



MICROSOFT & ARMANINO WEBINAR

Why Cloud? Why Now? Driving Innovation With Microsoft's Mike Ehrenberg and Armanino

March 2025

PRESENTERS

Panel of Experts



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- **Introductions**
- **Mike Ehrenberg**
 - Microsoft's vision for Business Applications
 - Copilot Studio + Agents
 - A complete business platform built on Microsoft technology
- **Demonstrations**
 - M365 Copilot
 - Copilot for Service
 - Copilot for D365 Biz Apps
- **Closing – Q&A**

ABOUT US

Armanino Overview

Rely on Armanino for strategic thinking and valuable insights that drive proactive actions. We go beyond addressing your compliance concerns and delve into the core business obstacles you face, offering comprehensive solutions.

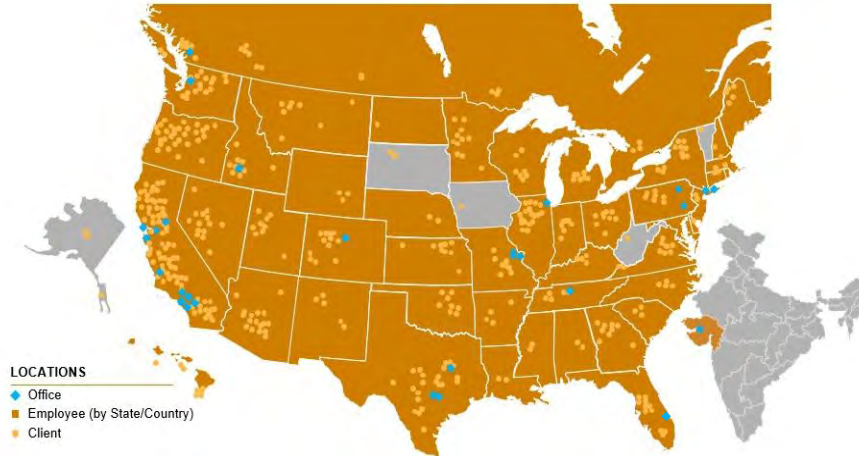
Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of our clients, people and our communities.

Snapshot

2900+ Employees
Team Members in
45+ States / 3 Countries
18th Largest CPA &
Consulting

Locations



Locations

CALIFORNIA San Ramon Century City El Segundo Irvine Los Angeles San Francisco San Jose Woodland Hills	ILLINOIS Chicago
COLORADO Denver	TEXAS Austin Dallas
CANADA Vancouver	PENNSYLVANIA Philadelphia Scranton
IDAHO Boise	NEW YORK New York City Garden City
TENNESSEE Nashville	MISSOURI St. Louis St. Charles
INDIA Ahmedabad Hyderabad	WASHINGTON Bellevue
	FLORIDA Boca Raton

NOTABLE RECOGNITION & AWARDS



Agentic AI – “Why Cloud, Why Now...INNOVATE

- A type of AI that can perform complex tasks with little human involvement
 - Machine learning models that mimic human decision-making
 - Can exhibit autonomy, goal-driven behavior, and adaptability
 - Can use generative AI to complete tasks autonomously
 - Agentic thinking
 - A mindset and approach that emphasizes the capacity to act independently, make decisions, and pursue objectives proactively
 - Perform Tasks, Generate Transactions, SAVE TIME
-

ROADMAP

A Guide to Microsoft's Digital Transformation



Mike Ehrenberg

- Technical Fellow @ Microsoft
- CTO, Dynamics 365 Applications Group

EXPERT

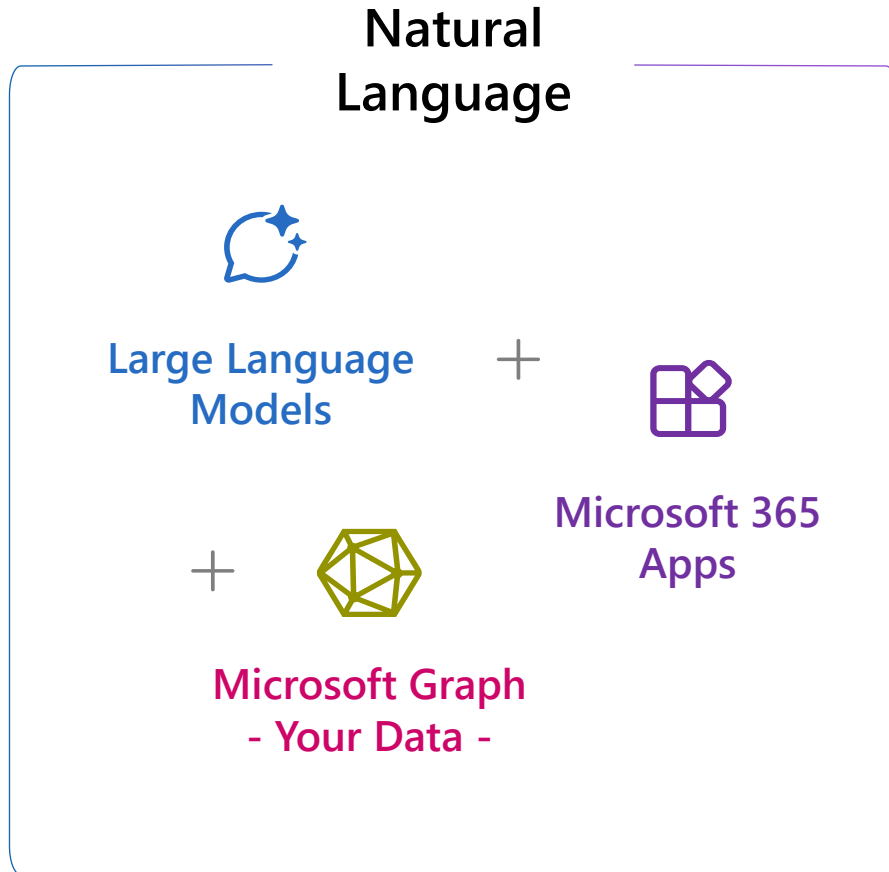
M365 Copilot



Gina Montgomery

Director of AI,
Automation & Analytics,
Armanino Advisory LLC

What is M365 Copilot?



Embedded across Microsoft 365 apps



Your M365 AI Assistant that works alongside you in the apps you use every day!



Microsoft 365 Copilot

Access to your business content and context



calendar, emails, chats, documents, meetings, and contacts

Built on Microsoft's Enterprise Grade Approach



Security



Privacy



Compliance



Responsible AI



M365 Copilot

DEMO SCENARIO

The 7.5-Hour Advantage: M365 Copilot's Real-World Impact on Client Relationships



As someone in...

A sales role



I want to...

I want to quickly analyze client communications and prepare comprehensive meeting materials using M365 Copilot. I also want to resolve client concerns promptly and maintain positive relationships with my clients.



Using...

M365 Copilot Chat

Outlook

OneNote



I'll know this is successful when...

I know this is successful an average time savings of 7.5 hours per user per week is attained.

The value Copilot provided me in completing this job
(Functional, Emotional, Social)

The Email Summarization: ~1 hour saved by quickly extracting key information from lengthy emails instead of manual reading and note-taking

Research & Analysis: ~2.5 hours saved by automatically analyzing the annual report and extracting relevant data points that would otherwise require careful manual review

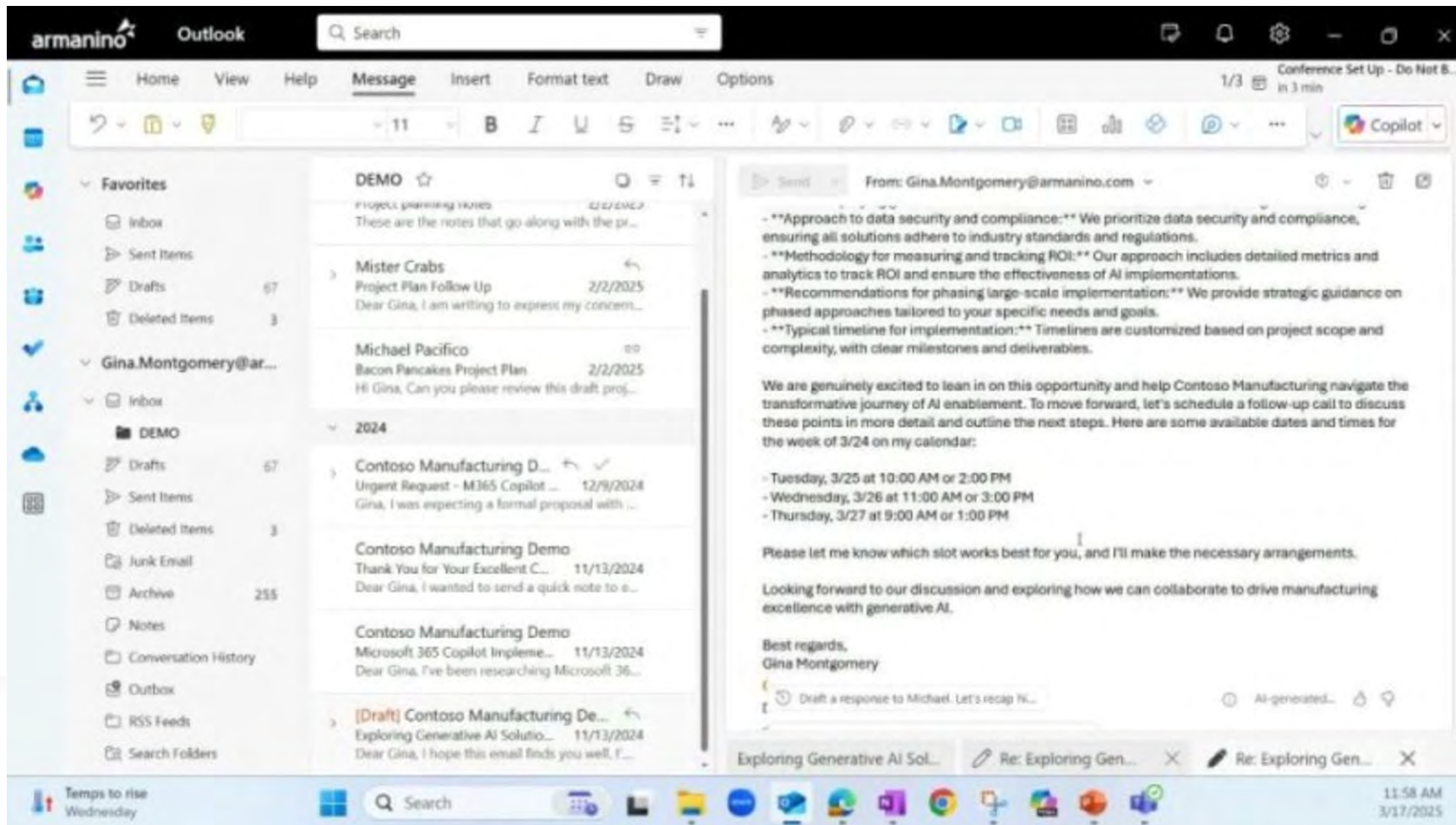
Meeting Preparation: ~2 hours saved by automatically generating a comprehensive brief instead of creating one from scratch

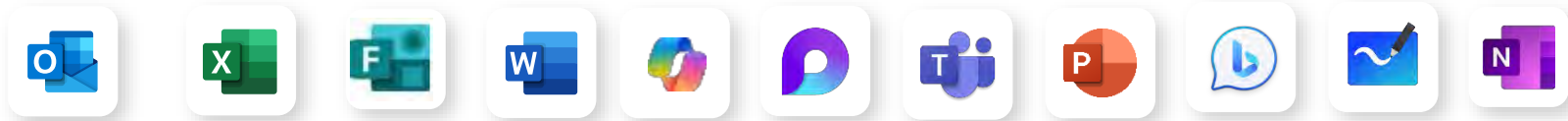
Communication & Follow-up: ~1 hour saved through automated scheduling and response drafting

Issue Resolution: ~1 hour saved by quickly crafting a nuanced customer satisfaction response that balances multiple factors

“7.5 Hour Advantage”

M365 Copilot





The 7.5-Hour Advantage: M365 Copilot's Real-World Impact on Client Relationships



Email Summarization

Summarize Client Communication

Summarize this email thread from Michael Chen at Contoso Manufacturing. Include the main challenges they're facing, their generative AI goals, what they're asking from us, and any deadlines or next steps mentioned.



Research Company Background

Review Contoso's annual report to gather financial data and strategic initiatives to prepare for the meeting

I need to prepare for a meeting with Contoso Manufacturing. Please analyze their annual report and extract: 1) Key financial metrics, 2) Their current technology initiatives, 3) Specific challenges related to their manufacturing operations, and 4) Their investment plans for digital transformation.



Meeting Preparation

Develop a comprehensive meeting preparation document for the upcoming discussion with Contoso Manufacturing

Create a meeting preparation brief for my upcoming call with Contoso Manufacturing about their generative AI implementation. Include: 1) Background summary, 2) Key discussion points based on their annual report and email communication, 3) Our potential solution offering, 4) Questions we should address about our "business value assessment and workshop",



Scheduling Follow-up

Create and send a follow-up email to schedule the meeting with appropriate details

Draft an email to Michael Chen at Contoso Manufacturing responding to his meeting request. Propose 3 possible dates next week for a 2-hour business value workshop discussion. Include a brief agenda, mention who from our team will attend, and attach the formal proposal document we discussed. The tone should be professional but friendly, acknowledging their timeline constraints for the January 15th deadline.



Addressing Customer Concern

Respond to Michael's urgent follow-up email expressing disappointment about the missing proposal

Help me draft a response to Michael Chen's urgent email where he expresses disappointment about not receiving our formal proposal. I need to acknowledge his concerns, apologize for the misunderstanding, explain that we'll deliver the comprehensive proposal today, and reaffirm our commitment to helping them meet their January 15th deadline for the CEO. The tone should be apologetic but reassuring.

EXPERT

Copilot for Service



**Alex
Fredrickson**

Solution Architect, Power
Platform, Armanino
Advisory LLC

TURBOCHARGE YOUR WORKFORCE WITH a copilot for every functional role

Sales

Recap sales meetings

Contextual customer emails

Auto-generated opportunity summaries

Marketing

Generate content ideas

Natural language audience segmentation

Simplify customer insights

Customer Service

Create customer responses

Enhance self-service bots

Boost conversations

Field Service

Streamline work order creation

Recommend technician scheduling

Recap work order progress

Finance & Operations

Create product descriptions

Risk assessment

Collections workspace

Supply chain

Predict disruptions

Summarize purchase order changes

SMB

Create product descriptions

Reconcile bank statements

Find records, learn new skills



Copilot for Dynamics 365



Microsoft 365 Copilot for Service

Your everyday AI assistant at work, purpose-built for service

Natural Language



Large Language Models (LLMs)



Web grounding



Microsoft Graph grounding



Enterprise-grade data protection



Contact center systems

Surface knowledge, summarize cases and conversations, draft contextual responses, and more



Commercial data protection



The Internet



Microsoft 365 Apps



Copilot Studio

What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team, or organization.

Agents vary in level of complexity and capabilities depending on your need

Simple



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available



Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available



Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Coming soon

Advanced

CASE STUDY



[MaxLinear \(NYSE: MXL\)](#), a global leader in broadband access and gateway solutions, has been improving the world's communication networks with integrated radio frequency, analog, digital, and mixed-signal semiconductor solutions for access, connectivity, and wired and wireless infrastructure since its founding in 2003. The Carlsbad, California-based company adopted [Microsoft Dynamics 365](#) to enhance operational efficiencies, streamline financial workflows, and improve supply chain visibility.

MaxLinear products are at the heart of technologies and devices all around you, revolutionizing how people connect and driving faster, smarter networks through engineering innovation. Always at the forefront in using technology to optimize business operations, the company had migrated acquisitions from SAP and Oracle to Dynamics AX 2012 for enterprise resource planning (ERP). But as that application reached the end of its life, the forward-looking company seized the opportunity to fully embrace the cloud with a Dynamics 365 ERP solution. A long-standing Dynamics 365 Customer Service and Sales customer, MaxLinear understood that Dynamics 365 opened new doors and expanded the art of the possible, a philosophy that anchors its culture.



SCAN TO READ FULL STORY

<https://www.microsoft.com/en/customers/story/22833-maxlinear-dynamics-365-finance>



M365 Copilot for Service

DEMO SCENARIO

EXPERT

Copilot for D365 Biz Apps



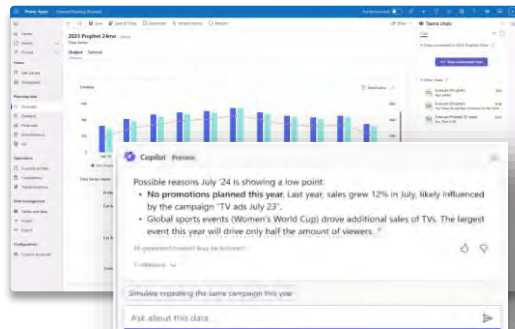
**Eric
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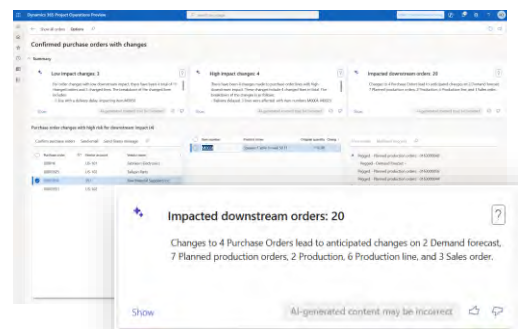
Shipped Copilot Capabilities

Supply Chain Management

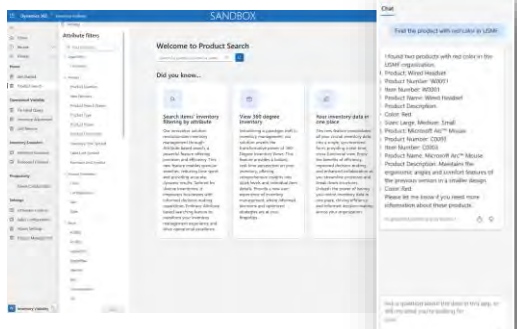
Collaborative demand planning



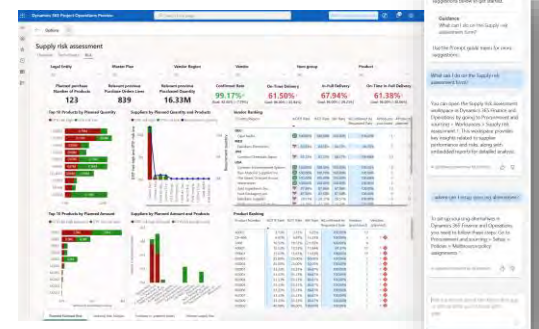
Summarize purchase order changes



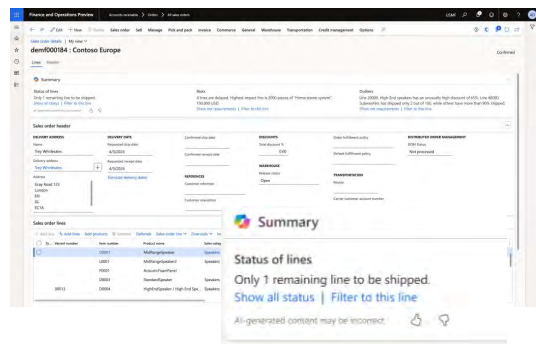
Natural language inventory search



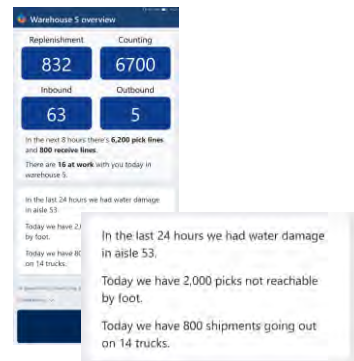
Conversational guidance



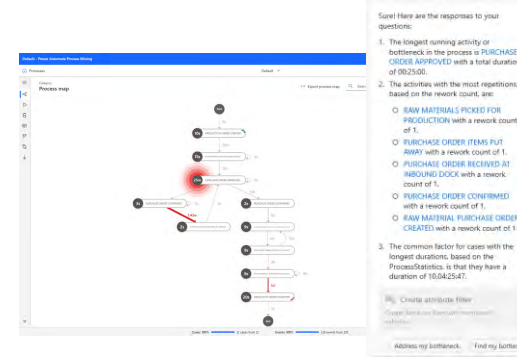
Summarization



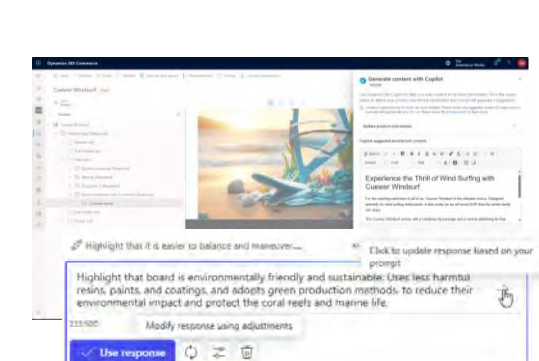
Warehouse worker insights



Bottleneck analysis



Product enrichment



Copilot Summarization

Purchase Order, Product, Sales Order, Vendor, Inventory

Streamlines Information Retrieval: Enables users to access relevant summaries, risk and outliers, enhancing efficiency in decision-making.

Tailors Summaries to User Context: Generates comprehensive, context-aware summaries based on user intent and role, ensuring high relevance and focus.

Reduces Time and Effort: Eliminates extensive searches and irrelevant data, saving time and increasing productivity for users.

Intuitive and User-Friendly: Offers easy access through a simple hover-over gesture, making product information retrieval effortless and efficient.



AI Driven Process Insights

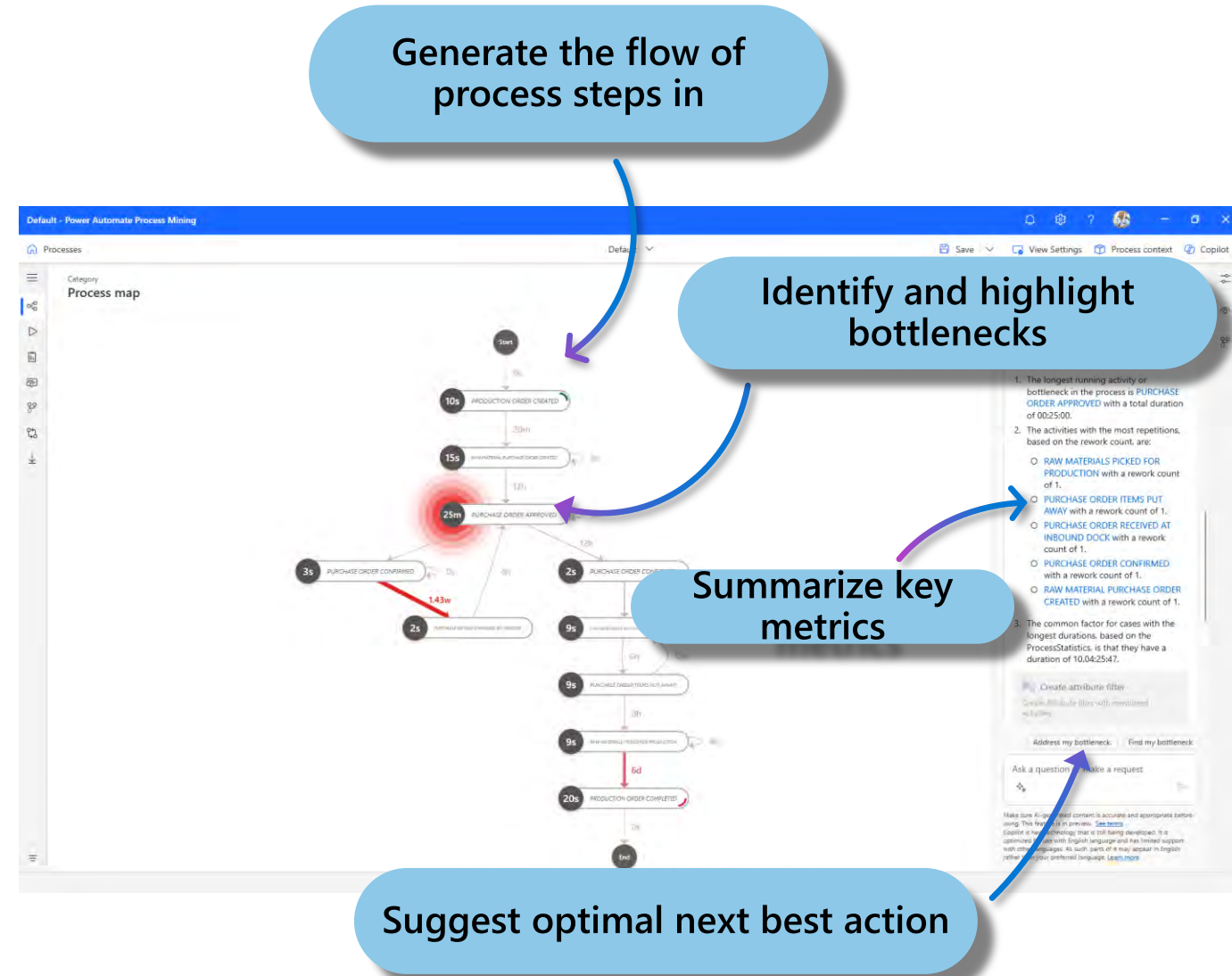
Warehouse operations bottleneck analysis

Identifies Process Inefficiencies Precisely: Utilizes Business Process Analytics to pinpoint bottlenecks, enhancing process optimization efforts.

Visualizes process and Bottlenecks: Offers clear, graphical representations of process flows, aiding in the understanding of complex workflows.

Summarizes Key Metrics and Findings: Provides concise, actionable summaries of process metrics, enabling informed decision-making.

Suggests optimal next best action: Employs Copilot's advanced skills to propose solutions for multivariable problems, driving continuous process improvement.



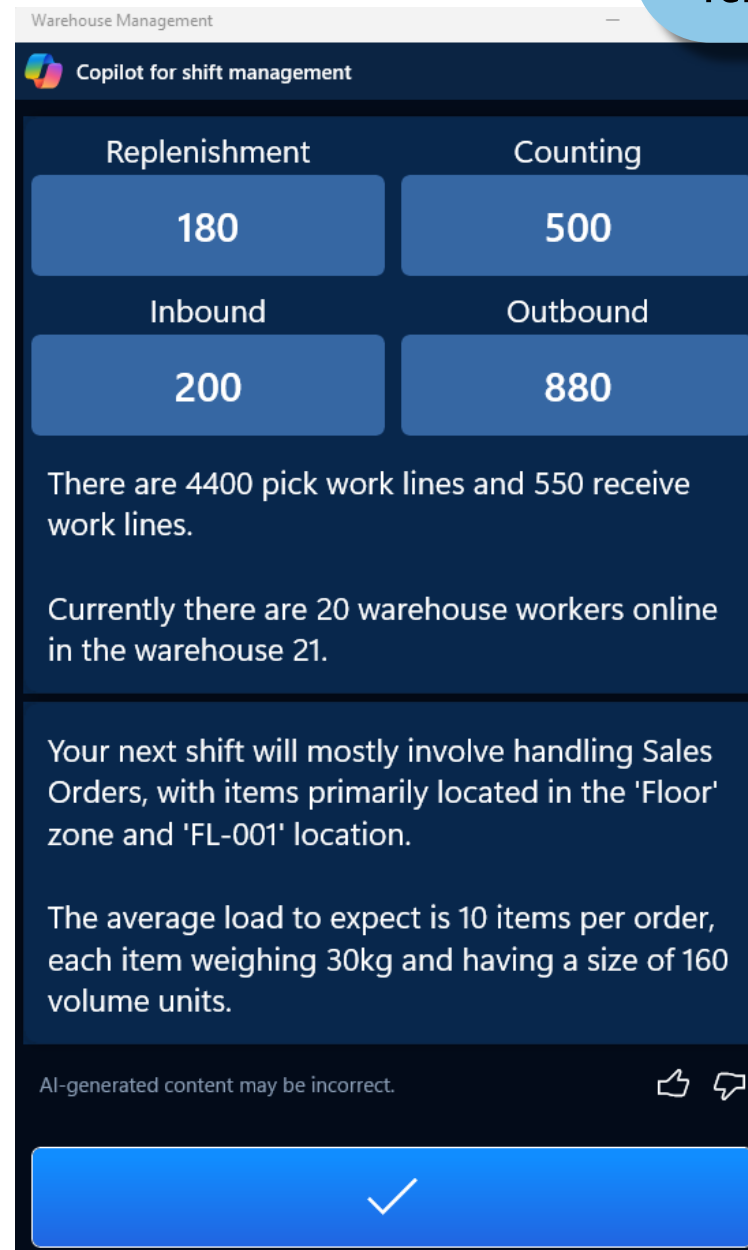
Copilot in WMA for warehouse worker

Warehouse worker shift start and hand over screen and have access all the time.

Copilot promotes proactive warehouse execution, ensuring that operations are efficient, safety standards are upheld, and workers are engaged and informed.

Generative Summarization provide a holistic view of the warehouse's status, focusing on elements that impact the day's work, including insights from the previous shift.

Generative AI takes information sharing to the next level by streamlining shift starts with crucial metrics, promoting efficiency and coordination from supervisor and across workers.



Essential workload metrics relevant for the worker

AI generated important work-related call outs

AI generated insights relevant to the worker

Copilot in Dynamics 365 ERP Finance and HR



Dynamics 365
Finance

Coming soon

- **AI-powered collections workspace and customer summary:** Account summarization and email generation
 - **Workflow History Summary:** Summarizes workflow history to help users understand past actions and decisions.
 - **Generative help and guidance:** Provides contextual support and guidance directly within the app
 - **Setup rules for defaulting financial tags:** Provides control and ease of setup in copilot assisted rules creation.
-
- Handle vendor invoice matching exceptions
 - Fixed asset book summaries
 - Batch log summarization of sales invoices
 - AI driven forecasting in business performance planning
 - Account reconciliation agent
 - Bank reconciliation copilot
 - Document explorer copilot
 - Regulatory compliance copilot
 - *And much, much more*



Dynamics 365
Human Resources

Coming soon

- **Recruiting Copilot:** Quickly create compelling job descriptions, match candidates to open roles, AI assistant for interviewers
-
- Candidate assessment
 - Personalized onboarding experience
 - Personnel management tasks
 - Optimize benefits enrollment process
 - *And much, much more*

Agentic capabilities in ERP

Sales Order Agent

Responds to customer inquiries about products and catalogs, generates sales quotations, and intakes sales orders.

Supplier Communications Agent

Processes purchase order confirmations, follows up with suppliers on pending purchases, and helps navigate through the impact of changes to inbound supply.

Account Reconciliation Agent

Autonomously reconciles ledger and subledger accounts, flags discrepancies and carries out corrections based on business logic

Financial Reconciliation Agent

Cleanses financial data from multiple sources and reconciles the data, flagging discrepancies for further review and suggesting mitigations

Time and Expense Agent

Drafts time entries based on projects forecast and calendars, creates expense reports based on email receipts, and reviews submitted time and expense reports for compliance with policies.

Applicable to



Dynamics 365
Business Central



Dynamics 365 Supply
Chain Management



Dynamics 365 Finance



Copilot for Finance



Dynamics 365 Project
Operations

Copilot solutions in Manufacturing



Goals and challenges

The manufacturing industry requires a steady flow of raw materials while managing costs and minimizing production disruptions. Manufacturers look for opportunities to drive innovation and operational excellence while balancing operational costs amid rising prices and finding ways to improve efficiency, supply chain management, and streamline the design-to-make process.



Manufacturing roles



Supply Chain Manager



Product Designer



Process Engineer



Production Manager

Opportunity to impact key Manufacturing KPIs



Minimize production downtime

Use Copilot to analyze information from manufacturers apps to predict and prevent equipment failures, manage inventory levels and identify training that can help staff keep machines operating.



Supply chain performance

Use AI to generate evaluation criteria for new materials and suppliers. Review contracts to make the most effective deals and use AI analysis to evaluate supplier performance.



Scrap rate

Quickly identify quality issues by accessing and analyzing quality logs. Reduce the cost of any recall programs that are required with effective management and tailored responses.



Customer satisfaction

Improve customer service performance with tailored LLMs for higher first-time call resolution. Improve customer communications whether through improved writing or improved call scripts.



Employee turnover

Retain critical plant and headquarters staff by improving the work/life balance of all workers by simplifying overhead tasks. Improve skilling to provide more growth opportunities and increase internal hiring.



Product time to market

Use Copilot capture customer needs and then support coordination of product development activities.



Copilot can assist with...

Copilot assists manufacturing organizations with numerous tasks that impact critical areas like contract management, design-to-make process, and factory asset management.

- [Simplifying tasks for plant employees](#)
- [Reduce freight leakage](#)
- [Improve factory safety](#)
- [Contract lifecycle management](#)
- [Perform factory maintenance](#)
- [Assist field service advisors](#)
- [Production planning](#)
- [Improve factory operations](#)
- [Optimizing asset management](#)
- [New product ideation and research](#)
- [Supplier RFP](#)
- [Recall management](#)
- [Supplier quality optimization](#)



Manufacturing | Perform factory maintenance

Available with:

Microsoft 365 Copilot and Copilot Studio

Scenario level:

Extend

KPIs impacted

✓ Production downtime

✓ Supply chain performance

Value benefit

✓ Cost savings

✓ Increase revenue

1. Assessment

Use Copilot to quickly access technical manuals, schematics, and repair histories, query them in natural language, and get responses including troubleshooting instructions.

 **Copilot Agent³**
+ Connection to SharePoint tech manual repository
+ Connection to maintenance database

Benefit: Simplify access to repair information enabling faster and accurate issue resolution leading to reduced downtime.

2. Expert assistance

Use Copilot to identify the right expert for your problem and call them to get remote assistance. Transcripts from Teams Phone calls can be used to improve the maintenance database content.

 **Copilot Chat²**

Benefit: Perform faster and accurate diagnosis and resolutions aided by experts.

3. Safety compliance checklist


Copilot drafts a tailored safety checklist to ensure adherence to both equipment-specific as well as personal safety measures.

 **Copilot Agent³**
+ Connection to SharePoint tech manual repository
+ Connection to maintenance database

Benefit: Improved safety compliance, avoiding accidents and compliance issues.

6. Document the work

Document job completion with structured forms or checklists, ensuring all necessary details such as actions taken, parts used, and time spent are accurately captured.

 **Copilot in Forms**

Benefit: Streamline documentation, ensuring accurate and comprehensive records that improve the agent's ability to assist with future repairs.

5. Repair instructions

Copilot can produce repair instructions in natural language and explain any instructions that are unclear.

 **Copilot Agent³**
+ Connection to SharePoint tech manual repository
+ Connection to maintenance database

Benefit: Speed time to repair and help ensure that repairs are done correctly.

4. Parts identification

Click a photo of a part that is faulty or worn out and use Copilot to identify the part information so that a replacement can be ordered.

 **Copilot Agent³**
+ Connection to SharePoint tech manual repository
+ Connection to maintenance database

Benefit: Instantly identify parts for reordering from photos, eliminating guesswork and expediting the process.



¹Access M365 Copilot Chat at m365copilot.com or the Microsoft 365 Copilot Chat mobile app and set toggle to "Web".

²Access M365 Copilot Chat at m365copilot.com, the Microsoft 365 Copilot Chat mobile app, or the M365 Copilot Chat app in Teams, and set toggle to "Work".

³Allow Copilot to access your organization-specific apps. In the past this would have required an API call to get data from a system of record.

The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.



Thank you for attending

Additional Questions?

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