

# Transforming Business Processes with an Agentic Mindset for Customer Engagement apps

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# Agenda

- Introduction
  - The Modern Business Analyst
  - The Business Process Catalogue
  - The anatomy of business processes
- Reimagining business processes with AI

# Introduction to business analysis with an agentic mindset



# The Role of the Modern Business Analyst



## Holistic Process Focus

Map end-to-end workflows, handoffs, and decisions across roles



## Progressive Maturity

Design from clarity through efficiency to intelligence and autonomy



## Human + Automation Balance

Know where human judgment outweighs AI-driven automation

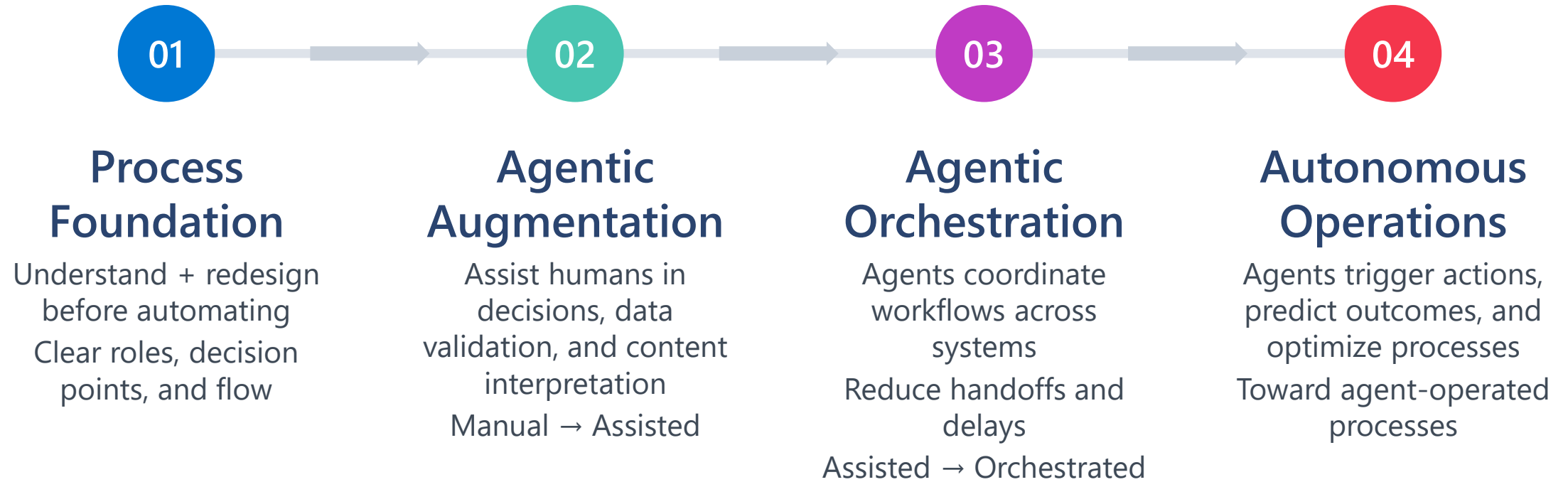


## Transformation Leadership

Lead redesign for scalability, adaptability, and measurable value

***Analysts must evolve from documentarians to transformation leaders who design intelligent processes***

# Agentic Transformation Pillars



***“You cannot automate a process you don’t understand”***

# Agentic Value Measurement Framework

## Productivity

Time + effort reduction

- Time per task
- Throughput
- Automation rate

## Quality

Accuracy + consistency

- Error rate
- First-time-right %
- Rework rate

## Efficiency

Process speed

- Cycle time
- SLA compliance

## Experience

Human + customer impact

- CSAT
- Employee satisfaction

## Adoption

Usage + trust

- Agent usage rate
- Override rate

## Financial Impact

Business value

- Cost per transaction
- Revenue lift

## Risk & Compliance

Control effectiveness

- Audit compliance rate
- Exception rate

# Process Discovery Signals and AI Opportunities

Signal	Opportunity	Agentic Capability	Technology Examples
Repetitive tasks	Automation	Task execution	Power Automate, Logic Apps, RPA
Data inconsistency	Validation	Guardrails + policy enforcement	Copilot, Business Rules, Dataverse validation
Decision bottlenecks	Decision support	Human-in-the-loop agents	AI Agents, Copilot Studio
Unstructured input (emails, docs)	Interpretation	NLP + semantic understanding	Azure OpenAI, AI Builder, Cognitive Services
Cross-system work	Orchestration	Workflow coordination	Dataverse, Fabric, Power Platform
High manual handoffs	Flow optimization	End-to-end orchestration	Durable Functions, Process Mining
Knowledge gaps	Knowledge augmentation	Context-aware assistance	RAG (Fabric, Azure AI Search)
Delayed insights	Real-time intelligence	Predictive + proactive agents	Fabric Real-Time Analytics
Exception-heavy processes	Exception handling	Adaptive agents	AI Agents + rules + escalation
Compliance risk	Monitoring & governance	Policy-aware agents	Purview, Compliance Manager
Customer friction	Experience optimization	Conversational agents	Copilot, Omnichannel, Bot Framework
Low process visibility	Process mining	Insight generation	Process Advisor, Power Mining
Static workflows	Dynamic adaptation	Autonomous decisioning	Multi-agent orchestration

# Agentic Value Measurement Framework

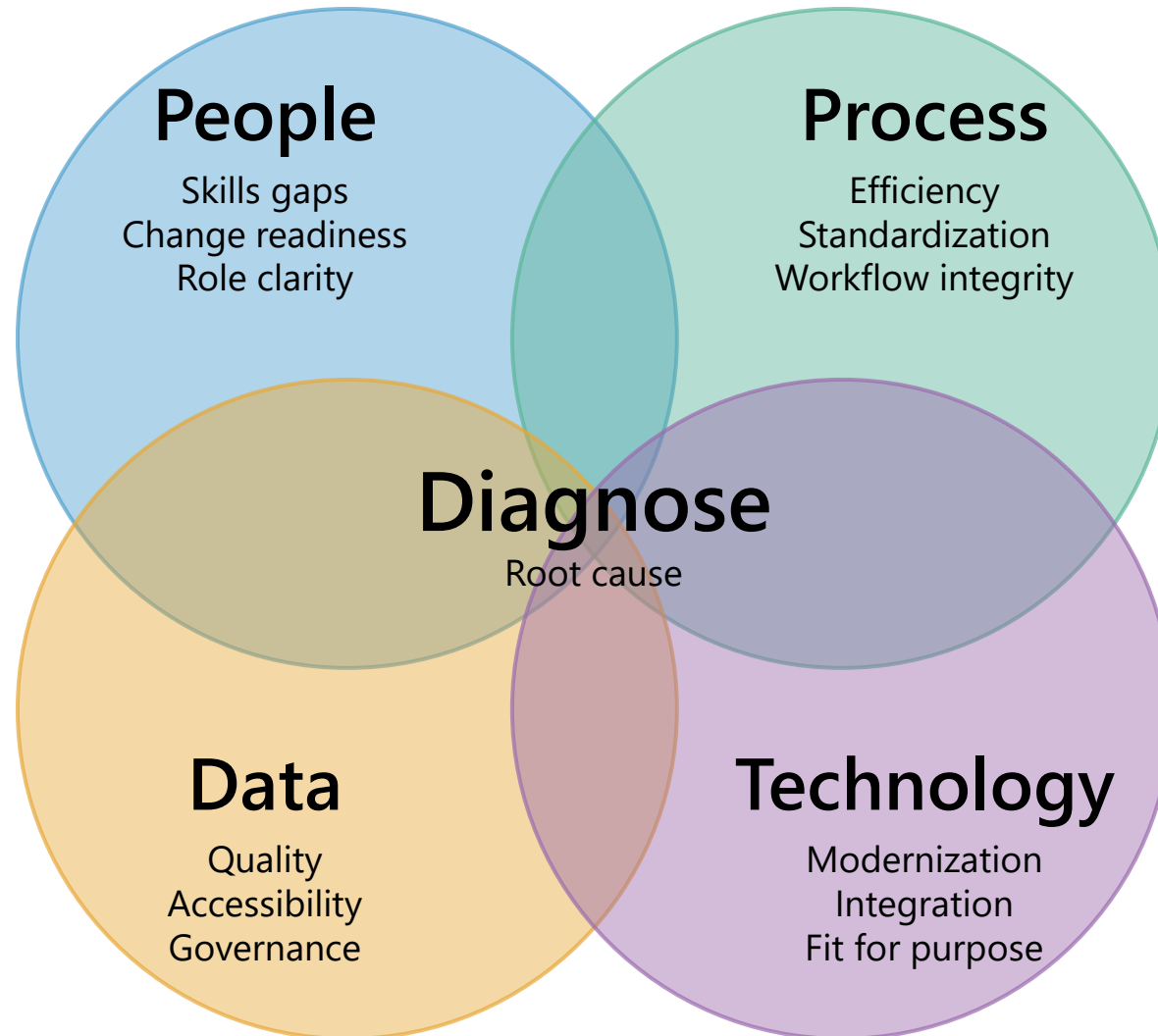
Metric Category	What to Measure	Example Metrics
Productivity	Time + effort reduction	Time per task, throughput, automation rate
Quality	Accuracy + consistency	Error rate, first-time-right %, rework rate
Efficiency	Process speed	Cycle time, SLA compliance
Experience	Human + customer impact	CSAT, employee satisfaction
Adoption	Usage + trust	Agent usage rate, override rate
Financial Impact	Business value	Cost per transaction, revenue lift
Risk & Compliance	Control effectiveness	Audit compliance rate, exception rate

Diagnosis before  
design – not every  
problem needs AI



# Root Cause Analysis Framework

*AI amplifies what exists — diagnose across four dimensions before designing any solution*



***You cannot  
automate a  
process you do  
not understand.***

# From Problem to the Right Solution

*Technology is rarely the first answer — diagnose root causes before prescribing solutions*

Symptom	Knee-Jerk Reaction	Actual Root Cause	Right Solution
<b>Reports take 3 days</b>	<i>"Automate reporting with AI"</i>	5 siloed spreadsheets	<b>Centralize data first, then automate</b>
<b>Slow customer response</b>	<i>"Deploy a chatbot now"</i>	No access to order history	<b>Integrate CRM + order system</b>
<b>Bad sales forecasts</b>	<i>"Add ML prediction models"</i>	No standard sales process	<b>Standardize methodology first</b>
<b>Rising data entry errors</b>	<i>"Add more validation rules"</i>	Staff untrained on new ERP	<b>Training program + user guides</b>

# The Evolved Business Analyst

*From documenting requirements to diagnosing root causes and guiding transformation*

## 4 Dimensions

Diagnose across People, Process, Data, and Technology before recommending any solution

## Amplification Effect

AI magnifies what exists — good patterns become great, broken foundations become expensive failures

## Strategic Judgment

Know when to recommend process over automation, training over tools, governance over dashboards

## The New Mandate

Diagnostic rigor + strategic judgment = analysts who ensure intelligent solutions address actual problems, not just automate symptoms. Master the four-quadrant framework and become the indispensable guide your organization needs.

# The anatomy of business processes



# Business Process Catalog — CE Project Starting Points

Each Dynamics 365 product maps to a core end-to-end business process

## CUSTOMER SERVICE

### Case to Resolution

Customer Service and/or Contact Center

## CUSTOMER INSIGHTS

### Concept to Market

Data and Journeys

## SALES

### Prospect to Quote

Transitions to Order to Cash after quote

## PROJECT OPERATIONS

### Project to Profit

End-to-end project delivery

## FIELD SERVICE

### Service to Deliver

On-site service delivery and scheduling

## PRODUCT-CENTRIC

### Design to Retire

Product information management and pricing

## SERVICE-CENTRIC

### Concept to Market

Service item management and pricing

# Start with problems. Then processes. Then technology.



## THE REALITY

No single product cleanly aligns to one end-to-end business process. Real implementations span multiple products and process areas.



## THE CATALOG

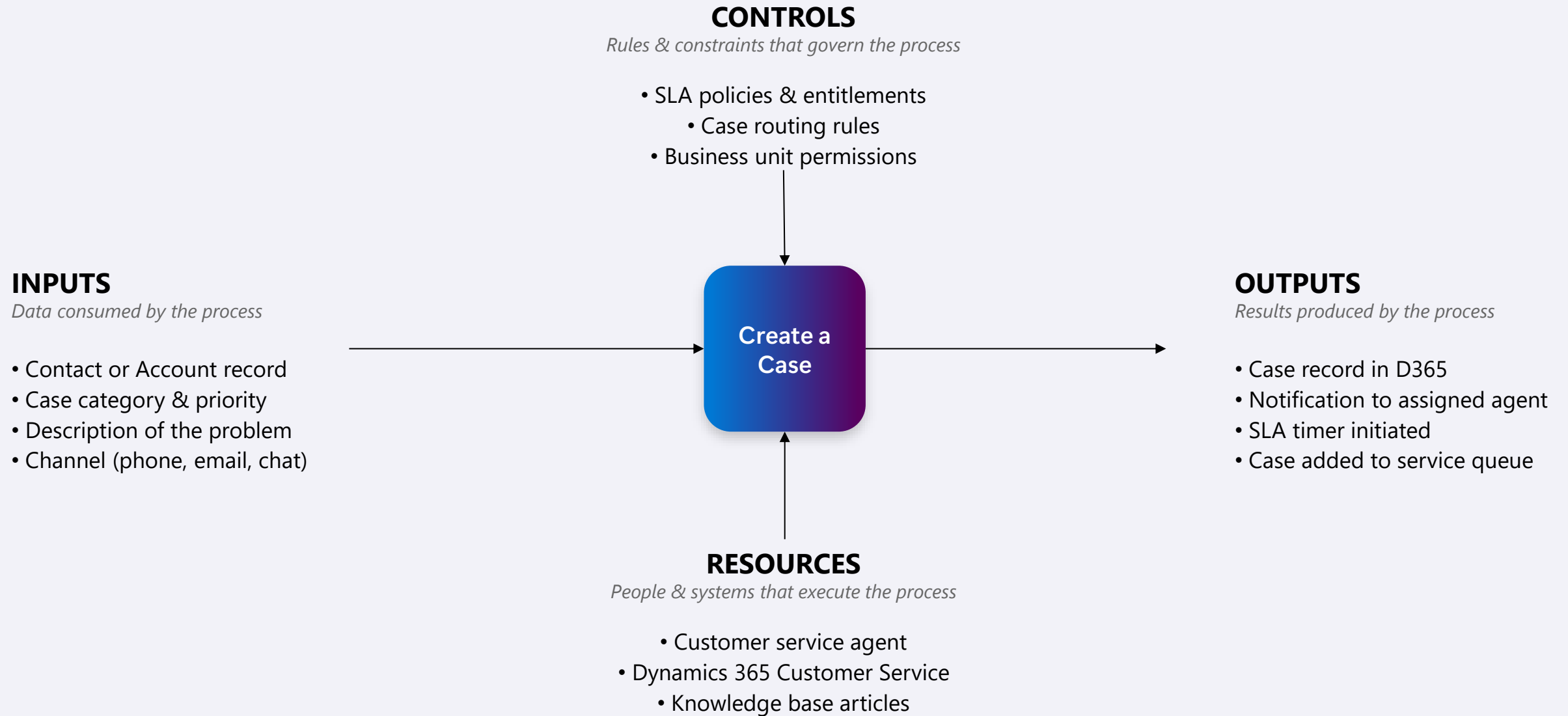
You can filter the business process catalog by application family or product — but don't let the filter define your scope.



## THE APPROACH

Don't start with products. Start by identifying business problems, map the processes that address them, and then select the right technology.

# What makes up a process?



# Reimagining processes



# The Reality: A Broken Contact Center Process

Northwind Insurance — 200 agents, 3 disconnected systems, goal: reduce 18-min avg handle time & improve 52% CSAT



# The Reality: A Broken Contact Center Process

*Northwind Insurance — 200 agents, 3 disconnected systems, goal: reduce 18-min avg handle time & improve 52% CSAT*

## What the Business Analyst Found in Discovery

### No Single Source of Truth

Agents switch between a legacy billing app, a homegrown CRM, and email to find customer info. No unified view.

### Tribal Knowledge Rules

Routing decisions depend on who answers. Senior agents resolve issues in 8 min; new hires take 25+ min for the same case.

### Rework Loops Everywhere

66% of cases reopened within 48 hrs. Customers call back because the first agent didn't have the right info to resolve it.

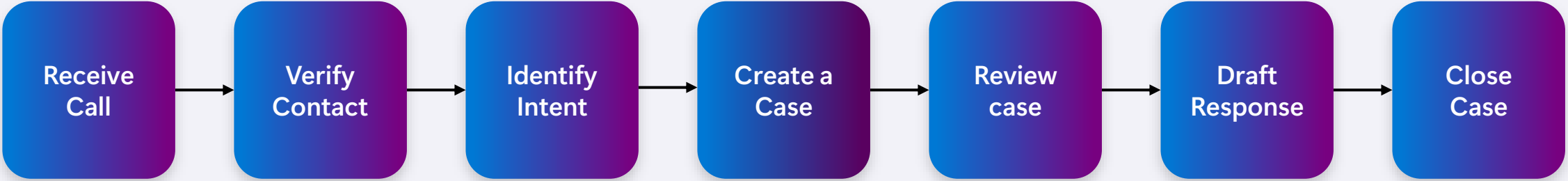
### The Business Goal

Cut handle time to under 10 min, raise first-call resolution above 70%, and improve CSAT from 52% to 80%+ within 6 months.

# From Tasks to Agents: Contact Center Example



**Human Agent**



## Phase 1



**Agent**

Copilot Studio – Conversational IVR

Verify

## Phase 2

Customer Intent Agent

Identify Intent

Next Best Actions

## Phase 3

Case Management Agent

Create & Update

Follow-up

Resolution

## Phase 4 & Beyond



Extend & Orchestrate

File Home Insert Draw Design Review View Add-ins Help Tell me what you want to do

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 10pt, Bold, Italic, Underline, Text Color, Background Color

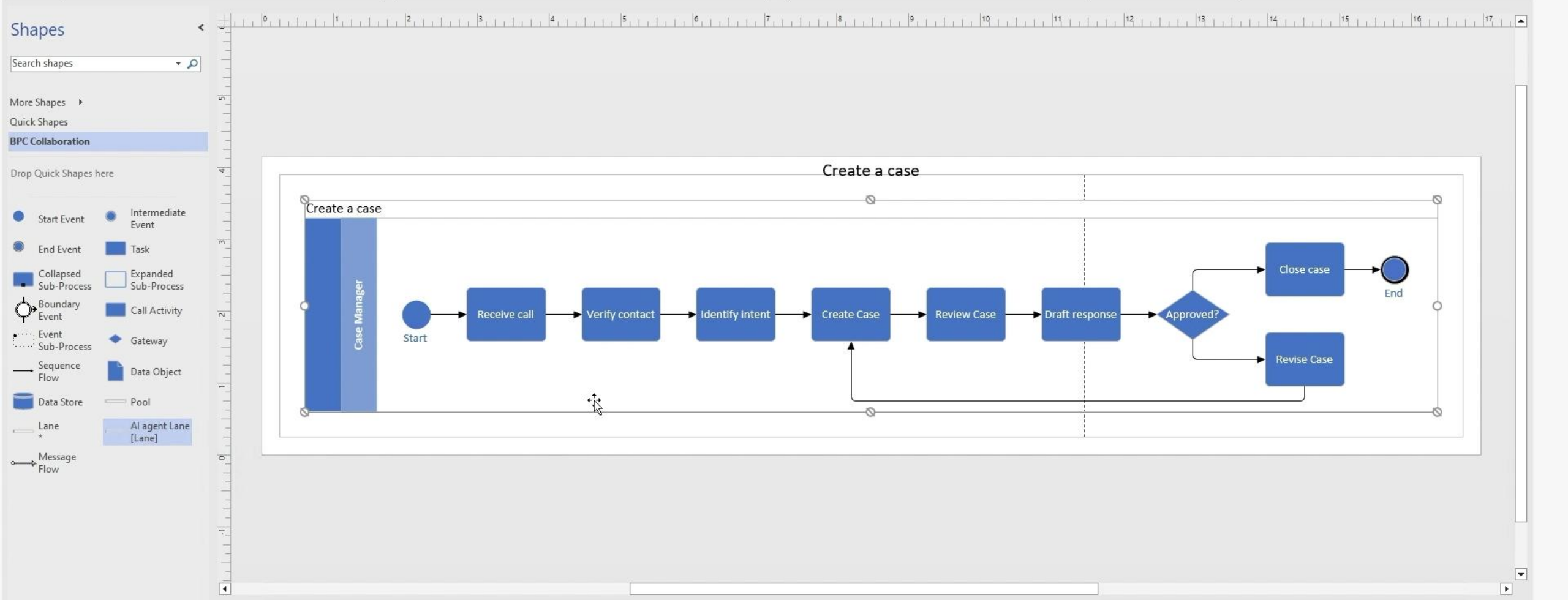
Paragraph: Bullets, Numbering, Indentation, Paragraph Spacing

Tools: Pointer Tool, Connector, Text

Shape Styles: Multiple 'Abc' style thumbnails

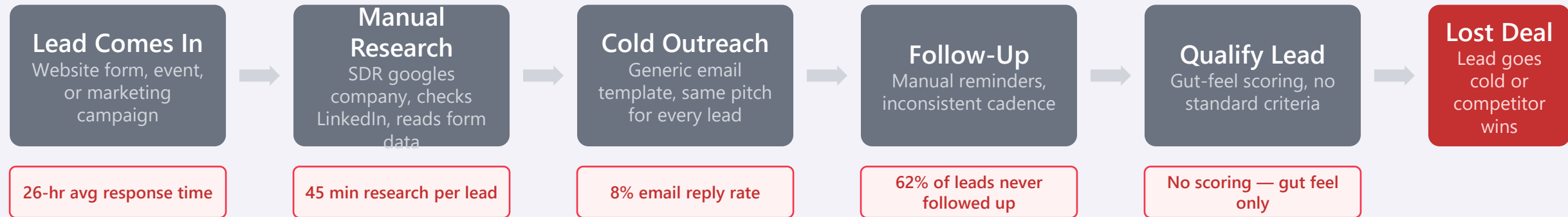
Arrange: Fill, Line, Effects, Align, Position, Bring to Front, Send to Back, Group

Editing: Find, Layers, Change Shape, Select



# The Reality: A Broken Inside Sales Process

Contoso SaaS — 40 SDRs, 4 disconnected tools, goal: double pipeline conversion & cut lead response time from 26 hrs to under 5 min



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*Contoso SaaS — 40 SDRs, 4 disconnected tools, goal: double pipeline conversion & cut lead response time from 26 hrs to under 5 min*

## What the Business Analyst Found in Discovery

### Speed-to-Lead Is Killing Deals

Avg 26-hr response time. Industry data shows leads contacted in <5 min are 9x more likely to convert. Competitors are responding same-day.

### Four Tools, Zero Integration

SDRs toggle between CRM, marketing automation, LinkedIn Sales Nav, and email. No unified lead view — 45 min just to prep for one call.

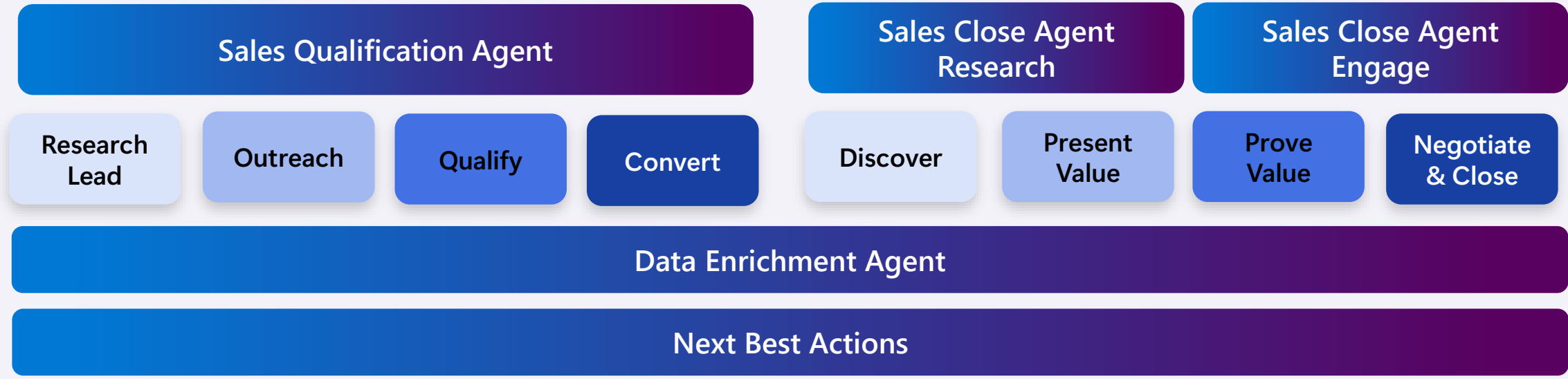
### Pipeline Leakage at Every Stage

62% of inbound leads never get a second touch. SDRs cherry-pick familiar industries and let the rest go stale in the queue.

### The Business Goal

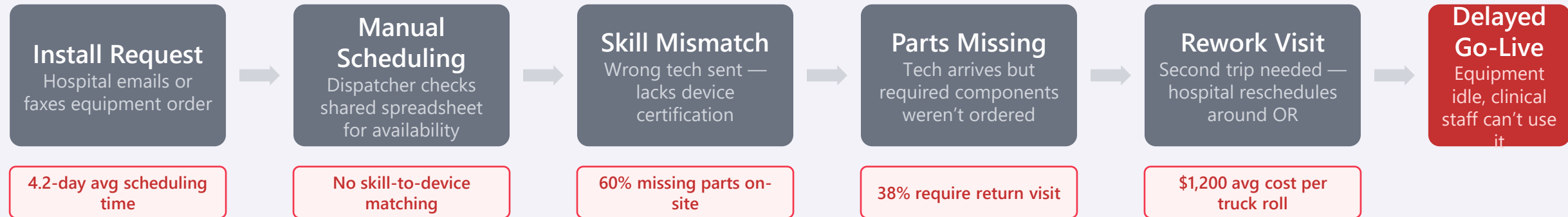
Respond to every lead in under 5 min, double pipeline conversion from 4% to 8%, and increase meetings booked per SDR from 12 to 25/month.

# From Tasks to Agents: Sales Example



# The Reality: A Broken Field Service Process

Contoso Medical Systems — 25 field techs, spreadsheet scheduling, goal: cut install lead time from 4.2 days to under 24 hrs & achieve 95% first-visit resolution



# The Reality: A Broken Field Service Process

*Contoso Medical Systems — 25 field techs, spreadsheet scheduling, goal: cut install lead time from 4.2 days to under 24 hrs & achieve 95% first-visit resolution*

## What the Business Analyst Found in Discovery

### **Scheduling Is a Guessing Game**

Dispatchers use a shared spreadsheet for 25 techs. No visibility into certifications, location, or workload. Double-bookings happen weekly.

### **Parts & Prep Are an Afterthought**

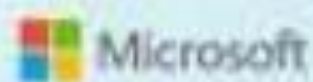
60% of install visits discover missing parts on-site. No automated BOM check ties the work order to inventory before dispatch.

### **Skill Gaps Create Costly Rework**

38% of jobs require return visits because the assigned tech lacked the right device certification. Each return costs ~\$1,200 in travel and downtime.

### **The Business Goal**

Cut scheduling lead time from 4.2 days to under 24 hours, reduce return visits from 38% to under 10%, and achieve 95%+ first-visit resolution within 6 months.



# A Business Process approach to Enterprise AI



Dynamics 365 Field Service

A Service to deliver – “Plan service contractor work” example



Agents

Every business process will have an agent

mav!m

# Resources and recommendations



# Microsoft Business Process Catalog Resources

- <https://aka.ms/businessprocesstechtalks>
- <https://aka.ms/oneguidance>
- <https://aka.ms/businessprocesscatalog>
- <https://aka.ms/businessprocesscatalogrequests>
- <https://aka.ms/businessprocesscatalogtemplate>
- <https://aka.ms/businessprocesscatalogsubmit>
- <https://aka.ms/businessprocessflow>
- <https://aka.ms/businessprocesscatalogfeedback>
- <https://learn.microsoft.com/en-us/dynamics365/get-started/contribute>
- Reach out to the team: [bizprocessguides@microsoft.com](mailto:bizprocessguides@microsoft.com)

# Microsoft and Mavim BPE Resources:

- [Microsoft Business Process Catalog in Mavim Free Preview](#)
- [Success by Design with the Dynamics 365 business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)
- [Navigate the business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)
- [Microsoft and Mavim Dynamics 365 Business Talks](#)
- [Unlocking Transformation Synergy: Mavim & Microsoft Process Catalog](#)
- [Introduction to the business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)

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# Next TechTalk...

Transforming Business Processes  
with an Agentic Mindset for  
Finance and Operations Apps

**Thursday, May 28<sup>th</sup>**

Option 1 – 7:00-8:00am PST

<https://aka.ms/BPETechTalksOption1Join>

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<https://aka.ms/BPETechTalksFeedback>

Business Process - Dynamics 365 -  
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# QUESTIONS

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria  
Děkuji **Tak** Dank u **Tānan** Kiitos **Merci** Danke Ευχαριστώ A dank  
Mahalo הודות. **Dhanyavād** Köszönöm Takk **Terima kasih** **Grazie** Grazzi

# Thank you!

감사합니다 Paldies Choukrane Aċiū **Благодарам** ありがとうございます  
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga  
Ďakujem **Tack** Nandri **Kop khun** Teşekkür ederim Дякую **Хвала** Diolch

