

# CONVERGENCE

AI+  
ERP

MIAMI | 2025

## Transforming Talent Acquisition with Dynamics 365 Human Resources: Recruitment and Onboarding

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# Agentic ERP

 +  Copilot Adaptive Experience

 Powered by Copilot Studio



ERP Agent Foundation

1P agents | 3P Partners agents | Customer agents

Headless Business Services

actions and data tools Powered by Model Context Protocol (MCP)

Dynamics 365 (AI ERP)

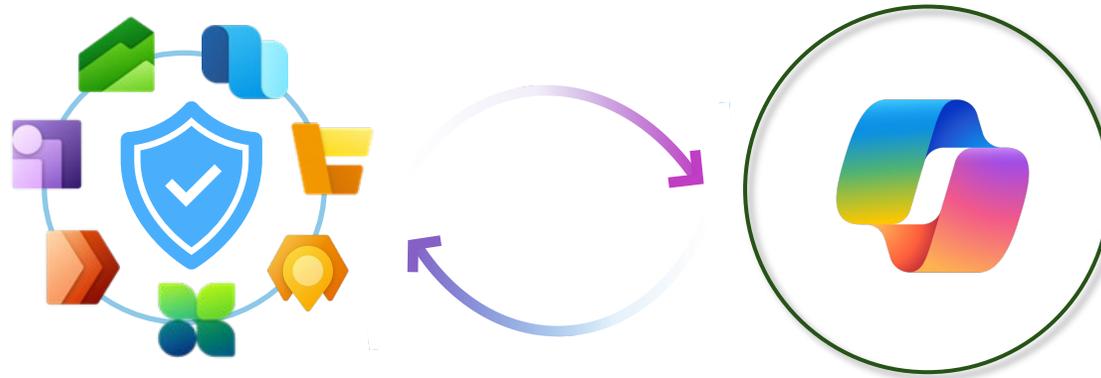


Industries | Microsoft 365 | Dynamics 365 Sales & Service | 3P apps

Extensibility / Industry Verticals

# Agentic ERP

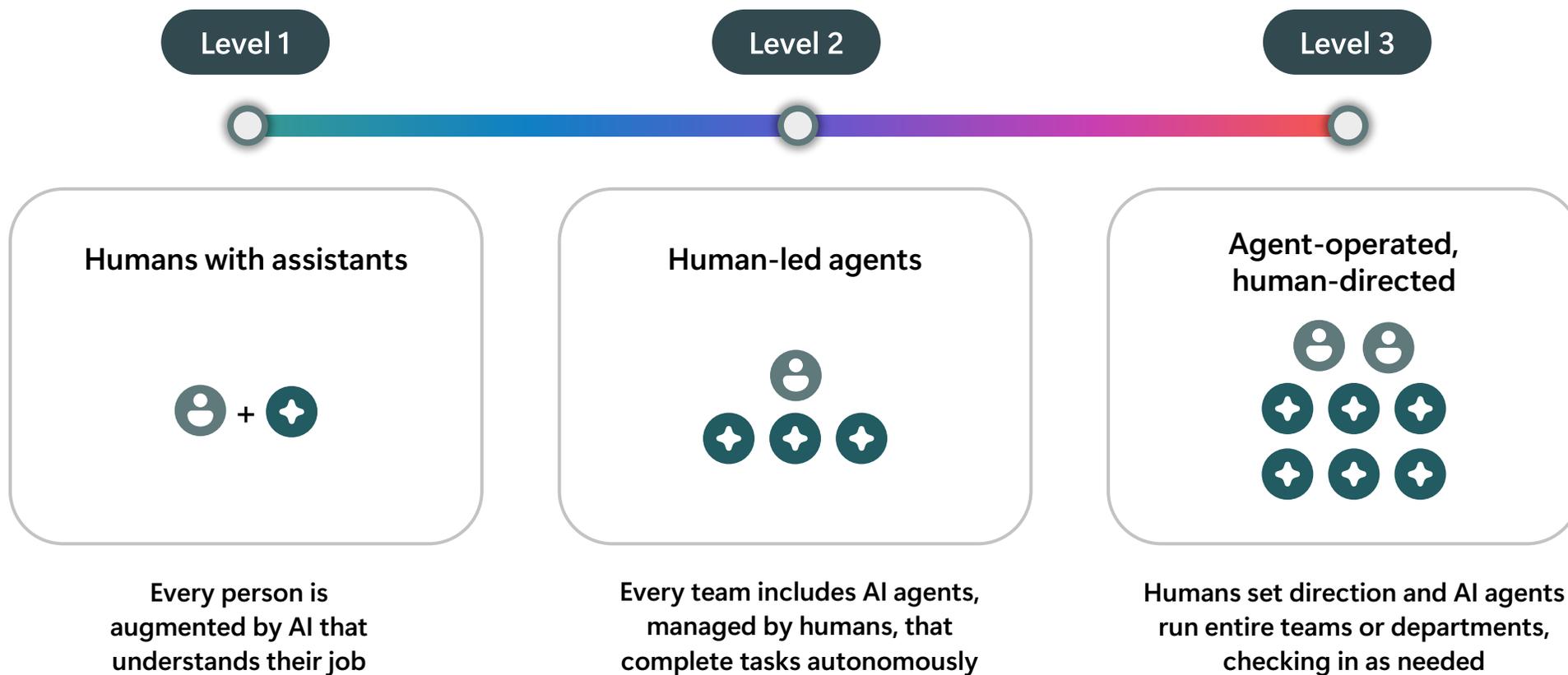
Meeting customer today's need and ensuring future success



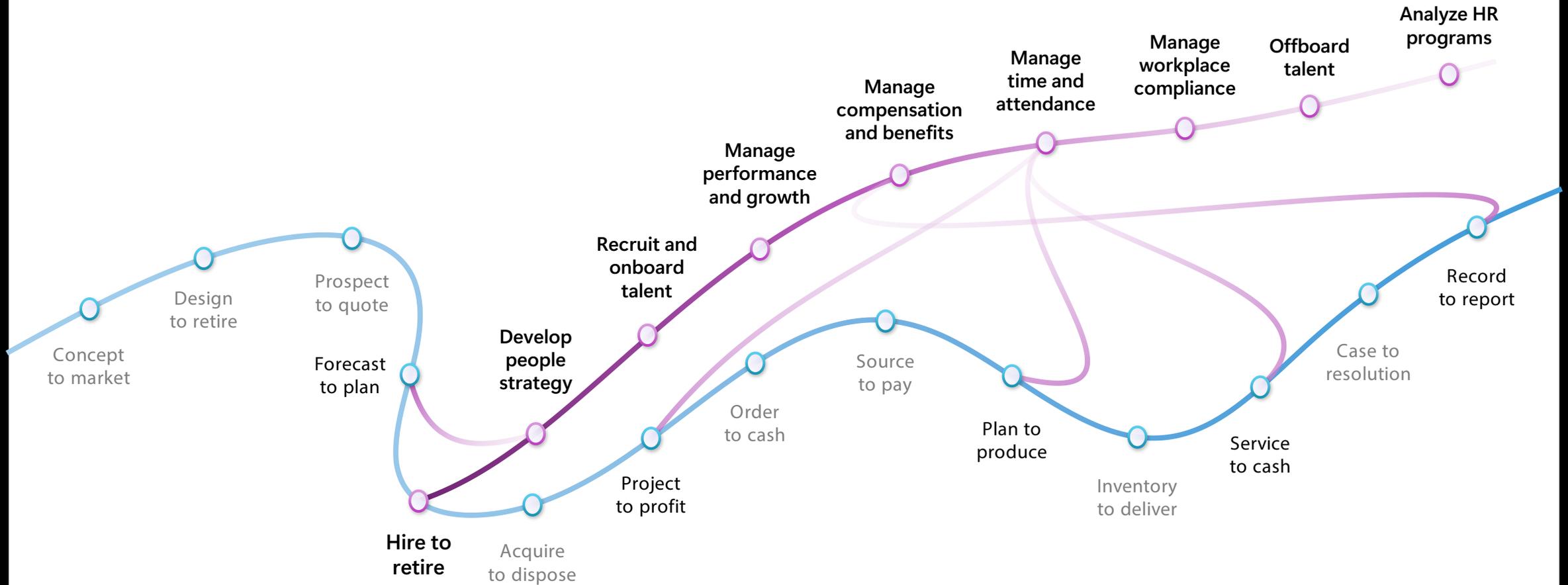
Portfolio maturity and industries

Acceleration of Agents

# Levels of AI Transformation



# An end-to-end journey



# Common challenges in *hire to retire*



## Attracting qualified candidates

Finding the right talent faster and effectively in a competitive job market



## Effective onboarding

Ensuring new hires are quickly integrated and productive with personalized onboarding



## Performance management

Continuously assessing and improving employee performance



## Compensation and benefits

Balancing competitive compensation packages with budget constraints



## Employee engagement

Maintaining high levels of engagement and satisfaction to reduce turnover



## Disconnected HR systems

Creating inefficiencies due to siloed operational and financial systems



## Manual HR processes

Reducing productivity because of many manual, difficult-to-track processes that are heavily regulated for compliance



## Siloed people data

Storing HR data in separate systems from operational and financial data, preventing full visibility into the business

# Our vision: Human Resources

## Increase organizational agility

to align employees to impact and thrive through business model changes and digital transformation initiatives with automation.

## Transform employee experiences

to empower people with simplified and personalized self-service experience with intelligence.

## Optimize human resources programs

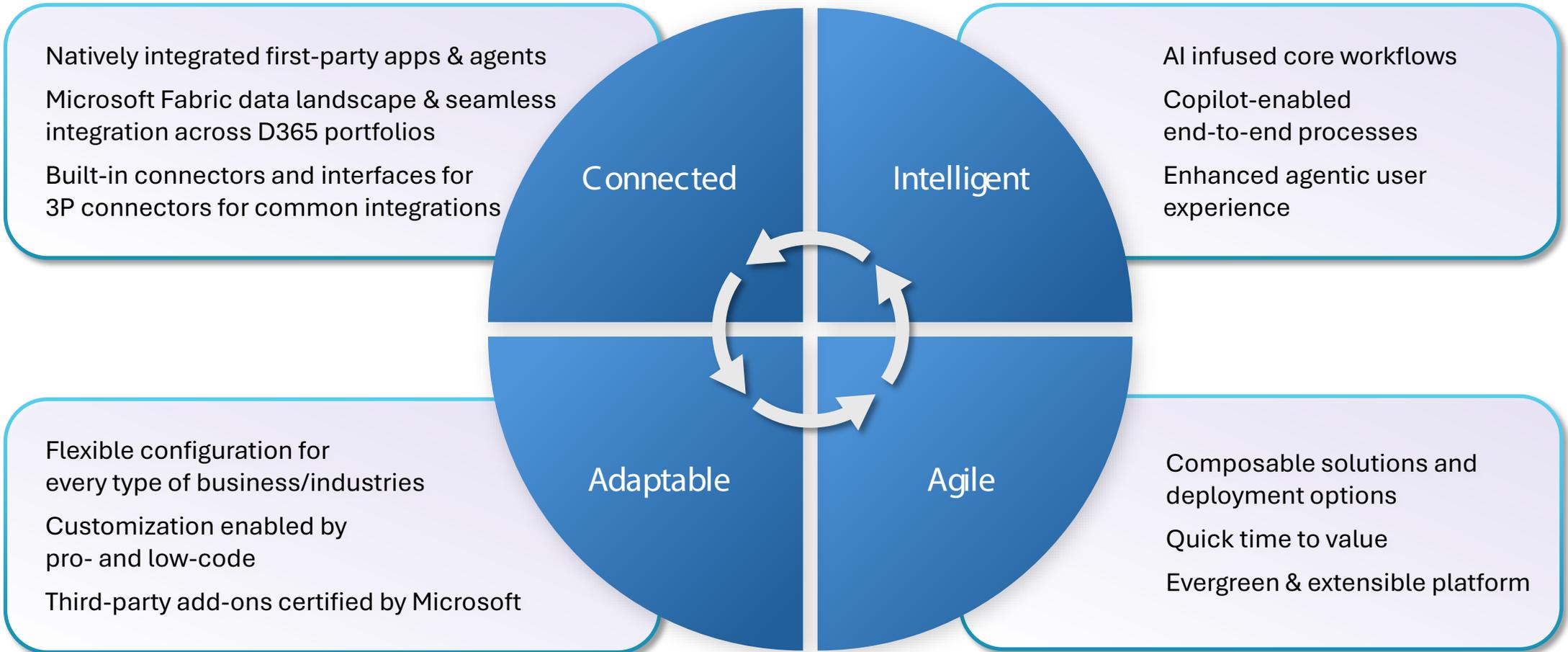
to boost employee engagement and satisfaction, while lowering people operation costs with advanced insights.

## Discover workforce insights

to meet compliance regulations, continuously innovate using data-driven decisions and evangelize HR execution.

**Balance operational excellence, organizational agility, and the employee experience to create a workplace where people and the business thrive on intelligence and automations.**

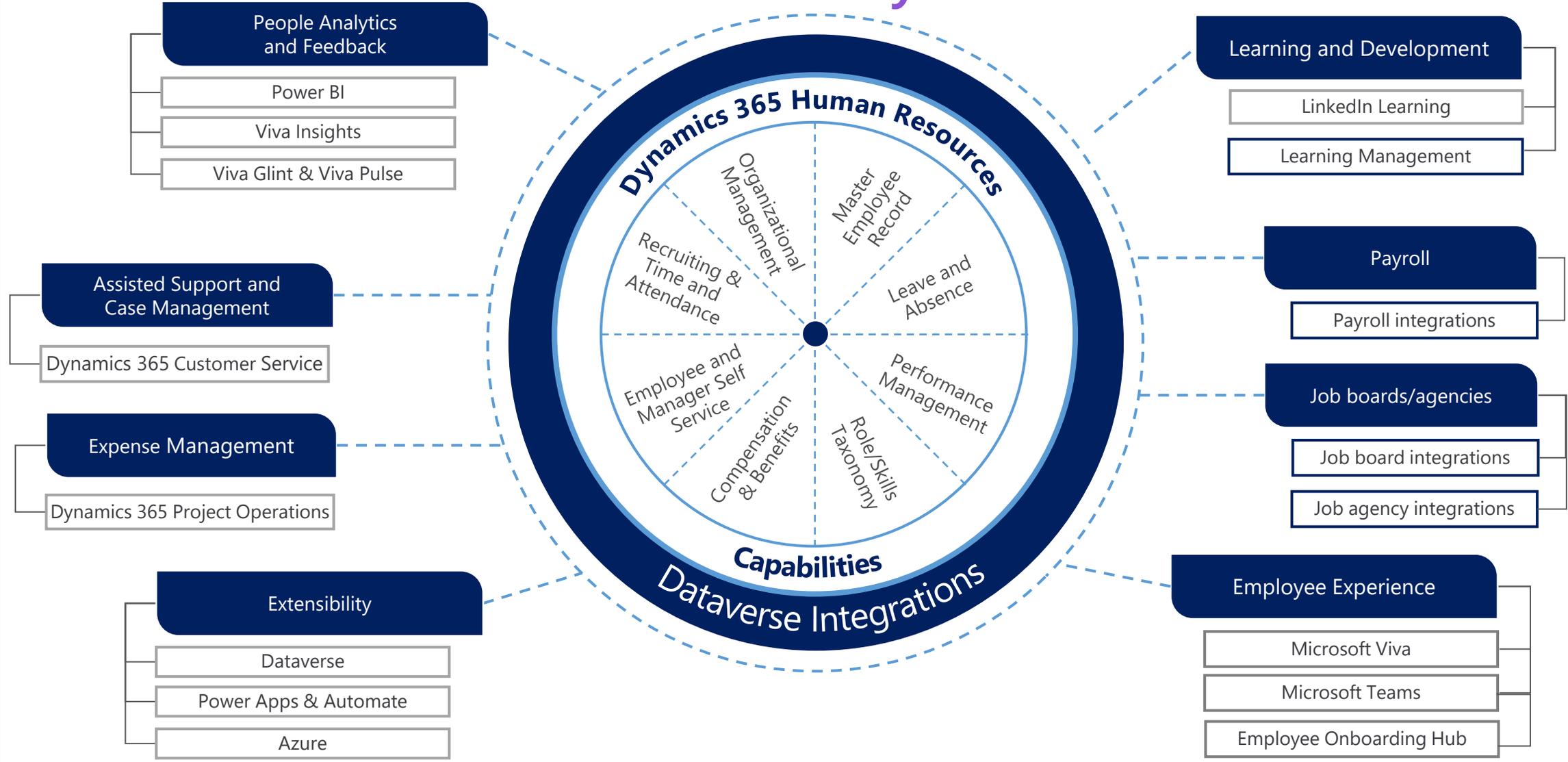
# Our unique position



# Better together - Finance and HR

Business Scenario	HR Side	Finance Side	Integration points
<b>Workforce Planning &amp; Budgeting</b>	Hiring plans, workforce forecasting, skills planning	Budget creation, headcount cost forecasting	Position based budget in core finance; headcount forecasting and cost of salaries/benefits via BPP.
<b>Compensation &amp; Benefits / Payroll</b>	Salary structures, benefits, incentives, policies	Payroll processing, journal postings, tax compliance	Payroll costs posted to GL; benefits liabilities tracked.
<b>Time &amp; Attendance / Projects</b>	Timesheets, leave management, overtime, scheduling	Project costing, billing, revenue recognition	Resource management involving labor hours and absence costs allocated to projects or cost centers.
<b>Travel &amp; Expenses</b>	Employee travel requests, policy compliance	Expense reimbursements, VAT/GST recovery, GL posting	Expense management via ESS; employee claims flow from HR to Finance for payment and accounting
<b>Procurement &amp; Self-Service</b>	Employees request items/training/services	Procurement workflows, vendor payments	Requisitions raised by employee's flow into finance processes.
<b>Organizational Structures</b>	Departments, positions, reporting hierarchies	Financial dimensions (cost centers, business units)	Mapping of HR org units to financial structures for reporting/control like limit approvals of POs/requisitions.
<b>Employee Lifecycle (Onboarding, Transfer, Exit)</b>	Provisioning access, updating employee records, offboarding	Payroll settlements, accrual adjustments, benefits closure	HR events (hire, transfer, termination) trigger financial postings; account distributions based on date
<b>Compliance &amp; Audit</b>	Labor law, equal pay, certifications, workforce records	Financial reporting, statutory compliance, audit	Shared need for audit trails, regulatory compliance, and controls.

# HRM – Ecosystem



# Agentic hire to retire – A journey

## Analyze HR programs

Benchmark HR initiatives with adoption goals; planning budget/funding of initiatives; monitoring fairness

## Develop people strategy

Dynamic workforce planning; skill demand forecasting; workforce strategy simulations; culture drift detections; workforce advisory

## Offboard talent

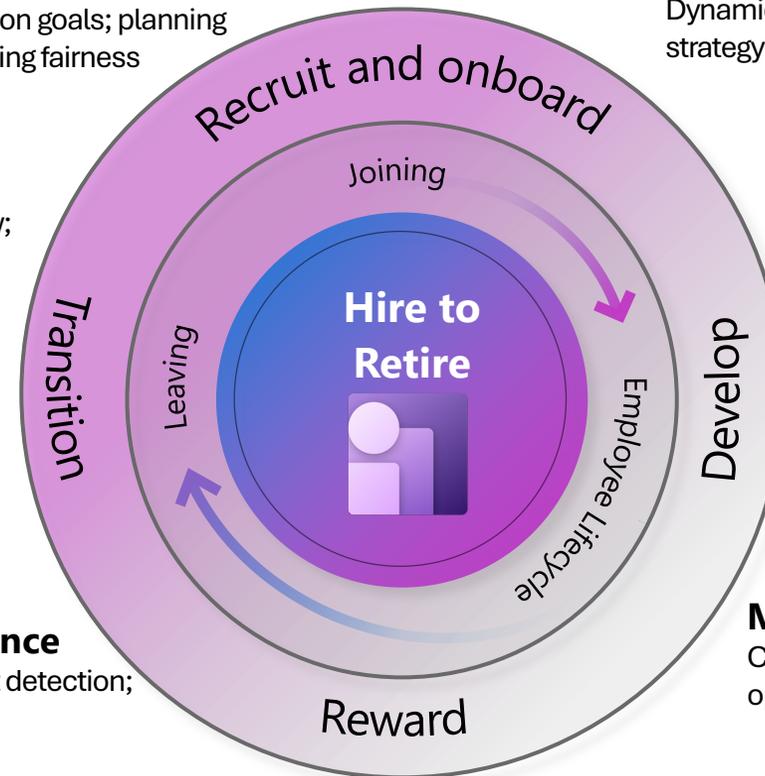
Adaptive AI-driven multi-department workflow; automated engagement and rehire pathway; personalized offboarding

## Manage time and attendance

Detects missing or incorrect entries; wellbeing data and predictive absence; compliance enforcement

## Manage workplace compliance

Self-updating regulations; support drift detection; ethical escalations



## Recruit and onboard talent

Intelligent requisition creation; screening/shortlisting candidates; coordinating interviews; generating draft offers; initiating approval, pre-onboarding, and onboarding workflows.

## Manage performance and growth

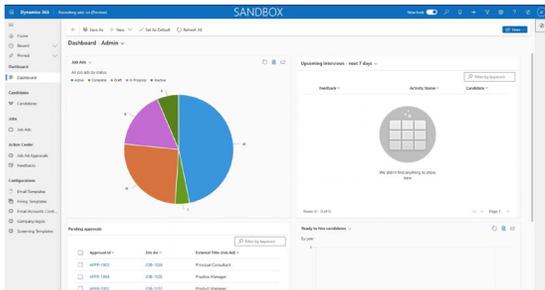
Continuous/adaptive evaluation; dynamic and context-aware goal setting; continuous detections of bias and burnouts

## Manage total rewards

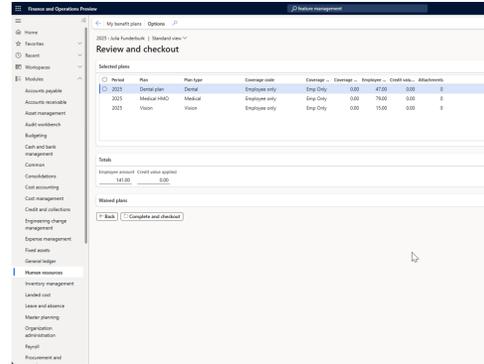
Compensation cycle planning; benefits cost optimization; rewards optimization; analytics driven pay equity and benchmarking

# Recently released capabilities

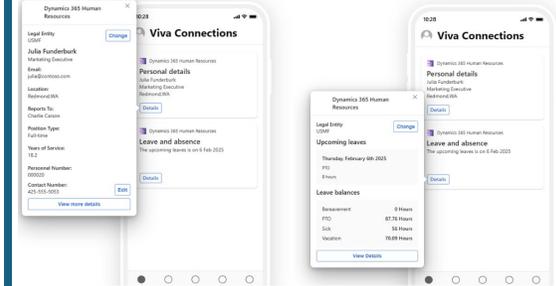
### Recruiting add-on GA



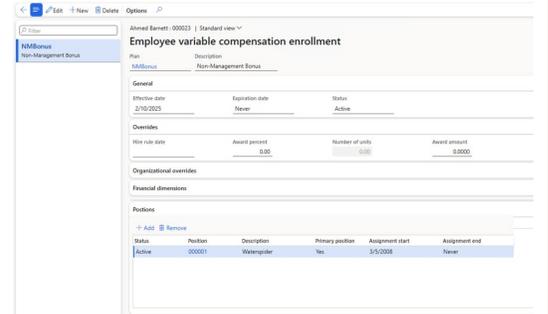
### Benefits enrollment enhancements



### Viva connection integration – Private Preview

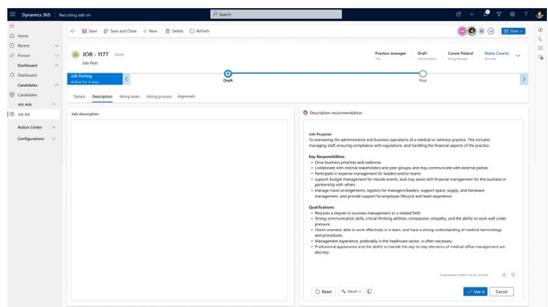


### Link position to variable pay



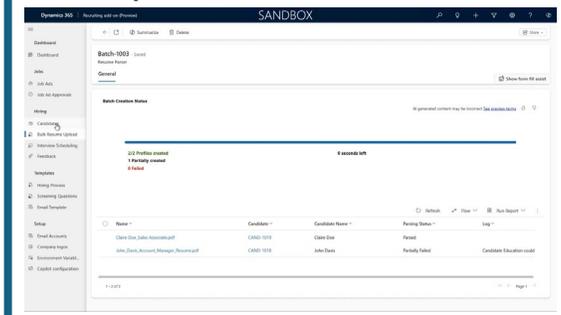
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### Recruiting Accelerator (JD generator) – Private Preview



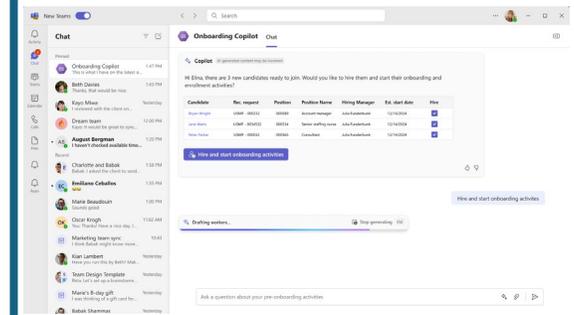
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### Recruiting Accelerator (Bulk resume upload) – Public Preview



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### Onboarding Accelerator – Private Preview

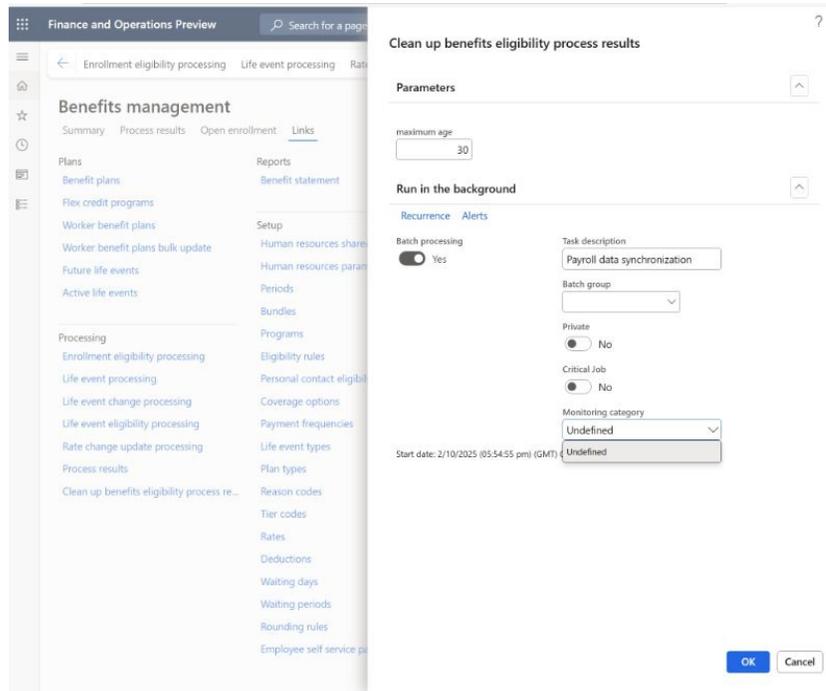


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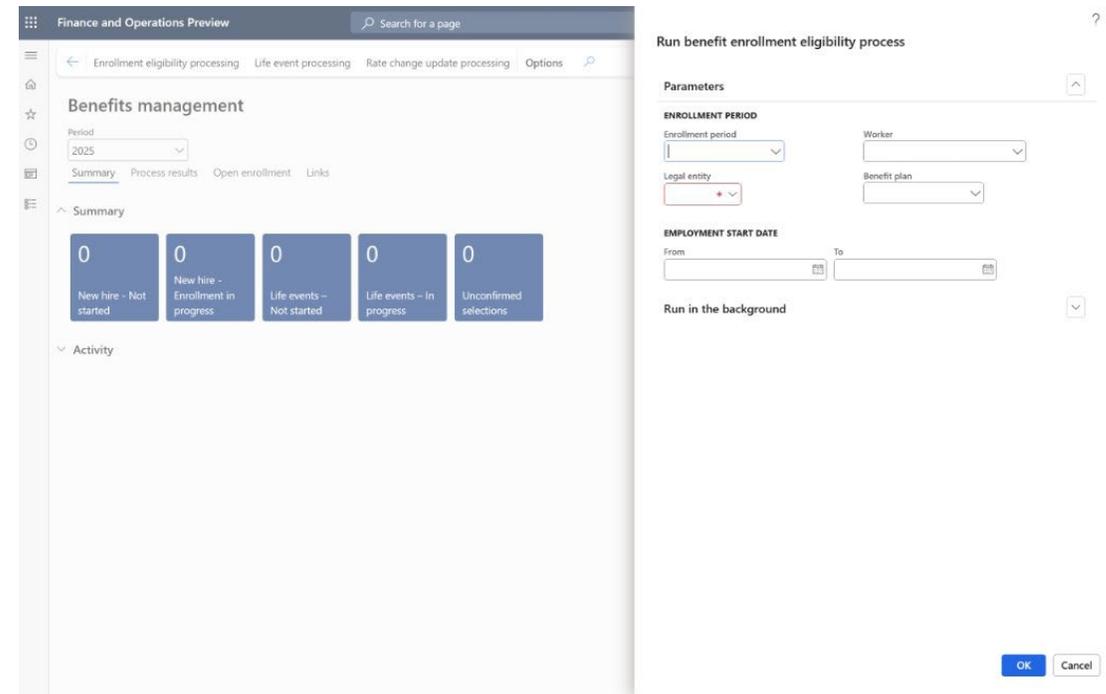
# Continuously improving fundamentals...

## Handling Scale in Benefits Module

Customers can trigger Benefit eligibility process results cleanup job.



New filters added for Benefits enrolment eligibility



# Recruiting



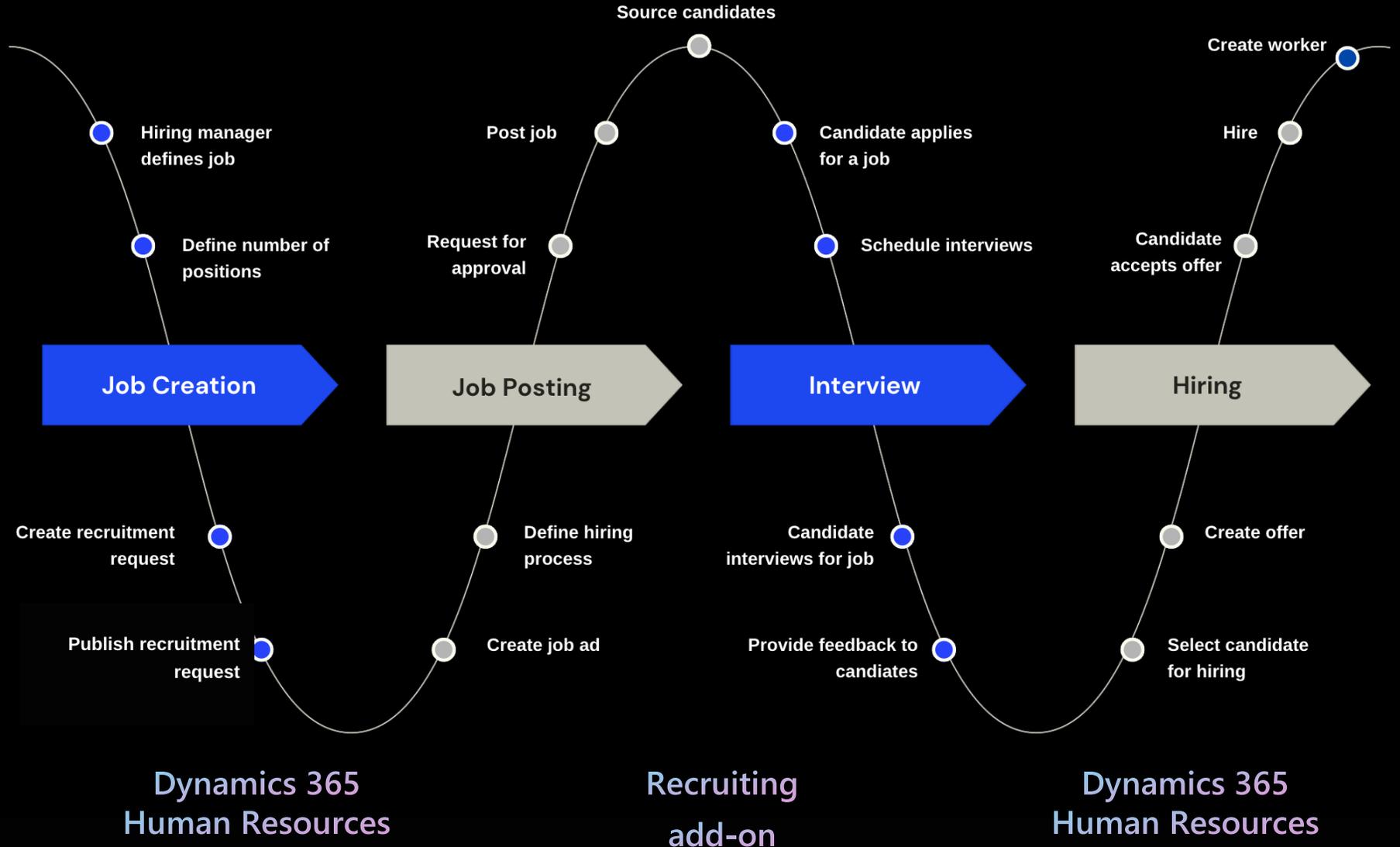
**Charlie Herb**  
Hiring manager



**Robin Jackson**  
HR Pro/Recruiter



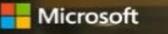
**Emily Daves**  
Candidate



# Product demo - Recruiting

# Job Creation

Enables the hiring managers to create positions, raise requirements, and publish job postings for the recruiters to post job openings



# Job Posting

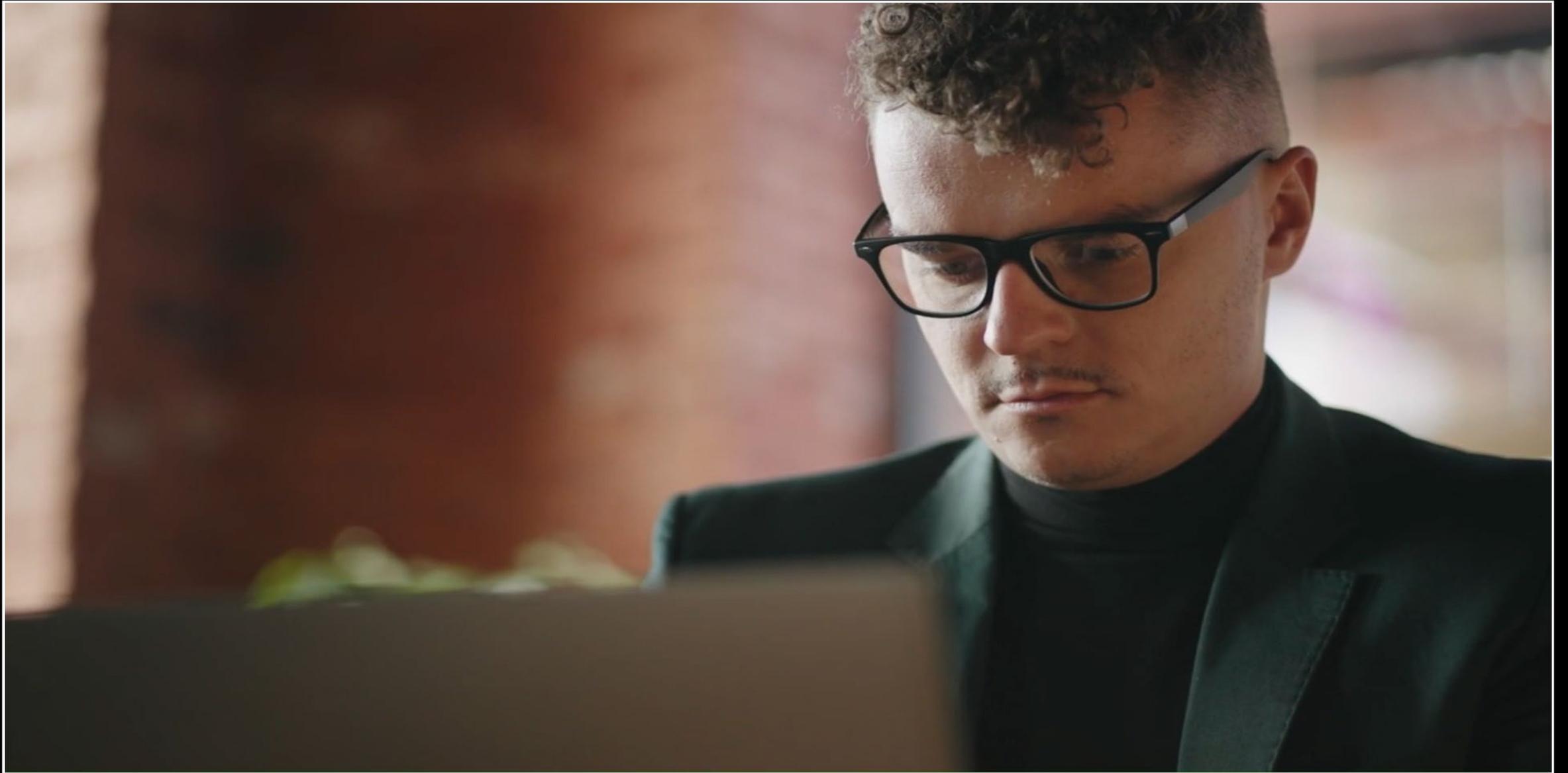
Enables the recruiters to add panel of team members for hiring, add templates for hiring and screening, and initiate workflow for approval to post the positions on the career site.

**Robin**  
Recruiter



# Candidate Experience

Enables the candidates to login to the career portal, search for job openings, create profiles, applies for positions, and monitors the status of applications.



# Interview Scheduling

Enables the recruiters to book the interview slots, manage the availability of the candidates and interviewers, and streamline the hiring process including the feedback via Teams.



# Ready to Hire

Enables the recruiters to transition the shortlisted candidates along with their details from the recruiting add-on to the Dynamics 365 Human Resources to initiate the offer and onboarding process.

**Robin**  
Recruiter



# Onboarding

# Challenges

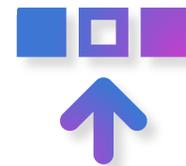
## Current state



Time consuming with manual onboarding



Fragmented Processes



Limited visibility & insights



Lack of personalization

# Onboarding Accelerator

## Capabilities

**Automates onboarding tasks:** No manual data entry, creates draft worker records, checklists, etc.

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**Intelligent data extraction:** Gathers details from documents, parses addresses, and validates information

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**Personalized onboarding flows:** Tailors steps and resources to each role, location, and individual.

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**Immersive workspace:** All activities surfaced in Teams and Dynamics 365 for full visibility and control.

### Outcomes

**Accelerate time-to-productivity:** Employees connect and contribute quickly

**Reduce HR admin burden:** HR spends less time on manual tasks..

**Increase accuracy & compliance:** Fewer errors, better compliance.

**Boost engagement & retention:** Early connection boosts retention.

# Onboarding Accelerator – HR Managers

- **Reduces manual workload** by automating repetitive onboarding tasks like data collection and validation.
- **Ensures consistency and compliance** across all new hires with standardized onboarding flows.
- **Minimizes errors and follow-ups** through intelligent data parsing and real-time employee self-service.

The screenshot displays the Dynamics 365 Human Resources Onboarding Assistant interface. The top summary shows 15 pending workers to be hired, 10 compensations to be entered, and 4 errors occurred in the last month. The interface is divided into several sections: Summary, Exception details, and a table of tasks with their respective statuses and exceptions.

Tasks	Company	Status	Exceptions	Details	Last updated
Hired workers	--	Has exceptions	2	--	--
Bryan Wright	USMF	Pending hire	--	--	1/31/2024 5:00PM
Raymond Jacob	DAT	Error	--	Onboarding checklist not found	1/31/2024 5:00PM
Leave plans assigned	--	Has exceptions	3	--	--
Raymond Jacob	DAT	Error	--	Leave plan not found	1/31/2024 5:00PM

The Onboarding Copilot chat window is also visible, showing a message from the Copilot agent: "Hi Elina, there are 3 new candidates ready to join on Monday 14th October. Would you like to start their onboarding and enrolment activities?" Below the message is a table of candidates:

Candidate	Rec. request	Position	Position Name	Hiring Manager	Est. start date	Hire
Bryan Wright	USMF - 000232	000589	Account manager	Julia Funderbunk	10/14/2024	<input type="checkbox"/>
Mary Jane	USMF - 0034532	000534	Senior staffing nurse	Julia Funderbunk	10/14/2024	<input type="checkbox"/>
Peter Parker	USMF - 000032	000565	Consultant	Julia Funderbunk	10/14/2024	<input type="checkbox"/>

HR business partners get updates and recommendations throughout the process

Agent guides the HR manager through the process

# Product demo - Onboarding



DYNAMICS 365  
HUMAN RESOURCES

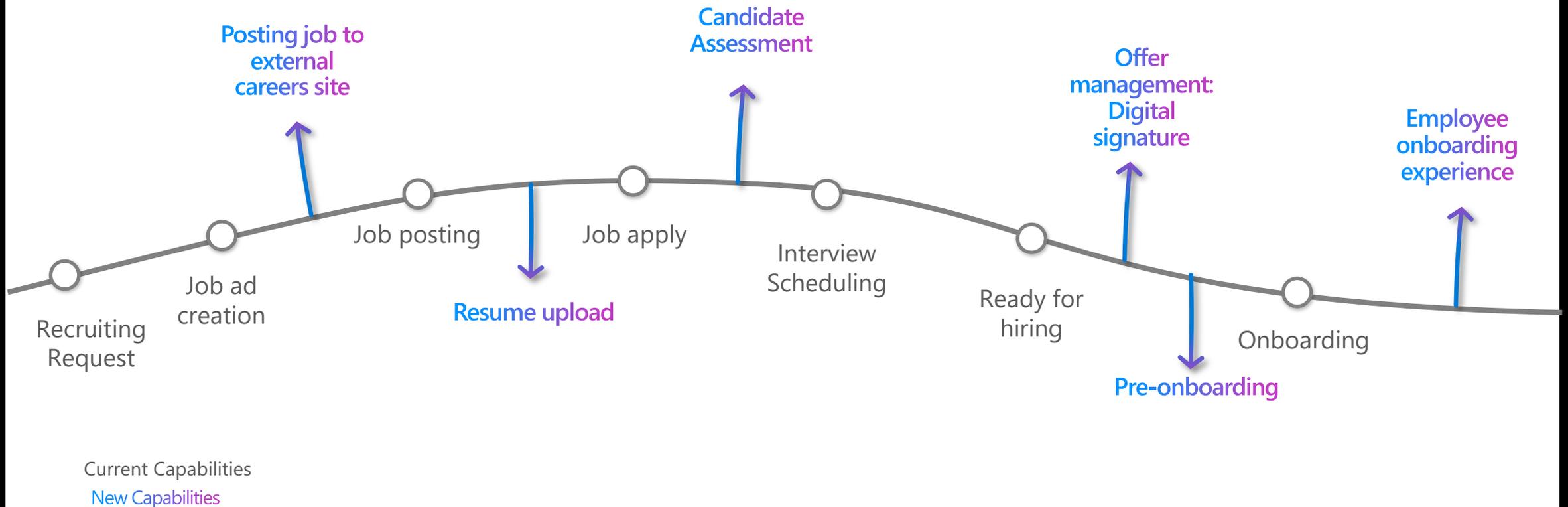
# Onboarding Accelerator

## HR Manager Experience



# Forward looking explorations

# Advancements in recruiting and onboarding



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# QUESTIONS

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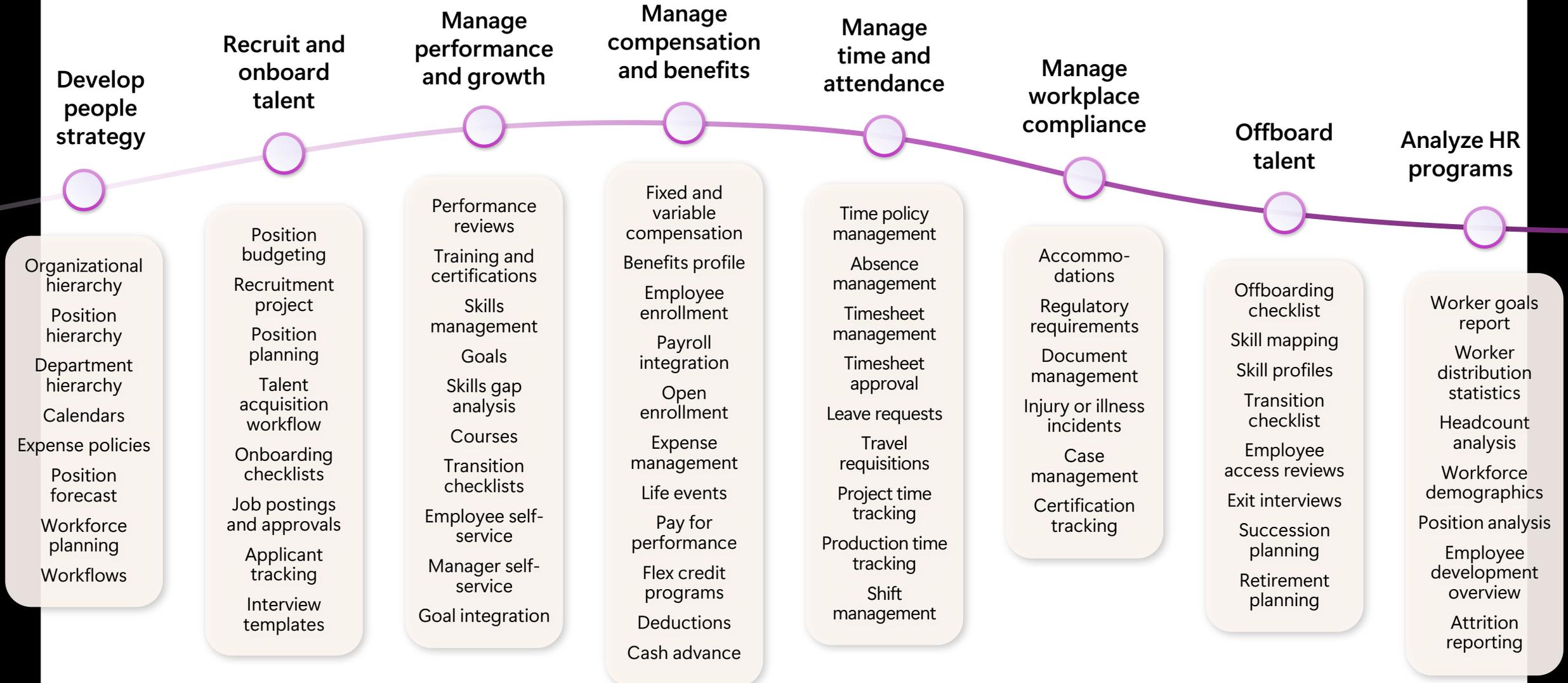
# THANK YOU

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# Appendix

# Hire to retire capabilities



STRATEGIES

- ❖ Align workforce to business objectives
- ❖ Optimize organizational structure
- ❖ Scale HR organization
- ❖ Reduce total cost of ownership
- ❖ Reduce Risk

VALUE MEASURES

- ❖ Profit per employee
- ❖ Time to impact
- ❖ Mission and vision alignment of work
- ❖ Overtime percentage
- ❖ Revenue per employee
- ❖ Reduce turnover
- ❖ Cost of HR per employee
- ❖ Compliance
- ❖ Regulatory report cycle time
- ❖ Expense per FTE

**Increase Operational Agility**

**Transform Employee Experiences**

STRATEGIES

- ❖ Empower managers
- ❖ Enable employee self service

VALUE MEASURES

- ❖ 1:1 meeting frequency
- ❖ Average time until promotion
- ❖ Above average performance management ratios
- ❖ Executive perceptions vs. employee engagement data
- ❖ Employee satisfaction index
- ❖ Issue resolution cycle time
- ❖ Number of HR tickets per FTE
- ❖ Absenteeism
- ❖ Number of vacation days used
- ❖ Retirement rate and average age of retirement

STRATEGIES

- ❖ Competitive compensation programs
- ❖ Retain top performers
- ❖ Flexible and compliant leave and absence programs
- ❖ Standardize training and certification requirements

VALUE MEASURES

- ❖ Percent of new hires that leave within 90 days
- ❖ Percentage of cost of workforce
- ❖ Salary competitiveness ratio (SCR)
- ❖ Cycle time to process payroll (integrations)
- ❖ Healthcare cost per employee
- ❖ Benefits satisfaction
- ❖ Employee wellness score
- ❖ ACA compliance
- ❖ Training ROI

**Optimize HR Programs**

**Discover workforce insights**

STRATEGIES

- ❖ Use data to measure program performance
- ❖ Improve diversity and equality
- ❖ Better manage workforce and operating expenses

VALUE MEASURES

- ❖ EEOC metrics
- ❖ Pay equity
- ❖ Diversity rates
- ❖ Length of service
- ❖ Job satisfaction rate