

Cracking the Sales Productivity Code

Justin Coaxum – Technical Sales Director, Microsoft





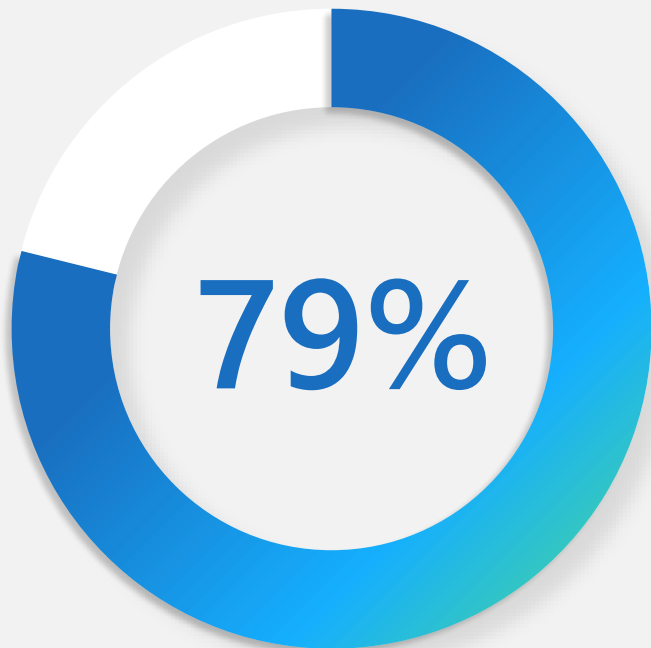
Transform sales productivity

Microsoft Copilot for Sales

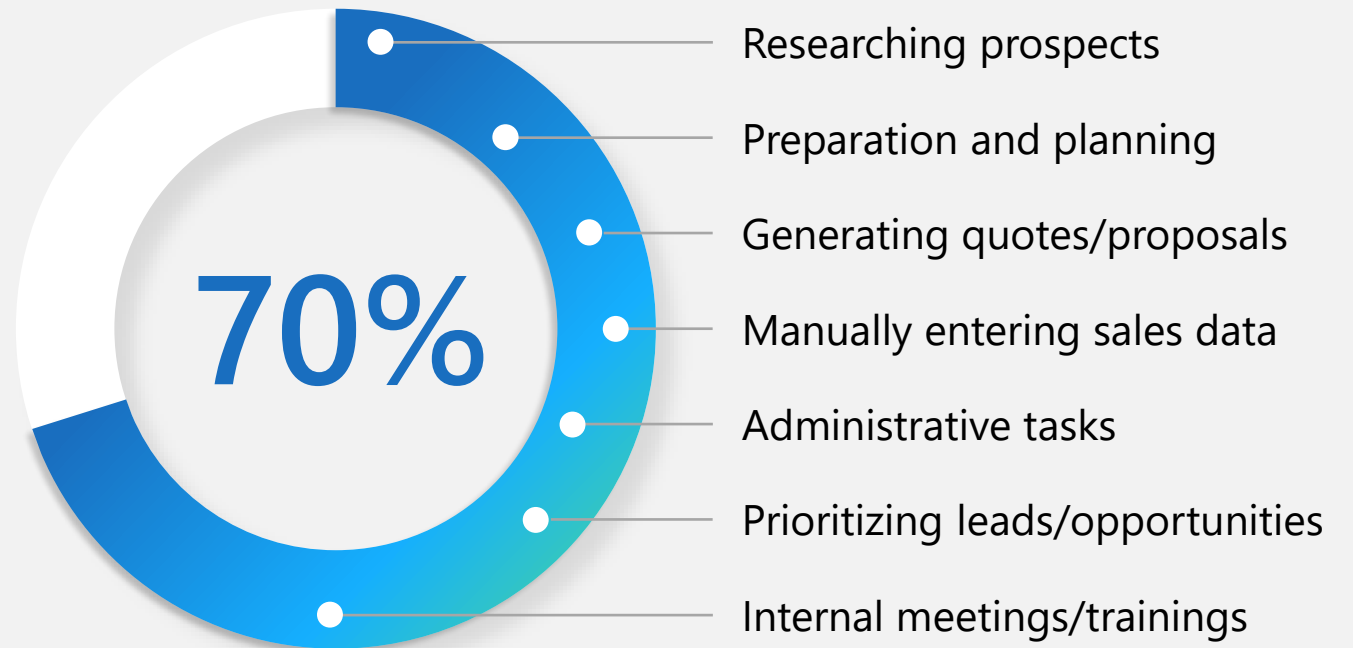


The role of the seller is getting harder

Percent of surveyed sellers who say success expectations and the number of supported customers and accounts have increased in the last year¹



Amount of time sellers spend on administrative and non-selling duties²



¹Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include Financial Services, Professional Services, Manufacturing, Retail, Technology, and Healthcare.

²Microsoft-sponsored Futurum Research 2022.

Reimagine the sales experience

Empower sales organizations with AI



Cut the
drudgery



Connect
the data



Crush
the sale



Continuously
improve

The AI advantage for sales

Leading consulting companies estimate that sales organizations can benefit significantly from generative AI

Sales efficiency

29% of sales time can be automated¹

3-5% productivity lift²
(total sales expense)

99% of sellers would reinvest time saved from AI on work tasks³

Data quality + sales effectiveness

+50% jump in lead-to-sale conversion rate⁴

3-15% of revenue uplift for players that invest in AI⁴

2X lift in cross-selling and up-selling rate⁴



¹Bain & Company. [How Generative AI Will Supercharge Productivity](#). August 2023.

²McKinsey. [The economic potential of generative AI: The next productivity frontier](#). June 2023.

³Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include Financial Services, Professional Services, Manufacturing, Retail, Technology, and Healthcare.

⁴McKinsey. [AI-powered marketing and sales reach new heights with generative AI](#). May 2023.



Microsoft Copilot

Your everyday AI **companion**

Natural Language



Large Language
Models (LLMs)

+



Web
grounding

+



Commercial
data protection

+



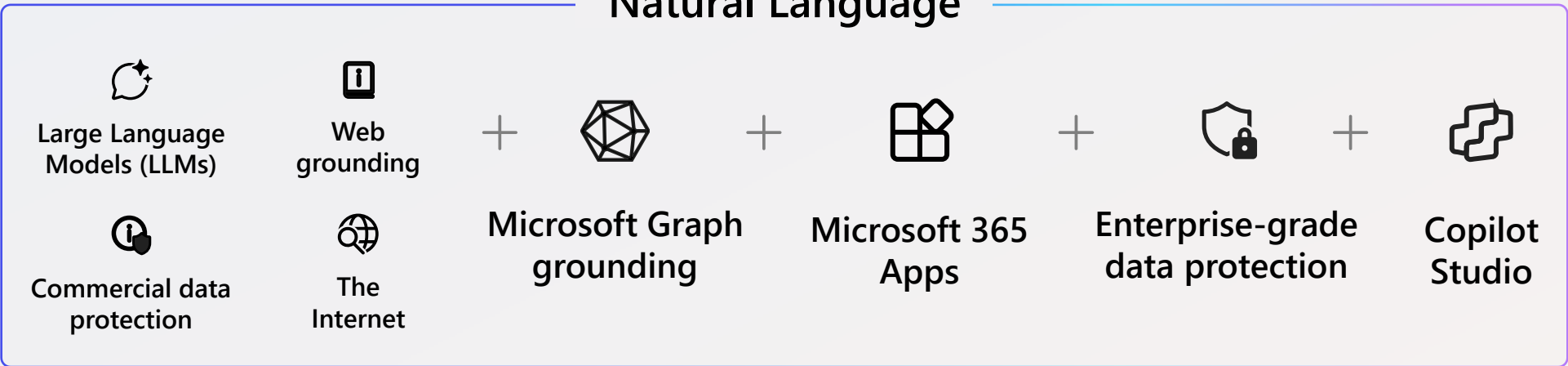
The
Internet



Microsoft Copilot for Microsoft 365

Your everyday AI **companion** assistant at work

Natural Language





Microsoft Copilot for Sales

Your everyday AI assistant for sales teams

Natural Language



Large Language Models (LLMs)



Web grounding



Microsoft Graph grounding



Enterprise-grade data protection



CRM platform

Salesforce Sales Cloud
Microsoft Dynamics 365 Sales
Sales insights, content, and recommendations



Commercial data protection



The Internet



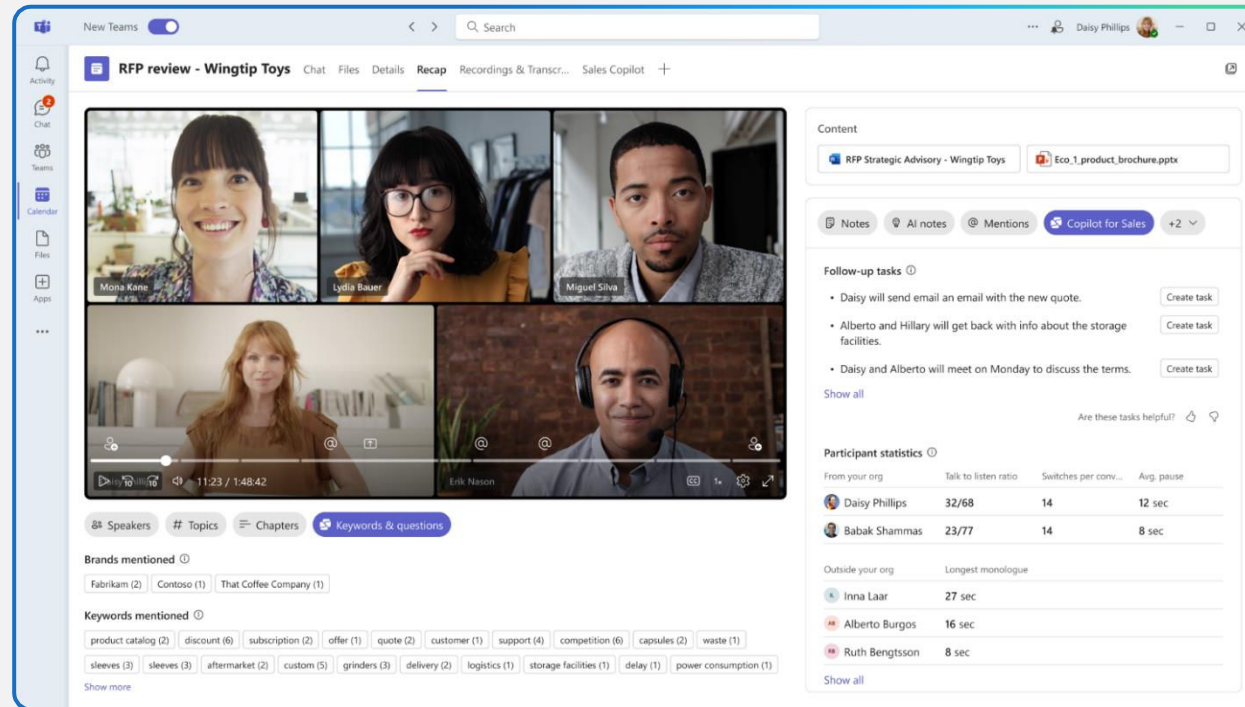
Microsoft 365 Apps



Copilot Studio


Microsoft Copilot for Sales

Next-generation AI assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal.



 View opportunity summary

 Analyze sales conversations

 Draft a proposal

 Create a revenue data chart

 Create CRM tasks from a meeting

 Update opportunity stage

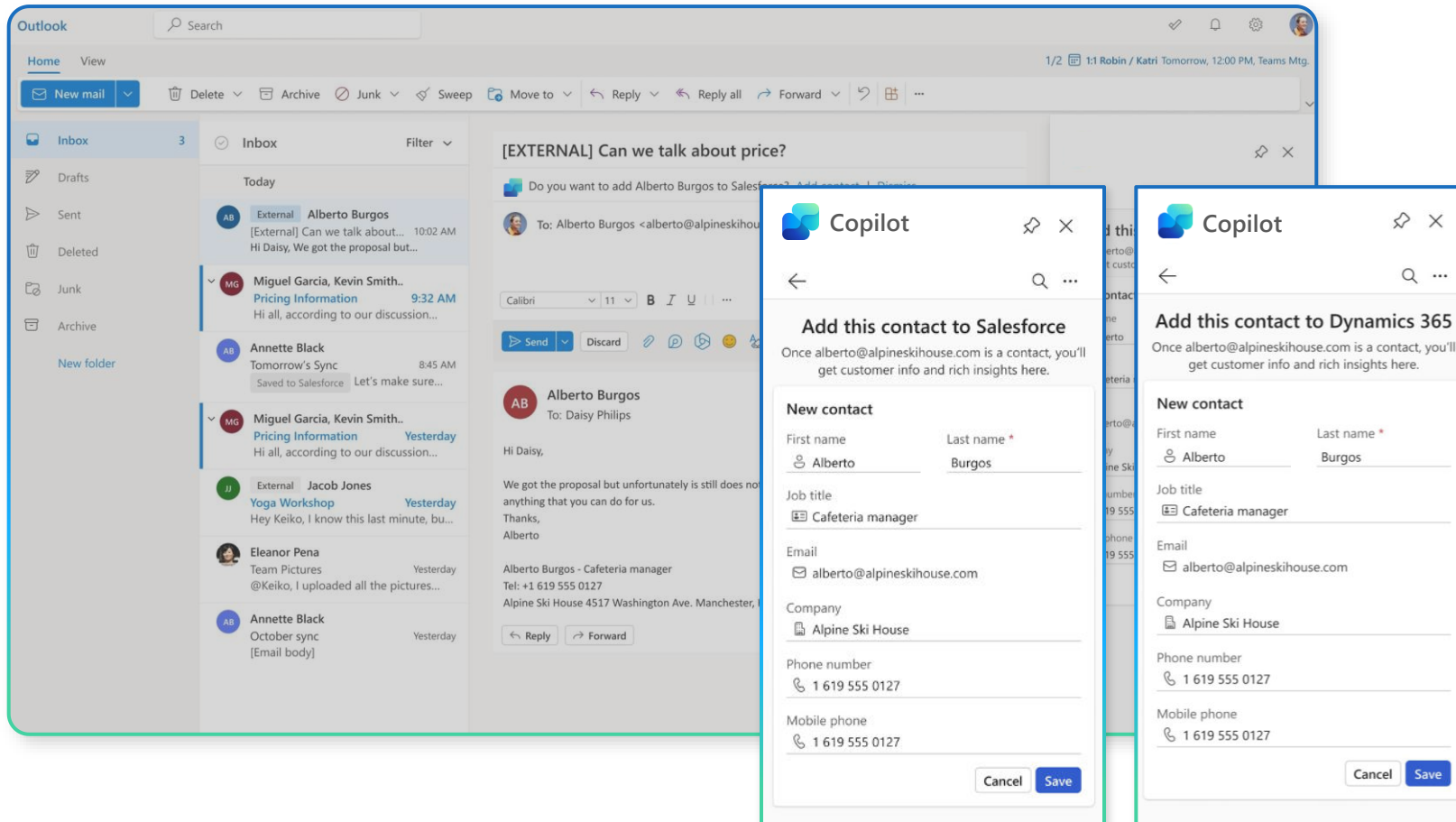
 Show conversion rate

 Create a pitch presentation

Copilot for Sales is experienced in Microsoft 365 and connects to your CRM system



Works with your CRM platform

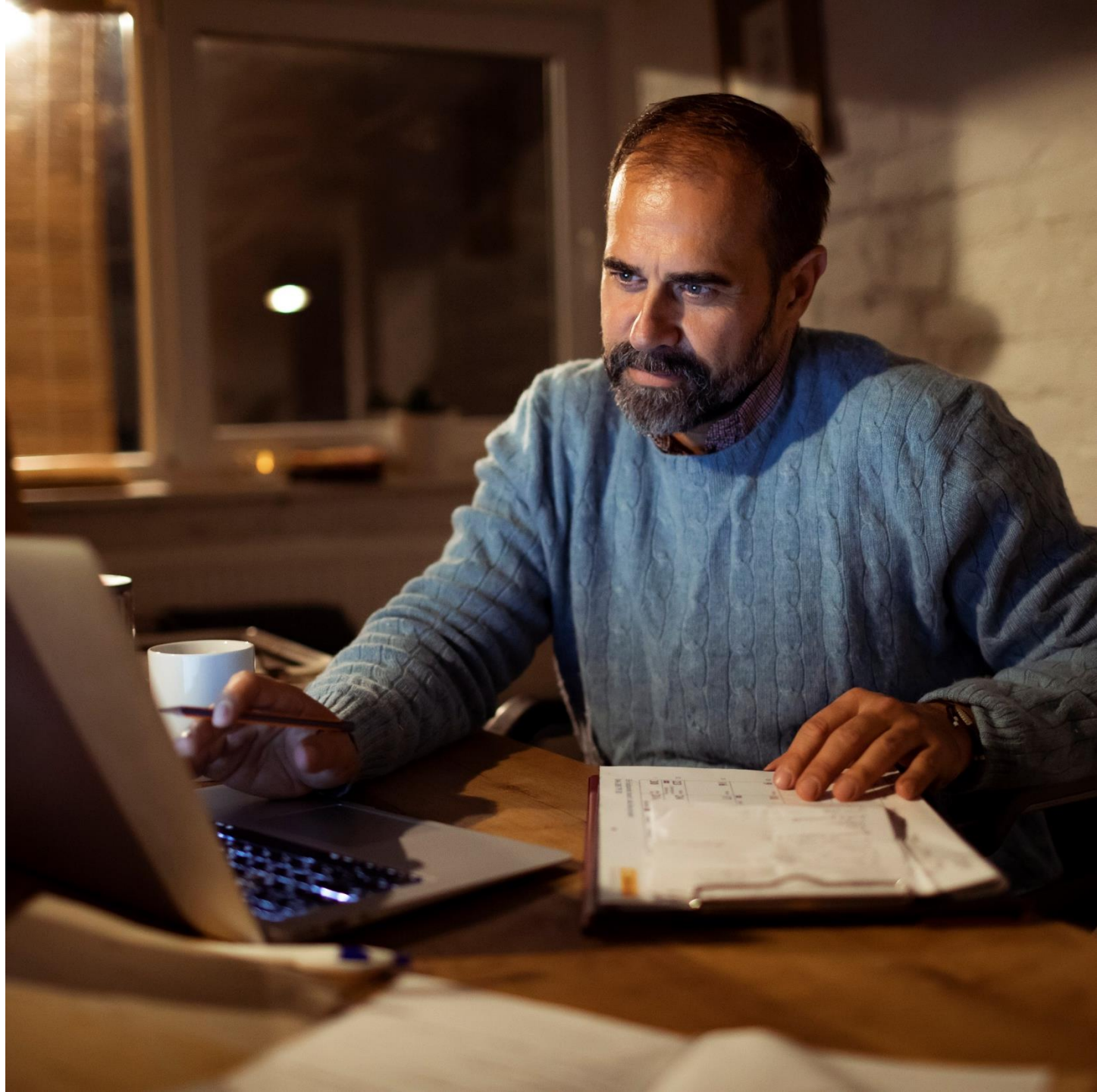


Connects to
Salesforce Sales
Cloud or Microsoft
Dynamics 365 Sales

AI across sales roles and stakeholders



Capabilities and Demo



Maximize seller productivity

AI capabilities in the flow of work that streamline processes and create personalized sales content

Get Copilot assistance to add contacts and update CRM records in Outlook and Teams

View Copilot-generated opportunity summaries and CRM record information directly in Outlook and Teams

Generate personalized sales content with Copilot assistance in Word, PowerPoint, and Excel

The screenshot displays the Microsoft Outlook interface. On the left, a list of emails is visible, including one from Alberto Burgos and another from Daisy Phillips. The main pane shows an email from Alberto Burgos with a subject line "[EXTERNAL] Inquiry regarding...". The email content discusses coffee machines and organic Arabica beans. To the right of the email, a "Copilot for Sales" panel is open, displaying a "New opportunity" summary. The summary includes key information such as the primary contact (Alberto Burgos), the company (Fourth Coffee), and the annual account revenue (\$300,000). Below the summary, there are fields for "Topic", "Est. revenue", "Close date", "Stage" (set to "Develop"), "Account" (set to "Fourth Coffee"), "Owner" (set to "Daisy Phillips"), and "Description".



Seller

Personalize customer engagements

AI-generated sales insights and recommendations for next steps

Use Copilot to generate email summaries and email drafts that pull in CRM platform information

Get sales assistance from Copilot during calls in Teams like meeting preparation notes, sales tips, and competitor insights

View Copilot-generated meeting summaries including sales keywords, KPI analysis, and suggested sales tasks

The screenshot displays a Microsoft Teams meeting window titled "RFP review - Wingtip Toys". The interface includes a video gallery with participants: Mona Kaine, Lydia Bauer, Miguel Silva, and Erik Nasson. A Copilot for Sales panel is open on the right, showing a "Content" section with documents like "RFP Strategic Advisory - Wingtip Toys" and "Eco_1_product_brochure.pptx". Below this, a "Follow-up tasks" section lists three tasks: "Daisy will send email an email with the new quote.", "Alberto and Hillary will get back with info about the storage facilities.", and "Daisy and Alberto will meet on Monday to discuss the terms." A "Participant statistics" table is also visible, showing data for Daisy Phillips and Babak Shammas.

From your org	Talk to listen ratio	Switches per conv...	Avg. pause
Daisy Phillips	32/68	14	12 sec
Babak Shammas	23/77	14	8 sec

Outside your org	Longest monologue
Inna Laar	27 sec
Alberto Burgos	16 sec
Ruth Bengtsson	8 sec



Seller

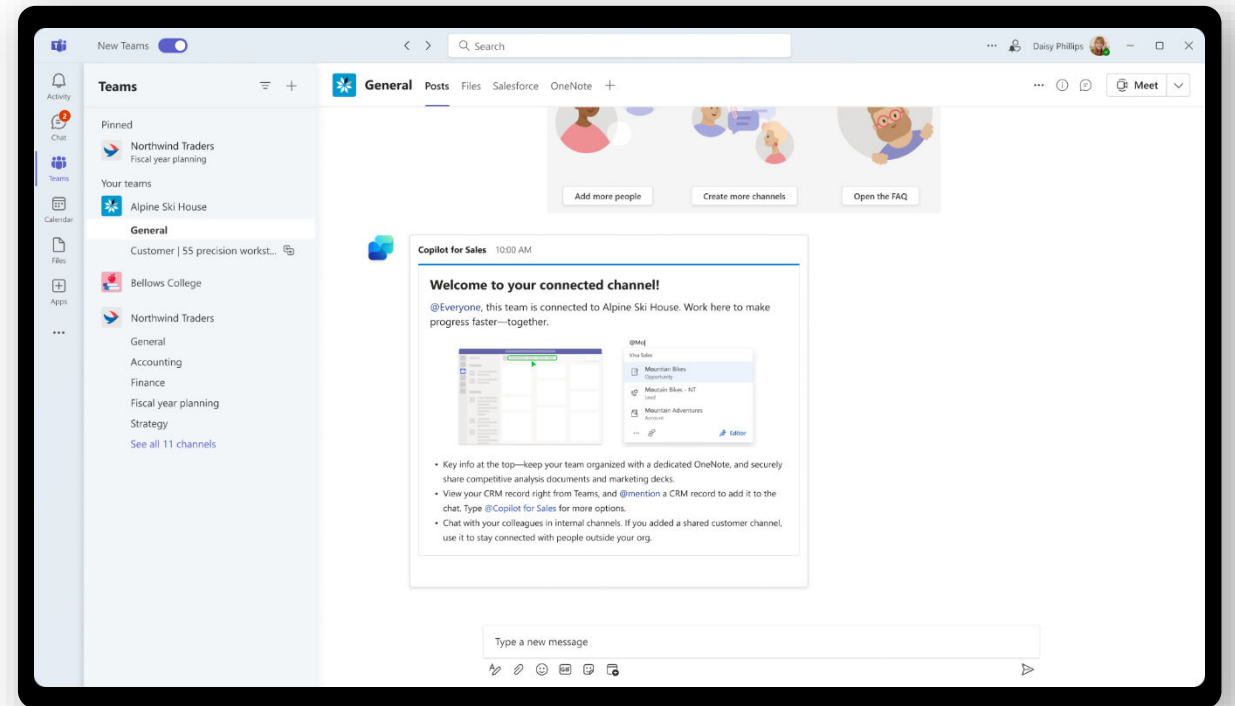
Enhance sales team performance

AI-powered manager insights and collaboration tools

Share contact cards and create deal rooms in Teams that sync with CRM platform data

Get Copilot assistance in OneNote and Loop to create plans, generate ideas, and format content

Get insights on sales pipeline and KPIs by asking questions in natural language with Microsoft Copilot's chat experience



Sales manager

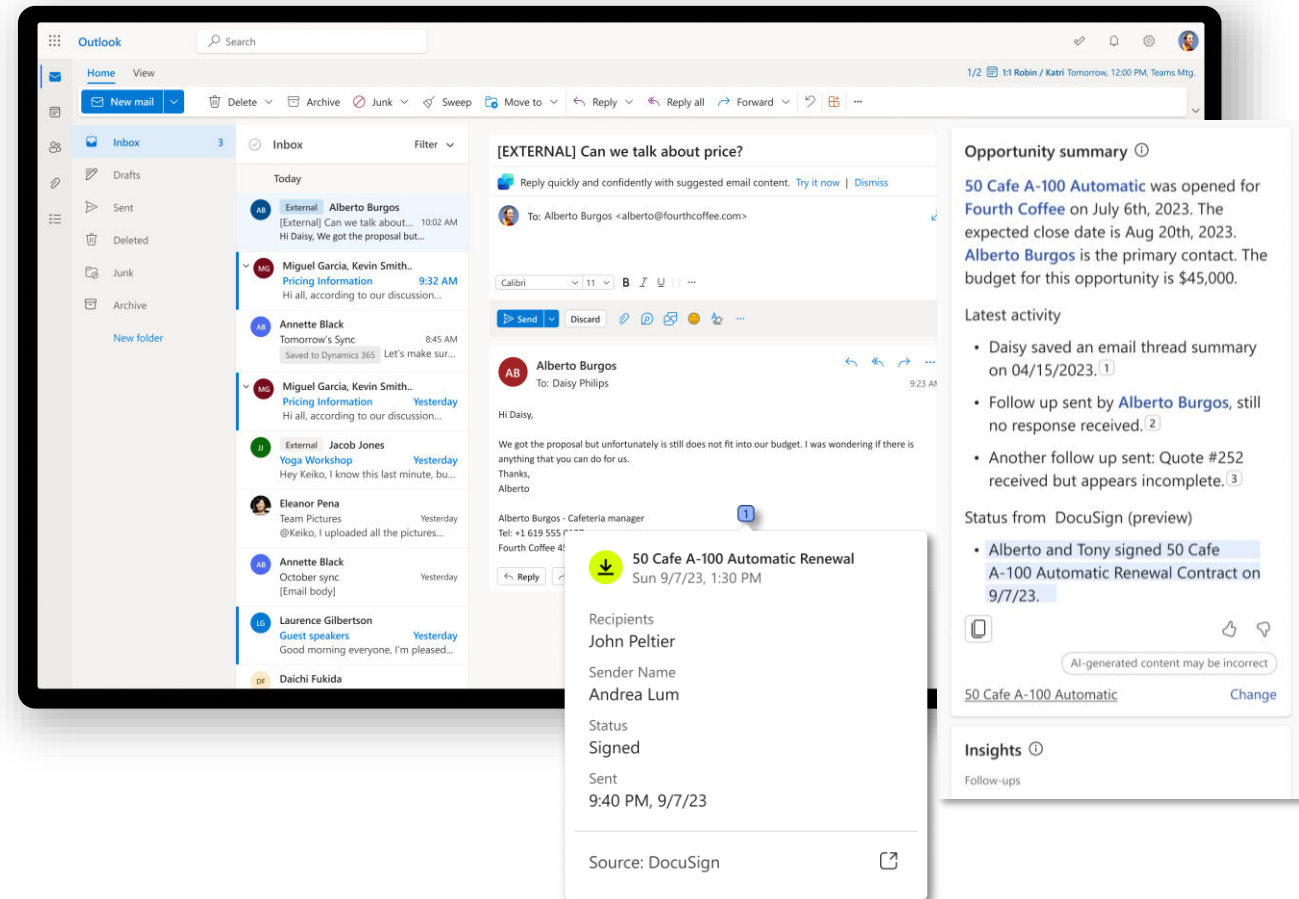
Customize for your needs

Customize for a uniquely tailored sales solution

Add additional fields to sales skills in Copilot for Sales

Extend Copilot for Sales skills to include data and insights from internal and external data sources

Customize Microsoft Copilot experiences with Microsoft Copilot Studio



Sales ops

Rich text editor toolbar with options for font size (Aptos, 12), bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, insert link, insert image, insert video, insert audio, insert document, insert table, insert table of contents, undo, redo, print, share, delete, and more.

- Favorites**
 - Inbox 138
 - Sent Items
 - Drafts 26
 - Add favorite
- Folders**
 - Inbox 138
 - Drafts 26
 - Sent Items
 - Deleted Items
 - Junk Email
 - Archive
 - Notes
 - Conversation History
 - Create new folder
 - Search Folders
- Groups**
 - KB 1
 - New group
 - Discover groups
 - Manage groups

- Inbox** ★
- [Draft] Justin Coaxum Project update
 - Yesterday**
 - MA Microsoft Azure [Action Required] ... Tue 1:34 PM [Action Required] Authentication...
 - MS Microsoft Security Microsoft Entra ID ... Tue 2:14 AM See your Microsoft Entra ID Prot...
 - Last week**
 - MS Microsoft Security Microsoft Entra ID Prot... Tue 5/7 See your Microsoft Entra ID Prot...
 - JC Justin Coaxum Accepted: Meeting wi... Mon 5/6 Meeting with LOB Justin Coaxum...
 - Last month**
 - MS Microsoft Security Microsoft Entra ID Pr... Tue 4/30 See your Microsoft Entra ID Prot...
 - MS Microsoft Security Microsoft Entra ID Pr... Tue 4/23 See your Microsoft Entra ID Prot...
 - MS Microsoft Security Microsoft Entra ID Prot... Tue 4/16 See your Microsoft Entra ID Prot...
 - MS Microsoft Security Microsoft Entra ID Pr... 4/9/2024 See your Microsoft Entra ID Prot...

Send From: justinc@gbbmfg.onmicrosoft.com

To Justin Coaxum <coaxum.justin@gmail.com> Bcc

Cc

Re: Project update

From: Justin Coaxum <justinc@gbbmfg.onmicrosoft.com>
Sent: Wednesday, June 14, 2023 4:33 PM
To: Justin Coaxum <coaxum.justin@gmail.com>
Subject: Re: Project update

I hope this email finds you well. I am writing to follow up on our conversation about Microsoft's Encompass Revenue Management Solution.

As discussed, our solution is designed to help you streamline your billing and account structures, so you can focus on growing your business. We offer a range of services including complex billing and account structures, charging schemes, and usage policies.

In light of this, I am pleased to offer you our Encompass Revenue Management Solution for a total price of \$1,000,000 for 1 unit. This offer includes all the features and services mentioned above.

I believe this solution will be of great benefit to your business and would love the opportunity to discuss it further. How about we meet at 10:00 AM on Wednesday the 26th instead? We can discuss the details of the proposal and answer any questions you may have.

I look forward to hearing from you soon.

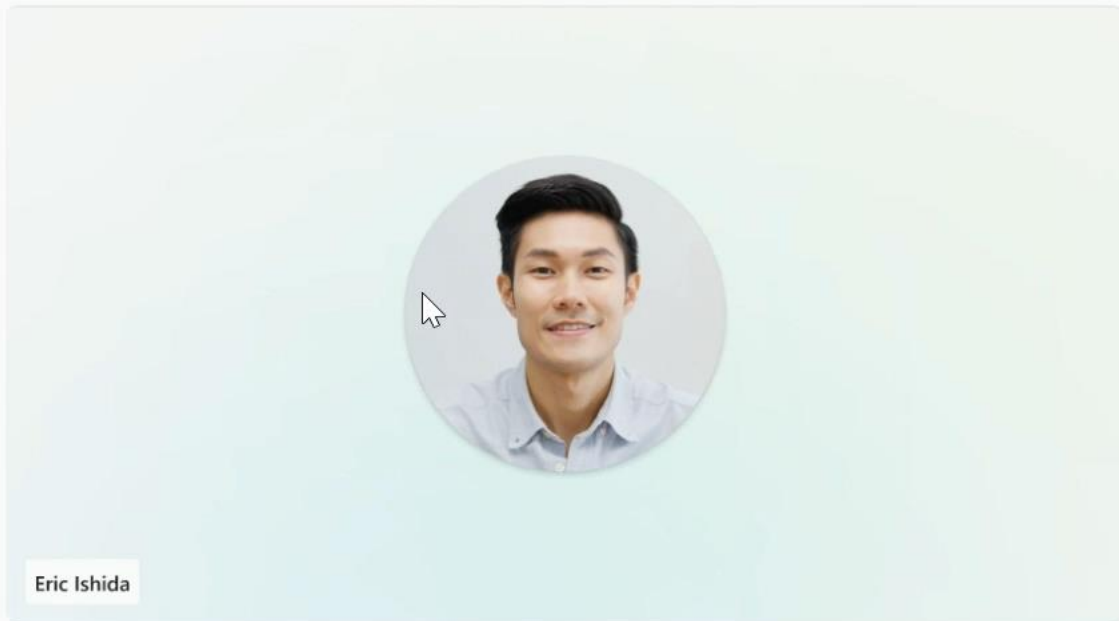
From: Justin Coaxum <coaxum.justin@gmail.com>
Sent: Wednesday, June 14, 2023 4:31 PM
To: Justin Coaxum <justinc@gbbmfg.onmicrosoft.com>
Subject: Re: Project update

I hope this email finds you well. My name is Matthew, and I am a sales representative. We specialize in providing innovative revenue management and billing solutions to businesses like yours.

can become increasingly complex. Our solutions are designed to help you streamline the...
 e of services including:



Radi Bettar



Eric Ishida

Copilot ⋮ ✕

A response could be inaccurate or incomplete. Share feedback to help Copilot improve.

It's just for you
Only you can see your conversation with Copilot.

Copilot 10:23 AM

Here's the key sales info for this meeting:

- **Eric Ishida** expressed interest in the new non-alcoholic beverage line.
- **Contoso** has an annual revenue of \$3,392,000.
- The last deal closed for this account was **500 Portable Dispensers for Contoso** on 10/23/23.

Related file:

Prep for Follow-Up: NA Bevera...
You modified 1 day ago

AI-generated content may be incorrect

Help me answer Eric's question: "Can you provide more information on the packaging?"

Recap the meeting

Ask me anything about this meeting

Draft with Copilot Preview ✕

Describe what you'd like to write, including notes or an outline, and Copilot can generate a draft to help get you started

0/300

Date: 11/27/2023 12/5/2023

Team
All
Seller
All

Activity type
All
Connected record
All
Stage
All
Campaign
All
Tag
All
Call category
All

Clear all slicers

Coaching opportunities Customer insights Conversation recordings

Analyzed conversations

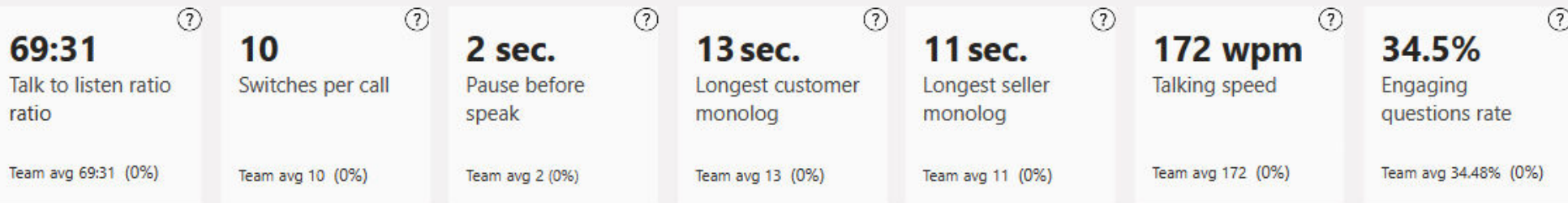


Analyzed hours



Conversational KPIs (based on the selected 20 conversations).

Explore



Sellers' conversation content

Explore



- Home
- Recent
- Pinned
- My Work
 - Copilot
 - Sales accelerator
 - Activities
 - Dashboards
 - Copilot
- Customers
 - Accounts
 - Contacts
- Sales
 - Leads
 - Opportunities
 - Competitors
- Collateral
 - Quotes
 - Orders
 - Invoices
 - Products
 - Sales Literature
- Sales

Copilot Preview

Hi Justin Coaxum,
Welcome to Copilot. Select one of the suggestions below to get started.

Get info	Ask questions	Stay ahead
Get latest news for accounts	What's newly assigned to me	Prepare for sales appointments
Show my pipeline	What's new with my sales records	Show emails that need follow up

Use the menu for more suggestions.

Ask a question about the data in the app. Use / to reference data
0/500

|| microsoft-my.sharepoint.com is sharing your screen. [Stop sharing](#) [Hide](#)

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Public Preview



Microsoft Copilot Studio

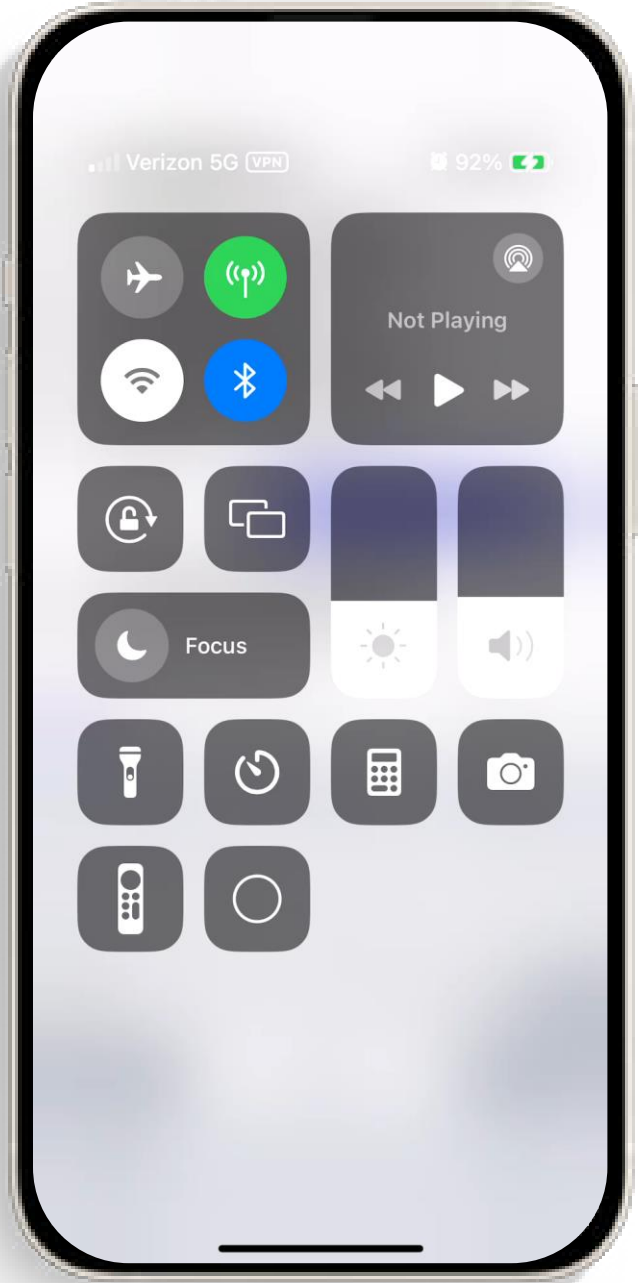
in Copilot for Microsoft 365

Make Copilot work for you

Connect Copilot
to your data
everywhere

Customize copilot to
your business needs
and workflows

Control & manage
customizations
centrally



Copilot for Microsoft 365

Make users more productive where they are already working in Teams, Excel, PowerPoint..

Ask Inline questions about data in Dataverse and connected systems

Business Copilots

Inline working optimized for specific personas and tasks. Embedded in M365 and takes Copilot for M365 dependency, e.g. Copilot for Sales

Process-specific value on top of Q&A.

Dynamics 365 + Copilots

Full business applications for dedicated professionals, powered by Copilot to remove mundane actions and improve outcomes.

Power + Copilot

The fastest way to automate every business process and deliver custom Copilot applications – even atop of existing SaaS apps and legacy systems.

Embedded in the flow of work in M365

Optimized out of the box for professional roles

Fully customizable for specific processes

Extensibility for Copilot for Sales

Extending Copilot for Sales with trusted partners that offer insights and data for each stage of the sales cycle

Insights and data integrations for every stage of the sales cycle



people.ai



 **Seismic**



PROS



DocuSign

People.ai connector with Copilot for Sales

Access buyer benchmarks to predict crucial insights such as inferred win rates and predicted buying power to ensure you're engaging with right people

Leverage AI engagement scores to deeply understand engagement trends, improve health, and course-correct deals when needed

Build stronger customer relationships by identifying colleagues who are connected to key stakeholders

The screenshot shows an Outlook interface with an email thread on the left and a Copilot sidebar on the right. The email thread includes messages from Alberto Burgos, Miguel Garcia, Kevin Smith, Annette Black, Jacob Jones, Yego Workshop, Hty Kikko, Ekanor Pena, and Laurence Gilbertson. The Copilot sidebar displays an opportunity summary for '50 Cafe A-100 Automatic' and provides AI-generated insights. Two callout boxes are shown below the Copilot sidebar, each containing specific insights.

Insight 1: Some of your colleagues have worked with Alberto before. [2](#)

- Top colleagues who know Alberto
Insight from People.ai (preview)
- Mona Kane
Senior sales manager
- Ray Tanaka
Sales specialist
- Daniela Mander
Technical specialist

See metrics and all 25 connections in People.ai

Source: People.ai

Insight 2: Engagement for this opportunity is currently low and trending up. [1](#)

- Engagement for 50 Cafe A-100 Automatic
Insight from People.ai (preview)

Engagement level: 20

28 total activities
3h 43m

3 meetings
56m

25 emails
2h 47m • 65% sent, 35% received

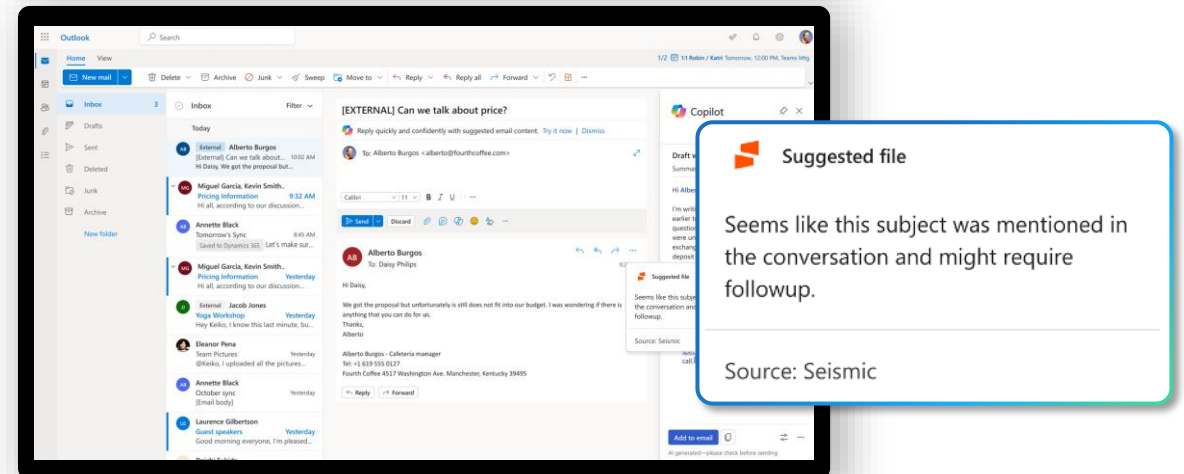
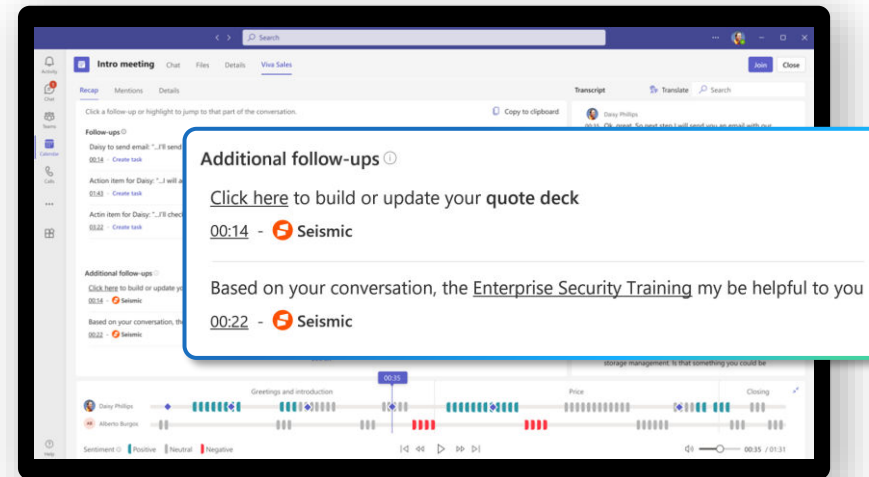
Source: People.ai

Seismic connector with Copilot for Sales

Receive suggested Seismic content related to post-meeting call and email summaries generated by Copilot

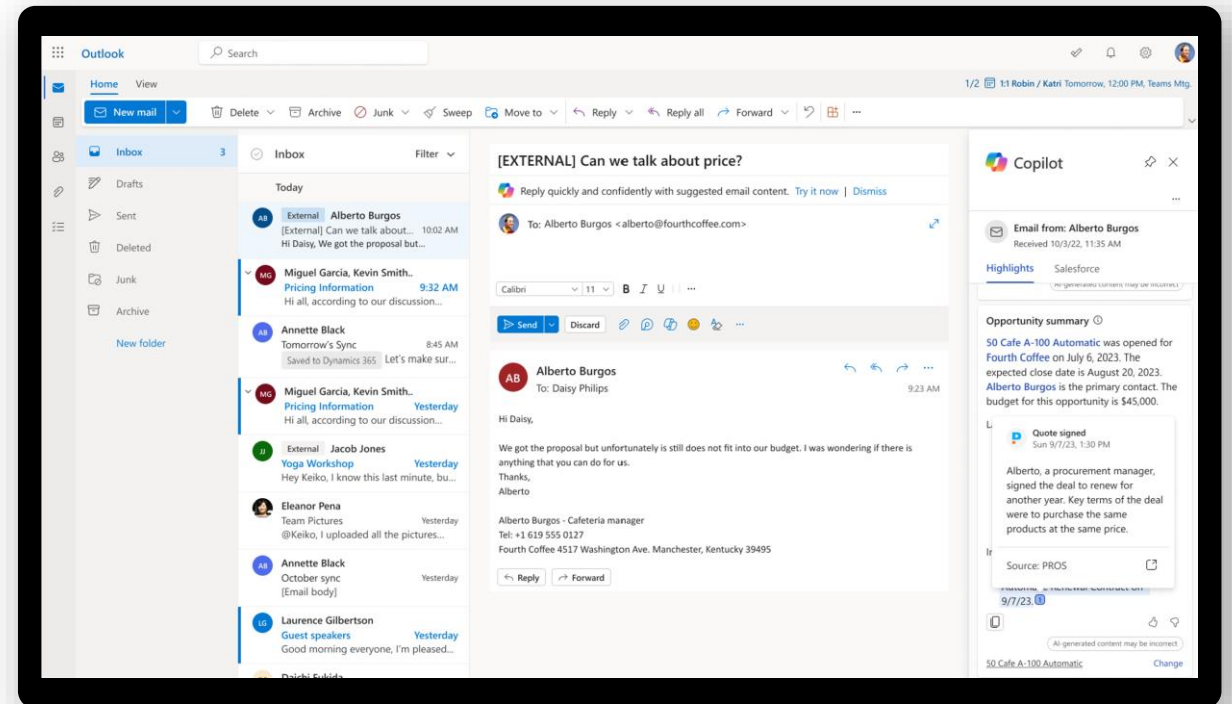
View recommended Seismic content for an opportunity summary and share insights directly with customers through the Digital Sales Room in Seismic

Leverage Copilot to generate email responses to customers, including Seismic content most relevant to them



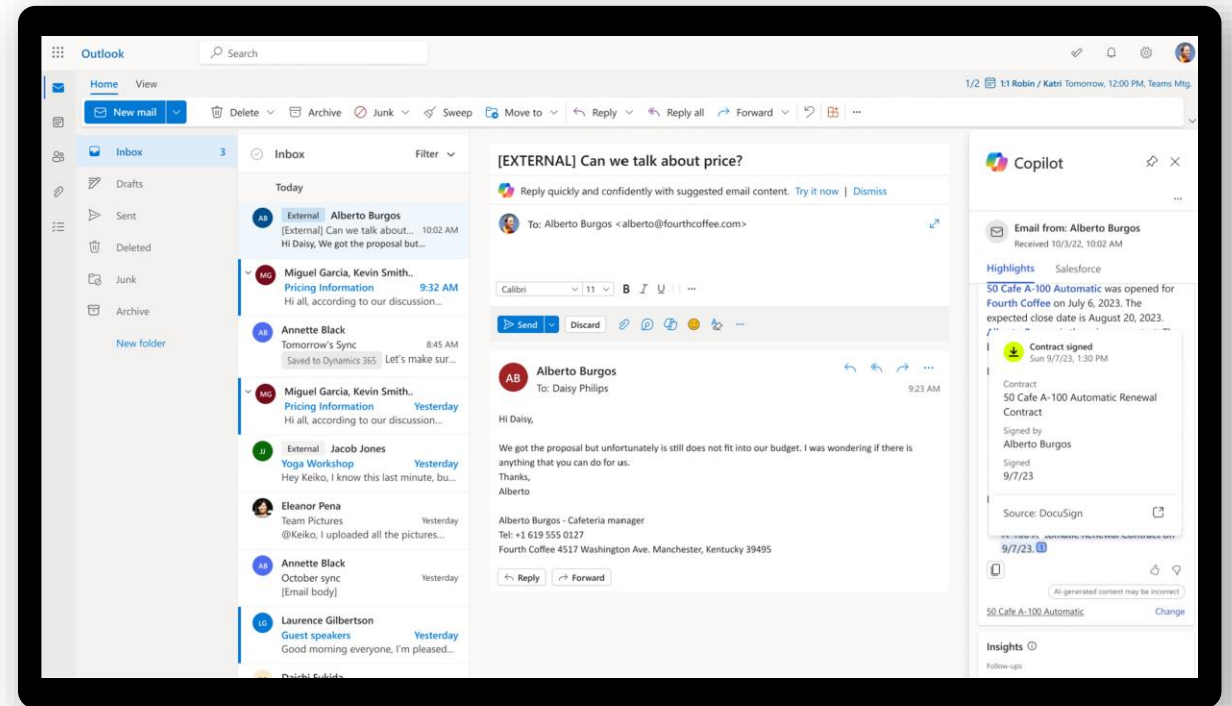
PROS connector with Copilot for Sales using Power Connectors

Bring in relevant pricing information from PROS Smart CPQ for opportunities and accounts from your CRM—all within Copilot for Sales



DocuSign connector with Copilot for Sales using Power Connectors

View DocuSign contracts associated with CRM opportunities and accounts directly within Copilot for Sales in Outlook



Netlogic



“Implementing Microsoft Copilot for Sales has saved time, improved skills, contributed to better work-life balance, and **increased revenue by 25%** in one quarter due to reduced burnout and enhanced efficiency.”

— David Swenson, Business Development Director at Netlogic

Customer:

- Netlogic

Industry:

- Manufacturing

Country:

- United States

Products and services:

- Microsoft Azure
- Microsoft Dynamics 365 Sales
- Microsoft Copilot for Sales

[Read full story here](#)

Situation:

Critical information on customer needs are inconsistent, inaccurate, or missing from seller notes and records. This results in difficulty meeting customer needs in a timely manner.

Solution:

Netlogic sellers use Copilot for Sales to generate meeting summaries for sales calls in Outlook. They can easily share notes and save to their CRM.

Impact:

Copilot standardizes notes across the sales team, decreases discrepancies, and helps sellers save time and focus on their customers and action items, leading to a 25% revenue increase in one quarter.

Avanade



Customer:

- Avanade

Industry:

- Partner Professional Services

Country:

- United States

Products and services:

- Microsoft Dynamics 365 Sales
- Microsoft Copilot for Sales
- Microsoft Teams
- Outlook

[Read full story here](#)

“When our sellers can reduce the time spent on sifting through multiple channels to find what matters with Microsoft Copilot for Sales, we can be **more focused** so that we can deliver with clients and **drive our business strategy faster.**”

— Jennifer Ferrara, Global Business Lead, Avanade

Situation:

Avanade sellers find that updating their CRM platform and tying together relevant threads from Microsoft Outlook and Teams infringes on valuable face time with clients.

Solution:

Avanade sellers use Copilot for Sales to summarize emails, update CRM records, and draft emails.

Impact:

Sellers notice tangible time savings, for example 30 to 60 minutes a week saved with the email summary feature. The quality of sales information has improved, with sales leads noticing more valuable information about their opportunities than ever before.

Microsoft



“[Microsoft Copilot for Sales] has had a **massive impact on our productivity...** It saves time, cuts down on redundant work, and lets our team work to their fullest.”

— Judson Althoff, EVP & Chief Commercial Officer

Customer:

- Microsoft

Industry:

- Software

Country:

- United States

Products and services:

- Microsoft Dynamics 365 Sales
- Microsoft Copilot for Sales
- Microsoft 365

[Read full story here](#)

Situation:

Sellers switch between 40 different tools per day and spend a lot of their time on small tasks. Microsoft’s IT org has a hard time managing the tech sprawl.

Solution:

Microsoft deployed Copilot for Sales to its sellers to automate and simplify tasks, get actionable insights in the flow of work, and learn from AI-powered analytics.

Impact:

83% of Microsoft sellers say that Copilot for Sales makes them more productive, 78% say it keeps them in the flow of work. Sellers are saving on average of 90 minutes per week.

Microsoft Lessons Learned

Seven things we learned deploying Copilot for Sales at Microsoft

Ride the
wave of
excitement



Leverage
leadership at
every level



Start simple
and work
from there



Practice
effective
prompting



Align
enablement
with
employee
needs



Ensure your
underlying
data policies
are secure



Prioritize
CRM data
resilience



Deploying Copilot for Sales

We built a five-step plan to deploy Copilot for Sales to around 60,000 employees worldwide

01



Build a change management plan

02



Provide landing toolkit

03



Launch and deploy to users

04



Listen and learn

05



Reinforce new behaviors

FOREWORD BY NEIL RACKHAM
BESTSELLING AUTHOR OF *SPIN SELLING*

CRACKING THE SALES MANAGEMENT CODE

The Secrets to Measuring and Managing
SALES PERFORMANCE

JASON JORDAN
WITH
MICHELLE VAZZANA

Actions

- D365 Sales – enable Copilot in your environment
- D365 and Other CRM – explore Copilot for Sales
- All – [explore adoption guide](#)

- Customers, Marketing, Copilots, and the Future of Engagement
 - Cottonwood
 - 1:45-2:45
 - Craig Harris





Thank you

Copilot for every role

Infuse Copilot skills into business processes and applications across functions

Copilot for Microsoft 365

AI assisted productivity



Copilot for Sales | Service | Finance

Extend Microsoft 365 with role-specific Copilot skills

Connects to 1st and 3rd party data

Dynamics 365 | Salesforce | Zendesk | ServiceNow | SAP

Copilot in Dynamics 365

Natively integrated Copilot and AI Innovation



Sales specific value embedded directly within Dynamics 365 Sales

Copilot experiences designed for Sales

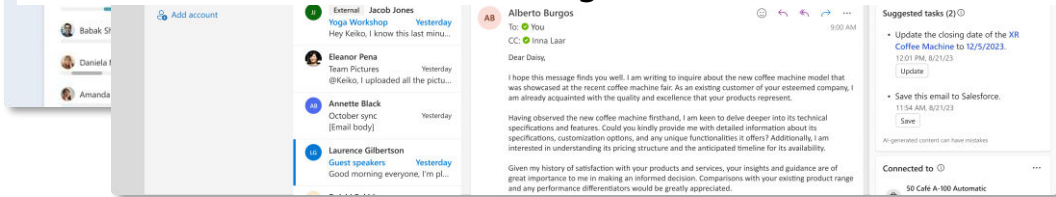


Copilot for Sales is an AI-driven sales assistant designed to empower sellers with insights, recommendations, actions, and up-to-date CRM data across all M365 applications.*



Designed For:

- Sales teams who engage with customers using M365 tools and use CRM systems to keep track of leads, customers and deals.
- Sellers who collaborate in teams on deals using Microsoft Teams
- Sellers who conduct calls using Teams

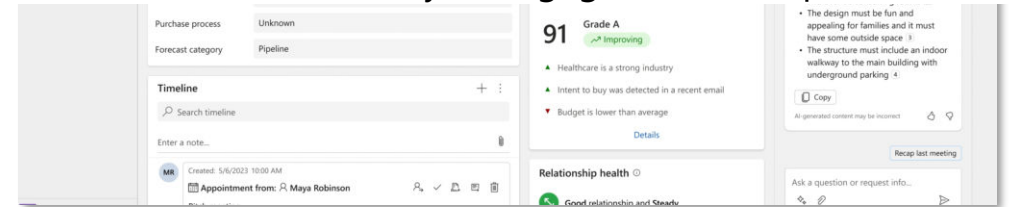


Dynamics 365 Sales is our core Sales offering, designed to help businesses manage their sales processes, improve customer engagement, and drive revenue growth.



Designed For:

- Sellers who spend most of their day inside the CRM application
- Prospecting / business development roles who use the whole suite of CRM functionality to engage on a sales process



Natural language AI-powered chat directly within the Dynamics 365 shell.

* Copilot for Sales includes Copilot for Microsoft 365

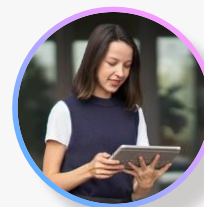
Enhance Copilot for Microsoft 365 with capabilities for specific teams



Copilot for Microsoft 365



Microsoft Copilot for Sales



Microsoft Copilot for Sales

Users that benefit most

Information Workers

Sellers, Sales Managers, Sales Operations

Out-of-the-box integrations

Salesforce Sales Cloud
Microsoft Dynamics 365 Sales

Sample use-cases

- Draft email replies
- Summarize emails to catch up quickly

- Draft email replies **using CRM data and insights**
- Summarize emails **with customer context from CRM and see sales-specific suggested actions**

- Draft a document from multiple source files
- In meetings, get answers on meeting discussions
- Summarize meeting with action items

- Draft a document (e.g., sales brief) **using CRM records as source**
- In meetings, **get real-time sales tips and opportunity summary from CRM**
- Summarize meeting; **Add action items as tasks in CRM directly from Teams, analyze sales keywords**

- Generate meeting prep document

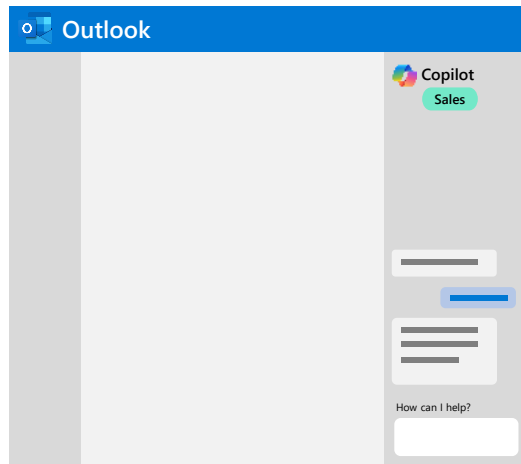
- Generate meeting prep document **using data from CRM including opportunity and deal info**

- Sales specific value built on top of Copilot for M365 for **combined experience**
- Customers can **buy just one SKU for both products**

Copilot for Sales

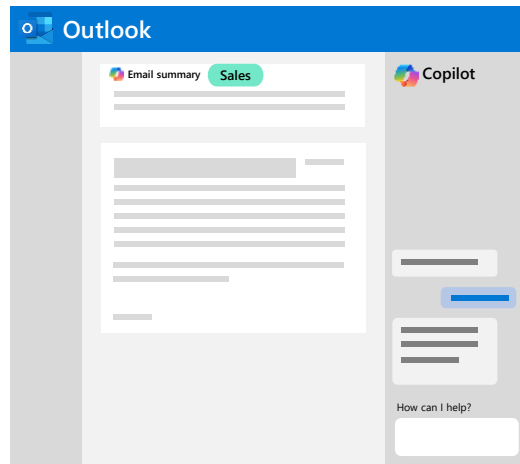
A **Copilot App** that assists sellers everywhere they work, bringing integrated data, enrichment, workflows, and insights that **bridge Microsoft 365 productivity tools and any business system of record**.

App Chat



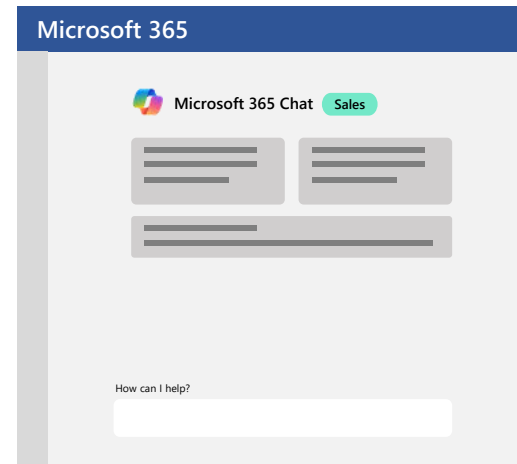
Ask questions of your CRM data in the context of customer emails and appointments.

Embedded AI



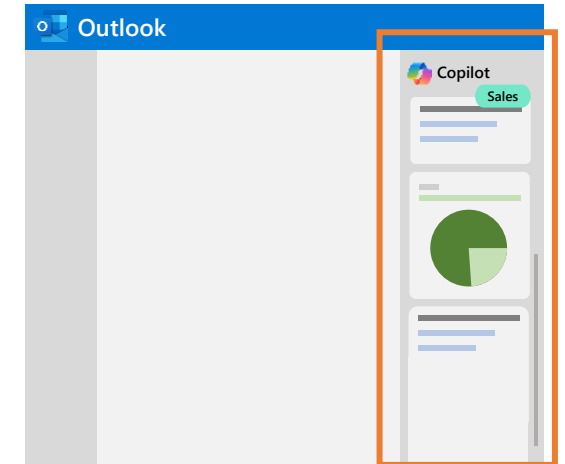
Write better emails with AI-generated content infused with enrichments from your CRM.

M365 Chat



Blend CRM data with your M365 data using natural language right from the home for Microsoft 365.

Contextual Side Car

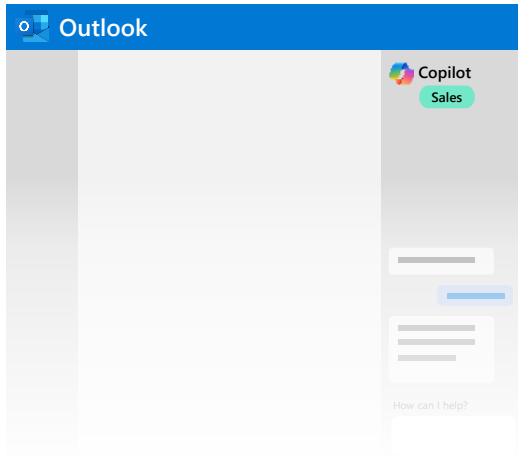


Curated CRM data, insights, and suggested actions in the context of the email you're reading/writing. **This is a non-chat experience.**

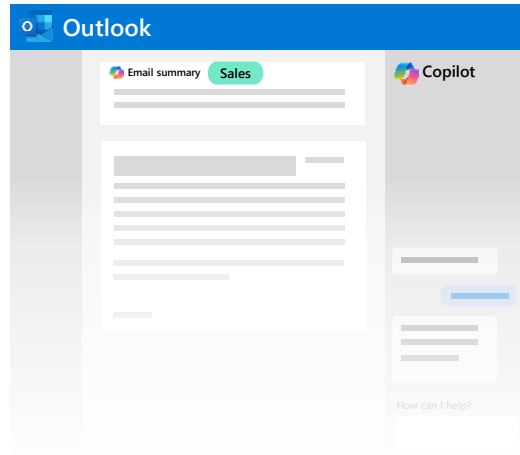
Copilot for Sales lives within and alongside **Copilot for Microsoft 365**. It doesn't replace Copilot for Microsoft 365, but instead brings a Sales point-of-view to each experience.

Copilot for Sales

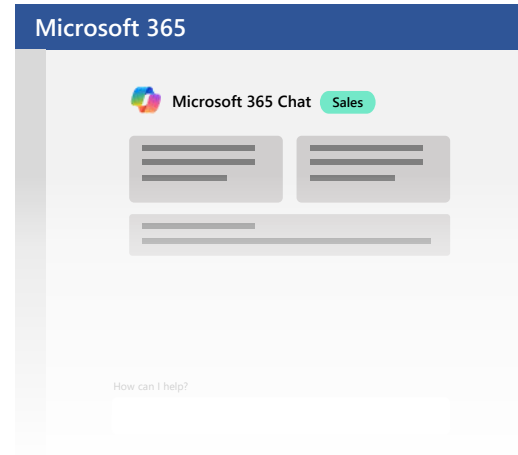
App Chat



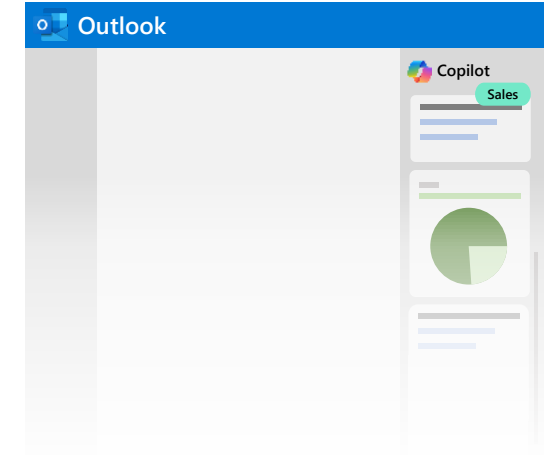
Embedded AI



M365 Chat



Contextual Side Car



 Teams

 Word

 PowerPoint

 Excel

 OneNote

“ We're making Microsoft 365 speak Sales. ”

Microsoft Copilot for Sales roadmap

FEATURES AND TIMING ARE SUBJECT TO CHANGE

Outlook

February 2024

Email

- Sales email summaries with BANT analysis and buying intent
- Sales email generation
- Suggested CRM updates to add and update records
- Save emails to CRM

March 2024

Email

- Issue & Question detection in email summaries
- @mention CRM entities

April-May 2024

Email

- CRM record search
- Competitor analysis in email summaries

Teams

February 2024

During the meeting

- Real-time call insights with opportunity summary and brand/competitor analysis

After the meeting

- Sales meeting summary with KPIs and suggested tasks

Collaboration Spaces

- Private and public sales workspaces with suggested planner tasks

March 2024

After the meeting

- Manager Power BI reports

April-May 2024

During the meeting

- Natural language chat inquiries
- Suggested CRM updates to add and update records

Word

February 2024

Content generation

- Meeting preparation brief

April-May 2024

Content generation

- RFP responses

PowerPoint

April-May 2024

Content generation

- Pitch deck creation

OneNote

April-May 2024

CRM connection

- Save notes to CRM

Microsoft Copilot

February 2024

Chat experience

- CRM record and sales meeting insights (Dynamics 365 support)
- KPI insights like Conversion rate, sales pipeline, sales cycle, and win rate (Dynamics 365 support)

March 2024

Chat experience

- Support for Salesforce
- Brand/competitor analysis

April-May 2024

Chat experience

- Advanced sales insights

Copilot Dashboard

April-May 2024

- Adoption, impact, and readiness reporting

April-May 2024: Outlook and Teams mobile app experiences

Why Microsoft

97%

Fortune 500
companies use
Business Applications

500k+

Microsoft business
application customers

16

Analyst reports where
Microsoft is positioned
as a Leader

1

Common data model
across all business
applications

Leader

- **The world's first copilot** in both CRM and ERP
- **Collaboration and productivity** infused in business processes
- **Low-code platform** embedded in Dynamics 365

Ensure your success with Microsoft Unified

Maximize your investment with expert-led services from planning to deployment and beyond



Protect your organization

Get advice to proactively manage IT health and maximize uptime with a comprehensive response plan



Accelerate your outcomes

Partner with a team of Microsoft experts who know you to co-design, configure, and implement solutions



Enable you to do more

Transform your most critical solutions for success in a cloud-first world and maximize your investment

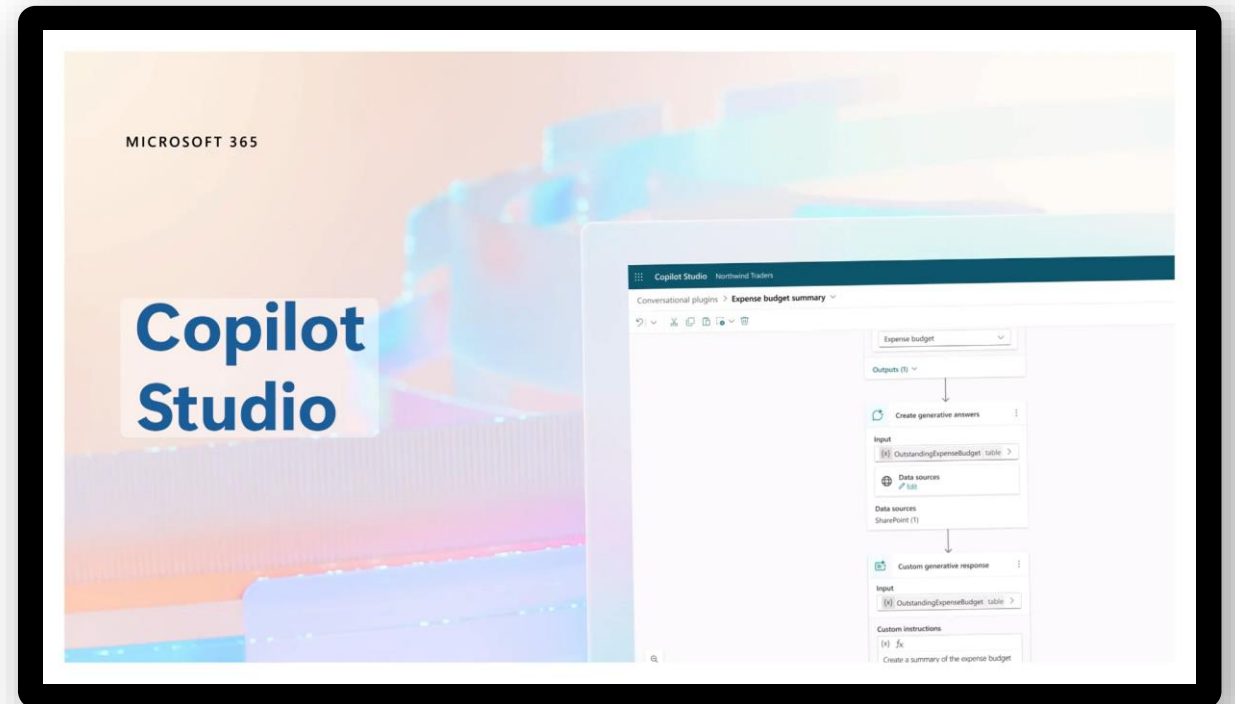
Appendix

Customize Copilot for your unique business needs

With Copilot Studio in Copilot for Microsoft 365, you can extend and customize Copilot to work the way you need

- **Connect Copilot to your data** in CRM, ERP, finance systems and more, using 1100+ standard and premium connectors.
- **Incorporate your business processes** into Copilot
- **Configure Copilot responses** to specific questions on topics like compliance, HR policies and more.
- **Publish and manage Copilot customizations** in one central place

Build your own Copilot: with Copilot Studio¹, quickly and easily create your own conversational Copilot for customers or employees with an intuitive low-code tool



Copilot Studio

¹Available standalone

Licensing



Microsoft Copilot

	Copilot	Copilot for Microsoft 365	Copilot for Sales	Copilot for Service
	Free	\$30	\$50	\$50
Foundational capabilities	●	●	●	●
Web grounding	●	●	●	●
Commercial data protection	●	●	●	●
Enterprise-grade data protection		●	●	●
Microsoft Graph grounding		●	●	●
Microsoft 365 Apps		●	●	●
Copilot Studio		●	●	●
Role-specific capabilities			●	●





Licensing details Copilot for Sales

Dynamics 365 Sales Enterprise	Dynamics 365 Sales Premium	Copilot for Sales	Capabilities	GA	Where experiences surface
\$95	\$135	\$50	Enterprise Sales force automation (SFA) • Lead and opportunity management, reporting and forecasting, quotes, orders and invoicing, etc.	Available now!	Dynamics 365 Sales
			Advanced SFA • Automated sales sequences, predictive scoring, relationship analytics, predictive forecasting, etc.	Available now!	
			Copilot Experiences in D365 Sales • Natural language inquiries, full-screen view, opportunity and lead summaries, latest news, meeting preparation summary	Available now!	
			Standard Copilot Experiences in Outlook • Create, read, update, and delete CRM records, email summaries, draft email replies, opportunity summaries	Available now!	Outlook
			Standard Copilot Experiences in Teams • Meeting summaries with conversation intelligence, deal rooms, share contact cards	Available now!	Teams
	Sold separately		Copilot for M365 Experiences • Copilot in Microsoft 365 Apps, Copilot Studio, Microsoft Graph, chat experiences, etc.	Available now!	Copilot for Microsoft 365 (\$30)
	1		Advanced Copilot Experiences in Outlook • Recommend CRM updates, BANT (budget, authority, need timing) analysis, buying intent, etc.	After February 2024	Outlook
	1		Advanced Copilot Experiences in Teams • Meeting preparation, recommended CRM updates, real-time call insights, BANT analysis, etc.	After February 2024	Teams
	1		Copilot Experiences in other M365 apps • Generate meeting prep briefs in Microsoft Word; Generate pitch-decks in Microsoft PowerPoint	After February 2024	Microsoft 365 Apps

¹Only available after purchase of Copilot for Microsoft 365

Licensing details with Copilot for Microsoft 365

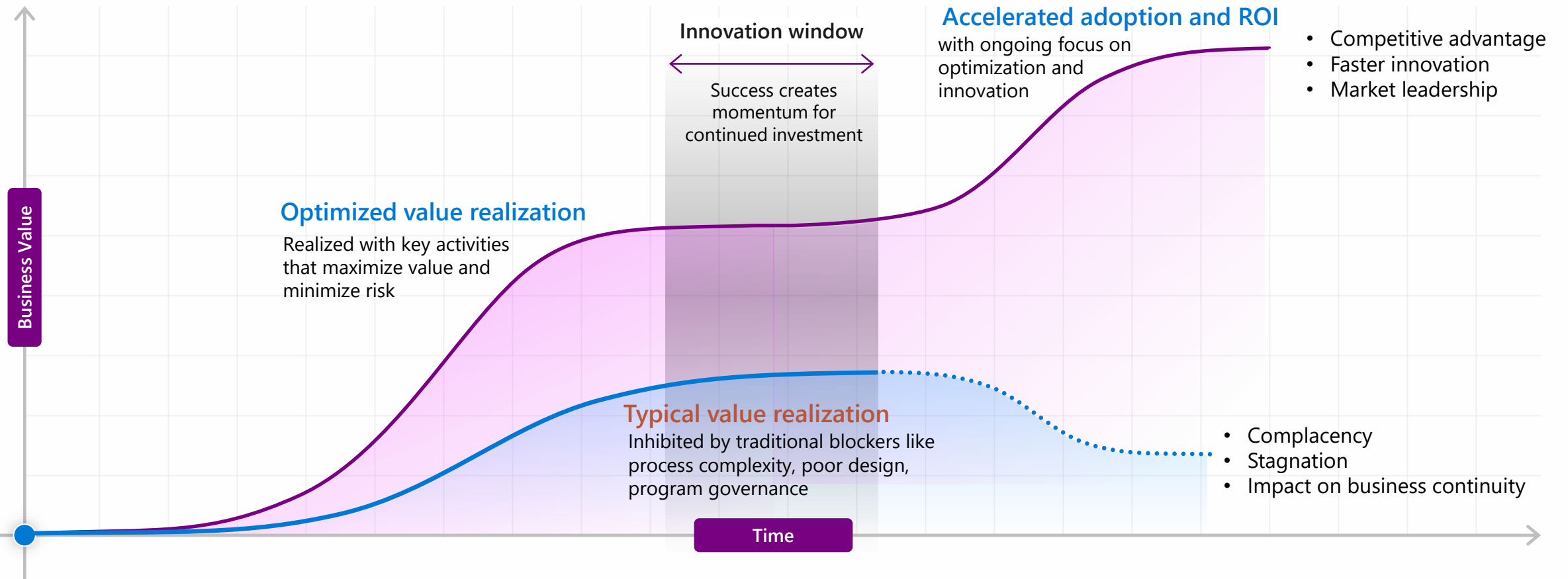
Copilot for Sales includes everything in Copilot for Microsoft 365 *plus* sales insights from CRM platform

	App/scenario	Capability	Copilot for Microsoft 365	Copilot for Sales
 Outlook	Email read	Highlight Key Emails	Y	Y
		Summarize Email Threads	Y	+ Sales value
		Save Emails and Appointments to CRM		+ Sales value
		Auto Update Contact Info To CRM		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	Email composure	Draft New Email	Y	+ Sales value
		Draft Reply Email	Y	+ Sales value
		Use Excel Data In Email Reply	Y	Y
		Set Up Teams Channels From Outlook (Collab Spaces / Deal Rooms)		+ Sales value
	Calendar	Read / Write / Summarize access to related CRM entities		+ Sales value
Meeting Prep w/ CRM Opportunity Summary			+ Sales value	
 Teams	During meeting	Read / Write / Summarize access to related CRM entities		+ Sales value
		Catch Me Up, Q&A On Discussion So Far, Wrap Up	Y	Y
		Real-time sales tips (Competitor/Brand mentions)		+ Sales value
	Post meeting	Summary, Notes & Tasks	Y	Y
		Follow Up Q&A	Y	Y
		Sentiments, Talking Speed, Talk To Listen Ratio for seller self-improvement		+ Sales value
		Create CRM Tasks from Follow-ups		+ Sales value
	Team/Channel	Collaborate using Collab Spaces - Account and Deal Room sales templates		+ Sales value
	Chat	Summarize and Q&A On Content	Y	Y
	Meeting extension	Search and share CRM entities as adaptive cards across Outlook and Teams		+ Sales value
 Word	Prepare for meeting	Generate meeting preparation brief	Y	+ Sales value
 Copilot chat	Get sales insights	Q&A with sales insights on conversion rate, sales pipeline, sales cycle, and win rate		+ Sales value

Microsoft Unified

Maximize your investments with Microsoft Unified

Accelerate your time to value with expert-led services from planning to deployment and beyond



Deep expertise to enhance business outcomes

With direct access to Microsoft experts, you can deploy and implement Dynamics 365 with confidence

What you want to achieve...



Ensure deployment and implementation of Dynamics 365 solution is successful



Reduce risks in the implementation project



Help teams navigate new solution implementation successfully



How we deliver...



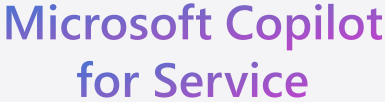



Assess current environment, analyze issues and risks, and workshop to ensure successful go-live

Technical and functional guidance, risk identification, and mitigation to help de-risk the project

Knowledge transfer sessions, coaching, and deep training to prepare your teams for deployment and optimization of Dynamics 365 with AI Copilot



Enhance Copilot for Microsoft 365 with capabilities for specific teams

	 Microsoft Copilot for Sales	 Copilot for Microsoft 365	 Microsoft Copilot for Service
			
Users that benefit most	Sellers, Sales Managers, Sales Operations	Information Workers	Customer Service Agents
Out-of-the-box integrations	Salesforce Sales Cloud Microsoft Dynamics 365 Sales		Salesforce, Service Now, Zendesk
Sample use-cases	<ul style="list-style-type: none"> Draft email replies using CRM data and insights 	<ul style="list-style-type: none"> Draft email replies 	<ul style="list-style-type: none"> Draft email replies analyzing CRM data, internal knowledge, and past cases
	<ul style="list-style-type: none"> Summarize emails with customer context from CRM and see sales-specific suggested actions 	<ul style="list-style-type: none"> Summarize emails to catch up quickly 	<ul style="list-style-type: none"> Summarize emails automatically into case summaries with details from Salesforce and other sources
	<ul style="list-style-type: none"> Draft a document (e.g., sales brief) using CRM records as source 	<ul style="list-style-type: none"> Draft a document from multiple source files 	<ul style="list-style-type: none"> In meetings, get answers and insights from contact center systems and other knowledge sources
	<ul style="list-style-type: none"> In meetings, get real-time sales tips and opportunity summary from CRM 	<ul style="list-style-type: none"> In meetings, get answers on meeting discussions 	<ul style="list-style-type: none"> Summarize meeting ; Add details to customer’s Salesforce contact record directly from Teams/Outlook
	<ul style="list-style-type: none"> Summarize meeting; Add action items as tasks in CRM directly from Teams, analyze sales keywords 	<ul style="list-style-type: none"> Summarize meeting with action items 	<ul style="list-style-type: none"> Get answers from Copilot for Service in agent console

A seller's day-in-the-life with Copilot for Microsoft 365

Summarize messages from customer

 Microsoft Copilot

Summarize emails and Teams chats from Contoso.



Prepare offer value document for customer

 Microsoft Excel

Show all data insights from *FinancialForecast2024.xls*



Take call with customer

 Microsoft Teams

Show all questions asked during the call.



Propose a meeting

 Microsoft Outlook

Draft an email to Contoso proposing a meeting.



Prepare for meeting

 Microsoft PowerPoint

Create pitch deck for meeting using *Fabrikam meeting brief.doc*



Review meeting and conduct follow-ups

 Microsoft Teams

Summarize meeting and show follow-up actions.



A seller's day-in-the-life with Copilot for Sales

Summarize messages from customer

 Microsoft Copilot

Summarize emails and Teams chats from Contoso.



Pursue opportunity

 Microsoft Outlook

Draft an email to Contoso with **product details from Salesforce**, proposing a meeting.



Prepare for meeting

 Microsoft Word

 Microsoft PowerPoint

Create a **sales meeting preparation brief**. Create pitch deck for meeting using *Fabrikam meeting brief.doc*



Review meeting and conduct follow-ups

 Microsoft Teams

Summarize meeting with **sales-specific** keywords and actions. **Post summary to deal room**.



Propose a meeting

 Microsoft Outlook

View **opportunity summary from Salesforce**. Update opportunity details and **sync to Salesforce**.



Prepare offer value document for customer

 Microsoft Excel

Show all data insights from *FinancialForecast2024.xls*

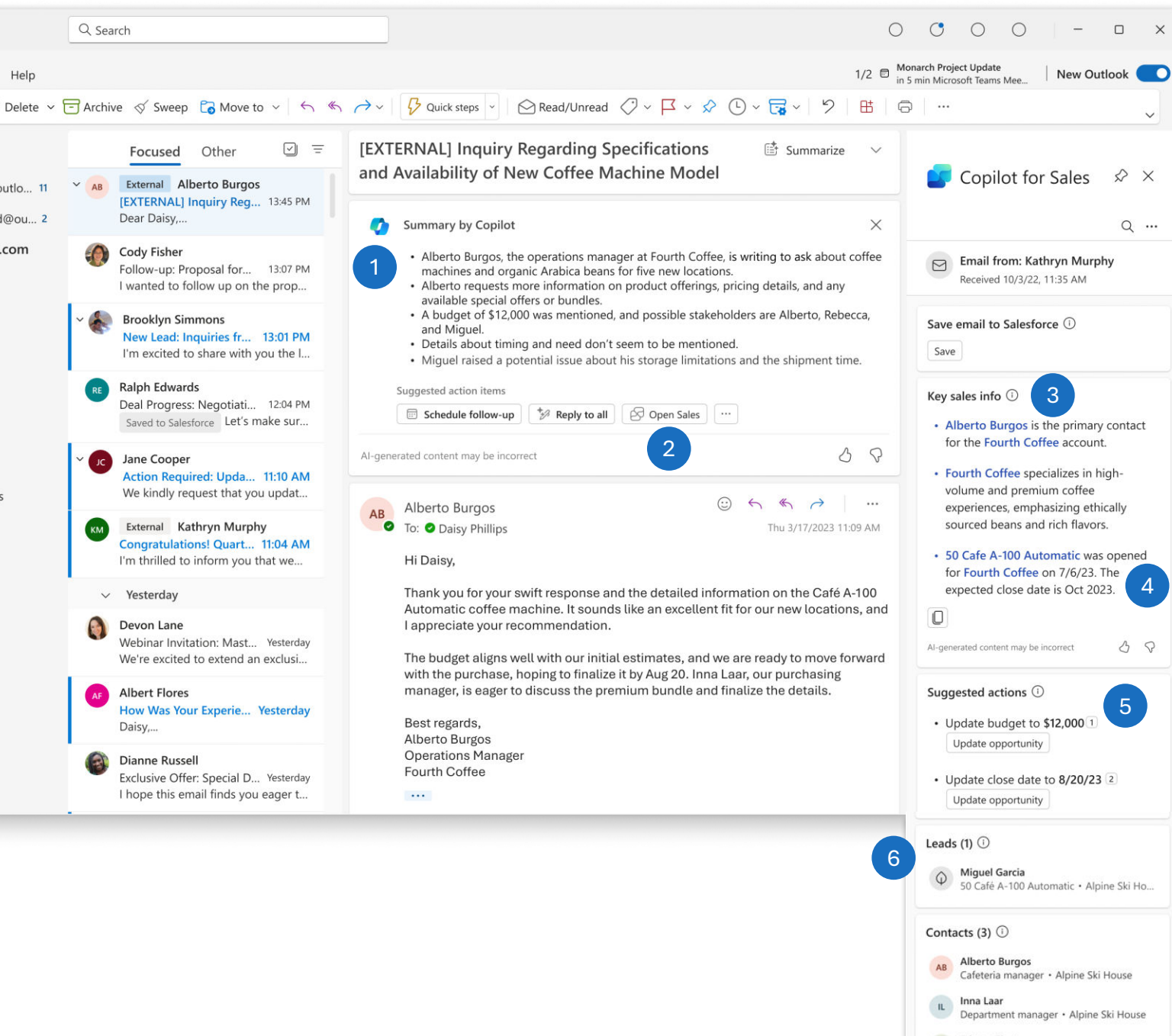


Take call with customer

 Microsoft Teams

Show **sales tips** and related information about **competitors** mentioned during call.

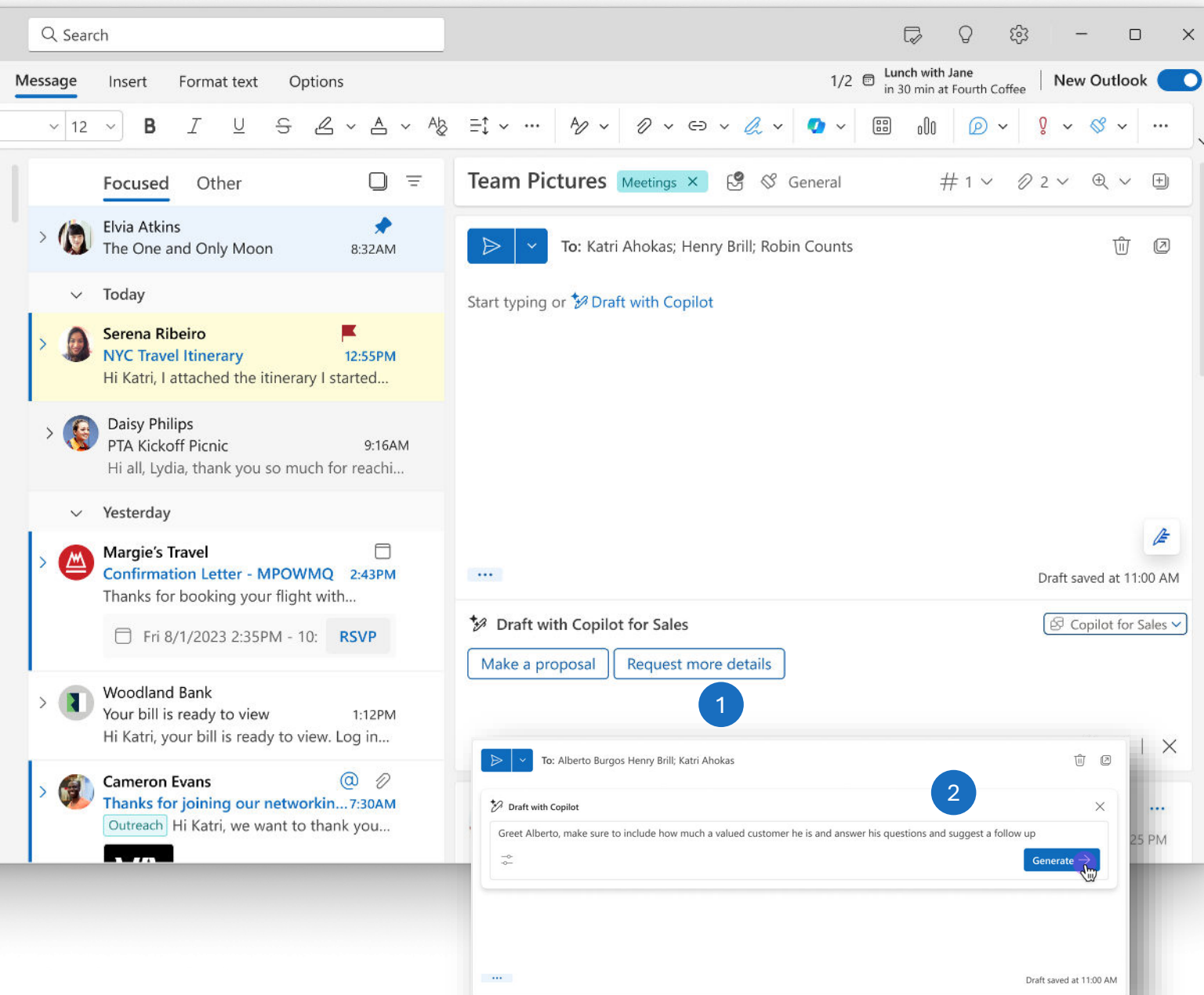




Outlook Email Summary

Copilot for Sales helps sellers catch up on email in a snap

- 1 Email summary provided by Copilot for Microsoft 365 enriched with information for the CRM and key sales insights – Budget, Authority, Needs, Timing, buying intent and more
- 2 Email summary has a link to open Copilot for Sales sidebar
- 3 Sales-specific information about the customer
- 4 Links to recent deals related to this customer or account
- 5 Sales-specific suggested next actions
- 6 Related CRM records



Outlook Email Draft

Copilot for Sales generates customer replies using sales prompts, data, and insights

- 1 Suggested sales-specific email prompts
- 2 Email draft provided by Copilot for Microsoft 365 enriched with CRM information and sales insights like BANT (Budget, Authority, Needs, Timing) analysis, buying intent, and more

Meeting prep for Relecloud · Saved

Search (Alt + Q)

Comments Catch Up Editing Share

Aptos (Body) 11 B I U

Draft with Copilot Preview

Help me prep for the pitch meeting with Relecloud meeting 1

9/300

Generate Reference your content

Open tasks for this opportunity 2

Subject	Priority	Due	Created on	Owner
Installation of a new panel in new cafeteria building	High	In progress	07/06/2023	Eva Terrazas
Low production from 3 solar panels	High	In progress	06/06/2023	Inna Laar
Send new autumn catalog	Low	Delayed	06/01/2023	Inna Laar

Recent meeting insights

Highlights and follow-ups from your last recorded meeting about 10 XL Coffee machines

Intro meeting for new coffee machines deal

07/03/2023 2:00 PM – 2:30 PM

Highlights

Alberto had questions about some of the games he was unable to attend, and why he couldn't exchange his tickets. Daisy explained the deposit process for next season, and how it works.

Follow-ups

- Daisy will send Alberto the refund information on Friday
- Alberto will confirm next week if he can place a deposit

Email thread summary

Highlights and follow-ups from your last recorded meeting about 10 XL Coffee machines

- Alberto from Trey Research requested updated price information for monthly espresso beans order from Daisy Philip
- Alberto added his colleague Miguel in CC for the new store location in San Diego and asks for an estimate of the shipping time to their new location
- Alberto wanted to discuss purchasing coffee machines with a range of cartridge and milk options and self-cleaning features for convenience in their new San Diego office with Daisy on their weekly call

Still working on it... Stop generating ESC

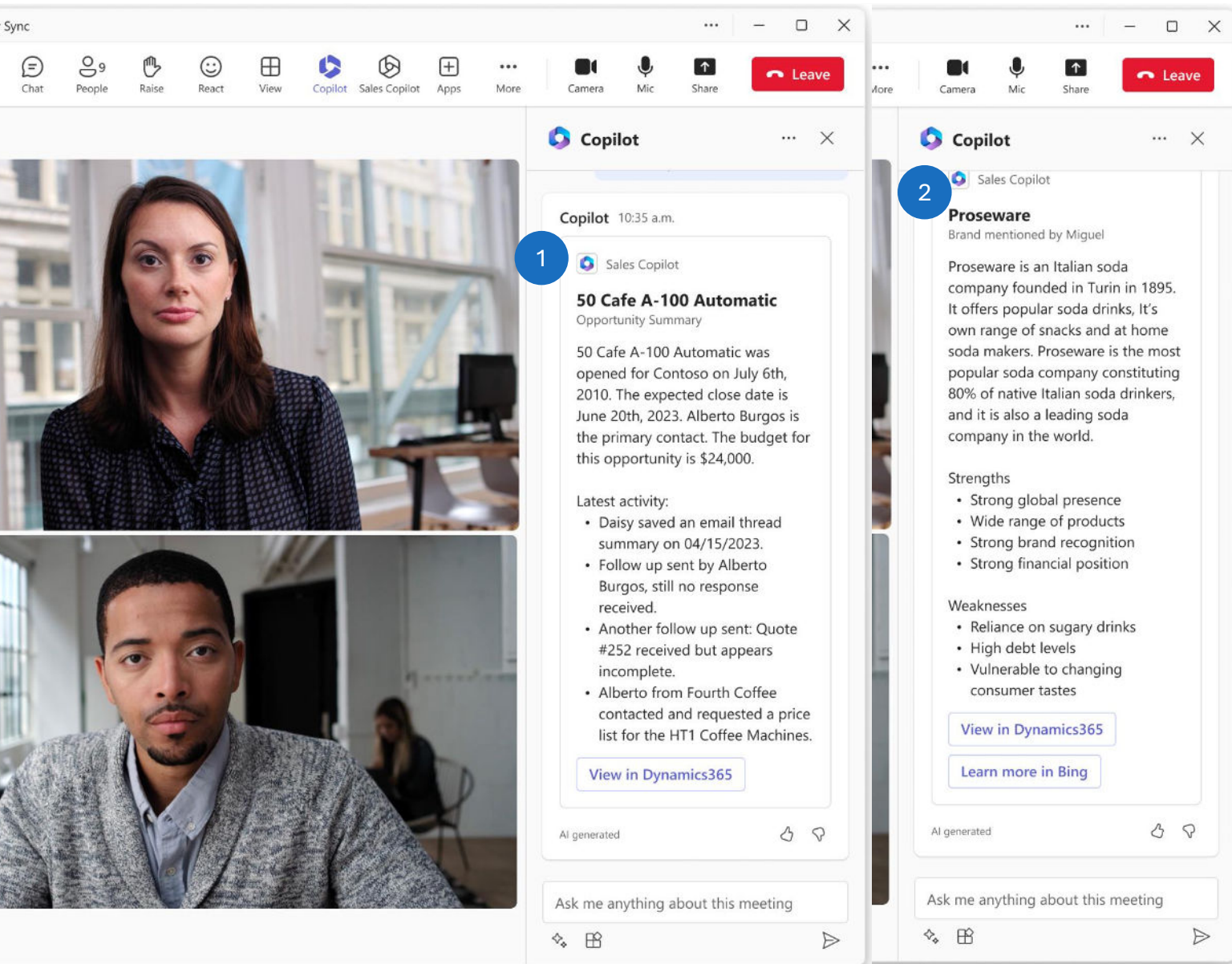
Page View Web View 100% Fit Give Feedback to Microsoft

Word Content Generation

Sales meeting preparation brief

Copilot for Sales helps sellers prepare for customer engagements

- 1 CRM records included directly into the content generation prompt
- 2 CRM insights and enrichment blended directly into the generated content



Teams In Meeting

During meetings, Copilot for Sales brings sellers real-time information and tips

- 1 Opportunity Summary**
Opportunity summary surfaces summarizing previous action items, notes and other related CRM information
- 2 Real-time Brand/Competitor detection**
When a brand name is mentioned, Copilot detects it and surfaces a SWOT analysis and overview of the brand from Bing's database

Navigation: < > Search | Daisy Phillips | Copilot

Recap | Recordings & Transcr... | Copilot for Sales

Content

- RFP Strategic Advisory - Wingtip Toys
- Eco_1_product_brochure.pptx

Notes | AI notes | Mentions | Sales | +2

Follow-up tasks

- 1. Daisy will send email an email with the new quote. [Create task](#)
- Alberto and Hillary will get back with info about the storage facilities. [Create task](#)
- Daisy and Alberto will meet on Monday to discuss the terms. [Create task](#)

Show all | Are these tasks helpful? [👍](#) [👎](#)

Participant statistics

From your org	Talk to listen ratio	Switches per conv...	Avg. pause
Daisy Phillips	32/68	14	12 sec
Babak Shammass	23/77	14	8 sec

Outside your org	Longest monologue
Inna Laar	27 sec
Alberto Burgos	16 sec
Ruth Bengtsson	8 sec

Engagement

Teams Meeting Recap

Copilot for Sales brings sales insights to the Teams meeting summary

- 1 Suggested CRM updates and an option to save to CRM as a task
- 2 Sales conversational KPIs (talk to listen ratio, customer longest monolog, etc.)