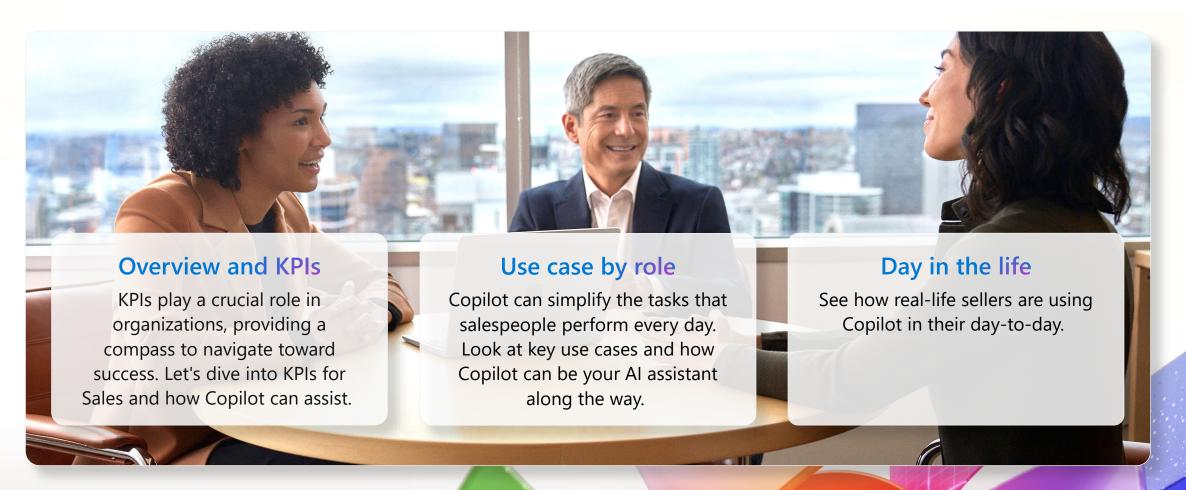


Copilot scenarios for Sales



Copilot scenarios for Sales



Using Copilot in Sales



Goals and challenges

Based on Microsoft research selling is getting harder with 79% of sellers saying they need to support more account and are spending 70% of their time on administrative tasks such as research, planning, generating proposals, data entry, and internal meetings.



Copilot can assist with...

Copilot 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.

- Automate your sales processes
- Improve customer meetings
- Make a pitch
- Respond to an RFP
- Create an unsolicited proposal
- Timely customer response



Sales roles



Account Manager



Customer Success



Technical Sales



Tele Sales

Transform sales processes



Lead generation & management



Negotiation & closing



Post-sale follow-up & upsell



Sales engagement



Sales presentations

Microsoft Copilot opportunity to impact key functional KPIs



Number of opportunities pursued

Simplifying and automating tasks like preparing for meetings, tracking tasks, sending emails, creating proposals, and researching customer and product information can allow sellers to pursue more opportunities.



Improve close rate

Improving marketing content and customer interactions such as emails and meetings can help to improve close rates.



revenue per sale Sellers can use Copilot to get suggestions for cross selling opportunities and then research a better together story. Copilot also assists in pulling together quotes and proposals.



Improve customer retention Improving the quality of sales materials and interactions helps with retention, but the rest of the company can contribute as well from improved support interactions and first call resolution to improved customer feedback processes to product development.

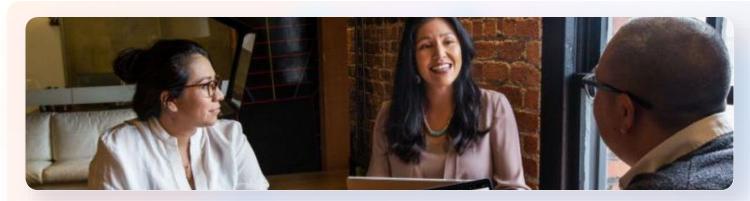






Improve employee experience

KPI – Increase number of opportunities pursued



Sales is about building relationships and pursuing opportunities. But these things take time, so anything Microsoft Copilot can do to reduce the time sales teams spend on other tasks can be used to increase customer face time and pursue more deals.

How Microsoft Copilot can help increase the number of opportunities pursued

Improve customer meetings

- Research company information
- Learn how to pitch the product
- Organize information from past interactions
- Completely focus during the meeting

Respond to an RFP

- Create richer, faster responses to proposals
- Have Copilot assist with drafting and summarizing emails
- Simplify finding information for RFP responses



Roles

Pursuing more opportunities can require input from:

Account Manager

Product teams

Technical Sales

Customer Success

Training staff



Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

KPI – Improve close rate



Closing a deal often requires bringing many elements together from an entire team to ensure that both the customer and seller are satisfied.

How Microsoft Copilot can help improve the close rate

Improve quality of customer-facing materials

- Improve sales and marketing and content
- Create more compelling proposals and RFP responses
- · Make emails and chats more impactful

Create a proposal

- Research market conditions
- Compare sales across regions or other variables

Improve targeting

 Analyze current product mix and cross sell success

Improve customer meetings

- · Prepare for the meeting
- Focus during the meeting
- Generate follow up communications



Roles

Improving close rates can require input from:

Account Manager

Product teams

Technical Sales

Product Marketing

Training staff

Finance



Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

KPI – Increase revenue per sale



Revenue achieved per sale can have many factors but the most common way to increase it would be through cross selling to include more items in the sale.

How Microsoft Copilot can help increate revenue per sale

Improve quality of customer-facing materials

- Improve marketing content with clear value propositions
- Create more compelling proposals and RFP responses
- Make emails and chats more impactful

Create a proposal

- Improve product training content
- Compare sales across regions or other variables

Improve targeting

 Analyze current product mix and cross sell success

Improve customer meetings

- Prepare for the meeting
- · Focus during the meeting
- Generate follow up communications by pulling CRM data into emails



Roles

Increasing revenue per sale can require input from:

Account Manager

Product teams

Technical Sales

Product Marketing

Training staff

Finance



Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

KPI – Improve customer retention



Keeping customers happy after a sale is a team effort. The efforts by the customer success team and product team to resolve any issues in a timely manner are critical. Follow up by the sales team is helpful and can lead to additional sales.

How Microsoft Copilot can help improve customer retention

Improve quality of customer-facing materials

- Improve marketing content with clear value propositions
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Improve customer meetings

- Prepare for the meeting
- · Focus during the meeting
- Generate follow up communications

Respond to a customer complaint

- Respond quickly
- · Access customer records
- Gets answer fast



Roles

Customer retention can require input from:

Account Manager

Product teams

Technical Sales

Customer Success

Product support



Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

Sales | Automate your sales processes using Copilot¹ ▶

Available with: Microsoft Copilot

Scenario level:

Get started

KPIs impacted

Opportunities Pursued



Value benefit



Employee Experience

1. Customer Outreach

Use Microsoft Copilot to draft a customer reach out email with a friendly tone and proposal to meet.



Copilot

Prompt: Draft an email to a prospective customer telling them about [x product/service] and proposing a meeting. Make the tone friendly.

6. Prepare for Cold Calls

Improve future customer outreach by using Copilot to write a cold call script.



Copilot

Prompt: Write a 30-second cold call sales script, highlighting 3 benefits of [x product] for [prospect] based off [paste information in chat box].

2. Customer Research

Prompt Copilot for information on the customer, pulling from their company website and annual reports.



Copilot

Prompt: Describe the key factors that influence customer purchasing decisions for [x product/service] in [y industry].

5. Objection Handling

Prepare for objection handling by prompting Copilot to simulate a customer conversation.



Copilot

Prompt: Act like a CTO in the technology industry who is apprehensive about the cost of implementing [x product]. Simulate a conversation discussing the value and benefits of [x products] offering.

3. Prepare for Customer Conversations

Prepare for customer calls by using Copilot to create a meeting agenda with exploratory questions to identify customer needs, pain points, and possible solutions.



Copilot

Prompt: Prepare an agenda for a 25-minute meeting for my exploration call with topics and questions that I should ask.

4. Create Presentation

Prompt Copilot to create a presentation outline for a sales product pitch.



Copilot

Prompt: Create a presentation outline that includes [x company's] mission statement, target customer, and the benefits of implementing our product or service.



3. Review interactions

Prompt Copilot² to create a bulleted list of notes

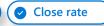
prior to the meeting using recent customer email

threads to understand the asks that need to be

addressed. Have Copilot prepare a script for the

Copilot

KPIs impacted







Value benefit



call.



1. Prepare for discovery session

Collaborate with your team to prepare for the customer discovery session by using Microsoft Copilot in Loop to generate ideas and enhance collaboration.



the draft.

Collaborate as a team using Copilot as a key

2. Research the company

Validate your ideas and learn more about your customer by asking Copilot¹ to summarize their online annual report. Prompt Copilot² for a summary of the account, pulling in CRM insights with Copilot for Sales.



Copilot

+Copilot for Sales

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time and deepen knowledge.

5. Summarize the meeting

After the meeting is over, review the meeting recap from Copilot in Teams for key points and action items. Copilot for Sales provides an analysis of sales keywords and KPIs.



Copilot in Teams

+Copilot for Sales

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Update the sales presentation

Save time searching for information in chats and

emails and get a more complete picture than you

may have if you quickly scanned the threads.

Use Copilot in PowerPoint to add a new slide to the presentation deck using customer details from the email summary and visuals relevant to their industry.



Copilot in PowerPoint

Quickly personalize pitch presentations with talking points and data specific to your customer.

Copilot in Loop

contributor of creative ideas.

6. Create the proposal

Create the final proposal by prompting Copilot in

the customer meeting to the prompt to enhance

Word to generate a draft, adding information from

Copilot to make improvements and focus on specific topics.

Improve the quality of the proposal by asking

Copilot in Word

¹Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web"

²Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".

KPIs impacted







Value benefit



Employee Experience

1. Prepare for a meeting

Prompt Copilot¹ for a summary of past interactions and customer details, enriched with CRM data from Copilot for Sales



Copilot

+Copilot for Sales

Rapidly get up to speed and improve **preparation** to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

6. Send a follow up email

Have Copilot turn the meeting notes and action items into a follow up email. Copilot for Sales

includes product and pricing details in the email

Copilot in Outlook

+ Copilot for Sales

from your CRM system.

2. Create a presentation

Use Copilot in PowerPoint to generate a presentation for the meeting using branded templates. Copilot can summarize important topics and customer requests from meeting transcripts.



Copilot in PowerPoint

Using higher quality presentations makes it easier to convey a clear message and can reduce the time to close the deal.

5. Summarize the meeting

Review the meeting recap from Copilot in Teams for key points and action items. Use Copilot for Sales to update the opportunity details in your CRM system.



+Copilot for Sales

spend that time improving the proposal.

Copilot in Teams

Avoid listening to meeting recordings and

3. Stay focused during the call

Copilot in Teams takes call notes and suggests talking points, allowing you to stay focused. Copilot for Sales includes sales keywords and KPIs in the meeting recap.



Copilot in Teams

+Copilot for Sales

Having a better discussion during the call can help to raise and resolve issues quicker, leading to increased customer satisfaction and potentially reduce the time to close the deal.

4. Get in-call sales insights

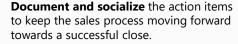
During the meeting, Copilot suggests questions to ask the customer. Copilot for Sales provides sales insights like brand and competitor analysis

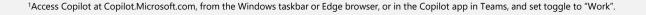


Copilot in Teams

+Copilot for Sales

Keep the conversation flowing onto meaningful topics can help to cover the agenda quicker and reduce meeting times.





KPIs impacted



Sales | Respond to an RFP



Value benefit



Employee Experience

1. Review the RFP

Use Microsoft Copilot in Word to summarize the RFP and generate a list of required items sorted by category.



Copilot in Word

Get started quickly by skipping over non-essential portions of the RFP.

6. Communicate response

Prompt Copilot to draft an email to the customer

with a summary the RFP response, and paste into

an email. Copilot for Sales includes relevant CRM

2. Gather customer information

Prompt Copilot¹ to summarize the information from the customer's website and annual reports. Use Copilot² to provide a summary of the opportunity, pulling in CRM insights with Copilot for Sales.



Copilot

+Copilot for Sales

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

5. Revise responses

Use Copilot in Word to revise the document to make it more compelling.

Copilot in Outlook + Copilot for Sales

details like product information in the email.

Quickly create professional emails

that are concise and more likely to be read and can lead to higher close rates.

Copilot in Word

Quickly make responses more readable to improve the quality of the RFP response.

3. Research responses

Prompt Copilot² for responses to RFP questions, enhanced with a custom RFP repository built with Copilot Studio.



Copilot

+Copilot Studio

Using defined content to answer customer questions ensures accuracy of the responses.

4. Review with team

Copilot in Teams generates a list of talking points, questions, and ideas during the meeting with your team.



Copilot in Teams

Don't miss any updates by asking Copilot for all the suggestions made during the meeting.



²Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".

KPIs impacted





Value benefit



Employee Experience

1. Identify leads

Prompt Copilot¹ to gather a list of leads, enriched with Marketo data from Copilot Studio. Copilot for Sales provides an overview of your pipeline and lead insights.



Copilot

+Copilot for Sales / Copilot Studio

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

6. Send proposal customer

Have Copilot in Outlook turn the meeting notes and

Copilot for Sales adds relevant product information

Use Copilot² to summarize information from the customer's company website and annual reports to understand financials, goals, and challenges.

2. Perform company research



Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time and helps to target the proposal.

5. Review with customer

Ask Copilot in Teams to suggest talking point during the meeting. Copilot for Sales in Teams provides sales tips like product information and competitor analysis.



Copilot in Teams

+ Copilot for Sales

Avoid listening to meeting recordings and spend that time improving the proposal.

3. Gather product information

Prompt Copilot¹ to pull product information, enriched with CRM data from Copilot Studio. With Copilot for Sales, also see projected revenue and other sales KPIs.



Copilot + Copilot Studio

+Copilot for Sales / Copilot Studio

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy

4. Generate the proposal

After creating a summary of the customer and product information in Word, use Copilot in PowerPoint to create a great presentation including images and tables.



Copilot in PowerPoint

Generating a first draft quickly so you can append more time on the details.

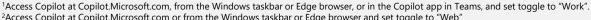
to the email.

Copilot in Outlook

action items into an email for all participants.

+ Copilot for Sales

Document and socialize the action items to keep the sales process moving forward towards a successful close.



²Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web"

3. Meet with product team

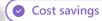
Use Copilot in Teams to suggest questions to ask

the product team based on the customer request

KPIs impacted



Value benefit





1. Review customer history

Prompt Copilot¹ to summarize email threads and meetings with the customer. With Copilot for Sales, view a summary of the opportunity.



Copilot

+Copilot for Sales

Rapidly get up to speed to on the concerns raised across all the communications you have received.

2. Research product info

Ask Copilot² to gather product information from the Web and create a summary of the issues and suggested next steps. Copilot for Sales includes product insights from your CRM system.



Copilot

+Copilot for Sales

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy.

and potential solutions.

Copilot in Teams

Copilot can help boost creativity by suggesting solutions from its vast knowledge base.

6. Meet with the customer

Have Copilot in Teams take meeting notes and summarize action items. Copilot for Sales provides an analysis of sales keywords and KPIs.



Copilot in Teams

+ Copilot for Sales

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Share response

Have Copilot in Outlook draft an email summarizing the presentation and highlighting how the issues will be resolved.



Copilot in Outlook

Quickly summarize files and draft emails to inform customers.

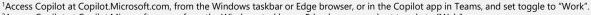
4. Draft proposed response

Use Copilot in PowerPoint to turn the information you have collected into a great presentation including images and tables.



Copilot in PowerPoint

Create a draft presentation directly from the meeting recap.



²Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web"

Copilot for Sales (includes Copilot for Microsoft 365)

A day in the life of an Account Manager

Benefits

~1 hour per week

Areas of investment: Customer engagement

★ Wellbeing & communication

8:00 am

Cassandra needs to prepare for her big pitch to Contoso so she uses Copilot¹ to summarize emails and chats. Microsoft Copilot for Sales provides a summary of the opportunity for more context.



Copilot

+Copilot for Sales

Summarize all the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 am

Cassandra asks Copilot in Outlook to create a message to confirm the meeting. Copilot for Sales includes relevant product and pricing details from her CRM system.



Copilot in Outlook

+Copilot for Sales

Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 am

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot in Excel to create some amazing charts to showcase the value of the offer.



Copilot in Excel

Show all data insights.

4:00 pm

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and asks Copilot¹ to summarize the conversation to quickly catch up.



Copilot

Summarize team chat and make sure to include the key points and who made them.

2:00 pm

It's time for the pitch. Cassandra can focus on her presentation. Copilot for Sales in Teams captures meeting notes, outstanding questions, and sales keywords and KPIs.



Copilot in Teams

11:00 am

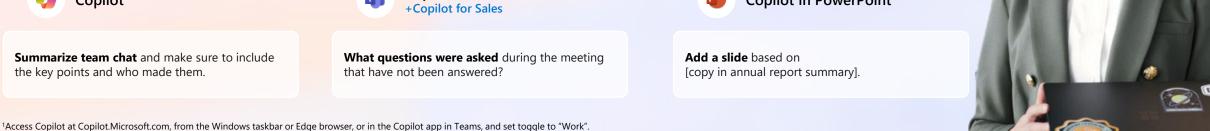
Cassandra puts the final touches on the pitch presentation by having Copilot create a slide based on a summary of the annual report.

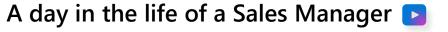


Copilot in PowerPoint

Cassandra is a sales lead at Contoso







Benefits

~1 hour per week

Areas of investment: Customer face time



★ Content creation

8:00 am

Juliet misses a key point during her regional sales meeting. She asks Copilot what was just mentioned.



Copilot in Teams

Summarize what was just said about possible discounting options.

8:15 am

Now that the meeting is over, Juliet needs to send out meeting notes to her team. She asks Copilot to recap the meeting.



Copilot in Teams

What are the action items from this meeting?

9:00 am

Juliet needs to respond to a complaint she has received from one of her customers. She uses Copilot to summary the lengthy email and draft a response.



Copilot in Outlook

Click on Summary by Copilot. Use Draft with Copilot to create a response that is formal and long.

4:00 pm

Juliet is reviewing the presentation and notices that the presentation doesn't have a logical flow. She asks Copilot to reorder the slides and create chapters.



Copilot in PowerPoint

Organize this presentation.

2:00 pm

Juliet needs to create a pitch deck for a customer presentation.



Copilot in PowerPoint

Add a slide to this presentation that explain our sustainability practices based on this document.

11:00 am

Juliet needs to respond to a RFP. She asks Copilot to create a first draft of the response and then make updates by converting some of the content into tables.



Copilot in Word

Draft a response to this [RFP]. Use the [pricing document] and the [product specification document] to answer and questions in the RFP.

Juliet is a sales manager at Contoso







To schedule a Copilot workshop contact:

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