



The main logo for '2026 Dynamics Con Vegas' is a vibrant, multi-colored graphic. It features a large, jagged shape in shades of purple, pink, and blue. The text '2026' is in green, 'DYNAMICS' is in yellow-green, and 'CON' is in yellow. Below this, the word 'Vegas' is written in a white, cursive font on a yellow background. The logo is accented with two green palm trees and a colorful geometric symbol consisting of overlapping squares in purple, blue, and pink.



2026 DYNAMICS CON



5 Copilot Scenarios Every Dynamics 365 Sales Team Should Be Using

Asif Rehmani | VisualSP | DynamicsCon 2026



Walk Into Every Call Already Caught Up

Opportunity Surface

The Sales agent in Outlook surfaces your linked opportunity, contact history, and account summary — before you dial in.

Instant Context

Relevant talking points, recent interactions, and deal context appear automatically — no need to open D365.

Show Up Prepared

Reps walk into every call informed and confident — not scrambling through through tabs at the last minute.



Let the Meeting Document Itself



Auto-Transcription & Summary

Copilot transcribes the call and generates an AI summary with action items, key topics, and sentiment — hands-free.

One Click to CRM

After the meeting, a single click saves AI-generated notes directly to the linked D365 opportunity record.

- ✔ Post-call admin is eliminated. The data data lands in your CRM automatically. automatically.

Follow-Up Email Written Before You Close Your Laptop



**Meeting Recap
Recap**

Generate Email

**Open in
Outlook**



Lead Qualification the Way It It Was Designed

Built-In Intelligence

Copilot inside D365 summarizes the lead record and surfaces key account details, recent changes, and suggested next actions — right where reps work.

Adoption Is the Real Work

Giving reps a clear, repeatable workflow around this feature is what separates organizations that get value from those that don't.

Pipeline Review That Actually Scales

Ask Your Pipeline Anything

Instead of clicking into opportunities one by one, reps ask Copilot Copilot natural language questions and get answers in seconds.

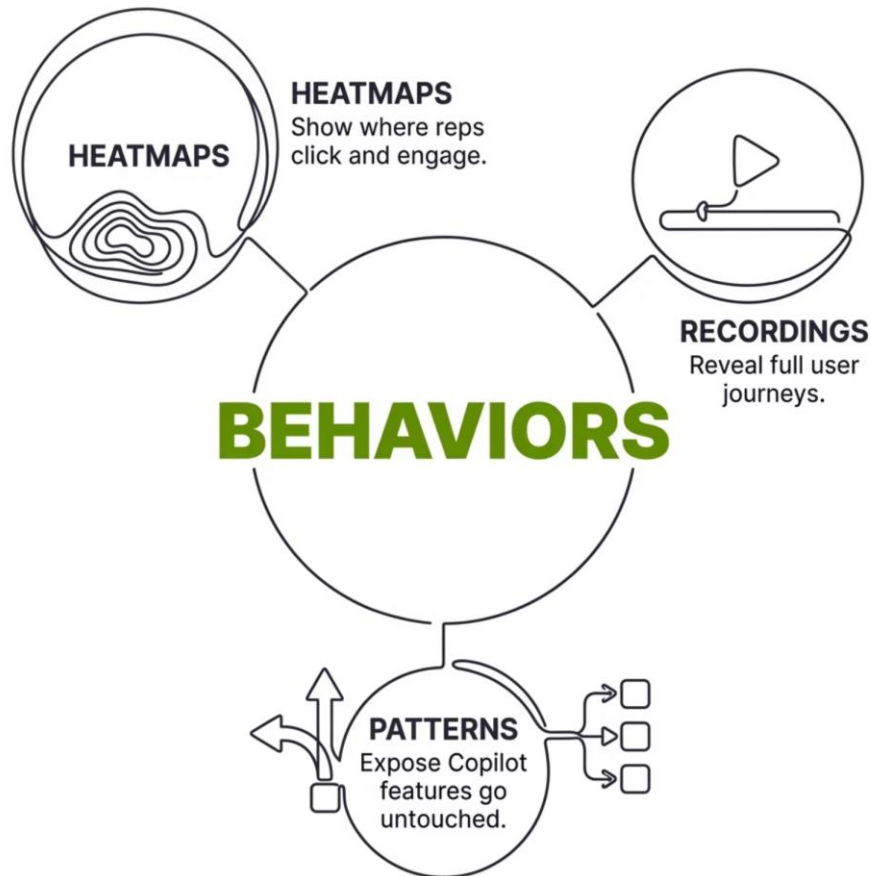
"Which deals are at risk?"

"What changed on my top opportunities this week?"

Sales managers who build this into their weekly rhythm stop relying on manual pipeline calls — and start having more strategic conversations with their teams.



Are Your Reps Actually Using Any of This?




Visibility Into Real Behavior

Microsoft Clarity can be deployed on top of Dynamics 365 to show exactly what users are doing inside the application — not what you assume they're doing.

The Data Often Surprises

Most organizations discover that Copilot features they've rolled out are going largely untouched. Heatmaps and session recordings make the blind spots visible.

 Search **Microsoft Clarity for Dynamics 365** to explore what's possible in your environment.

Call to Action:

Create a Dynamics CRM Insights & Friction Report

Heatmaps by Workflow

See exactly where attention lands — and where it doesn't — across your key sales processes.

Session Recordings

Watch real rep behavior to uncover friction points no survey or ticket would ever surface.

Copilot Engagement Patterns

Quantify actual Copilot usage and identify where adoption is stalling.

Concrete Recommendations

Walk away with specific, prioritized actions — not a generic assessment.

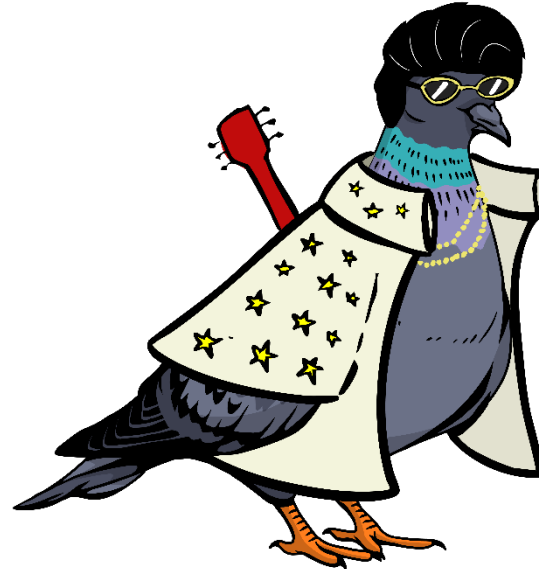
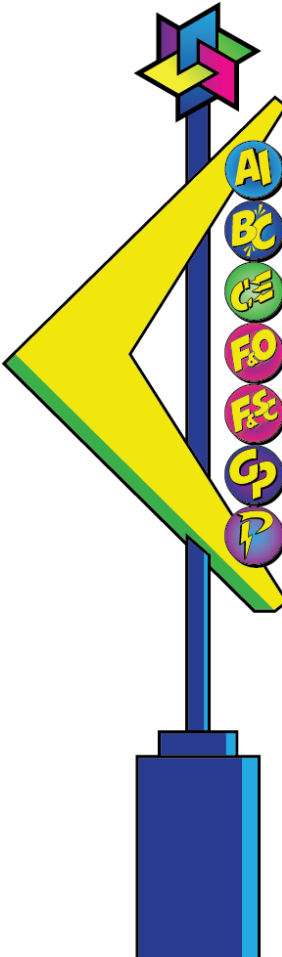
- If today's session raised questions about what's happening in your own environment, this is a practical practical next step – understand before being understood.



ASSETS



ASSETS



ASSETS

