Microsoft Dynamics 365

Transforming Business Processes with an Agentic Mindset for Azure and Fabric

Presenter(s):
Mandi Toves
Senior Program Manager, Microsoft
Rachel Profitt
Senior Program Manager, Microsoft

Microsoft

Mandi Toves

Senior Program Manager

Microsoft

manditoves@microsoft.com

https://www.linkedin.com/in/mandi-mollerstuen-toves-8488097/

Microsoft

Rachel Profitt

Principal Program Manager
Microsoft
Rachel.Profitt@microsoft.com
https://Dynamics365Lady.com
https://twitter.com/rachelprofitt
https://linkedin.com/in/rachelprofitt
https://youtube.com/c/Dynamics365Unboxed

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Agenda

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

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Introduction to business analysis with an agentic mindset

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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

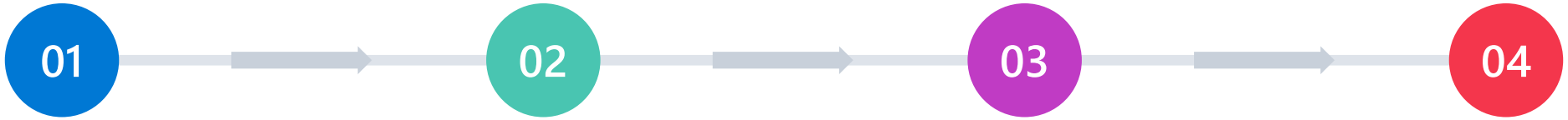
Know where human judgment outweighs AI-driven automation

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



Process Foundation

Understand + redesign before automating

Clear roles, decision points, and flow

Agentic Augmentation

Assist humans in decisions, data validation, and content interpretation

Manual → Assisted

Agentic Orchestration

Agents coordinate workflows across systems

Reduce handoffs and delays

Assisted → Orchestrated

Autonomous Operations

Agents trigger actions, predict outcomes, and optimize processes

Toward agent-operated processes

"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

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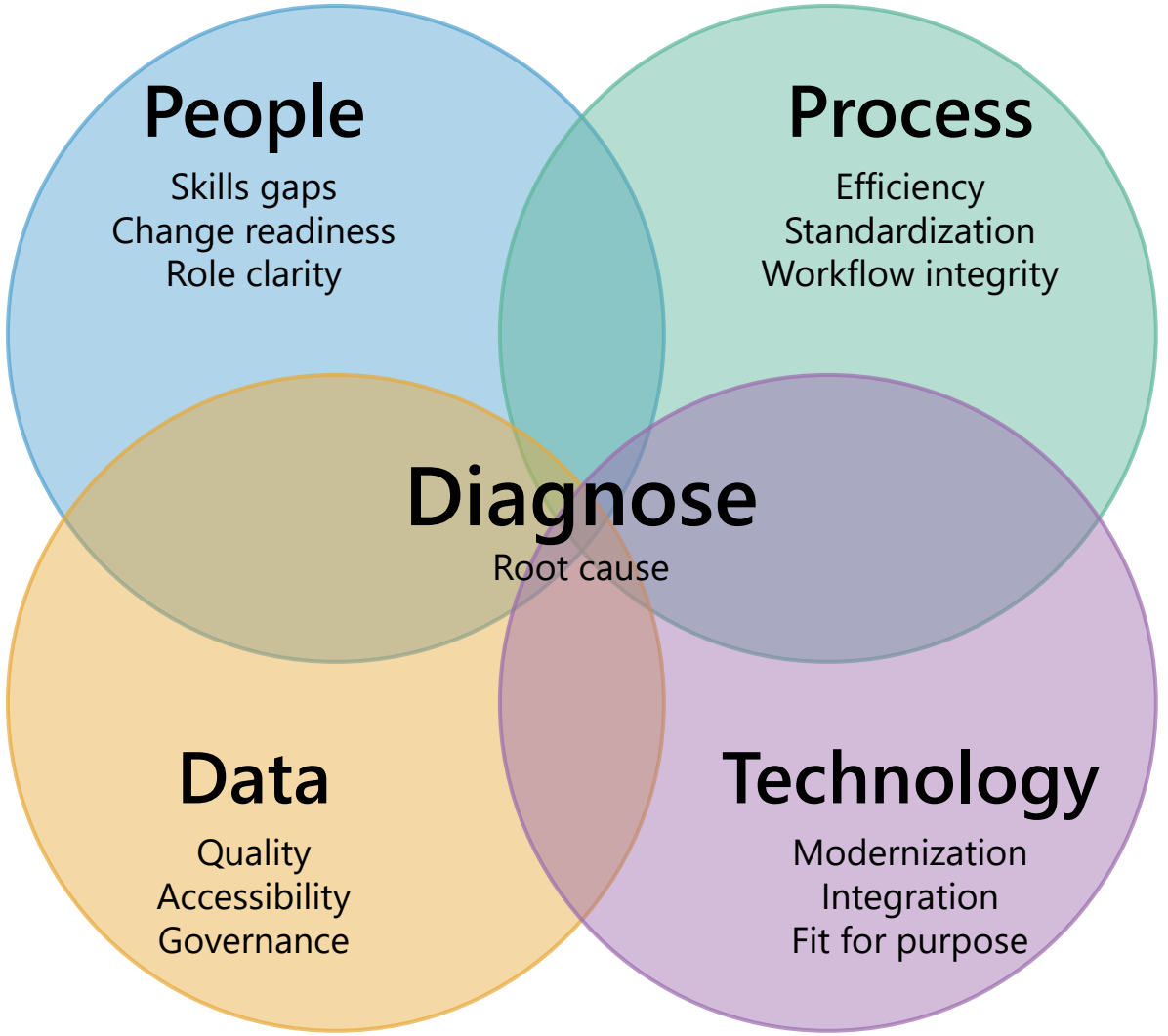
Diagnosis before design – not every problem needs AI

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
Reports take 3 days	*"Automate reporting with AI"*	5 siloed spreadsheets	**Centralize data first, then automate**
Slow customer response	*"Deploy a chatbot now"*	No access to order history	**Integrate CRM + order system**
Bad sales forecasts	*"Add ML prediction models"*	No standard sales process	**Standardize methodology first**
Rising data entry errors	*"Add more validation rules"*	Staff untrained on new ERP	**Training program + user guides**

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.

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The anatomy of business processes

Business Process Catalog — Azure and Fabric Starting Points

Use Administer to Operate as the platform anchor; each tile below names its actual L2 areas that map to the Azure and Fabric product areas.

ADMINISTER TO OPERATE

Primary BPC anchor

Operations, security, compliance, support, and governance — the L2 areas below all anchor here.

MANAGE DATA

Microsoft Fabric

Pipelines, lakehouses, and semantic models — home of the Analyze L2 that closes all 14 end-to-ends.

MANAGE SYSTEM ACCESS AND SECURITY

Microsoft Entra · Azure

Identity, role-based access, security posture, and compliance.

MONITOR SYSTEMS, ENVIRONMENTS, AND CAPACITY

Azure Monitor

Telemetry, service health, reliability, and capacity planning across cloud workloads.

DEFINE BUSINESS CONTINUITY PLAN

Azure Backup · Site Recovery

Business impact analysis, recovery objectives, and disaster recovery testing across Azure and non-Dynamics systems.

SUPPORT SYSTEMS

Azure · Cross-platform

Support procedures, subscriptions, incident handling, and root cause analysis for any platform.

ADMINISTER SYSTEM FEATURES

Fabric · Power Platform admin

Tenant settings, feature management, and data governance controls.

IMPLEMENT SOLUTIONS

Azure · Fabric

Landing zones, environment setup, and integration to the target process.

VALUE-CHAIN OUTCOMES

Map by end-to-end

One of the 14 end-to-ends: Record to Report, Order to Cash, Source to Pay, Case to Resolution, and others, each closing with an Analyze L2 area

Rule of thumb: don't create new Azure/Fabric L1 processes; anchor in Administer to Operate and connect to the process being improved.

Start with problems.
Then processes.
Then technology.

THE REALITY

Implementations span apps, data, infrastructure, security, and operations — not one clean service boundary.

THE CATALOG

Filter by workload or service, but don't let service boundaries define business scope.

THE APPROACH

Start with business problems, map the process, then choose the right Azure and Fabric capabilities.

What makes up a process?

CONTROLS

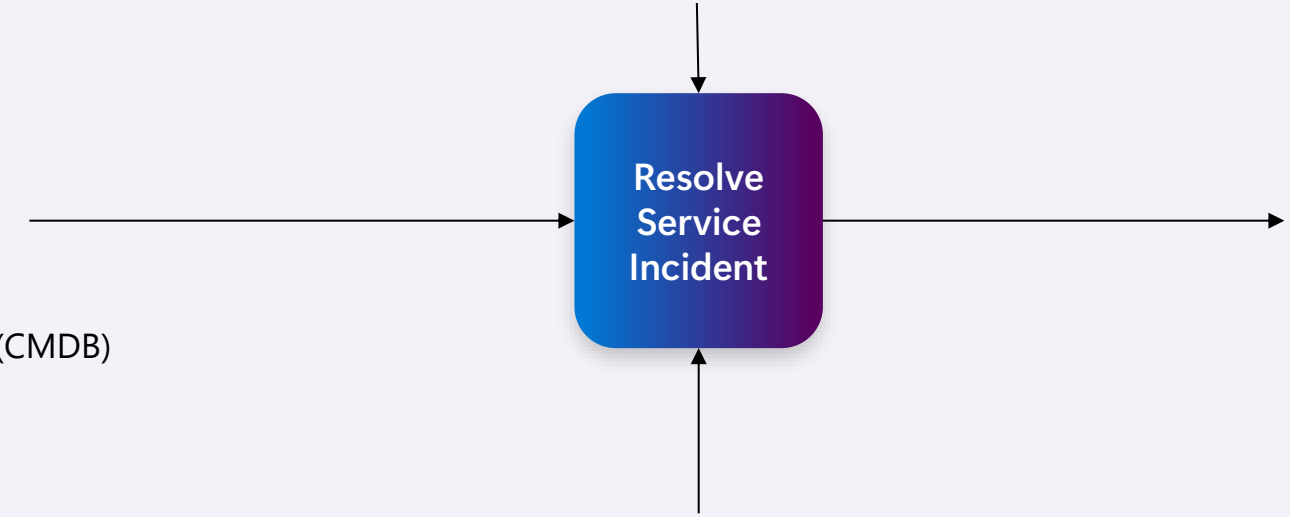
Rules & constraints that govern the process

- Service-level targets (SLO / SLA)
- Change policy
- Security and compliance rules
- Escalation thresholds

INPUTS

Data consumed by the process

- Azure Monitor alert
- Application telemetry
- Service map / config database (CMDB)
- Customer impact signal



OUTPUTS

Results produced by the process

- Incident record updated
- Remediation action completed
- Stakeholder status posted
- Post-incident actions created

RESOURCES

People & systems that execute the process

- Site reliability engineer (SRE) / on-call
- Azure Monitor and Defender
- GitHub or Azure DevOps
- Runbooks and knowledge base

Microsoft Azure + Fabric

Reimagining processes

The Reality: A Broken Azure Operations Process

Contoso Digital — 30 app teams, 6 monitoring tools; goal: cut Sev2 MTTR below 30 min and reduce repeat incidents

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Contoso Digital — 30 app teams, 6 monitoring tools; goal: cut Sev2 MTTR below 30 min and reduce repeat incidents

What the Business Analyst Found in Discovery

No Unified Context

Alerts, deployments, ownership, and customer impact live in separate tools. Engineers spend the first minutes assembling the picture.

Tribal Knowledge Rules

Senior engineers know which runbook to trust and who to call. New responders escalate earlier.

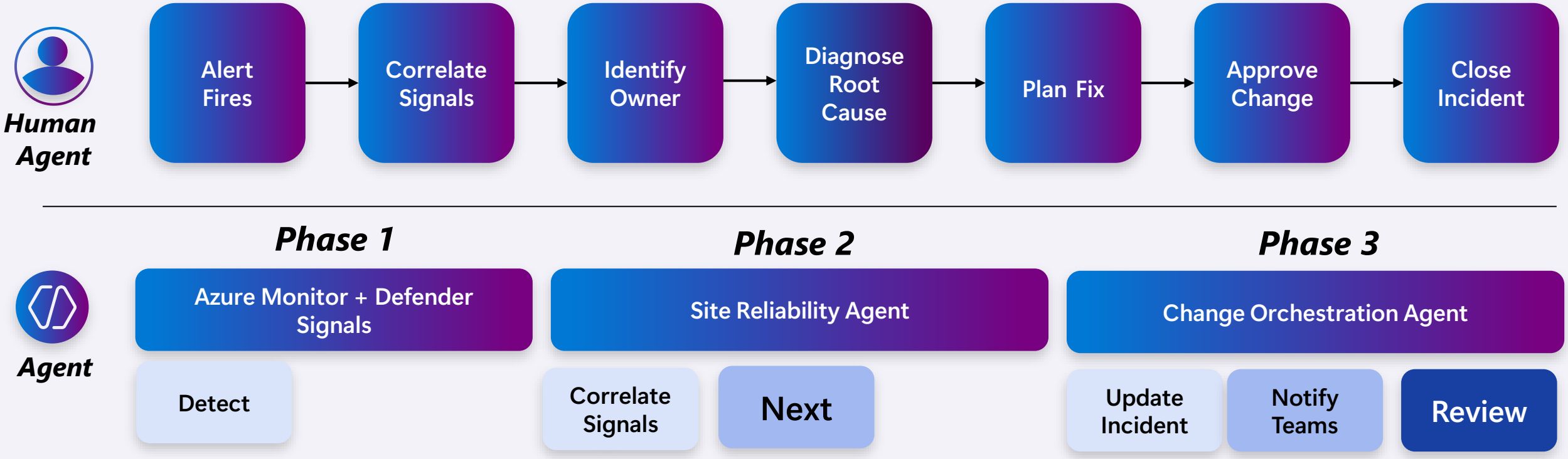
Repeat Incidents Persist

Fixes are documented after the fact, but similar signals are not correlated across apps and environments.

The Business Goal

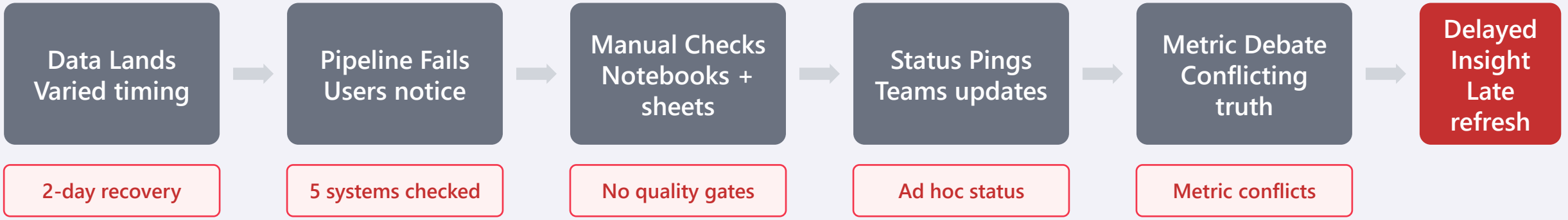
Reduce Sev2 MTTR below 30 min, cut repeat incidents by 50%, and post reliable status within 10 min.

From Tasks to Agents: Azure Operations Example



The Reality: A Broken Fabric Analytics Process

Contoso Retail — 12 data products, 5 source systems; goal: recover failed refreshes under 4 hrs and improve data trust



The Reality: A Broken Fabric Analytics Process

Contoso Retail — 12 data products, 5 source systems; goal: recover failed refreshes under 4 hrs and improve data trust

What the Business Analyst Found in Discovery

Quality Issues Surface Late

Problems are found after reports fail or users question the numbers.

Ownership Is Unclear

Teams cannot quickly see which table, pipeline, or owner is responsible for a broken metric.

Manual Status Loops

Engineers answer refresh questions instead of fixing root causes and improving reliability.

The Business Goal

Recover failed refreshes in under 4 hrs, publish trusted data products, and notify users before decisions are affected.

From Tasks to Agents: Fabric Analytics Example

Human Agent

Monitor health

Profile data

Notify owner

Assess impact

Qualify?

Refresh model

Publish

2-day recovery

5 systems checked

No standard quality gates

Status updates are ad hoc

Metric definitions conflict

Agent

Data Quality Agent

Profile Data

Notify

Fix

Publish

Insight Agent Prepare

Validate

Explain

Insight Agent Publish

Refresh

Share Insight

Lineage Agent

Next Best Actions

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Resources and recommendations

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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

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QUESTIONS

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria

Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank

Mahalo תודה **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

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