



- Real-time AI driven journey orchestration
- Maintain personalization
- Customer Data Platform



- Connect to any legacy system
- Any device

# Dynamics 365 Copilot

AI-powered assistance that helps business professionals

- Generate ideas and content faster
- Perform and automate task faster
- Get insights and next best actions

All using natural language

---

## Key differentiation:

- GPT-powered Copilot for every job role
- **Copilot features natively built in Dynamics 365**
- Secure enterprise data – your data is your data
- Powered by Azure OpenAI Service
- Empowering impactful responsible AI practices



# EDU Scenarios



# D365 Customer Service for EDU

[Copilot in Microsoft Dynamics 365 Customer Service - YouTube](#)

**Utilize Generative AI to solve constituent asks quickly and efficiently.**

**Makes school support agents more productive while providing better customer experiences.**

- Point searching capabilities to any existing websites, KB, procedures, closed case history, etc.
- Reads Email content, searches content and suggests answers
- Reads Power Virtual Agent chat bot text, searches content and suggests answers
- Click content source link to verify and refresh Agent knowledge
- Copy suggested content into email body, personalize and send to the customer

**Support for all EDU personas:**

- Employees
- Prospective Students
- Students
- Parents
- Alumni
- Business Partners
- Vendors
- Government Agencies

# Resolve service cases faster with AI-assisted responses



Resolve customer issues faster, with more relevant and personalized recommendations.

## Challenges

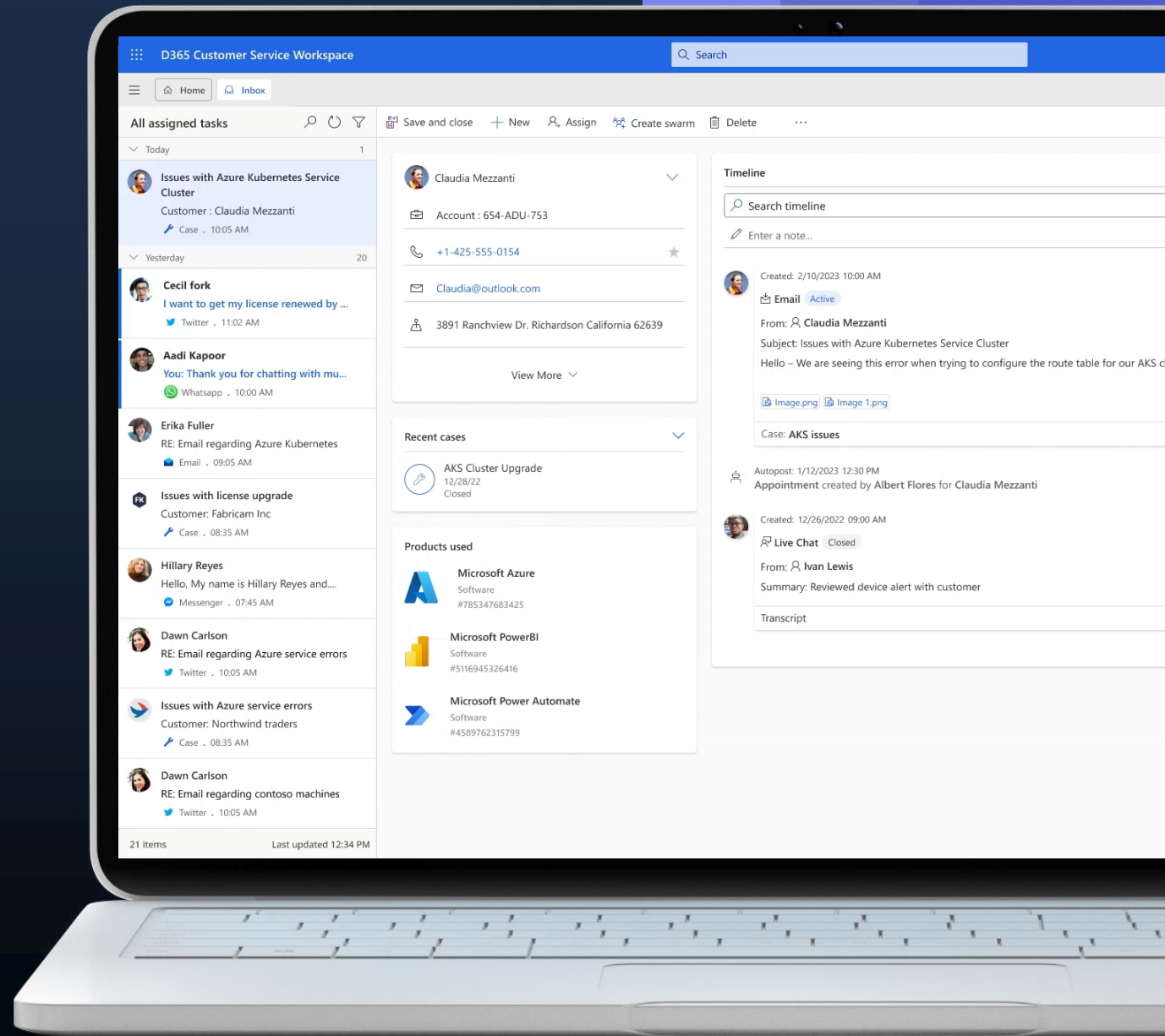
- Difficult to scale personalized service
- Agents under pressure to resolve multiple cases quickly

## With Copilot in Dynamics 365 Customer Service

- Draft messages with one click, from emails to chat responses
- Generate content in context with live conversation and trusted support resources
- Resolve high volumes of cases thoroughly and efficiently
- Improve CSAT and agent productivity



# Copilot in Dynamics 365 Customer Service



# Enrich self-service with conversational AI



Enable customers to self-service with intelligent, conversational bots trained on trusted support content.

## Challenges

- Difficult to scale personalized service
- Agents under pressure to resolve multiple cases quickly

## With Copilot in Customer Service

- Provide human-like conversational support
- Resolve cases efficiently with trusted websites, knowledgebase articles, internal resources
- Resolve high volumes of cases thoroughly and efficiently
- Improve CSAT and reduce human fallback

# Education Power Platform Use Cases

## Students

- Academic advisor request
- Academic intervention management
- Career & college planning
- Club applications
- Grades & assignment management
- Health services request
- Mental health support
- Schedule distribution
- Student support
- Summer school application
- Tutoring assistance
- Financial aid information (Copilot Studio)
- Transfer student inquiries (Copilot Studio)

## Parents & Community

- After-school and special programs registration
- Alumni management
- Business/partner management
- Enrollment forms
- Grant management
- New student applications
- Queueing management
- Student handbook acknowledgment
- Summer school registration
- Transportation management
- General inquiries about school/school system (Copilot Studio)
- Review Course Catalog (Copilot Studio)

## Teachers & Staff

- Asset management
- Curriculum evaluations
- Class behavior management
- Data collection
- Digital hall pass
- Employee annual review
- End-of-year checkout
- Field trip management
- Library management
- New staff onboarding
- PD management
- Technology support
- Time-off & travel requests
- Review school policies (Copilot Studio)

## District

- After action report app
- Benefits management
- Data management portal
- District events
- Employee paperless enrollment
- Facilities management
- Food service management
- Helpdesk ticketing portal
- Leave request management
- Purchase requests, expenses submissions, budget tracking
- Safety reporting
- Software approvals
- Transcript request portal
- HR benefit questions (Copilot Studio)

# Power Apps Collection

## Built with Premium Entitlements



### Discipline App

Log discipline incidents, actions and receive district remediations.



### Universal Checklist

Create and complete any checklist for staff and teachers.



### Employee App

Dynamically add expenses, evaluate employees, or other similar needs.



### Asset Management

Manage any type of asset and the checking in and out of that asset.



### Rapid IEP

Manage the process of individual education plans for a DOE or districts.



### Conference App

Created to manage, register and do reviews at an internal conference.



### Event Request

Request a field trip, recruiting event or personal development trip.

# Get in Touch



**Amalia Mariaca**  
Business Applications  
Specialist

[AmMariaca@microsoft.com](mailto:AmMariaca@microsoft.com)



**Brianna Morris**  
Sr. Business Applications  
Technical Specialist

[BrMorris@microsoft.com](mailto:BrMorris@microsoft.com)



**April McGuire**  
Sr. Azure Data and AI  
Specialist

[AprilMcguire@microsoft.com](mailto:AprilMcguire@microsoft.com)

# Resources

## Power Apps

- Create a canvas app in Power Apps: [link](#)
- Create a model-driven application in Power Apps: [link](#)
- Extend user experience with model-driven apps: [link](#)
- Get started with Power Apps component framework: [link](#)
- Build a mobile-optimized app from Power Apps: [link](#)

## Power Automate

- Create and Manage Automated Processes: [link](#)
- Automate a business process using Power Automate: [link](#)
- Integrate Power Automate flows and Dataverse: [link](#)
- Power Automate's deep integration across data sources: [link](#)
- Build approval flows with Power Automate: [link](#)

## Power Pages

- Get Started with Power Pages: [link](#)
- Explore Power Pages design studio: [link](#)
- Explore Power Pages templates: [link](#)
- Administer Power Pages: [link](#)
- Extend Power Pages websites: [link](#)

## Copilot Studio

- Create bots with Microsoft Copilot Studio: [link](#)
- Manage topics in Microsoft Copilot Studio: [link](#)
- Enhance Microsoft Copilot Studio bots: [link](#)
- Build effective copilots with Microsoft Copilot Studio: [link](#)
- Extend and manage Copilot Studio copilots: [link](#)

# Learn more

- Learn how to boost productivity with [Copilot for Power Platform](#)—your AI assistant

---

- Check out the latest news in the [Power Platform Blog](#)

---

- See what's coming up on the roadmap in the Copilot and AI innovation [release planner](#)

---

- Explore Copilot product and features by geography and languages in the [availability reports](#)

---

- Learn about the latest Copilot for Power Platform innovations directly from the experts, sharpen skills, and build your network at [Microsoft Build](#)

---

- Reach out to your account team to discover how Copilot for Power Platform can help improve your business innovation today