

**Autonomous ERP:**  
Power the future of  
business operations with  
Microsoft Dynamics 365  
and Copilot



# Introduction

It is no secret that the way we work has fundamentally shifted. As the pressure to grow faster and deliver better results increases, 68% of employees say that they struggle to keep up with the current pace and volume of work.<sup>1</sup> As a result, business leaders must deploy solutions that empower sustainable growth and allow their teams to focus on high-value work.

To activate these changes across every line of business, agility needs to start with a cloud-based, AI-powered enterprise resource planning (ERP) solution. As organizations take advantage of a modern ERP solution, their teams can start to delegate work to **autonomous AI Agents** that allow them to reclaim time and energy to stay focused on business goals and innovation.



1. ["2024 Work Trend Index Annual Report"](#) Microsoft, 2024



# The future of ERP is autonomous

In an increasingly competitive business landscape, executives must navigate complex financial and supply chain decisions daily. Making sense of this data, ensuring compliance, and driving profitability are now tasks that can be seamlessly managed by AI agents in ERP systems.

## Copilot and Agents in an ERP solution

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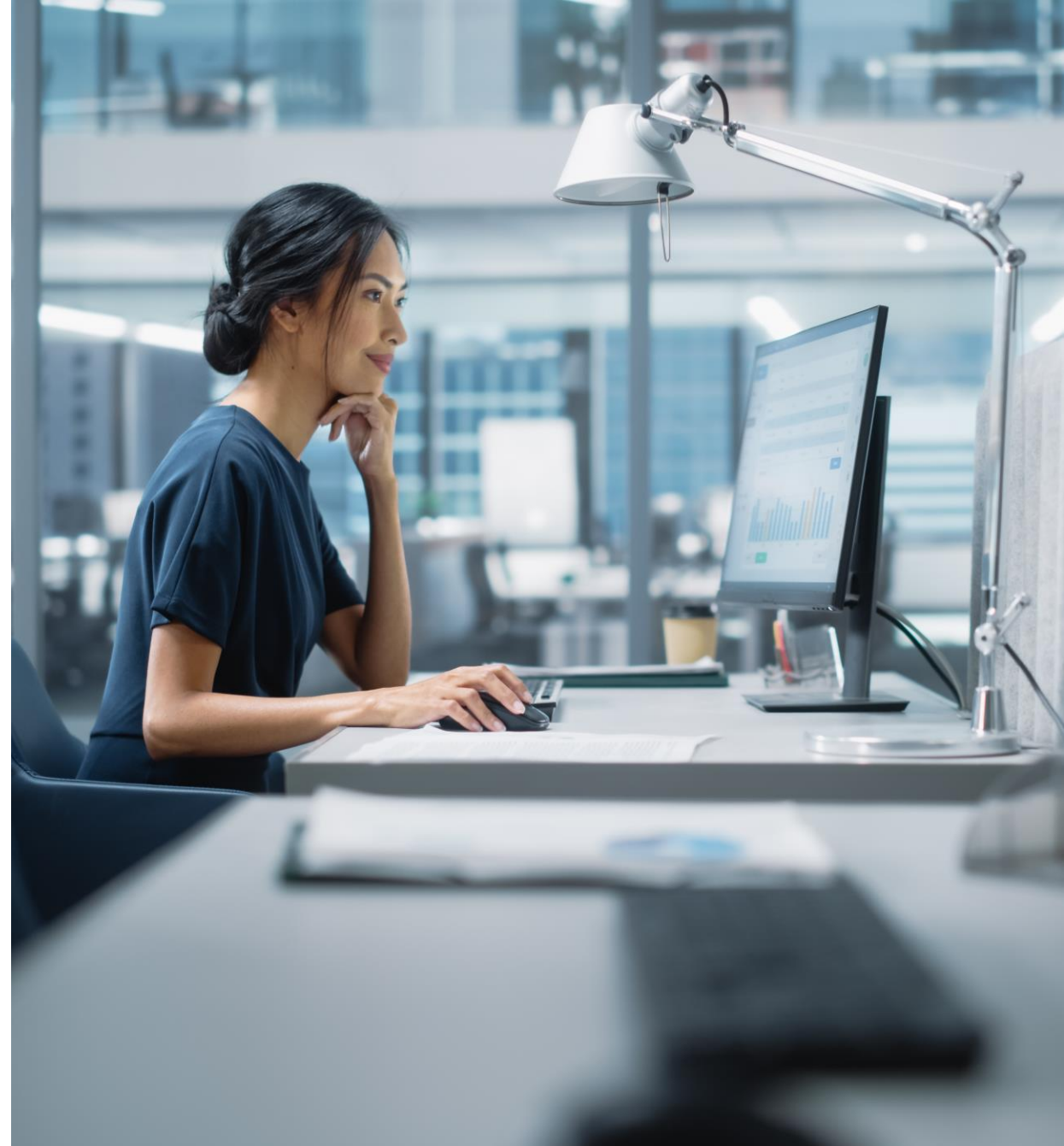
**Operate independently** to automate complex tasks.



**Respond to events and requests** automatically based on real-time signals.



**Act on behalf of individuals, teams, departments, or companies** to manage intricate workflows.



# What are Copilots and Agents?

Copilots and Agents work together to automate, orchestrate, and execute business processes, working with or for a human. Depending on where an organization is in their AI transformation journey, the Copilots and Agents a business uses fall on a spectrum of complexity.





Businesses that are at a more advanced stage are using and building the next generation of Agents with autonomous capabilities. Others are still adopting agents to focus on retrieval and task experiences to bring the knowledge and automations into their agent experiences.



← Copilot agents vary in levels of complexity and capabilities depending on your need →

# How does Copilot and Agents enable an autonomous ERP?

The key difference of an **autonomous ERP** is that they use Copilot agents instead of traditional automation for:

-  **Reasoning**  
Autonomous ERP systems enable businesses to handle dynamic, unpredictable situations more effectively by analyzing multiple factors to suggest or take actions based on historical data and real-time inputs.
-  **Memory**  
AI Agents improve over time by learning from past interactions and decisions, recognizing patterns, and enhancing decision-making processes based on accumulated knowledge.
-  **Orchestration**  
Direct multiple tasks, agents, and systems towards a common business goal. An autonomous ERP coordinates entire workflows, ensuring all connected processes, from finance to supply chain to customer service, are seamlessly managed.
-  **Adaptability**  
Autonomous ERP systems are built to adapt in real time. They can make immediate adjustments to processes based on new data, ensuring continuous optimization without requiring users to manually reconfigure workflows.

Autonomous ERP represents a new class of ERP, where **AI assists, advises, and optimizes operations**, enabling businesses to operate more strategically.

# There are three roles AI can play to transform business operations by automating repetitive tasks, providing actionable insights, and orchestrating complex workflows.

## Assistant

Imagine having a personal assistant that manages your schedule and anticipates your needs to:

- Automate routine tasks like email review, research, and status reports.
- Ensure you never miss a deadline.
- Keep your meetings organized.
- Streamline communications.

## Advisor

AI advisors are trusted partners who always have the latest data and insights at their fingertips. They:

- Analyze complex datasets to provide clear, actionable recommendations.
- Help you navigate challenges, predict trends, and make better informed decisions.
- Surface real-time insights and data-driven recommendations across finance and supply chain teams.

## Optimizer

AI optimizers serve as reliable managers that handle tedious tasks across your financial, operational and organizational business process. They:

- Manage complex, end-to-end workflows to ensure smooth execution.
- Escalate discrepancies for review.
- Learn from every anomaly to continuously improve and keep operations running smoothly.

**[Partner Name]** can help you unlock all the benefits of these three types of agents with Microsoft Dynamics 365.

# The value of working with a Microsoft partner

As with any ERP implementation and migration, working with a partner experienced with your specific organizational requirements is critical.

While it is important to create a foundation for the future, current business operations must be maintained and migration to a new ERP infrastructure cannot disrupt daily workflows. We bring meaningful value to the process through:



## Expertise in ERP migrations

Take advantage of in-depth knowledge in migrating ERP systems from various environments to a cloud-based solution, providing guidance and support for a smooth transition and quicker ROI, while alleviating the strain on existing teams during the migration process.



## Insight into the digital transformation process

Achieve digital transformation using the latest technologies and features of a next-generation ERP system. This includes automating routine tasks, improving decision-making, enhancing customer experiences, and helping businesses identify patterns and trends in data to make more informed decisions and drive innovation.



## Industry-specific knowledge

Industry-specific expertise is invaluable during the migration process, so the migration strategy can be tailored to meet specific business needs. We can also provide additional guidance and support to ensure a smooth transition.







## Planning and execution

Migrating to a next-generation ERP in the cloud requires careful planning and execution. We help you develop a well-defined migration strategy, including factors such as data migration, system integration, and user training. We can also provide project management expertise to make sure that the project stays on schedule and within budget.



## Seamless integration assistance

We can assist in integrating the new cloud ERP system with existing systems and applications, ensuring a seamless flow of data and processes across the organization. This integration is crucial for maximizing the benefits of all your systems and achieving operational efficiency.



## Ongoing support and training

Access ongoing support and training to get the most from the software's features and capabilities. We can offer training programs for employees for a smooth transition, and guidance to help them adapt to the new system.





# Boost business performance using Dynamics 365

Confidently move to the cloud with an AI-powered ERP and unlock the agility needed to lead the way in today's rapidly evolving marketplace with Dynamics 365.

Dynamics 365 can support your employees across tasks like bookkeeping, invoice handling, supply chain management, and vendor relations to enable them to work smarter and more efficiently. Using Microsoft Copilot Studio, you can build autonomous Agents in Dynamics 365 to automate tasks, improve decision-making, and enhance customer experiences.

You can also build agents that assist your employees in generating new ideas, completing critical tasks, and making decisions aligned to company goals based on connected data and insights.



# The return on investment (ROI) of moving to the cloud with Dynamics 365

When organizations like yours migrate their ERP operations to the cloud with Dynamics 365, they



**Operate more profitably** and meet customer demands by improving workforce productivity and optimizing operations.



**Enhance business performance** with new ways to generate revenue and achieve financial goals despite disruptions.



**Create a connected and resilient enterprise** with an agile platform that helps them operate securely and customize processes to meet unique and evolving business needs.

Based on a Forrester Total Economic Impact™ study, a composite organization based on interviewed customers with an on-premises ERP realized the following by moving to the cloud:

**106%**

ROI.<sup>2</sup>

**\$8.9M**

in improvements in finance/accounting, supply chain/logistics, and other personnel.<sup>2</sup>

**\$1.2M**

in increased profitability from real-time visibility and enhanced decision-making.<sup>2</sup>

2. "The Total Economic Impact™ Of Microsoft Dynamics 365 ERP," Forrester, 2024

# Take the next step in your modernization journey with an AI-powered ERP

Today's business landscape has evolved beyond anything the business world might have ever predicted. While more change is inevitable, you can set your organization up for success by choosing Dynamics 365 with us as your migration partner. We can help you unlock the AI capabilities in Dynamics 365 that enable real-time visibility, data-driven decision-making, and more efficient operations to stay prepared for the unpredictable and set your business apart from the competition.

Contact our team today to see how.

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