



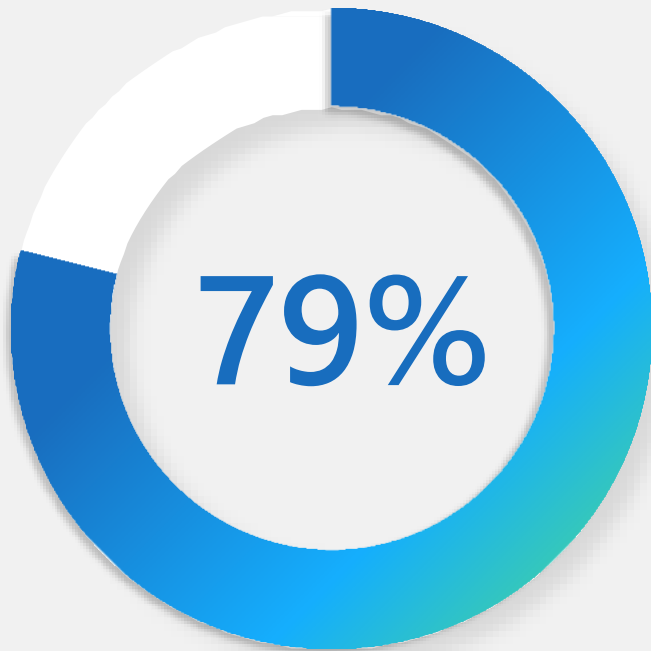
Transform sales productivity

Microsoft Copilot for Sales

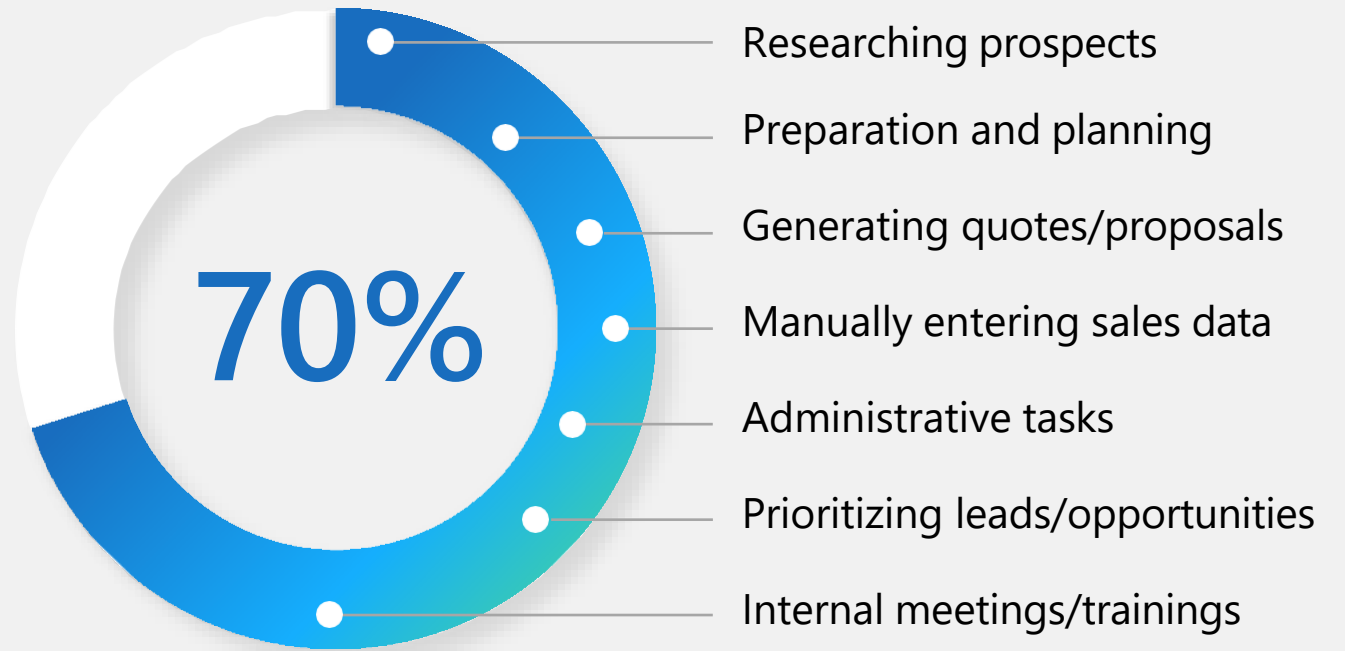


The role of the seller is getting harder

Percent of surveyed sellers who say success expectations and the number of supported customers and accounts have increased in the last year¹



Amount of time sellers spend on administrative and non-selling duties²



Reimagine the sales experience

Empower sales organizations with AI



Cut the
drudgery



Connect
the data



Crush
the sale



Continuously
improve

The AI advantage for sales

Leading consulting companies estimate that sales organizations can benefit significantly from generative AI

Sales efficiency

29% of sales time can be automated¹

3-5% productivity lift²
(total sales expense)

99% of sellers would reinvest time saved from AI on work tasks³

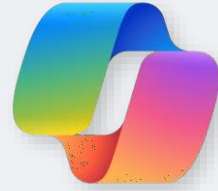
Data quality + sales effectiveness

+50% jump in lead-to-sale conversion rate⁴

3-15% of revenue uplift for players that invest in AI⁴

2X lift in cross-selling and up-selling rate⁴





Microsoft Copilot

Your everyday AI **companion**

Natural Language



Large Language
Models (LLMs)



Web
grounding



Commercial
data protection



The
Internet



Microsoft Copilot for Sales

Your everyday AI **assistant at work** for sales teams

Natural Language



Large Language
Models (LLMs)



Web
grounding



Microsoft Graph
grounding



Enterprise-grade
data protection



CRM platform

Salesforce Sales Cloud
Microsoft Dynamics 365 Sales
Sales insights, content, and
recommendations



Commercial data
protection



The
Internet



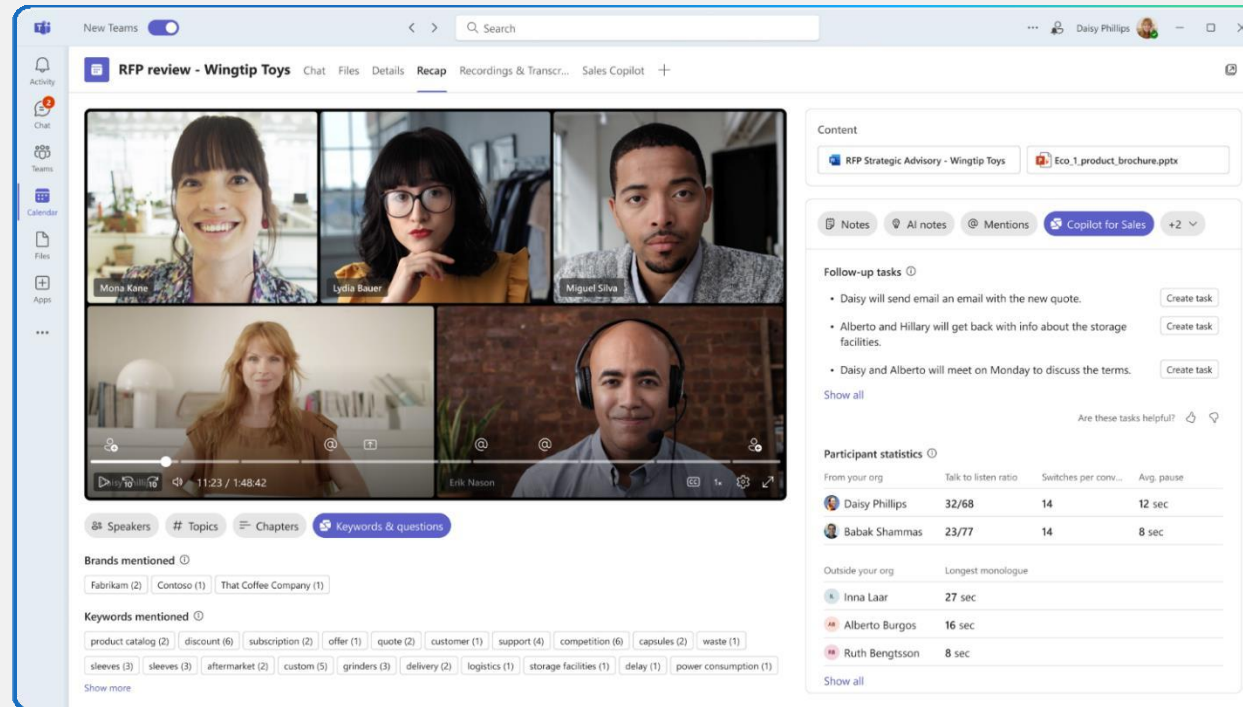
Microsoft 365
Apps



Copilot
Studio


Microsoft Copilot for Sales

Next-generation AI 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.



 View opportunity summary

 Analyze sales conversations

 Draft a proposal

 Create a revenue data chart

 Create CRM tasks from a meeting

 Update opportunity stage

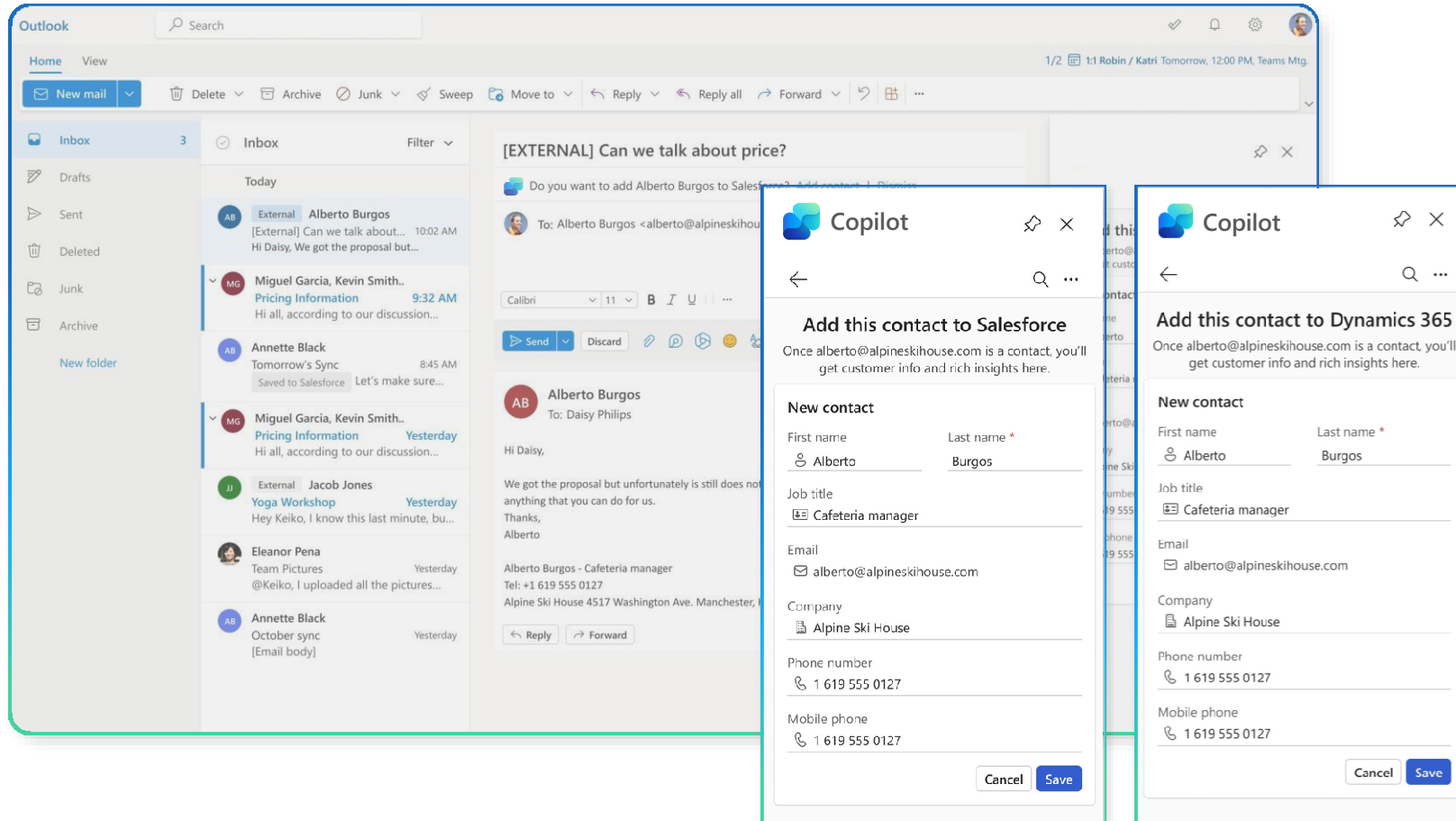
 Show conversion rate

 Create a pitch presentation

Copilot for Sales is experienced in Microsoft 365 and connects to your CRM system



Works with your CRM platform



Connects to
Salesforce Sales
Cloud or Microsoft
Dynamics 365 Sales

AI across sales roles and stakeholders



Do more with less with Microsoft Copilot for Sales

Copilot for Sales can drive revenue-related goals, such as growing customer acquisition, increasing upsell/cross-sell, and improving customer retention and operational efficiency.

Increase revenue			Decrease costs
Customer acquisition	Upsell/cross-sell	Customer retention	Operational efficiency
Improve sales efficiency			
Increase capacity to manage leads with less time spent on updating contacts, emails, and interactions on CRM system.	Reduce customer meeting prep time with account and opportunity summaries and seamless collaboration across sales teams.	Cover more customers at-risk with account summaries providing actionable insights and contextualized emails.	Save sales assistant, manager time with seamless CRM updates and account analysis, based on generated summaries.
Improve sales effectiveness and data quality			
Increase contact-to-lead conversion with personalized emails based on richer, more complete, CRM data.	Convert more up/cross-sell with better meeting prep, cross-company insights, richer 360°-view in CRM system, in-call guidance, and insights.	Differentiate against competitors and avoid churn with in-call compete insights and sentiment analysis on conversation data.	Increase customer satisfaction with proactive back office and customer service interactions, informed by a more complete customer context.
Potential impact			
An effective 0.4% to 0.5% increase in number of leads generated	An effective 2.5% to 3.1% increase in upsell/cross-sell rate	An effective 0.8% to 1.0% revenue lift from higher renewal rate/retention of at-risk customers	An effective 1.8% to 2.4% capture of productive manager, assistant time

Early evidence of Microsoft Copilot for Sales success

**30
mins**

saved per customer meeting and per email using meeting summary¹ and email generation² features

83%

of sellers say Copilot for Sales makes them more productive³

79%

of sellers indicate Copilot for Sales reduces admin work³

78%

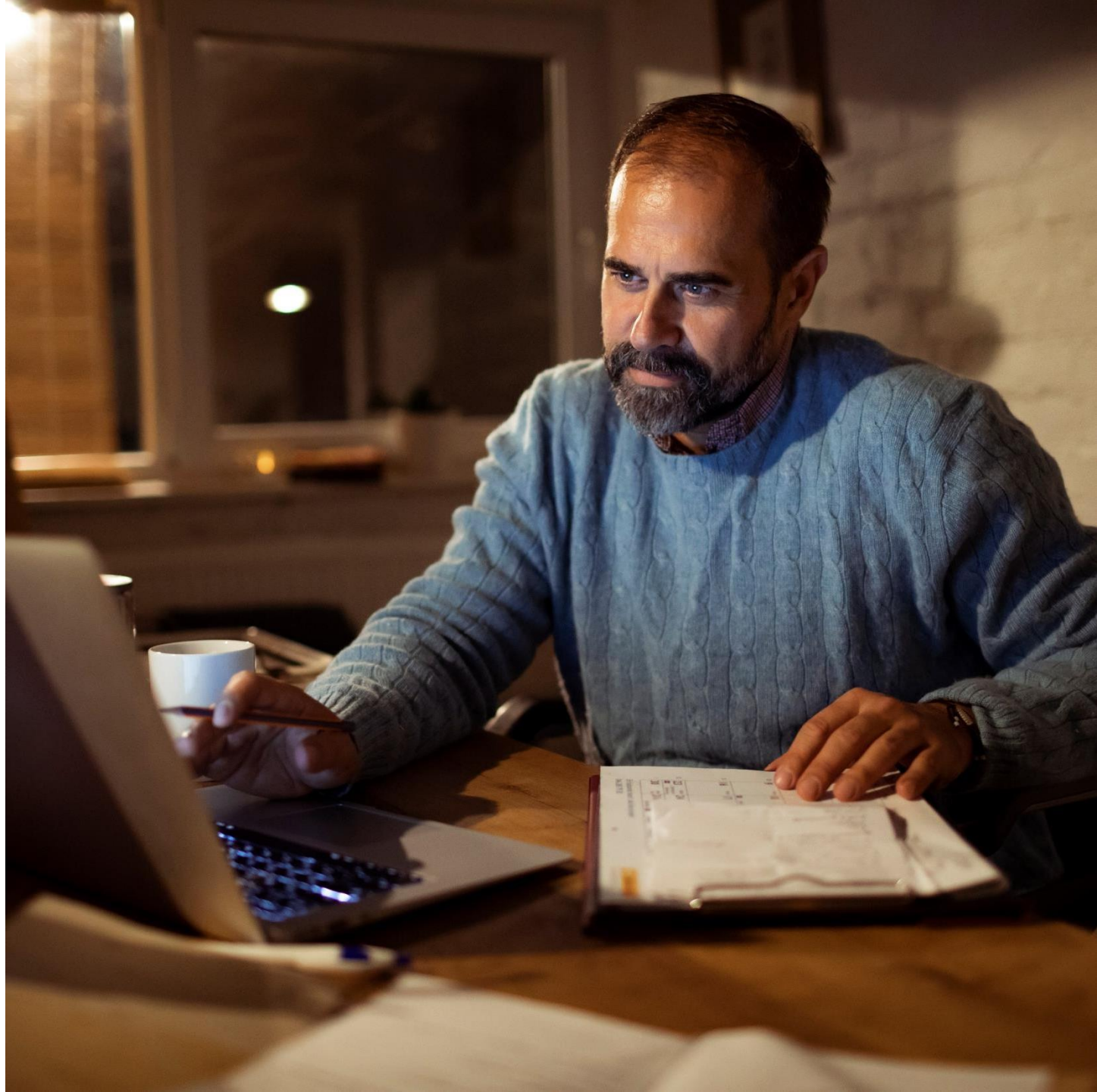
of sellers say Copilot for Sales helps them stay in the flow of work³



Implementing Microsoft Copilot for Sales has saved time, improved skills, contributed to better work-life balance, and **increased revenue by 25%** in one quarter.”¹

David Swenson, Business Development Director
at Netlogic

Capabilities



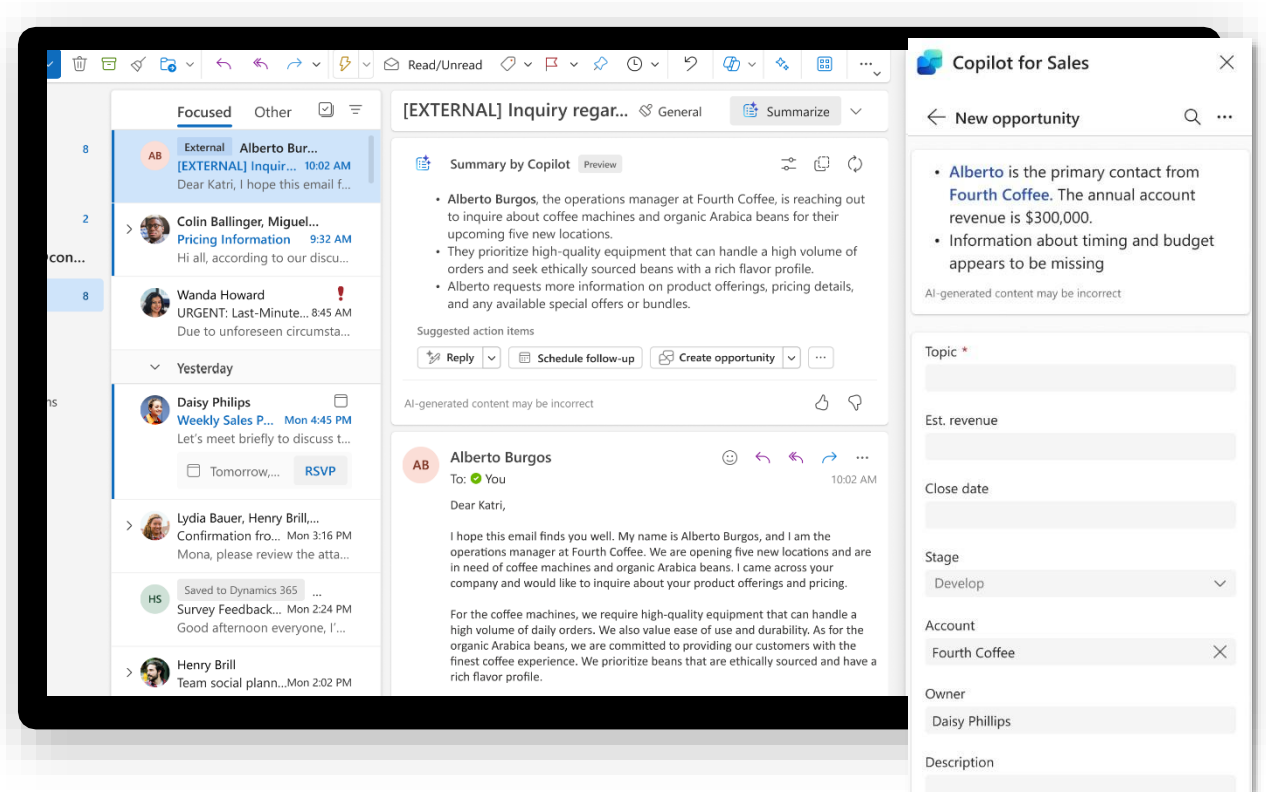
Maximize seller productivity

AI capabilities in the flow of work that streamline processes and create personalized sales content

Get Copilot assistance to add contacts and update CRM records in Outlook and Teams

View Copilot-generated opportunity summaries and CRM record information directly in Outlook and Teams

Generate personalized sales content with Copilot assistance in Word, PowerPoint, and Excel



Seller

Personalize customer engagements

AI-generated sales insights and recommendations for next steps

Use Copilot to generate email summaries and email drafts that pull in CRM platform information

Get sales assistance from Copilot during calls in Teams like meeting preparation notes, sales tips, and competitor insights

View Copilot-generated meeting summaries including sales keywords, KPI analysis, and suggested sales tasks



RFP review - Wingtip Toys

Chat Files Details **Recap** Recordings & Transcr... Sales Copilot +

Mona Kane Lydia Bauer Miguel Silva

Erin Nason

11:23 / 1:48:42

Speakers # Topics Chapters **Keywords & questions**

Brands mentioned

- Fabrikam (2)
- Cortoso (1)
- That Coffee Company (1)

Keywords mentioned

- product catalog (2)
- discount (6)
- subscription (2)
- offer (1)
- quote (2)
- customer (1)
- support (4)
- competition (8)
- capsules (2)
- waste (1)
- sleeves (3)
- sleeves (3)
- aftermarket (2)
- custom (5)
- grinders (3)
- delivery (2)
- logistics (1)
- storage facilities (1)
- delay (1)
- power consumption (1)

Show more

Follow-up tasks

- 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

Inna Laar	27 sec
Alberto Burgos	16 sec
Ruth Bengtsson	8 sec

Show all

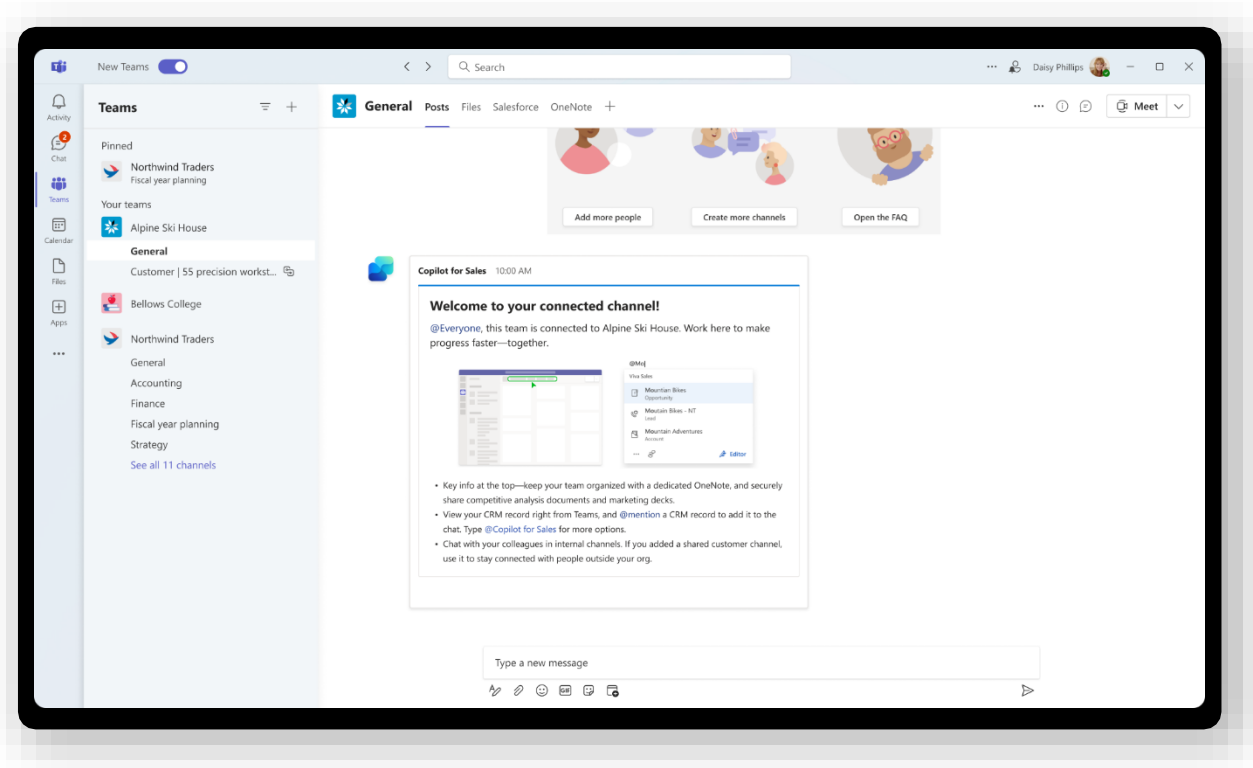
Enhance sales team performance

AI-powered manager insights and collaboration tools

Share contact cards and create deal rooms in Teams that sync with CRM platform data

Get Copilot assistance in OneNote and Loop to create plans, generate ideas, and format content

Get insights on sales pipeline and KPIs by asking questions in natural language with Microsoft Copilot's chat experience



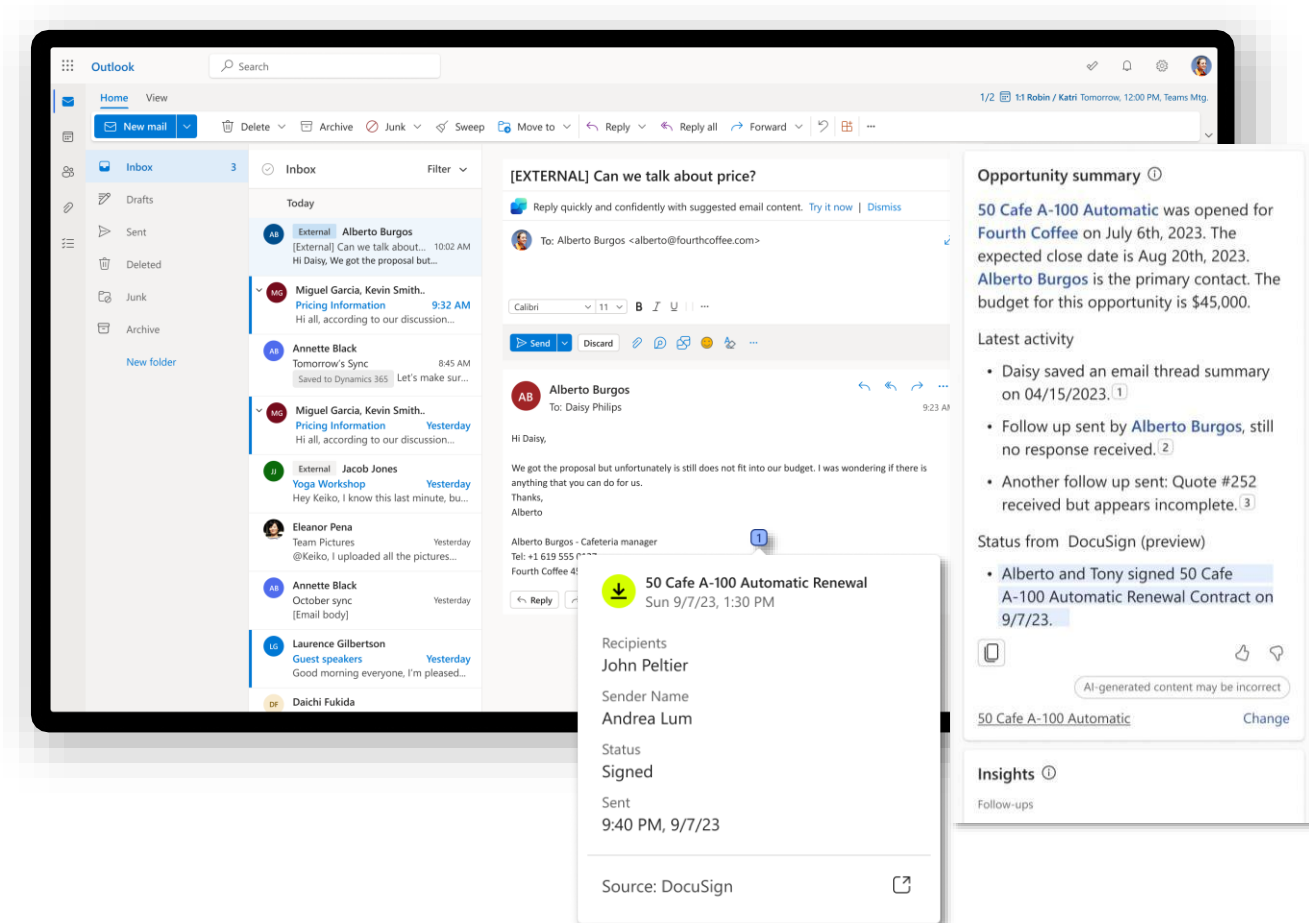
Customize for your needs

Customize for a uniquely tailored sales solution

Add additional fields to sales skills in Copilot for Sales

Extend Copilot for Sales skills to include data and insights from internal and external data sources

Customize Microsoft Copilot experiences with Microsoft Copilot Studio



Sales ops