



Copilot for Sales



Microsoft Copilot for Sales

Your AI assistant for sellers

Maximize seller productivity

AI capabilities to streamline processes and create personalized sales content

Personalize customer engagements

AI-generated insights and recommendations for next steps

Enhance sales team performance

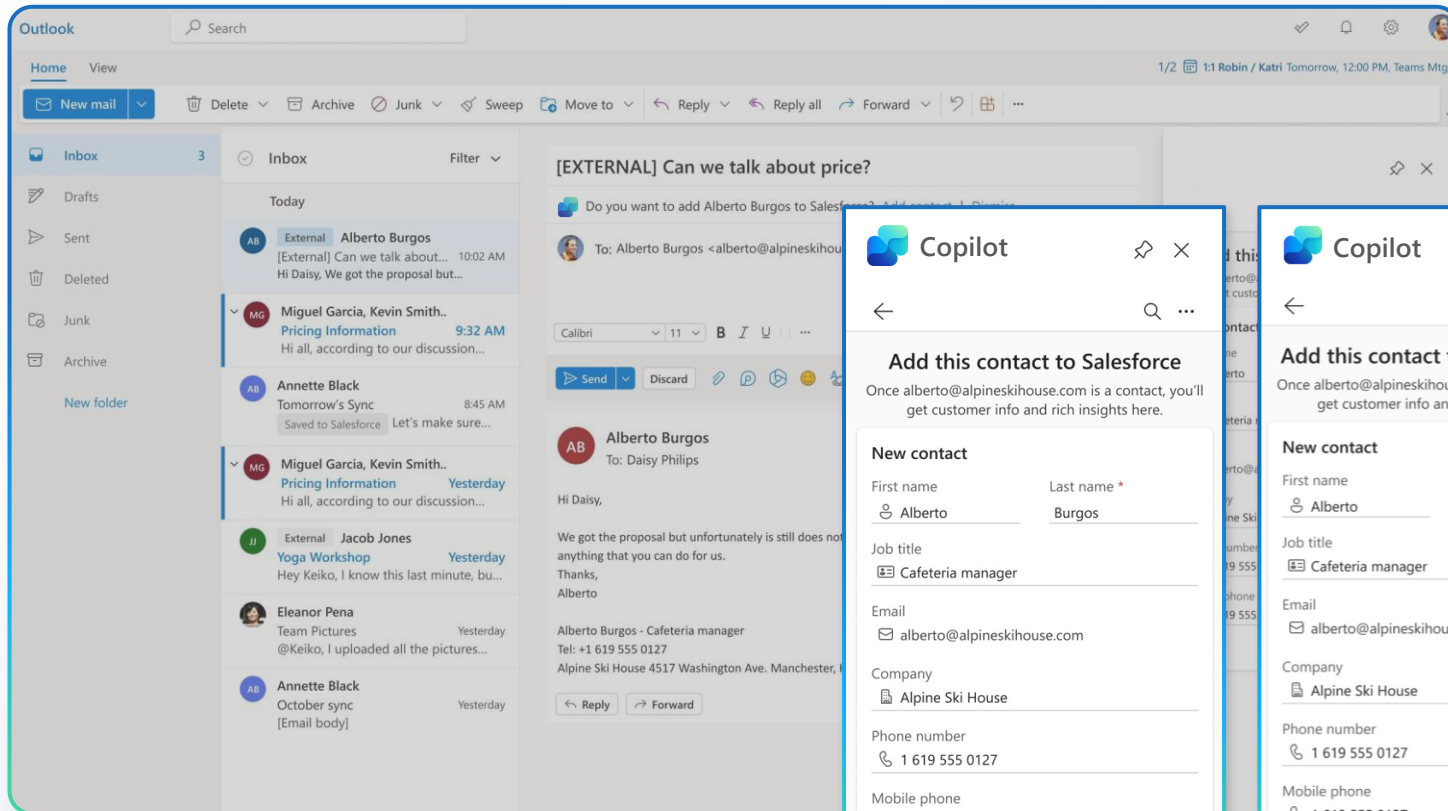
AI-powered manager insights and collaboration tools

Customize for your needs

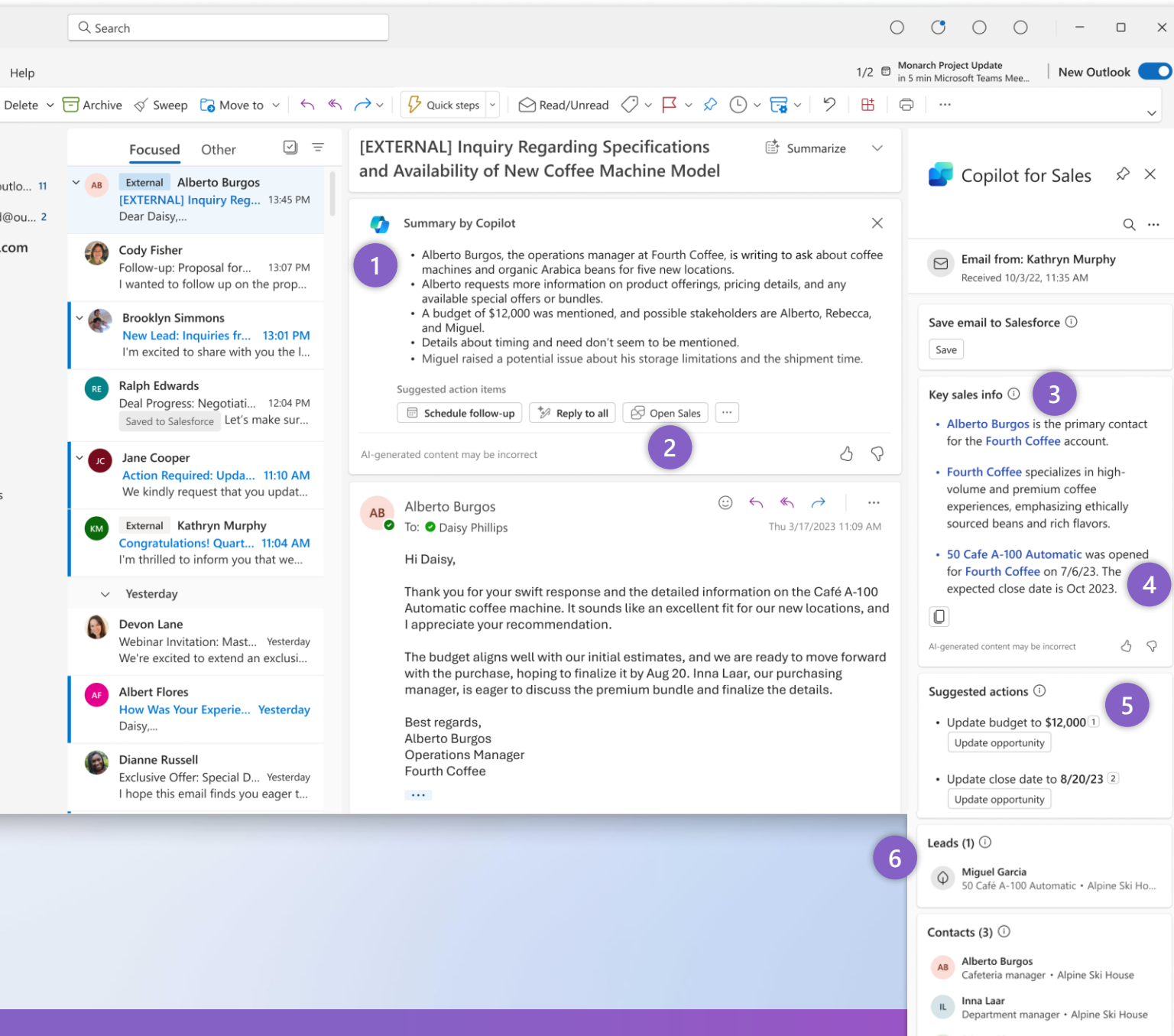
Customization for a uniquely tailored sales solution

\$50 pupm, includes Microsoft Copilot for Microsoft 365

Works with your CRM platform



Connects to
Salesforce Sales
Cloud or Microsoft
Dynamics 365 Sales

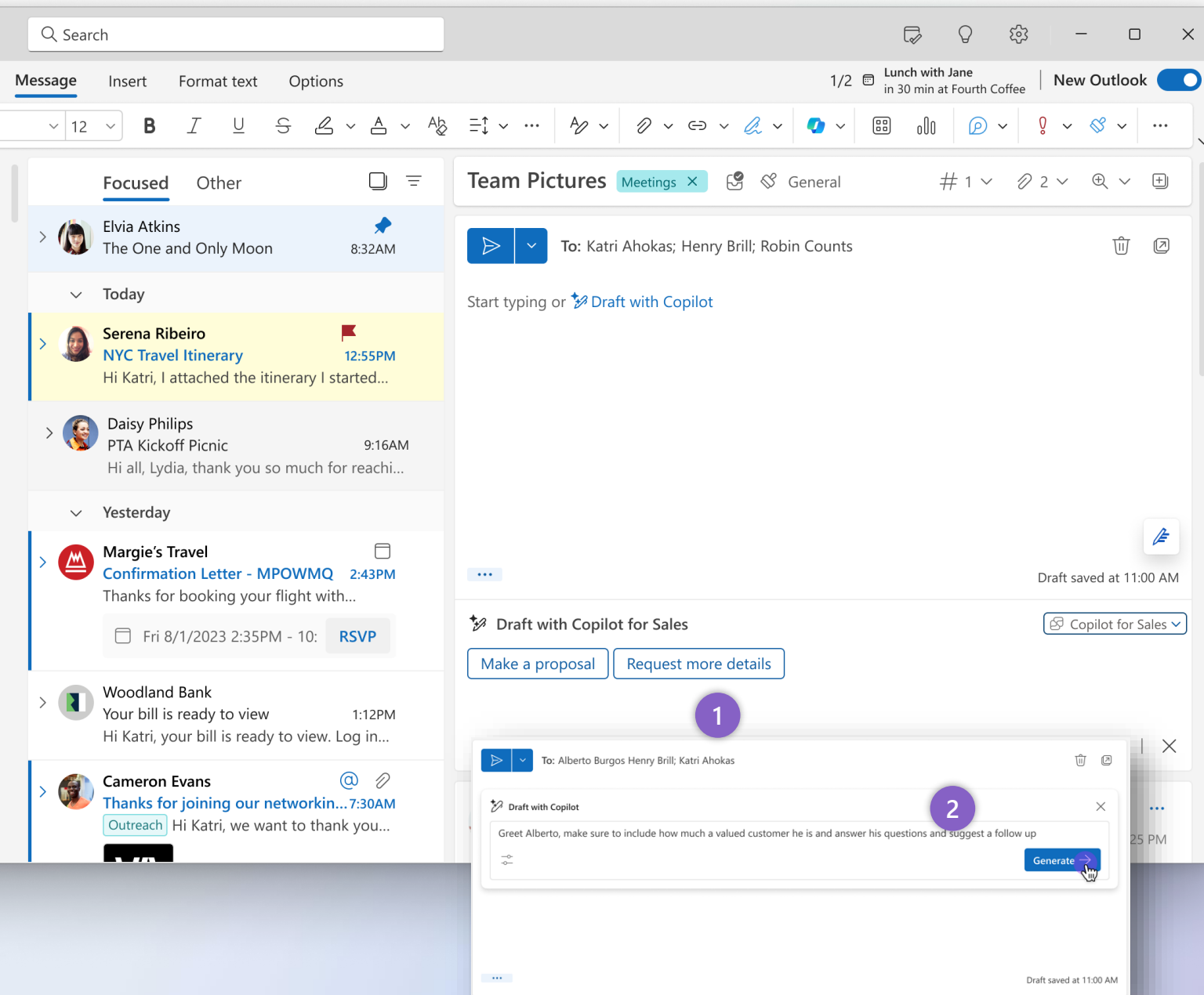


Outlook Email Summary



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 sidecar
- 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



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

Word Content Generation

Draft with Copilot Preview

Help me prep for the pitch meeting with Relecloud meeting

9/300

Generate Reference your content

Open tasks for this opportunity

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	06/010/2023	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

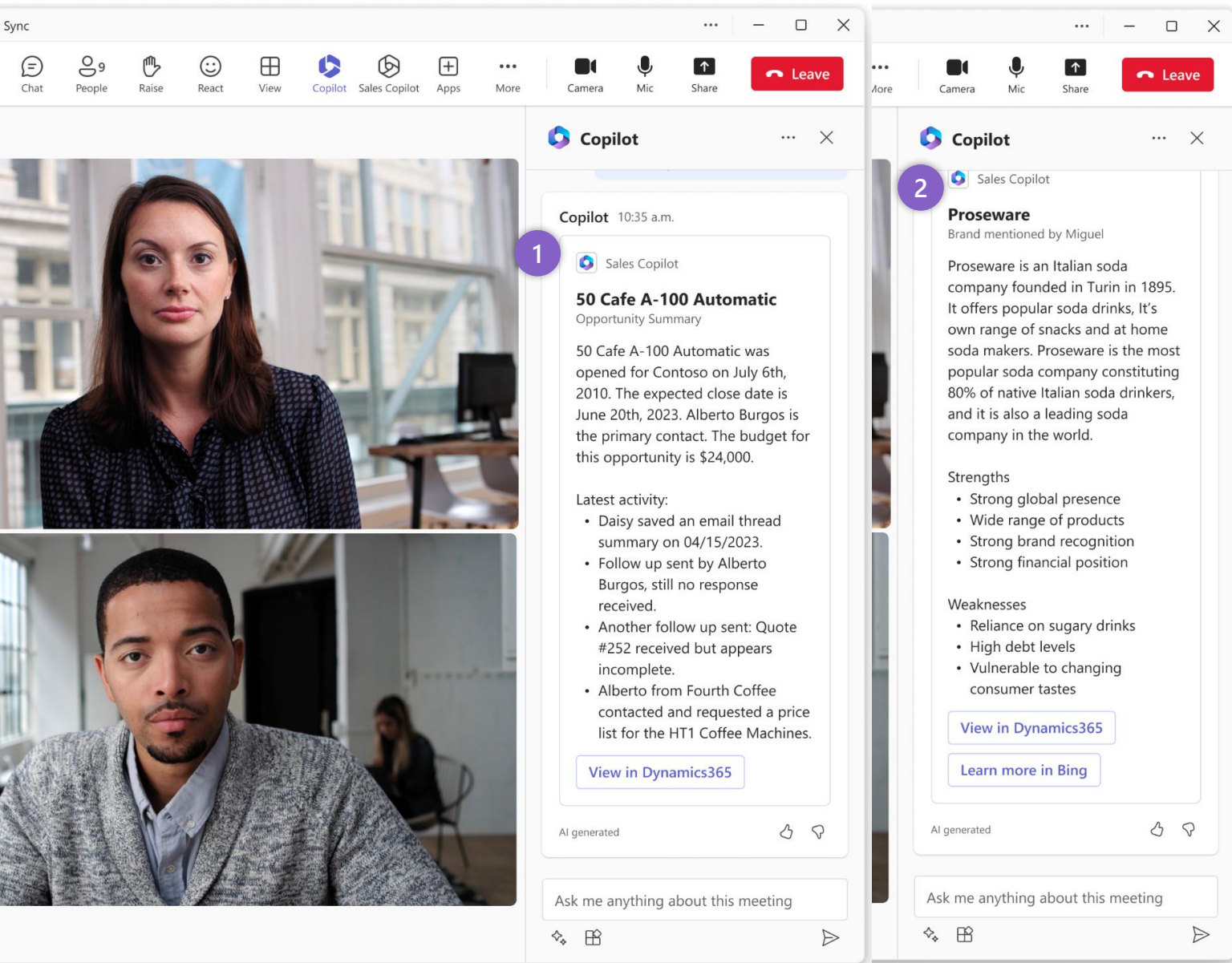
Email thread summary

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 1 of 1 229 words English (U.S.) Text Predictions: On Page View Web View 100% Fit Give Feedback to Microsoft



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

Teams Meeting Recap

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



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.)

Microsoft Copilot for Sales roadmap

TIMING AND FEATURES ARE SUBJECT TO CHANGE

Outlook

February 2024

Email

- Sales email summaries with BANT analysis and buying intent
- 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



Copilot for Sales

Pricing licensing, and packaging

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	+ Sales value
		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 compose	Draft New Email	Y	+ Sales value
		Draft Reply Email	Y	+ Sales value
		Use Excel Data In Email Reply	Y	+ Sales value
		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	Catch Me Up, Q&A On Discussion So Far, Wrap Up	Y	+ Sales value
		Real-time sales tips (Competitor/Brand mentions)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	Post meeting	Summary, Notes & Tasks	Y	+ Sales value
		Follow Up Q&A	Y	+ Sales value
		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	+ Sales value
	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

FAQs

	License I have today	I have Copilot for Microsoft 365 license today	SKU to buy
What do I buy to get access to Copilot for Sales as a Salesforce user?	Salesforce Sales Cloud	No	Copilot for Sales (\$50) <i>Includes Microsoft 365 Copilot entitlements</i>
	Salesforce Sales Cloud	Yes	Step up (\$20)
What do I buy to get access to Copilot for Sales as a Dynamics 365 Sales user?	Dynamics 365 Sales Pro Dynamics 365 Sales Enterprise*	No	Copilot for Sales (\$50)
	Dynamics 365 Sales Pro Dynamics 365 Sales Enterprise	Yes	Step up (\$20)
	Dynamics 365 Sales Premium	No	Copilot for Microsoft 365 (\$30) <i>As the \$20 step up value is included with Sales Premium</i>
	Dynamics 365 Sales Premium	Yes	Fully Licensed

*Includes CE Plan, MRSs customers



Copilot for Microsoft 365

Microsoft Copilot for Sales

Close more deals with
the AI assistant
designed for sellers

- + Out-of-the-box CRM connectivity
- + Real-time sales insights
- + Sales content generation

Microsoft Copilot for Service

Modernize your contact
center with a copilot
designed for service

- + CRM and knowledge source connectivity
- + Case and service insights
- + Embed into third-party agent desktops

Copilot Studio

Customize and build Copilots to meet your business needs



**Extend your practice with
Copilot**

Copilot partner opportunities

AI + Copilot
Advisory

Readiness
Assessment

Deployment

Adoption &
Change
Management

Extensibility

Take action today!

Capability development

Learn the pitch



- Read the GA Blog:
aka.ms/CopilotGAFeb2024
- Review practice building content:
aka.ms/AIFutureOfWorkPartner
- Familiarize yourself with the scenarios, capabilities, and pitch on Partner Hub:
aka.ms/CopilotforSales_Service
- Align your Modern Work and Business Applications practice leads as you build Copilot practice

Training



- Consume the Microsoft Learn modules:
 - [Microsoft Copilot for Sales](#)
 - [Microsoft Copilot for Service](#)
- Review the Microsoft Copilot Partner Bootcamp content on-demand at:
aka.ms/SalesEnablementHub

GTM Execution

Offer development



- Provide visibility to field, customers, and other partners of your Copilot capabilities through creation of offers:
 - AI Advisory Services
 - Readiness Assessment
 - Deployment
 - Adoption and Change Management
 - Extensibility
- Offer development guidance
aka.ms/AIFutureOfWorkPartner

Share your Copilot wins!