

The background features a stylized city skyline with various skyscrapers in shades of blue, purple, and pink. A bright yellow sun or moon is partially obscured by the text. In the upper left, a small blue figure is shown in flight. In the lower right, two superheroes are seated on a fountain. The text "2025 DYNAMICS CON" is rendered in a large, bold, yellow font with a thick black outline. The word "2025" is positioned above "DYNAMICS", and "CON" is positioned below "DYNAMICS".

2025 DYNAMICS CON

Automate your Sales Process

A step-by-step guide to Microsoft Copilot for Sales



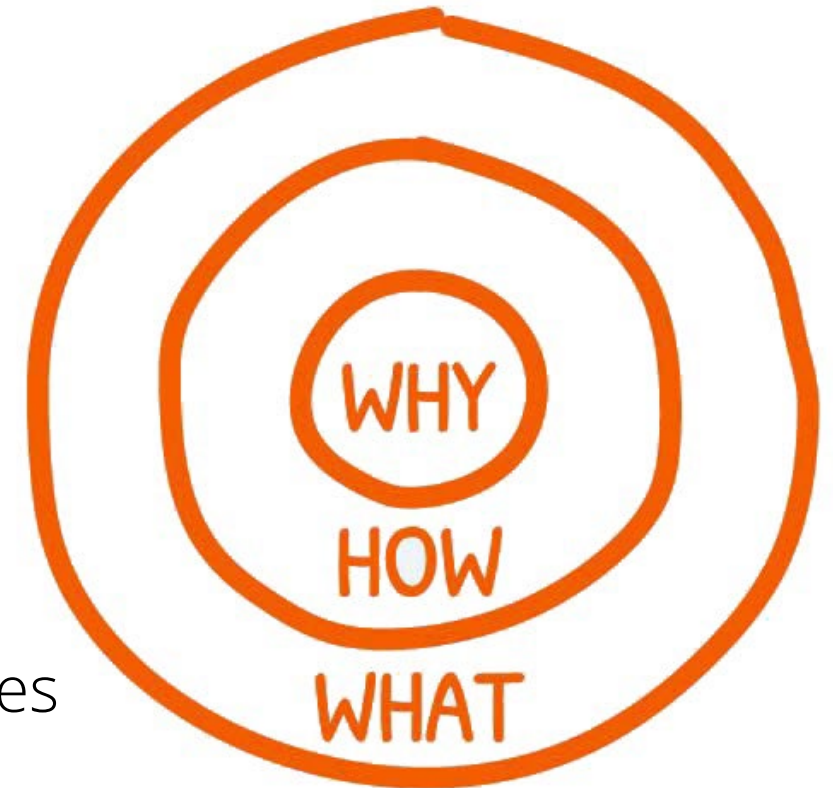
Here is what we are doing

- Prologue: Start with Why
- Act 1: Let's talk Copilot for Sales
- Act 2: Demo - Setup, Configure & Extend
- Act 3: Demo – Copilot for Sales
- Epilogue: What did we learn?



Prologue: Start with Why

- Why am I here?
 - To **IGNITE** a spark of curiosity & excitement
 - To **GIVE** back to the community
 - To **BUILD** new relationships
- Why are you here?
 - To be **INSPIRED** by potentials of AI
 - To **GET** a better understanding of Copilot for Sales
 - To **FIND** new ways to add value to clients





ACT 1

Let's talk Copilots



Something to think about ...

“No one ever got into sales because they love updating the CRM.”

–Matt Dixon,
co-author of The Challenger Sale

“Generative AI will unlock a richer understanding of target audiences and usher in a new era of sales decision-making.”

–Adnan Zijadic,
Gartner press release



Act 1: Let's talk Copilot for Sales

- Hype Cycle for Artificial Intelligence
- What is Copilot for Sales?
- Where is Copilot for Sales?
- Why Copilot for Sales – 5 Reasons
- Licensing Simplified ...
- User Adoption?



Hype Cycle for Artificial Intelligence, 2023



Where are we now?

2022 – 2023: Hype Cycle Peaked (for some)

2023 – 2024: Trough of Disillusionment

2024 – 2030: Slope of Enlightenment

Right now, we are at the point of Maximum Opportunity

- Learn how to harness AI
- Get Productivity Gains
- Maximum potential for Partners

Why Copilot for Sales

5 Reasons

1. **Boost** Sales Productivity
2. **Enhance** Customer Engagement
3. **Integrate** with you Technology Stack
4. **Customize** to Fit Your Business
5. **Gain** Competitive Advantage with AI



Licensing Simplified

- **New Purchase**
 - \$50 Includes Copilot + Copilot for Sales
- **Add-On Purchase**
 - \$20 Copilot for Sales (only)
 - Prerequisite: \$30 Copilot subscription
- **D365 Sales Enterprise**
 - Included limited Features
 - \$50
- **Prerequisite**
 - Qualifying Microsoft 365 Subscription

\$50
Subscription
/user/month





Act 2: Demo

Copilot for Sales



Demo :Copilot for Sales

- Outlook
 - Create / Update CRM Records
 - Get Sales Insights
 - Save Email Activities
- Teams
 - Meeting Insights
- Word
 - Meeting Summary





ACT 3: Demo

Setup, Configure, Extend



Act 2: Setup, Configure, Extend

- Setup
 - Admin Install (recommended)
- Configure
 - Use Teams to Configure
 - Add Entities
 - Set Views
 - Creating / Editing Records
- Extend
 - Use Copilot Studio to Extend



Thank You - The future is bright

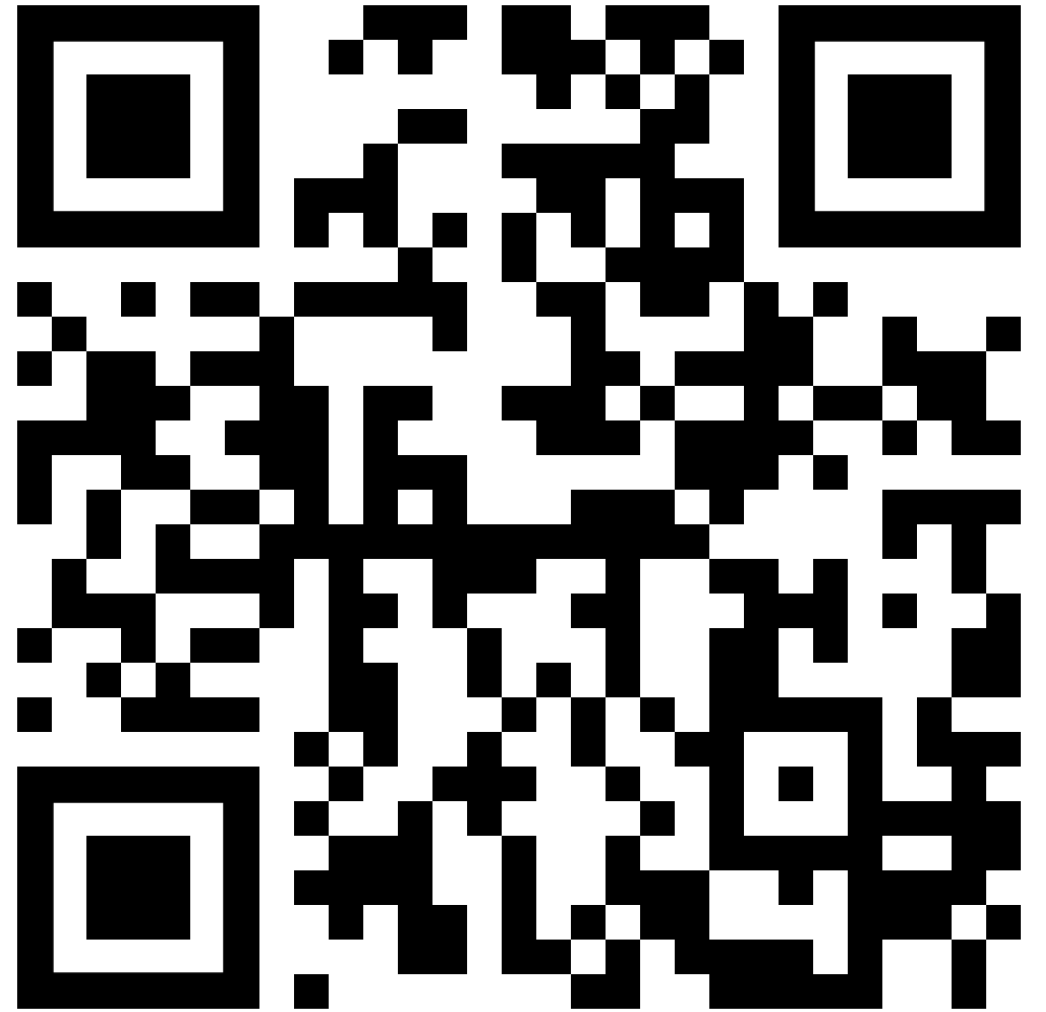


Wrapping Up

- Connect with me on LinkedIn
- Let's Network
- Get this Presentation sent to you
- Leave me a comment or feedback

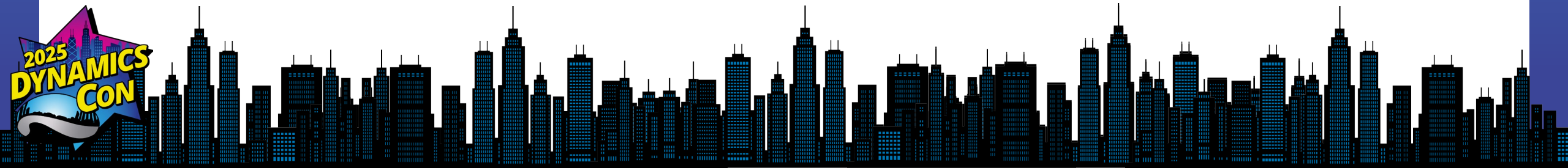
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Sources

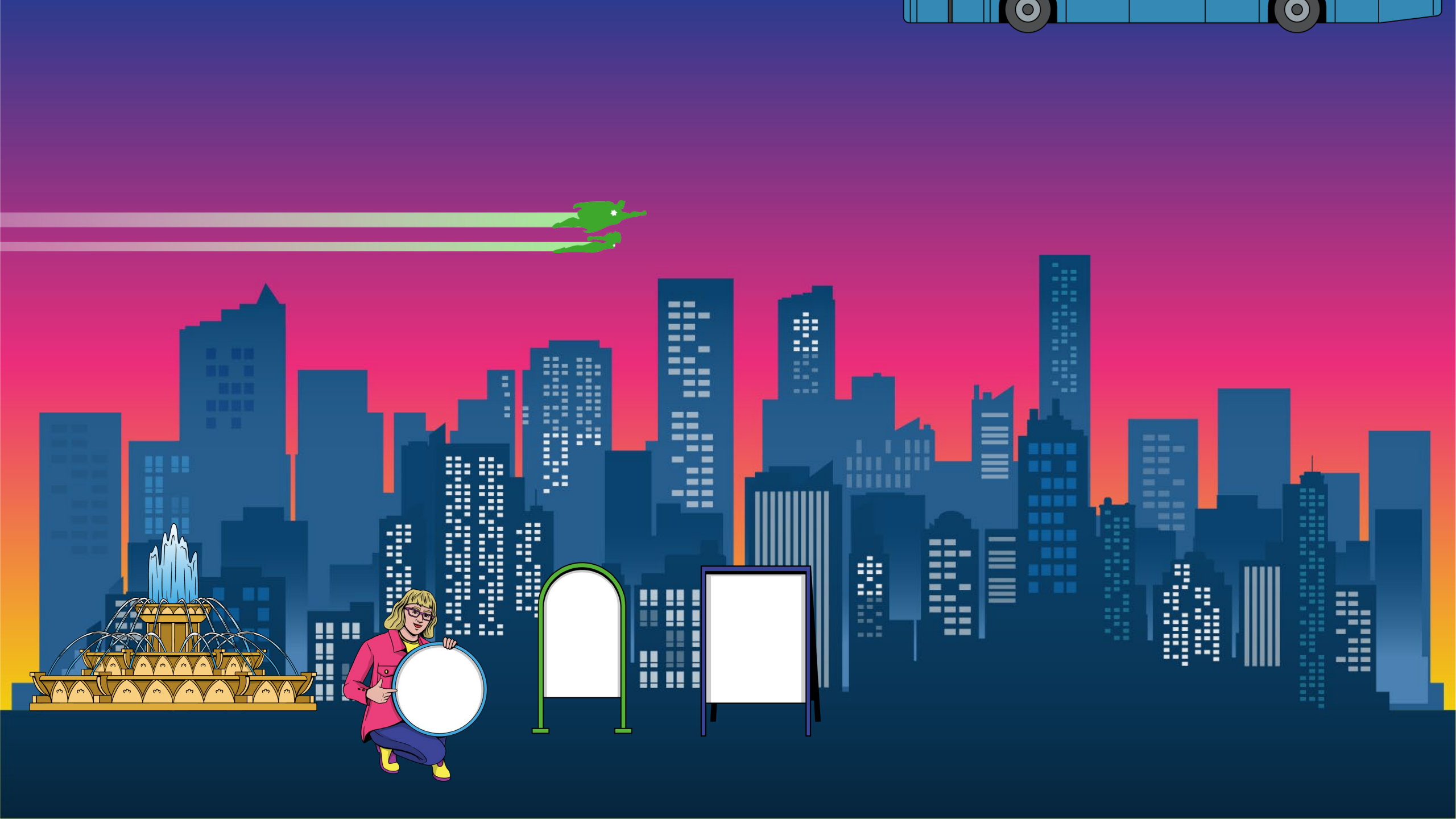
- [Microsoft 365 Copilot for Sales documentation | Microsoft Learn](#)
- [Microsoft Copilot for Sales Blog | Microsoft Community Hub](#)
- [Microsoft Viva Sales is now part of Microsoft Sales Copilot | Microsoft Community Hub](#)
- [New sales agents accessible in Microsoft 365 Copilot help teams close more deals, faster | Microsoft 365 Blog](#)
- [Extend Microsoft 365 Copilot for Sales with partner applications \(preview\) | Microsoft Learn](#)
- [AI for Enterprise Productivity | Microsoft 365 Copilot](#)

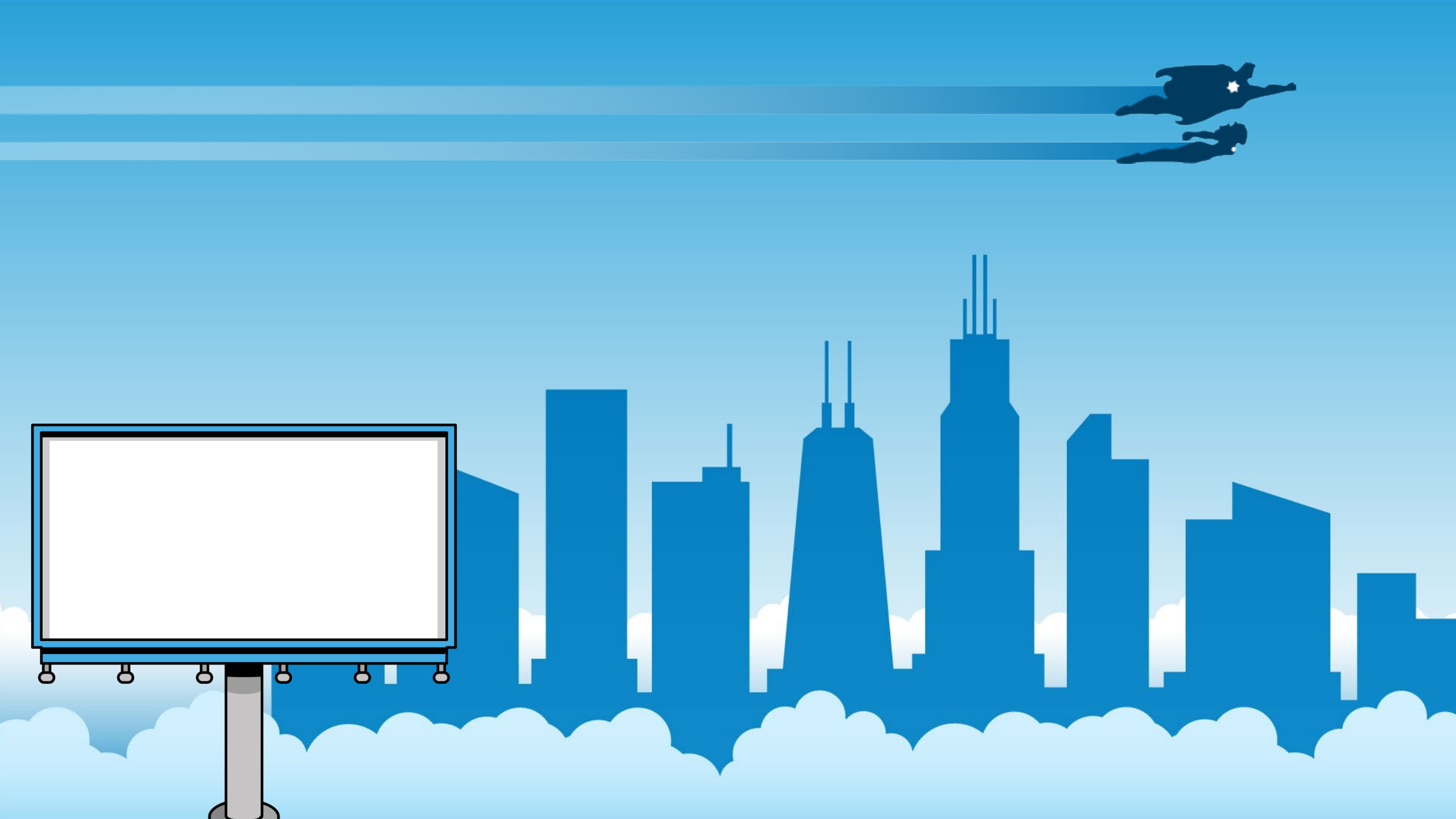


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**2025
DYNAMICS
CON**

The image features a stylized graphic design. In the background, there is a dark blue silhouette of a city skyline with various skyscrapers of different heights and shapes. In the foreground, a large, semi-circular, light blue shape with a thick black outline dominates the lower half of the frame. Inside this semi-circle, the text "2025 DYNAMICS CON" is written in a bold, yellow, sans-serif font. The text is arranged in three lines: "2025" on the top line, "DYNAMICS" on the middle line, and "CON" on the bottom line. The letters have a slight 3D effect with a darker yellow shadow. Below the semi-circle, there are some grey, curved shapes that look like stylized clouds or ground. The overall color palette is primarily blue, yellow, and grey.