

G-Cloud 15

Microsoft Dynamics 365 Agents



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Service Description

Dynamics 365 Agents are autonomous AI colleagues that execute end-to-end business processes without constant human intervention. Operating across sales, service, and supply chain modules, they monitor data events to proactively trigger workflows and resolve issues. These self-directing engines work within defined guardrails to scale operational capacity and drive efficiency.

Features

- Autonomous financial reconciliation matching bank statements with open invoices.
- Autonomous lead research to enrich and qualify sales prospects.
- Self-service knowledge creation from resolved cases and internal documentation.
- Proactive supplier outreach to manage supply chain delays and updates.
- Cross-app process orchestration.
- Intent-based reasoning to determine optimal steps for task completion.
- Fine-tune behaviour via Copilot Studio using natural language and instructions.
- End-to-end case lifecycle management from creation to final resolution.
- Sentiment-driven escalations to hand over sensitive issues to humans.
- Trigger-based execution responding to real-time data changes and events.

Benefits

- Increases operational capacity by executing high-volume tasks without extra staff.
- Reduces process latency by running business workflows 24/7 without delays.
- Eliminates repetitive manual entry across sales, service, and finance roles.
- Ensures consistent data quality by automating record updates and logging.
- Shortens sales cycles through autonomous lead nurturing and instant follow-ups.
- Improves service speed by resolving routine inquiries through autonomous agents.
- Proactively prevents disruptions by monitoring supply chain and inventory levels.
- Enables strategic focus by freeing humans from low-value administrative work.
- Scales business growth without a linear increase in operational costs.
- Enhances decision accuracy using data-driven logic within defined guardrails.

How We Plan Our Service:

We provide a flexible and collaborative approach to planning and strategy development, from ideation (including business case writing), all the way through to live service and subsequent continuous improvement. We have a dedicated project management office that specialises in technology delivery and have experience at all stages of the programme lifecycle, including supporting service development from pre-alpha onwards.

We do this through a proven, GDS aligned, Agile Scrum and PRINCE2 wrapped methodology, combined with ITIL-based operational service delivery (using our award-winning DevSecOps capability). Our preference is to work openly through sprints with customers and partners, using a one-team, one-goal approach, and use a continuous delivery principle to provide demonstrable benefit as early as possible in all of our work.

Whilst implementation phases are run as a series of Agile sprints, the inputs, outputs and processes governing them are closely monitored and tightly controlled. Project plans are aligned with deliverables and a burn-up of points is used to provide clear activity status, leading to a high degree of confidence in milestones.

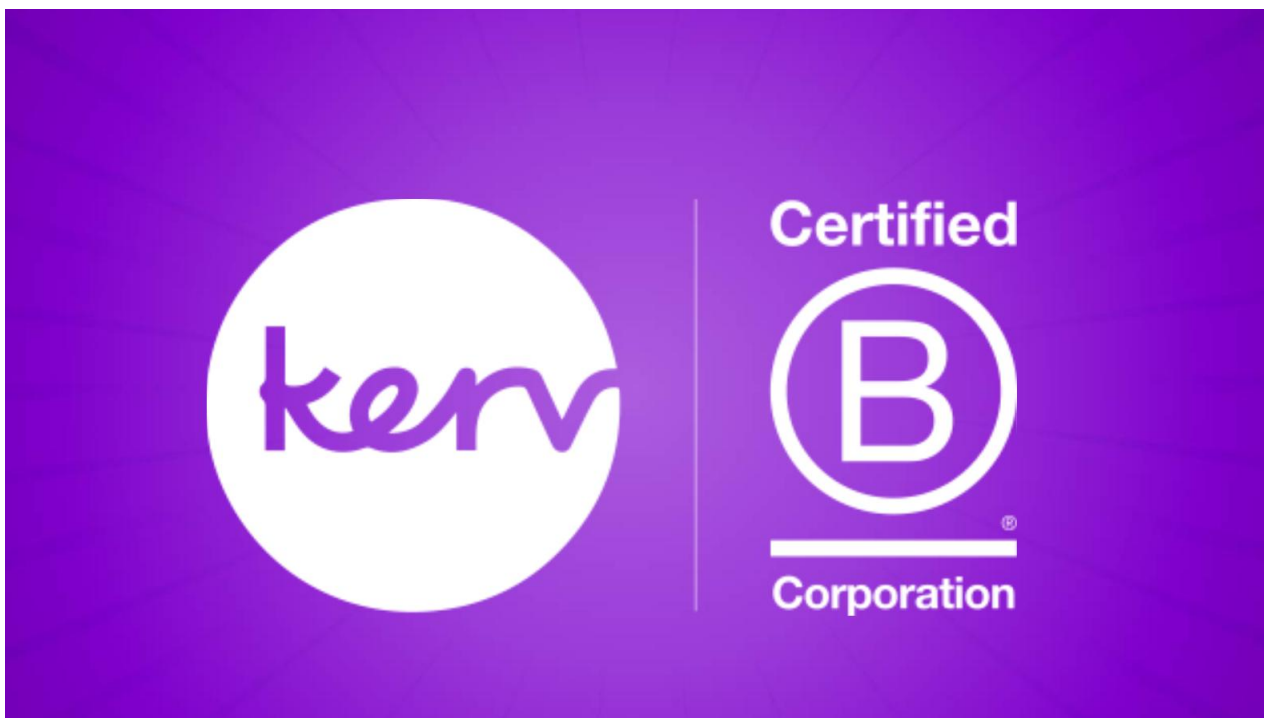
B Corp Sustainability Partner

Sustainability isn't a choice; it's a responsibility

Our commitment to sustainability is embedded into every aspect of our business. From the very beginning, our ambition has been to build a values-first organisation where technology specialists are empowered to thrive and create meaningful, lasting impact.

Every day, we live our mission from attracting top talent and winning new customers to securing investment from Bridgepoint DC and receiving Great Place to Work certifications in both the UK and India. Our people, customer, investors, and community expect us to lead the way by following a sustainable strategy, and we are more than ready.

Through our relentless pursuit of purpose-driven impact, we accelerate the way we make a difference. One thing's for sure: we'll always keep evolving, raising the bar for a smarter, more sustainable future.



Terms & Conditions

All Services provided are governed by the G-Cloud 15 Framework Terms and Conditions. Additional Terms may apply dependent upon the service being purchased; these may include:

- **Licensing requirements**

Licenses and subscriptions are the customer's responsibility, except where Kerv is explicitly engaged to deliver licenses and subscriptions within the service Kerv is able to provide licenses to support your project via the cloud solution provider route. Please enquire or view our software listings on G-cloud.

- **Data Privacy**

Data privacy agreements/GDPR

Your Obligations

*In order to deliver the service, we may require:

- **Secure Access**

Access to VPNs and internal systems may be a requirement based on the work undertaken

- **Collaboration**

Access to key stakeholders required to ensure smooth service delivery, using modern collaboration tools

- **Requirements**

Information to help us plan service onboarding, typically discovered through documented initial questionnaire and live discovery workshops

About Kerv

We help your business get ahead - and stay there.

Tech should put people first, so culture is crucial. Combining ingenuity and emotional intelligence, we use advanced technology to solve your trickiest problems in smart and human-centred ways.

Kerv Digital continues Kerv's mission of delivering disruptive tech with business and social impact. Whether you want to increase productivity or make better decisions, we use custom accelerators to get you ROI in record time. Get ready for digital transformation done different.



Data

Exploit your data to make more informed decisions. We'll help you harness Microsoft Dataverse, Artificial Intelligence and predictive insights to uncover hidden opportunities and get ahead.



Experience design

Get to the root of your problems and prototype solutions at Design Thinking and Catalyst Workshops. Then we build the intuitive, accessible tech that meets your unique needs.



Software development

Don't spend on problems we've already solved. Component-led design means we've got a huge library of problem-solving code and add-ons. Which makes your bespoke software more economical.



DevSecOps

Maximise uptime and regularly deploy updated code through industry-leading CI/CD approaches. We've supported some of the UK's largest live software deployments.



Microsoft Power Platform

Building on Microsoft Power Platform and adding our accelerators and Centre of Excellence support, we'll help you improve and innovate across multiple departments and business cases.



Microsoft Dynamics 365

Take the problem-solving capacity of Microsoft Dynamics 365 to another level for your business - with our user experience design and free, sector-specific accelerators.

Contact Us

We are happy to assist and talk through how this service along with others, can be tied together to support your Digital Transformation



T: 0330 1078 009

E: Hello@Kerv.com

W: www.Kerv.com