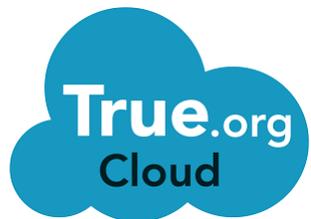




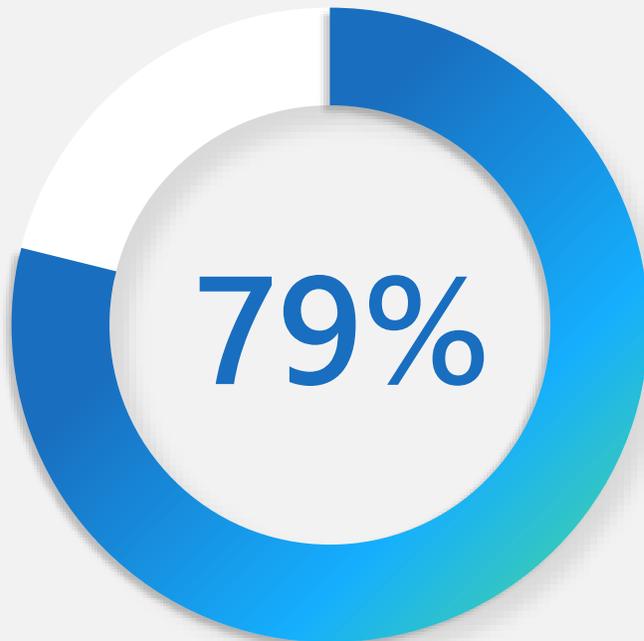
# Transform sales productivity

Microsoft Copilot for Sales

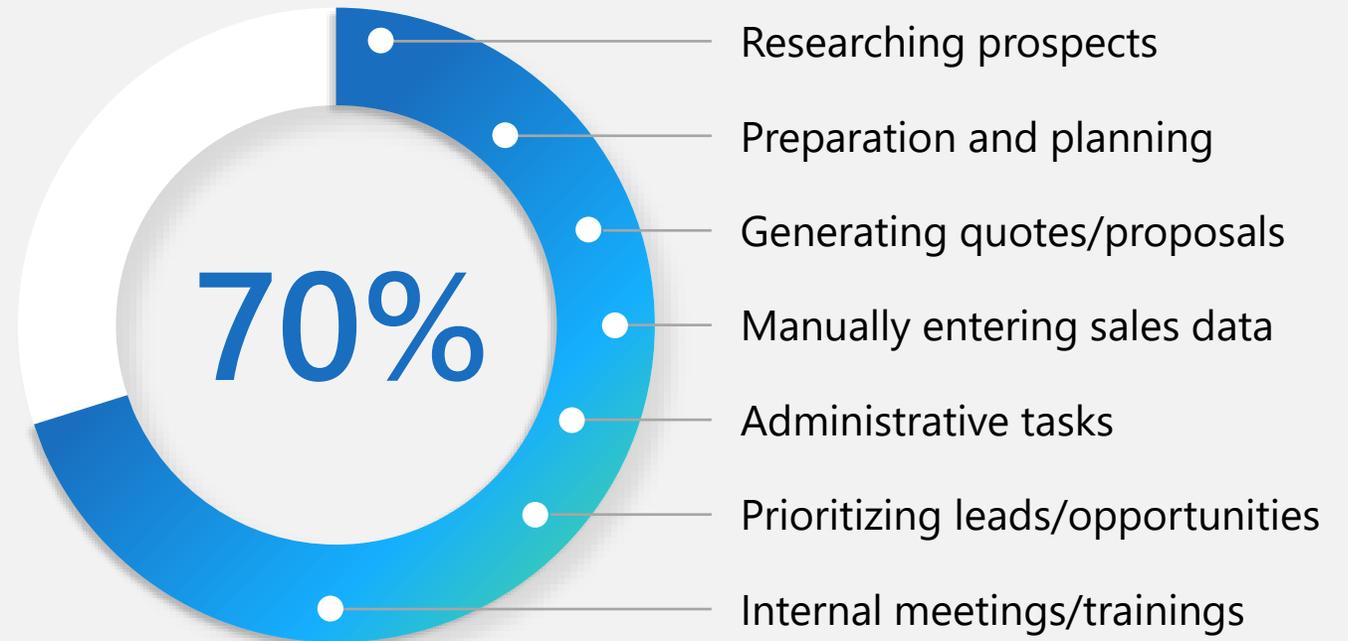


# The role of the seller is getting harder

Percent of surveyed sellers who say success expectations and the number of supported customers and accounts have increased in the last year<sup>1</sup>



Amount of time sellers spend on administrative and non-selling duties<sup>2</sup>



# 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 automated<sup>1</sup>

**3-5%** productivity lift<sup>2</sup>  
(total sales expense)

**99%** of sellers would reinvest time saved from AI on work tasks<sup>3</sup>

## Data quality + sales effectiveness

**+50%** jump in lead-to-sale conversion rate<sup>4</sup>

**3-15%** of revenue uplift for players that invest in AI<sup>4</sup>

**2X** lift in cross-selling and up-selling rate<sup>4</sup>



# 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



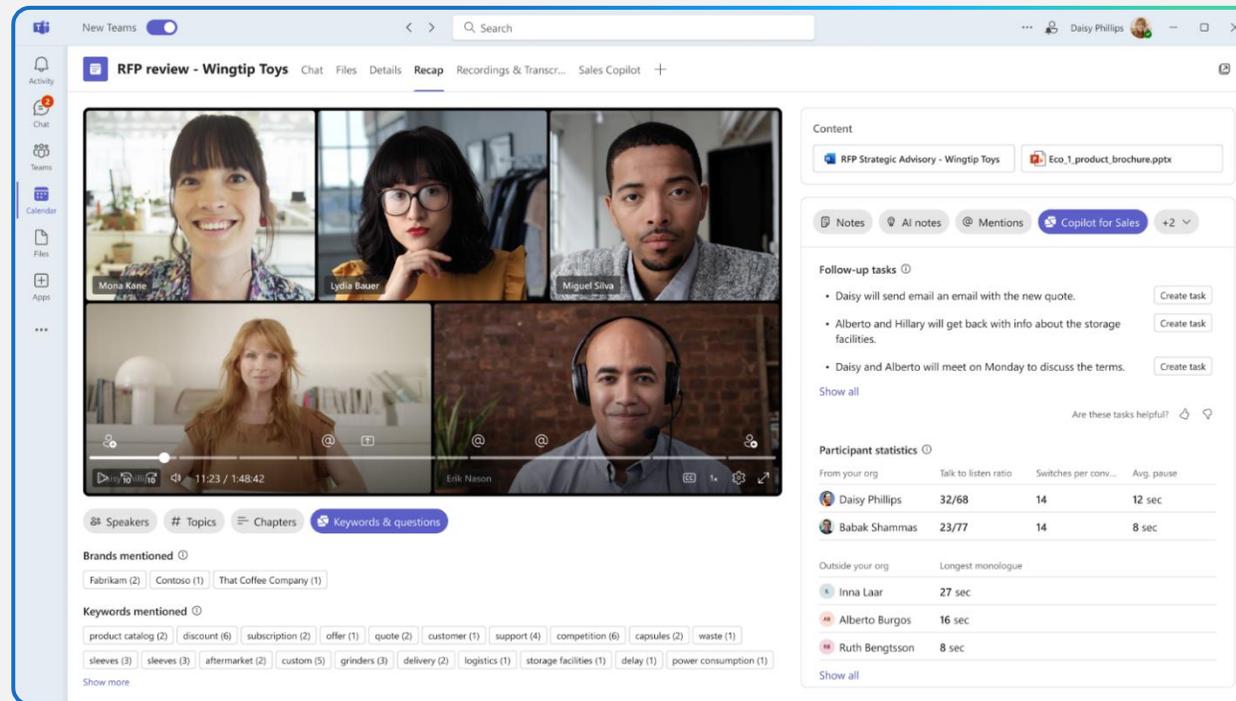
Microsoft 365 Apps



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

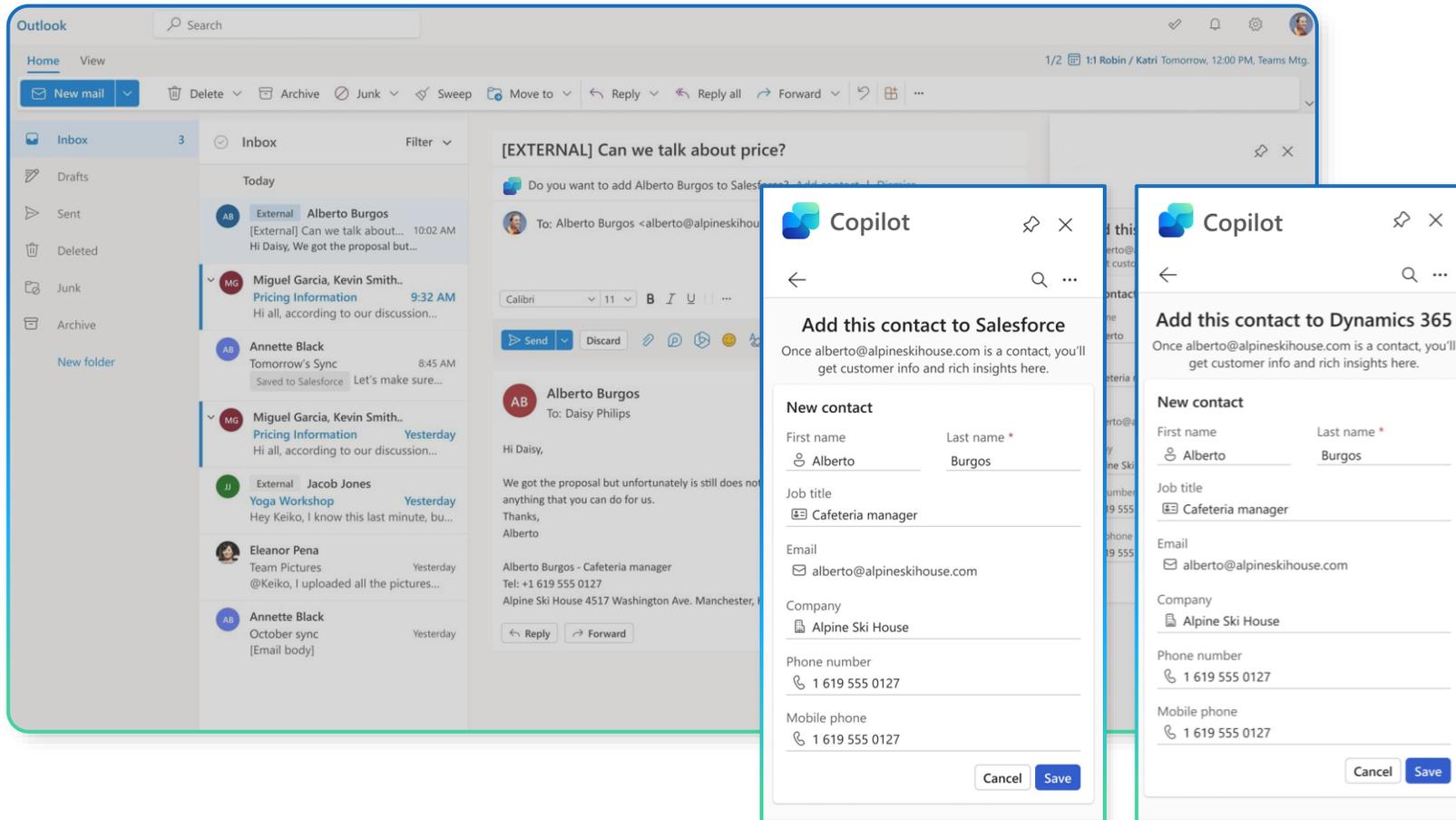
 Show conversion rate

 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
<b>Improve sales efficiency</b>			
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.
<b>Improve sales effectiveness and data quality</b>			
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.
<b>Potential impact</b>			
An effective <b>0.4% to 0.5% increase</b> in number of leads generated	An effective <b>2.5% to 3.1% increase</b> in upsell/cross-sell rate	An effective <b>0.8% to 1.0% revenue lift</b> from higher renewal rate/retention of at-risk customers	An effective <b>1.8% to 2.4% capture</b> of productive manager, assistant time

# Early evidence of Microsoft Copilot for Sales success

**30 mins** saved per customer meeting and per email using meeting summary<sup>1</sup> and email generation<sup>2</sup> features

**83%** of sellers say Copilot for Sales makes them more productive<sup>3</sup>

**79%** of sellers indicate Copilot for Sales reduces admin work<sup>3</sup>

**78%** of sellers say Copilot for Sales helps them stay in the flow of work<sup>3</sup>



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

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

The screenshot displays the Microsoft Outlook interface. On the left, a list of emails is visible, including one from Alberto Burgos with the subject "[EXTERNAL] Inquiry regar...". The main pane shows the email content, which includes a "Summary by Copilot" section. This summary lists key points: Alberto Burgos is the primary contact from Fourth Coffee, the account revenue is \$300,000, and there is missing information about timing and budget. Below the summary, suggested action items include "Reply", "Schedule follow-up", and "Create opportunity".

On the right side of the interface, a "Copilot for Sales" panel is open, showing a "New opportunity" card. This card provides a structured overview of the sales opportunity, including the contact name (Alberto Burgos), the company (Fourth Coffee), the account revenue (\$300,000), and the current stage (Develop). The panel also includes fields for "Topic", "Est. revenue", "Close date", "Account", "Owner" (Daisy Phillips), and "Description".



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

The screenshot displays a Microsoft Teams meeting window titled "RFP review - Wingtip Toys". The interface includes a video gallery with participants: Moira Kane, Lydia Bauer, Miguel Silva, and Erik Nasson. A Copilot sidebar is open on the right, showing a "Content" section with documents like "RFP Strategic Advisory - Wingtip Toys" and "Eco\_1\_product\_brochure.pptx". Below this, a "Follow-up tasks" section lists three tasks: "Daisy will send email an email with the new quote.", "Alberto and Hillary will get back with info about the storage facilities.", and "Daisy and Alberto will meet on Monday to discuss the terms." Each task has a "Create task" button. A "Participant statistics" section shows a table with columns for "From your org", "Talk to listen ratio", "Switches per conv...", and "Avg. pause".

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

Below the statistics, an "Outside your org" section lists "Longest monologue" for Inna Laar (27 sec), Alberto Burgos (16 sec), and Ruth Bengtsson (8 sec).



Seller

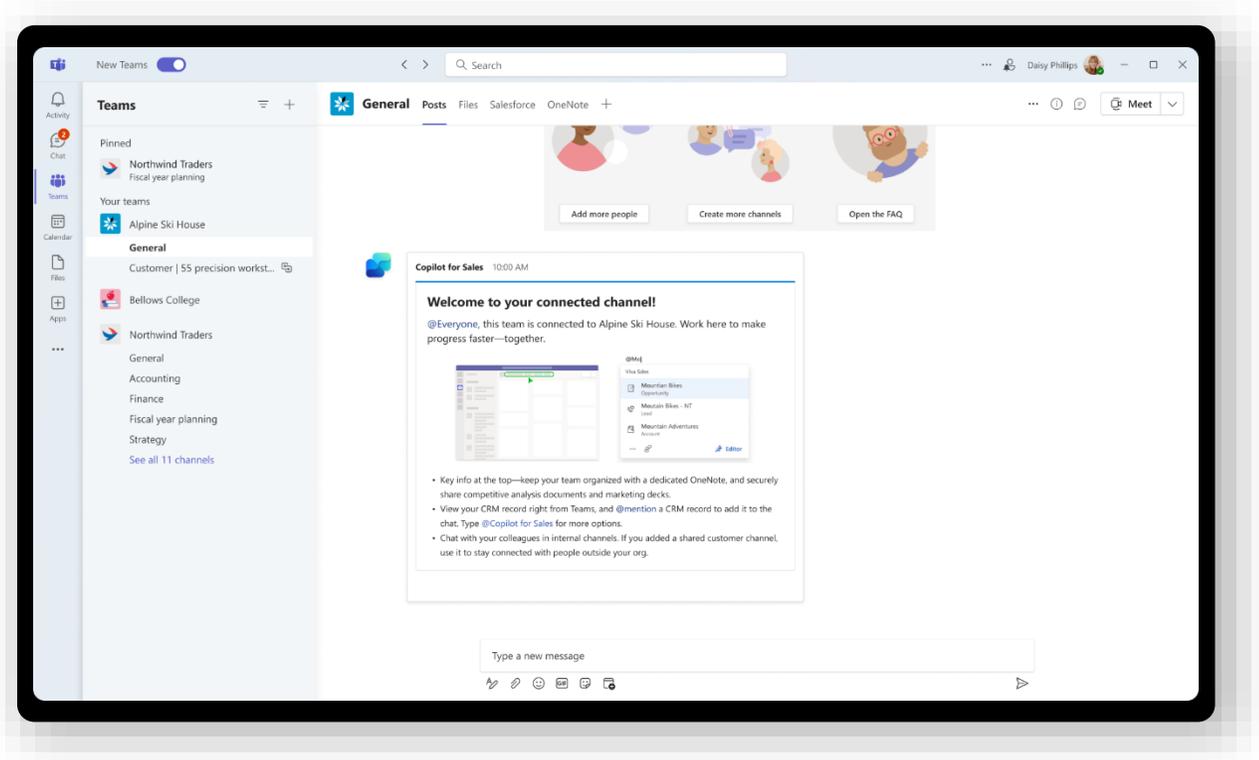
# Enhance sales team performance

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



Sales manager

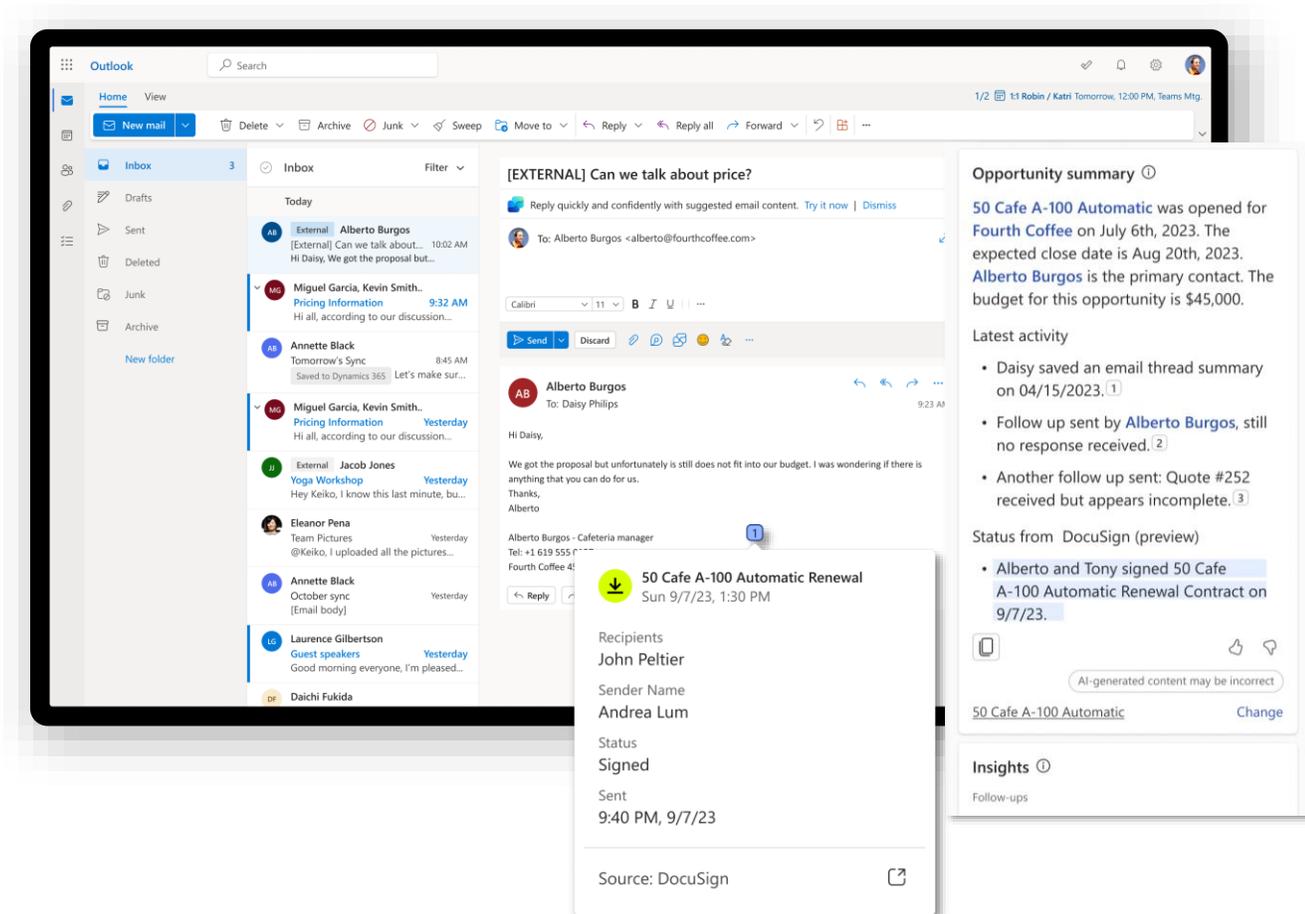
# Customize for your needs

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