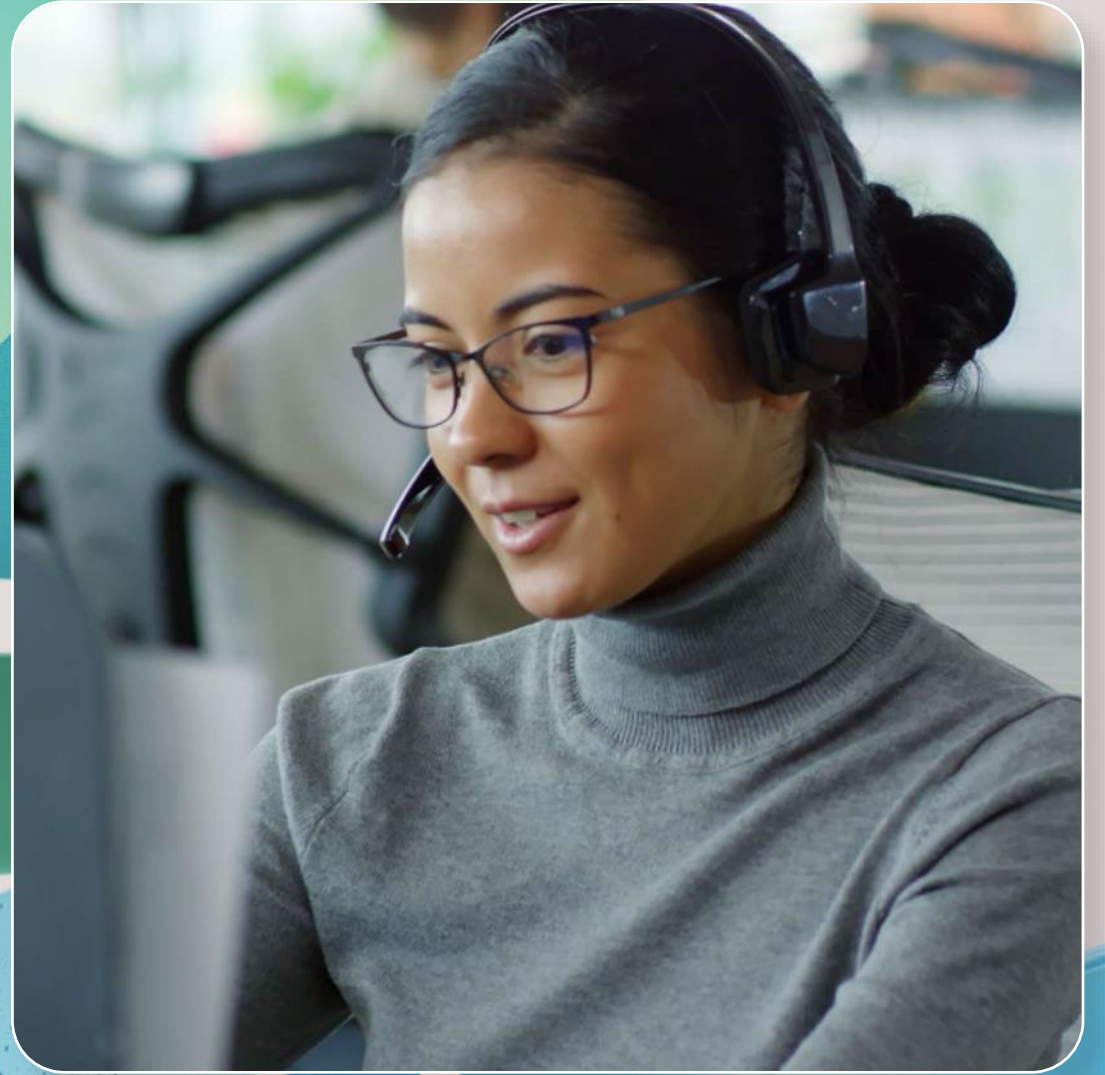




Copilot scenarios for Sales



Copilot scenarios for Sales

Overview and KPIs

KPIs play a crucial role in organizations, providing a compass to navigate toward success. Let's dive into KPIs for Sales and how Copilot can assist.

Use case by role

Copilot can simplify the tasks that salespeople perform every day. Look at key use cases and how Copilot can be your AI assistant along the way.

Day in the life

See how real-life sellers are using Copilot in their day-to-day.

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.



Increase 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.



Revenue growth



Cost savings and avoidance



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
Copilot for 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

Technical Sales

Training staff

Product teams

Product Marketing

Finance



Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

Copilot for 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 increase 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

Technical Sales

Training staff

Product teams

Product Marketing

Finance



Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

Copilot for 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

Technical Sales

Product support

Product teams

Customer Success



Microsoft AI solutions

Copilot for Microsoft 365

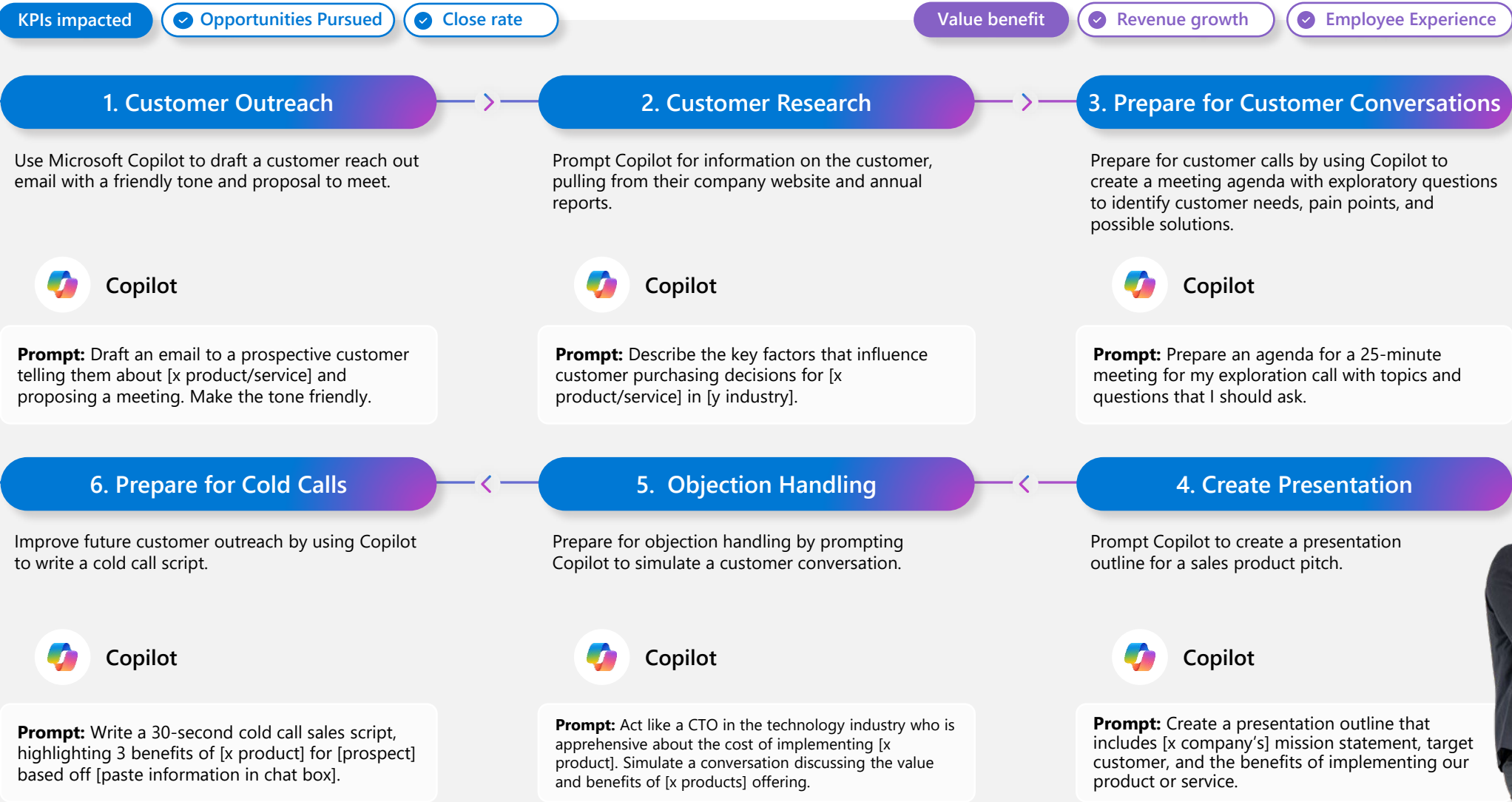
Copilot in Dynamics 365 Sales

Copilot for Sales

Sales | Automate your sales processes using Copilot¹

Available with:
Microsoft Copilot

Scenario level: ● ● ●
Get started



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

- KPIs impacted
- ✓ Close rate
- ✓ Revenue per sale
- ✓ Opportunities pursued
- Value benefit
- ✓ Revenue growth
- ✓ Employee Experience

1. Prepare for discovery session

2. Research the company

3. Review interactions

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



Collaborate as a team using Copilot as a key contributor of creative ideas.

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.



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

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 call.



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.

6. Create the proposal

5. Summarize the meeting

4. Update the sales presentation

Create the final proposal by prompting Copilot in Word to generate a draft, adding information from the customer meeting to the prompt to enhance the draft.



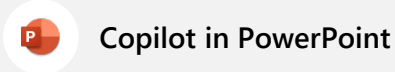
Improve the quality of the proposal by asking Copilot to make improvements and focus on specific topics.

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.



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

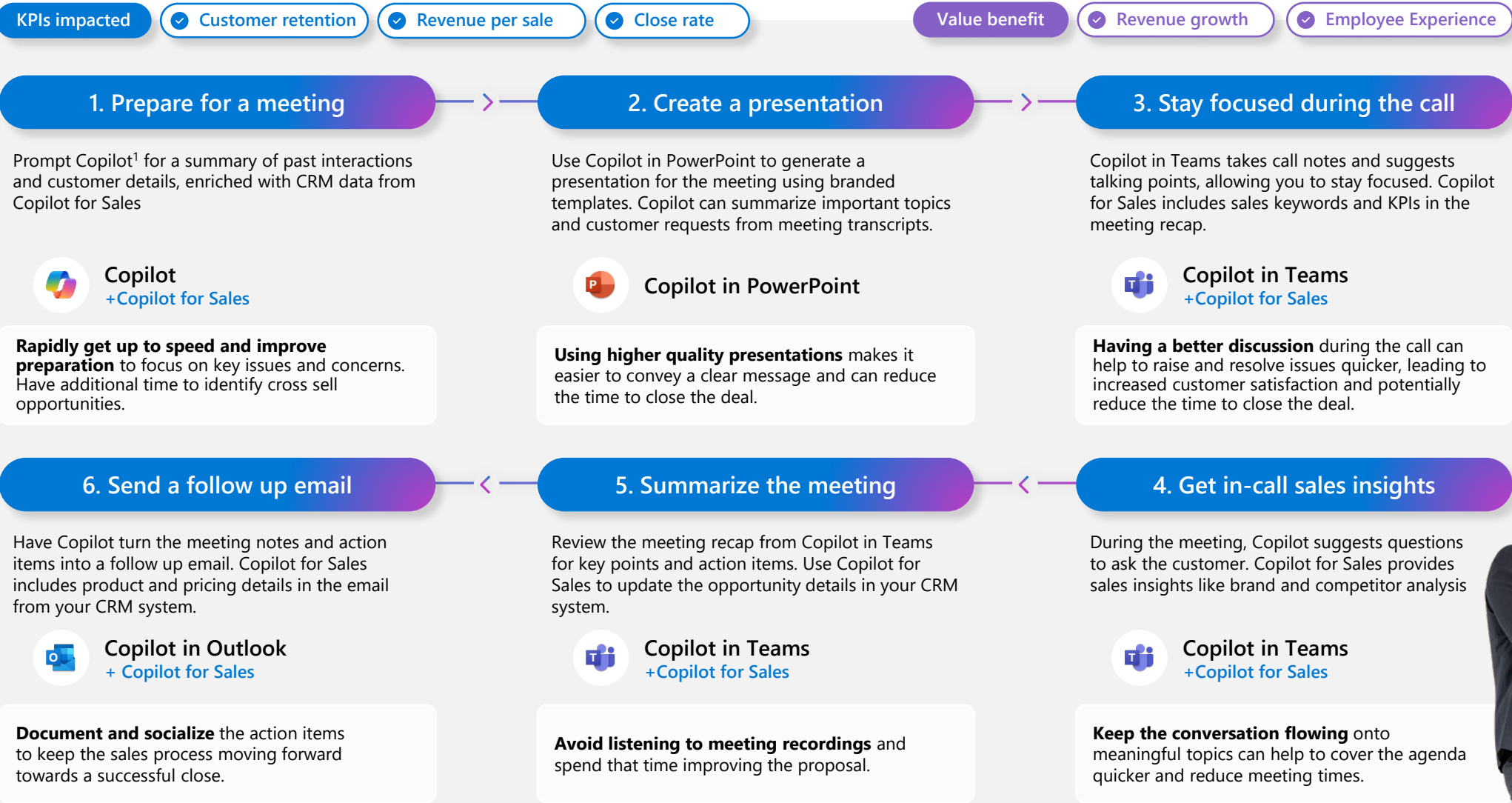
Use Copilot in PowerPoint to add a new slide to the presentation deck using customer details from the email summary and visuals relevant to their industry.



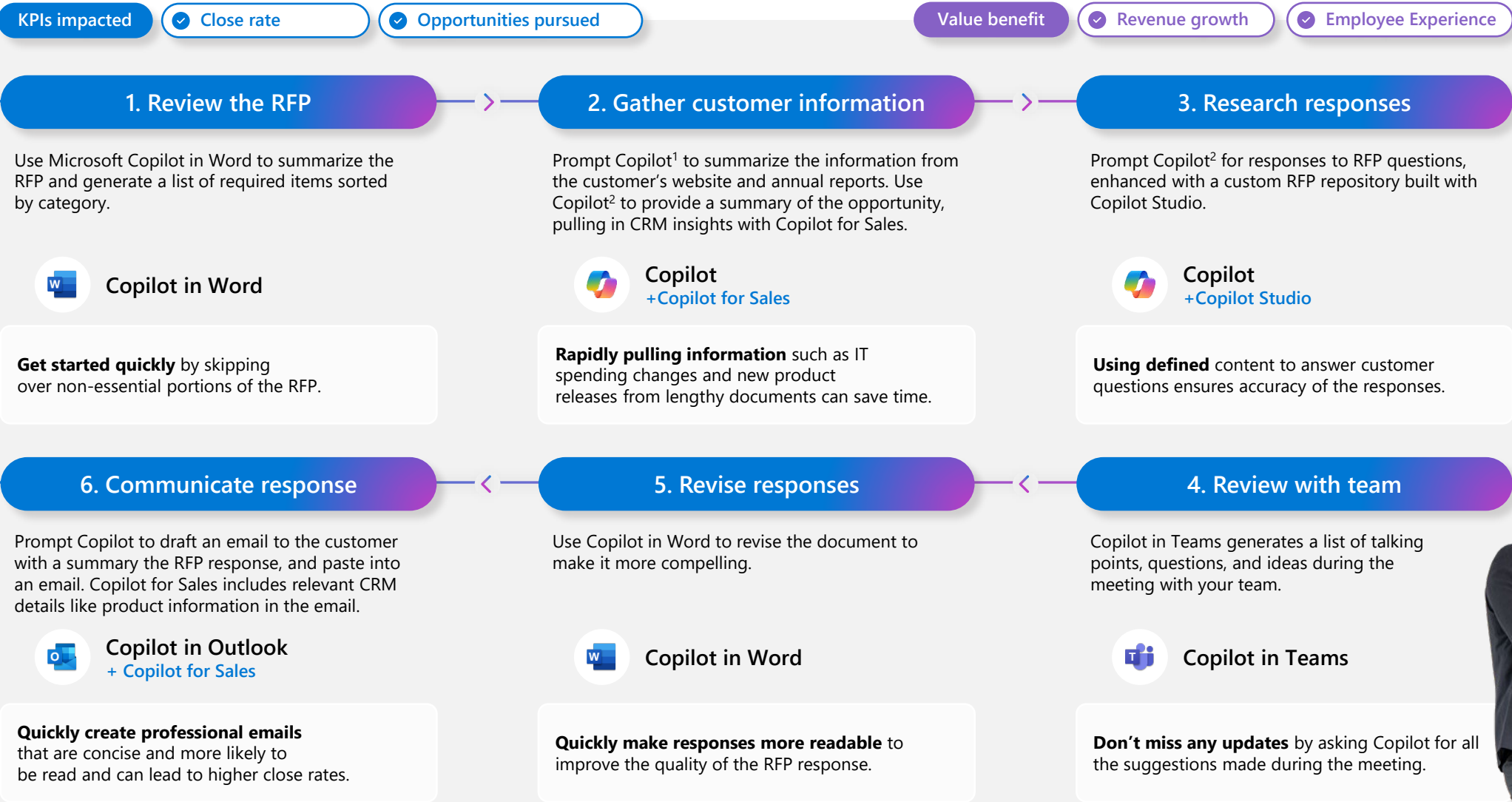
Quickly personalize pitch presentations with talking points and data specific to your customer.



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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".

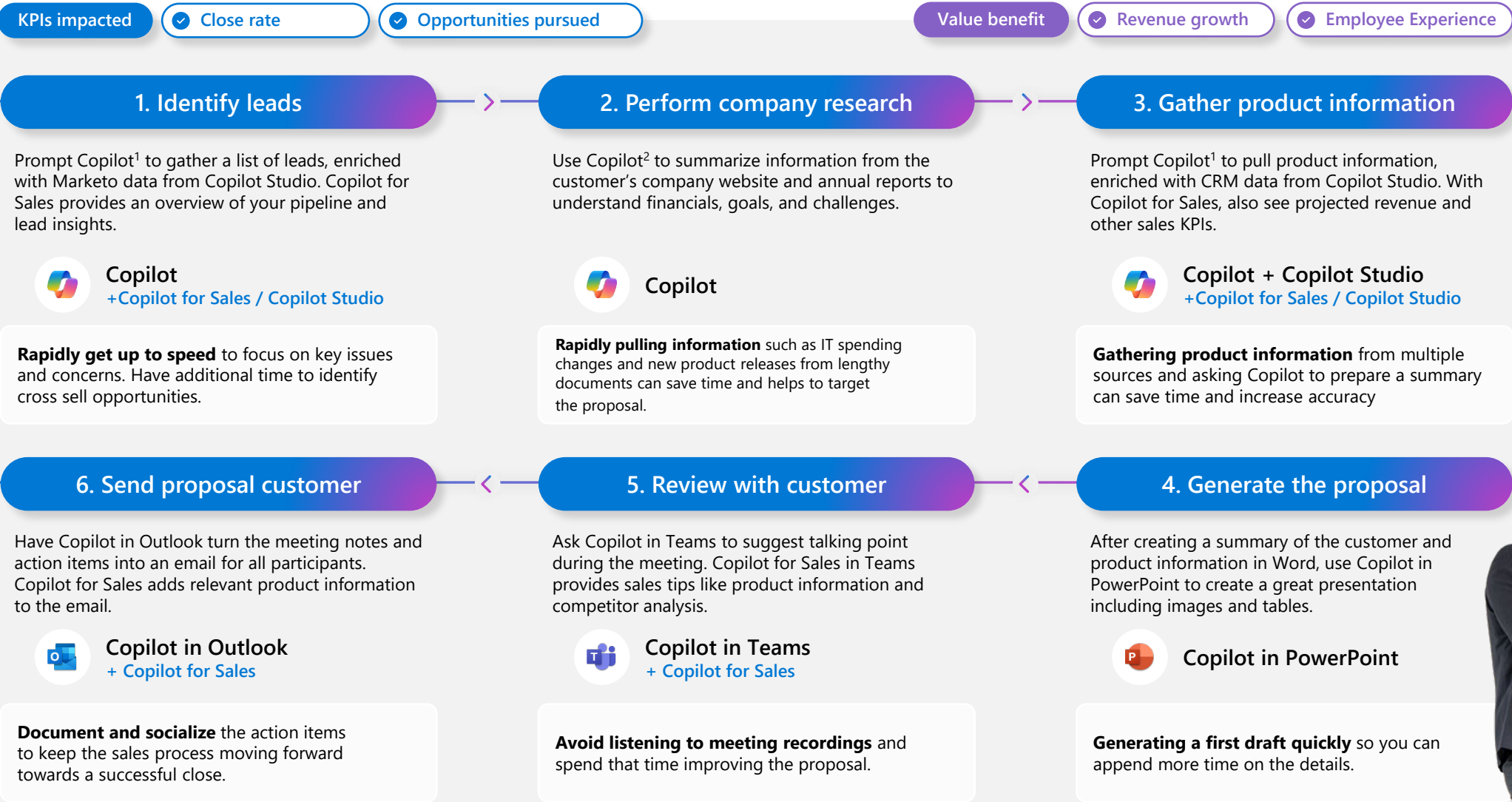


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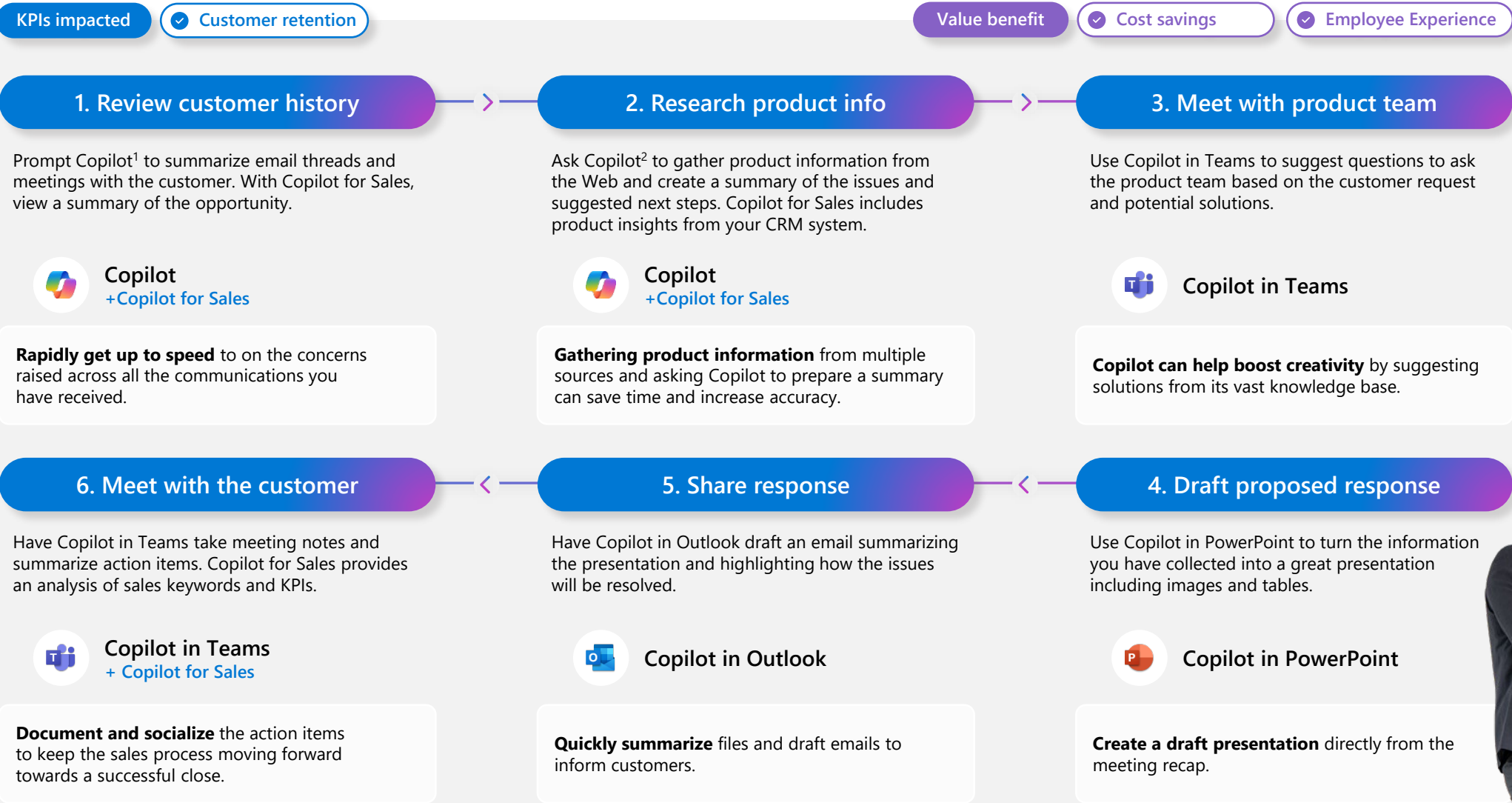


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Sales | Create an unsolicited proposal



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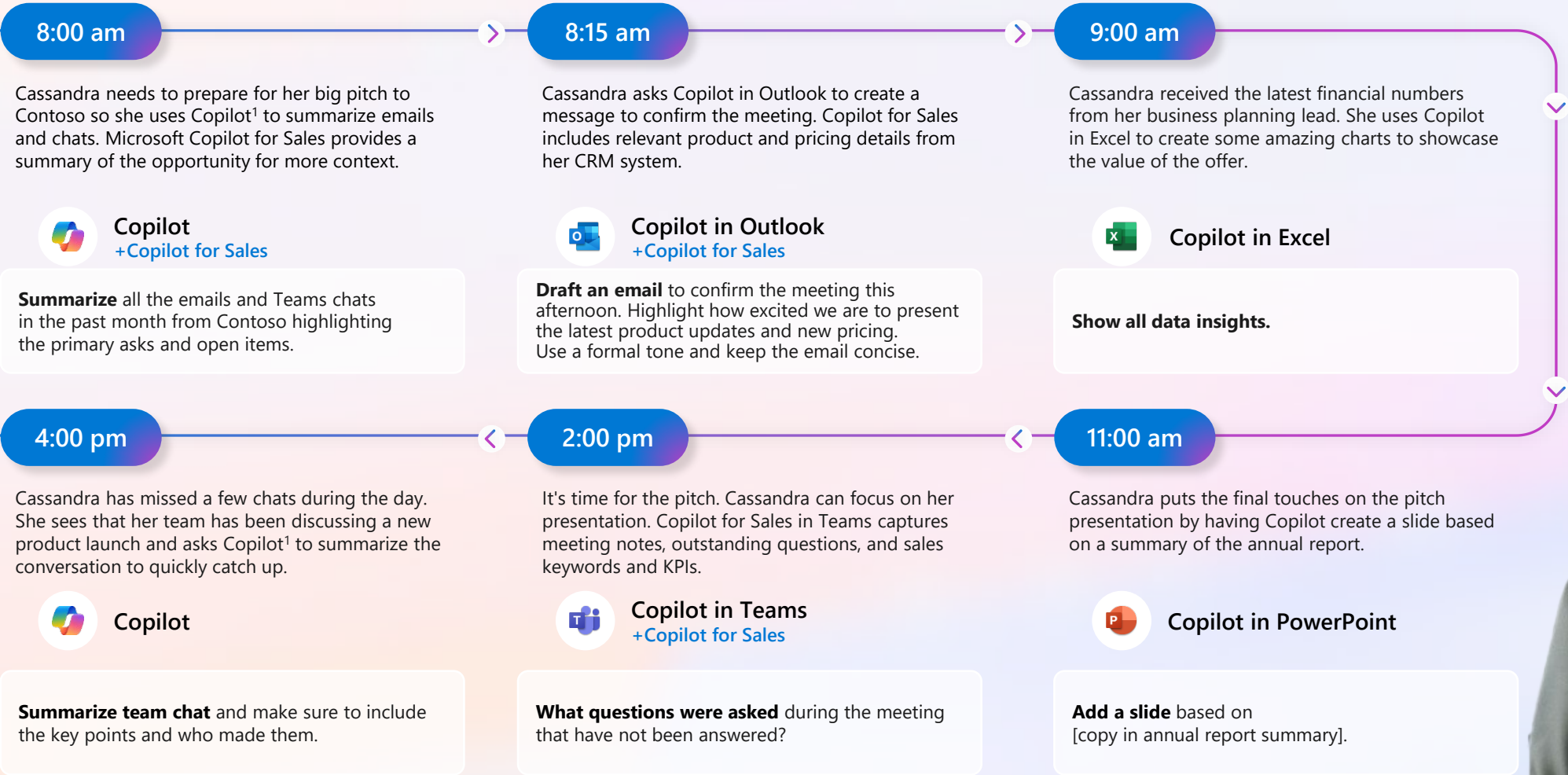


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A day in the life of an Account Manager

- Benefits
-  ~1 hour per week
-  Areas of investment: Customer engagement
-  Wellbeing & communication



Cassandra
is a sales lead
at Contoso



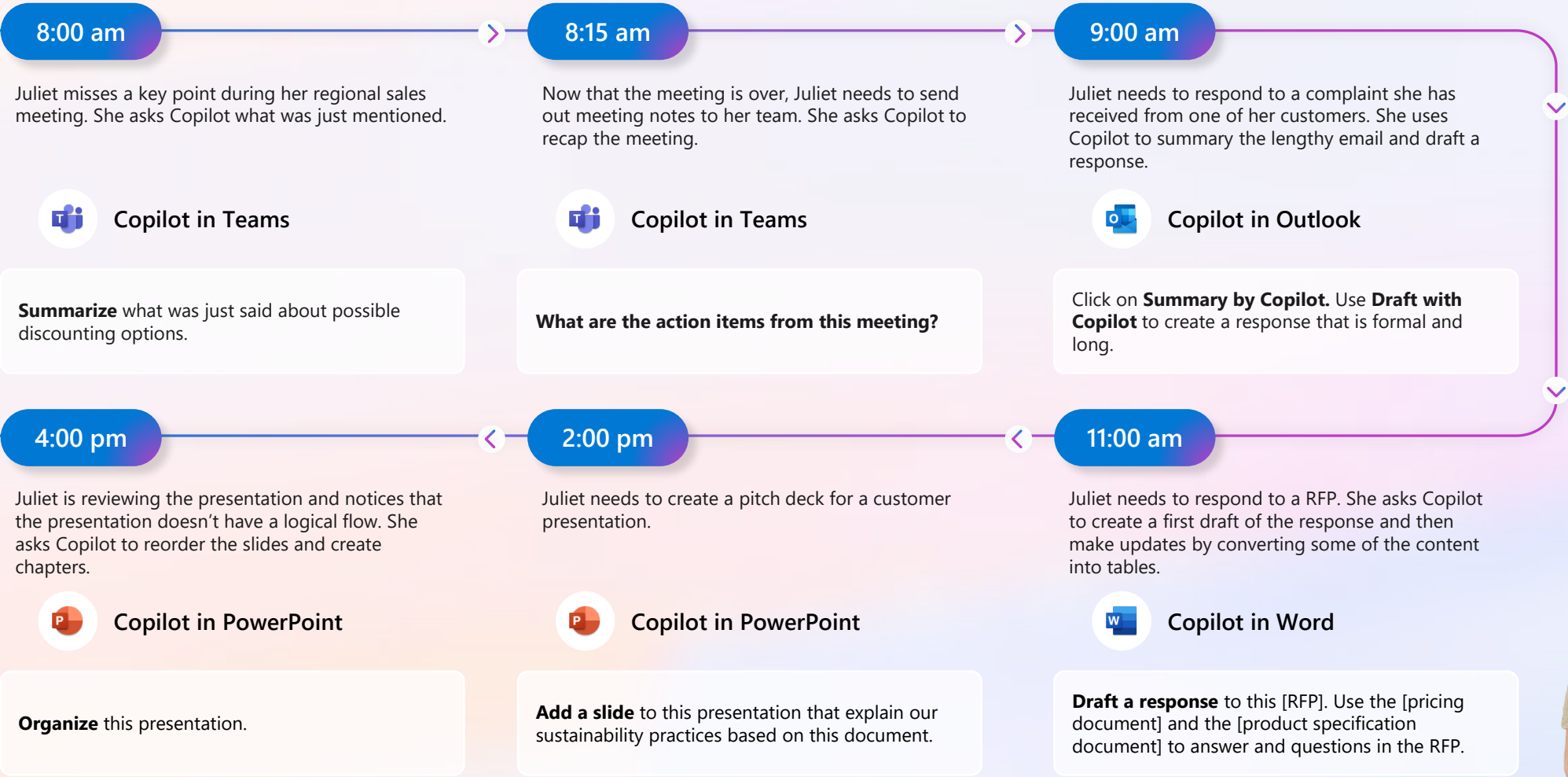
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A day in the life of a Sales Manager

Available with:
Copilot for Microsoft 365

Scenario level:   
[Get started](#)

- Benefits
- ~1 hour per week
- Areas of investment: Customer face time
- Content creation



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is a sales manager
at Contoso



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