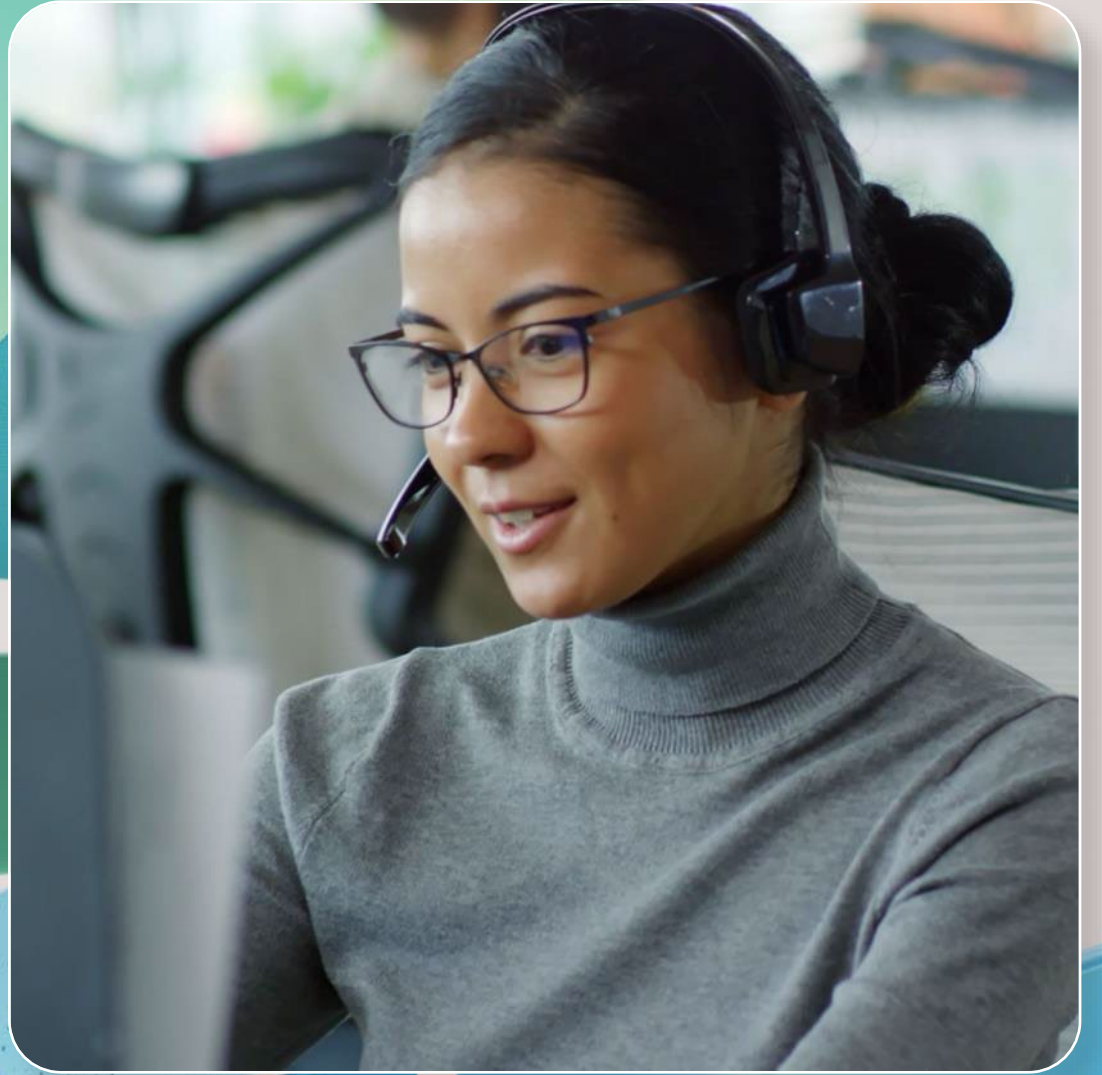




Copilot scenarios for Sales



Using Copilot in Sales

Copilot Workshop

Request information on the Copilot for Microsoft 365 online Workshop



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.

- Accelerate customer research and sales preparation
- Improve customer meetings
- Make a customized pitch
- Quicker customer response and CRM Updates
- Respond to an RFP
- Create an unsolicited proposal



Sales roles



Account Manager



Customer Success



Technical Sales



Tele Sales

Transform sales processes



Lead generation



Customer engagement



Negotiation & closing



Post-sale follow-up & upsell



Sales analysis & forecasting

Microsoft Copilot opportunity to impact key functional KPIs



Sales 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.



Close rate

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



Deal Size

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.



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