



# The future of selling: unlocking growth with agentic CRM

Reimagining the sales funnel with  
Microsoft Dynamics 365 and Copilot



# A new reality for sales leaders

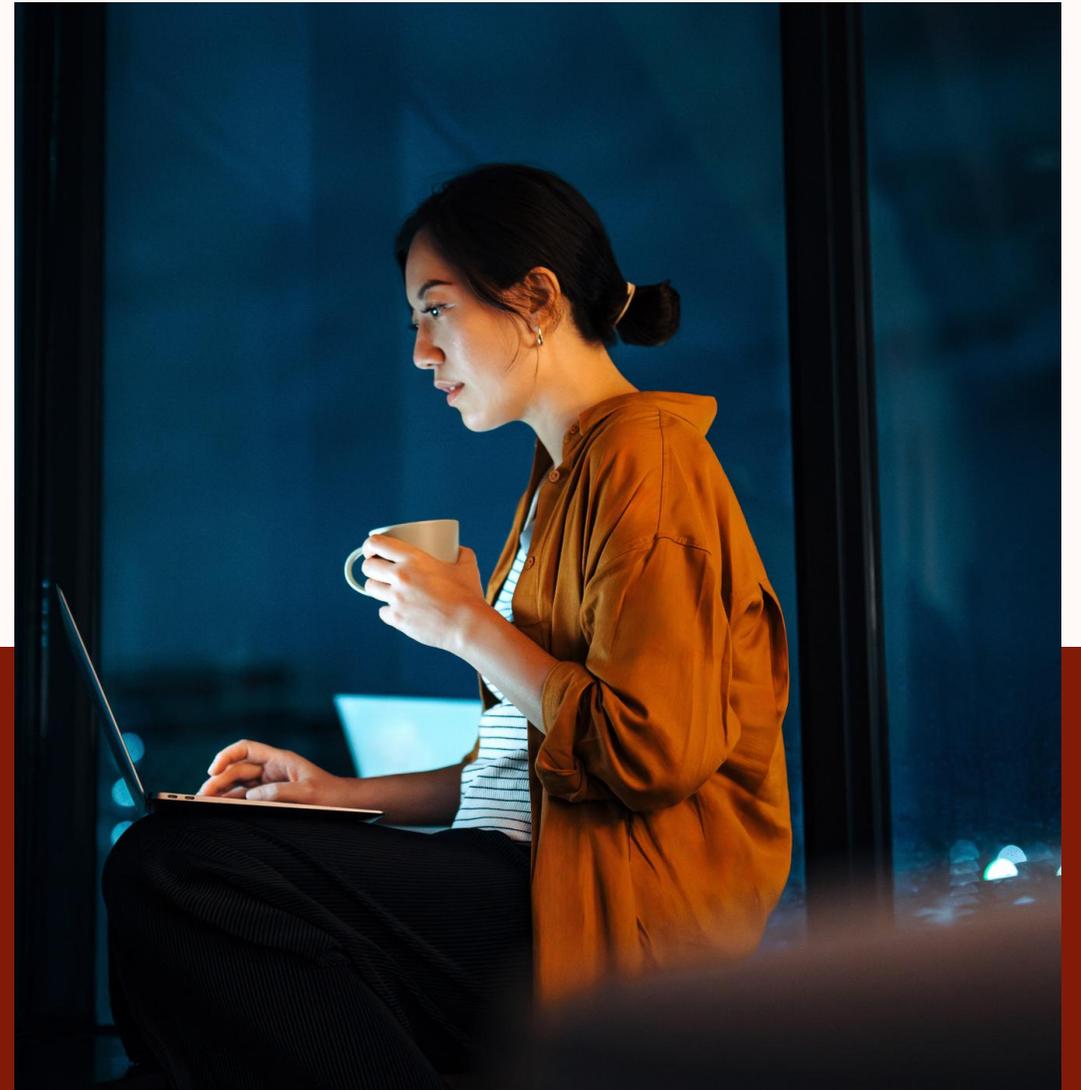
In the past, growing revenue meant sales leaders had to expand their teams to manage the overwhelming workflows of tracking and distributing customer data across multiple legacy systems. This time-consuming way of working led to frustrated sellers and dissatisfied customers.

However, AI is creating a once-in-a-generation opportunity to reimagine CRM capabilities and seller workflows. With the rise of agentic AI, sales organisations can implement AI agents throughout the sales journey to unify data, simplify processes, and accelerate seller productivity.

**66%** of enterprise marketers have trouble tracking customer journeys<sup>1</sup>

According to Gartner®, **44%** of sales leaders report data quality is among their top barriers affecting their sales analytics program<sup>2</sup>

**61%** of enterprise organisation teams have trouble communicating across organisational silos<sup>1</sup>



1. "Enterprise Content Marketing Benchmarks, Budgets, and Trends: 2025." Content Marketing Institute, 2025.

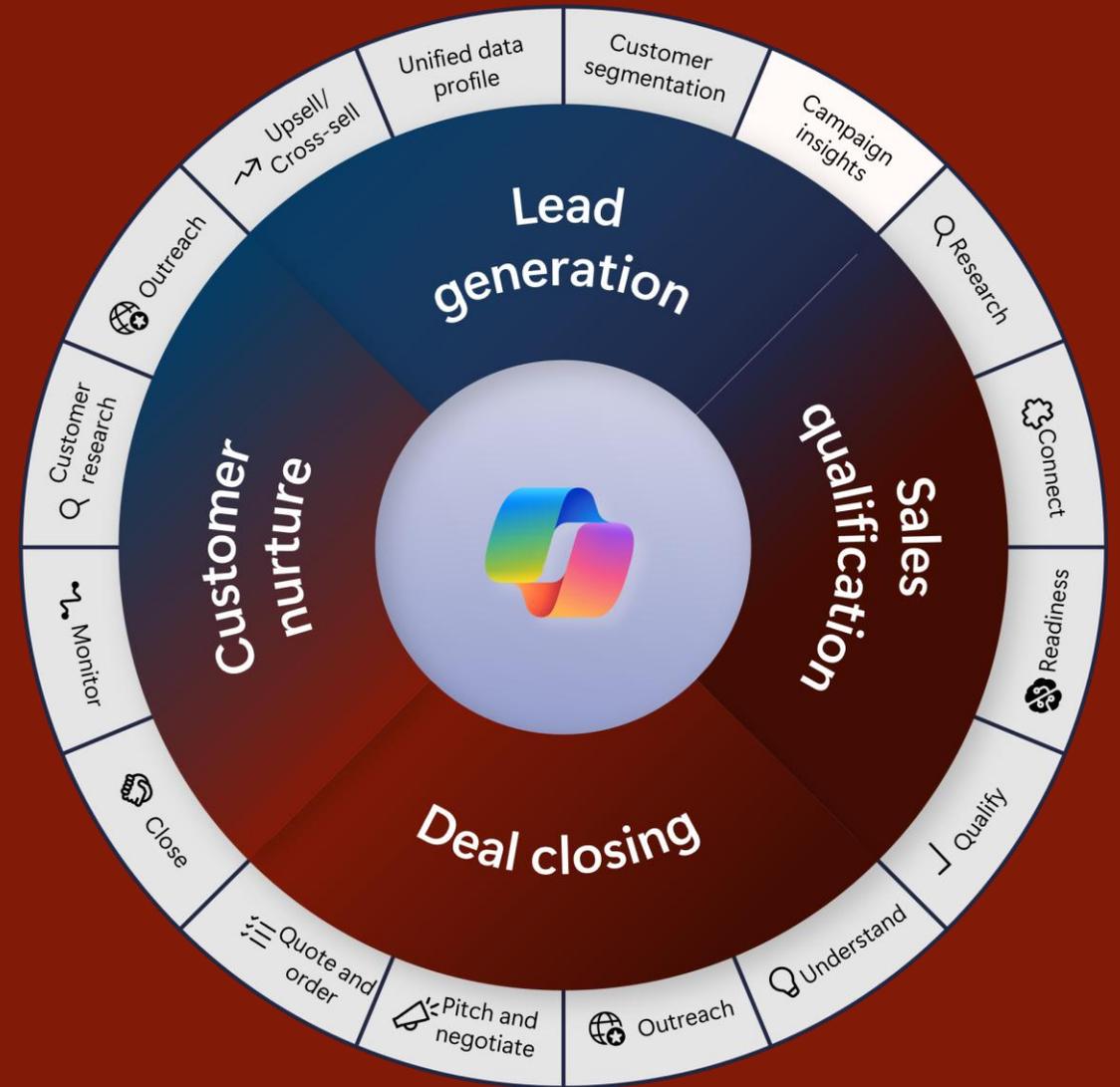
2. Gartner research, How to Increase the Impact of Your Sales Insights, by Tyler Huguley, Steve Rietberg, May 2025. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the US and internationally and is used herein with permission. All rights reserved.

# Transform your organisation with an agentic CRM

**Microsoft Dynamics 365 Sales**, powered by Microsoft Copilot, enables you to accelerate growth with AI that goes beyond automation and transforms how your team builds and nurtures customer relationships. Dynamics 365 Sales enables you to:

- ✓ **Empower teams with a connected business platform** by seamlessly integrating into your sales, service, and marketing solutions within the Microsoft ecosystem to boost productivity and enable your teams to focus on what matters most.
- ✓ **Drive results that matter** by reimagining your sales process with built-in AI that goes beyond automation to guide your team with insights, recommended actions, and prebuilt sales agents that deliver real results.
- ✓ **Build trust with your customers using a secure and compliant agentic CRM solution** that is grounded in enterprise-grade security, compliance, and responsible AI to protect customer data at every touchpoint.

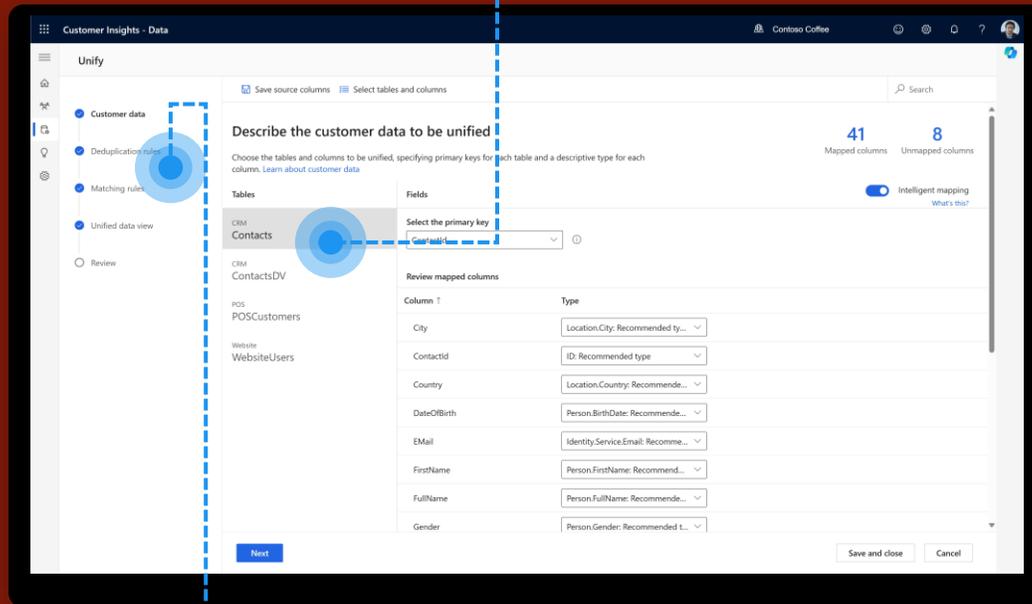
In this e-book, we'll take a closer look at how you can benefit from these capabilities at each stage of the sales funnel.



# Generate leads with AI-powered customer engagements

Let's start at the top of the funnel. Microsoft Dynamics 365 Customer Insights enables teams to be more strategic by delivering memorable and personalised experiences from the first interaction.

Select customer data from multiple sources



Fully customise criteria before unifying data

Unify real-time customer data for richer profiles with Dynamics 365 Customer Insights to get a holistic view of customers to eliminate data silos and know your customers end to end.

Tailor campaigns to improve conversions by targeting the right audience with AI-generated insights and segmentation.

Get access to AI-powered engagement scores from marketing campaigns and automate handoffs of qualified leads between marketing and sales for faster and more consistent customer experiences.

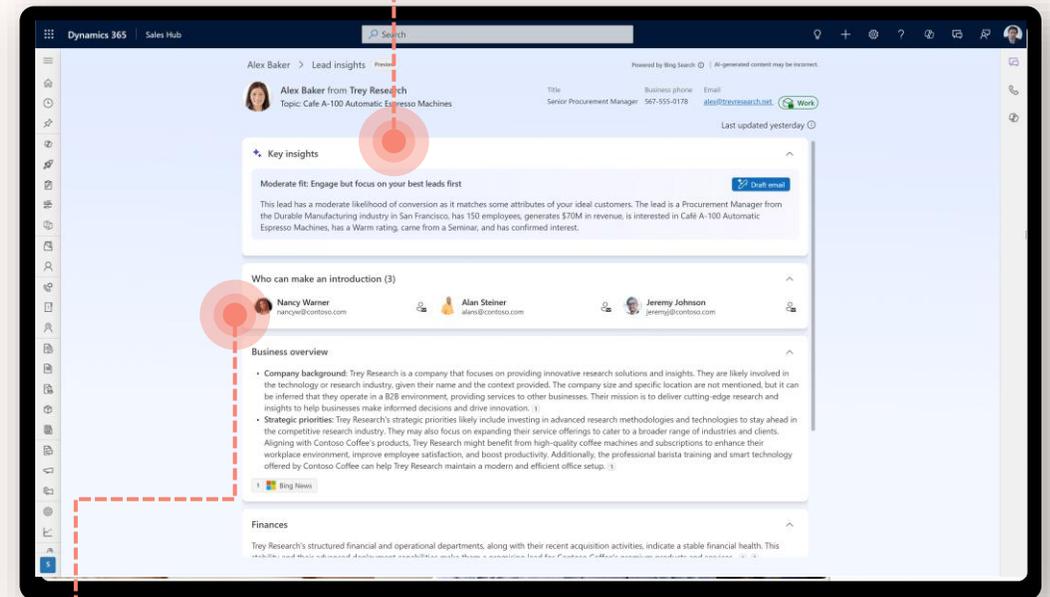


# Qualify and prioritise sales leads with agentic AI

Now that your team has leads in the pipeline, Sales Qualification Agent in Dynamics 365 Sales helps them qualify leads faster and more accurately.

- ✓ Work autonomously to research inbound leads in the pipeline from multiple data sources.
- ✓ Synthesise customer data from first- and third-party sources to eliminate several hours of manually researching for insights. This time can then be used on converting the right leads into real opportunities.
- ✓ Convert priority leads to confirmed sales meetings with personalised outreach that moves top opportunities to the next stage quickly.

AI-powered insights on every lead



Connections to top leads rooted in customer data

# Close more deals and boost sales outcomes

Copilot in Dynamics 365 Sales is your partner in bringing deals over the finish line.



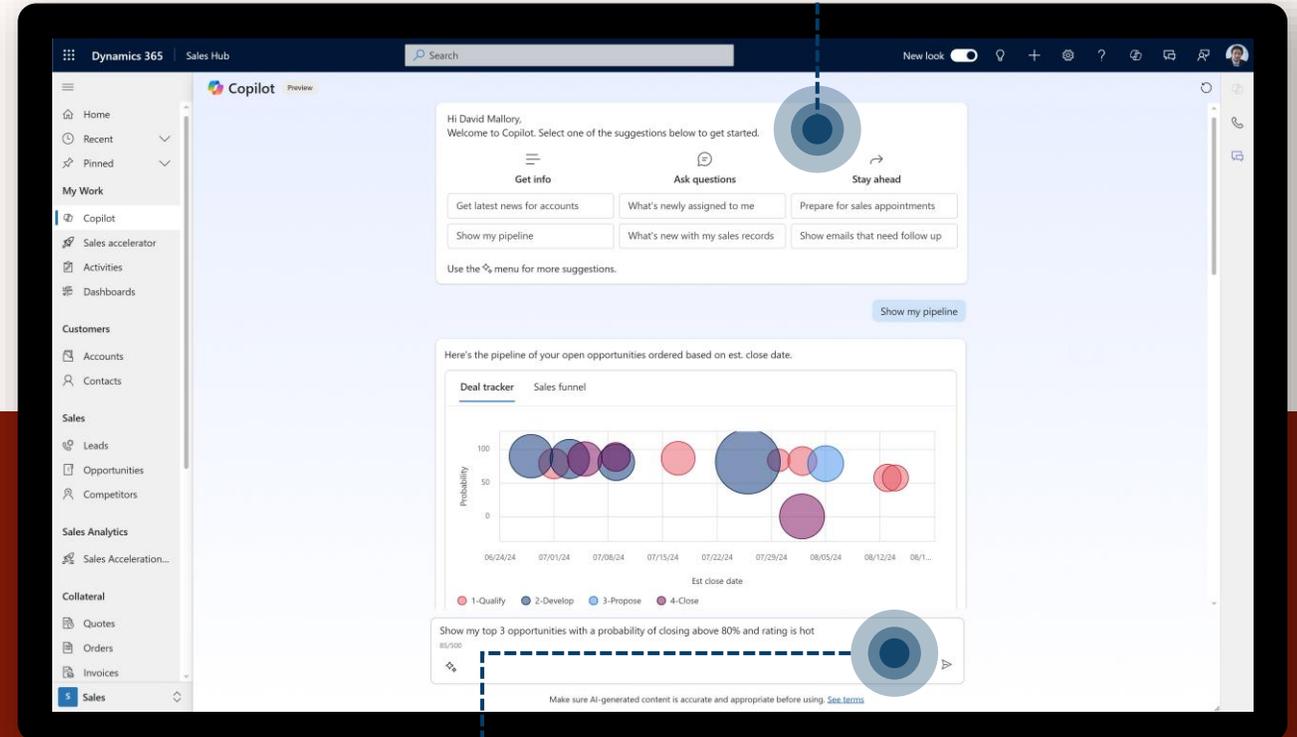
Stay on top of your pipeline using Copilot to surface open tasks for priority opportunities



Forecast sales to predict revenue and track performance against goals with AI-powered suggestions every step of the way



Enhance customer interactions across the sales journey with real-time insights to build strong customer relationships and move deals forward with confidence



AI-powered suggestions for every step in the deal cycle

Chat with Copilot to catch up on pipeline

You can also take an agentic approach to winning more deals faster using Sales Close Agent (in preview) to prioritise opportunities.



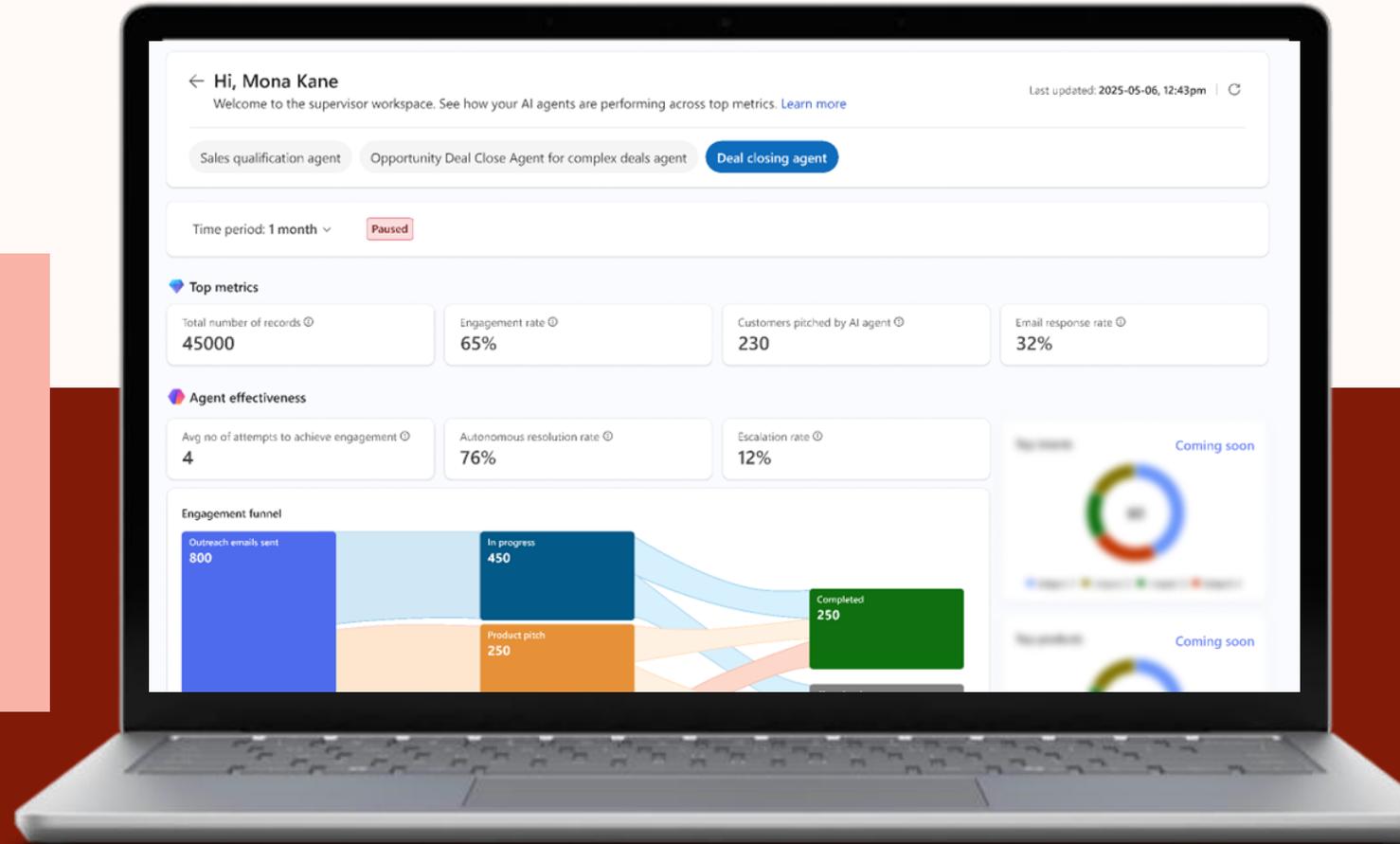
Analyse opportunities and prioritise high-value pursuits.



Proactively identify risks and prompts for seller action.



Autonomously complete low-complexity transactions without seller involvements.

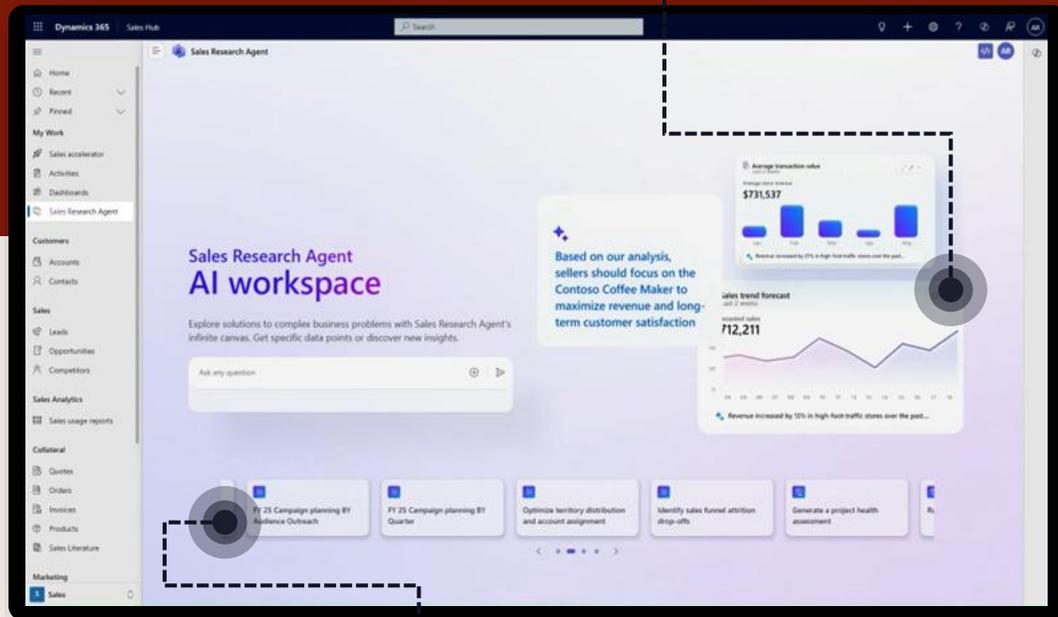




# Nurture customer relationships with data-backed decisions

Agents in Dynamics 365 Sales provide support even after you close a deal to maintain a strong connection with your accounts. [Sales Research Agent](#) (in preview) can turn raw data into insights so you can nurture relationships long after the deal is done.

Receive AI-powered pipeline assessments



Use research insights to plan your interactions

Gather deep research insights from multiple data sources for new and existing customers.

Identify potential pipeline risks and get AI-powered next steps to stay one step ahead in building trust and driving growth.

Create action plans for your team based on territory mapping.





# Agentic selling is already driving real business impacts

Businesses that have already integrated AI into their selling process and CRMs are seeing an impact on the bottom line. For example, Microsoft sellers with high Copilot and agent usage are seeing **increased sales, better close rates, and higher revenue.**

**10%+**

increase in sales lead/  
opportunity conversion<sup>3</sup>

**20%+**

increase in close rates  
using Copilot<sup>4</sup>

**9%+**

higher revenue  
per seller<sup>4</sup>

We're here to help you experience these types of benefits. Centium can support you in implementing agentic CRM solutions in Dynamics 365 to unlock the full value of CRM AI transformation.

3. Based on Internal Microsoft data; Jan–March 2025. A sales lead is a potential customer who has expressed interest in making a purchase, while a sales opportunity is a qualified sales deal derived from that lead.

4. Internal Microsoft sales team data based on 30 SME&C sellers from pilot of Sales Agent. AI Is Already Changing Work—Microsoft included, Microsoft, 2024.

# Reimagine sales and realise results

The future of sales isn't extending your team to accommodate siloed data and complex workflows—it's equipping them with the power of AI. An agentic CRM empowers your sales team to sell smarter, faster, and more effectively.

When you make the move to agentic CRM solutions in Dynamics 365 with us, you can transform your CRM into a growth engine that offers employees and customers a unified, seamless experience.

**Ready to transform your CRM?**

**Contact Centiun to accelerate growth with  
Dynamics 365.**

**Contact: Centiun**

