



Microsoft Dynamics 365 Sales Copilot

Maximize seller-customer engagement by unlocking the potential of intelligent assistant in a focused 3-hour training session.

Training

The Dynamics 365 Sales Copilot is a 3 hours session targeted for Sellers and administrators, which will cover an interactive workshop delivered remotely via Microsoft Teams.

This training focuses on sales team to use Dynamics 365 Sales Copilot and engage better with the customers.

Each session can be tailored to the requirements of the organization and will allocate time for Q&A.

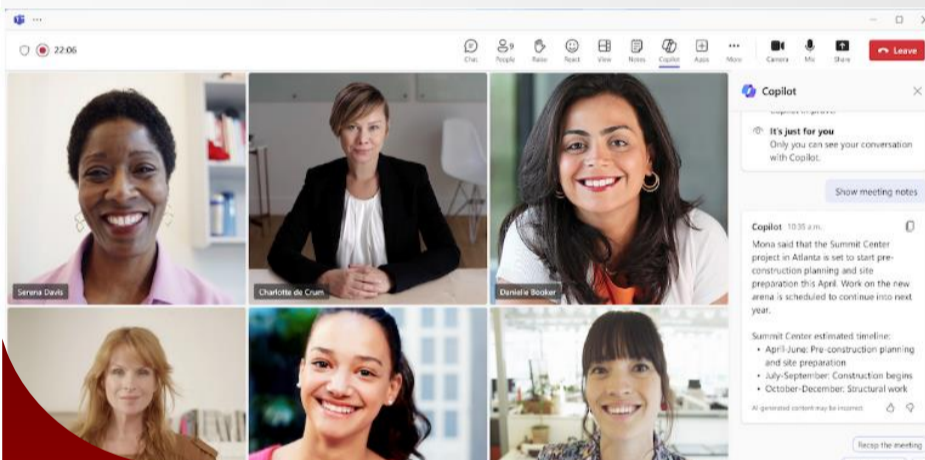
Agenda

Sellers

- Dynamics 365 Copilot overview
- Use Sales Copilot with CRM for
 - Prioritize your leads based on past interactions
 - Automatically generate proposals using product catalog and price sheets
 - Quick prompt and best practices
- Use Sales Copilot in Teams
 - Automated meeting summary
 - Collection information about attendees
 - Sync with CRM
- Use Sales Copilot in Outlook
 - Draft email follow-ups in context to the conversation in CRM
 - Use predefined categories to reply to an email
 - View email summary

Administrator

- Setup and configurations
- Configuring copilot in context to your CRM
- Adding existing CRM customizations to Copilot



Learning outcome

By the end of the session, attendees will be confident in the following:

- **Using Dynamics 365 Sales Copilot**
- **Using Copilot with Teams and Outlook**
- **Effective prompts to get best results**
- **Leveraging the data generated through copilot to its best context**

Target audience	Dynamics 365 Sales users, Sales professionals
Skills Level/Delivery/Pre-req	<ul style="list-style-type: none"> • Beginner/ Steady pace/ • No familiarity with Copilot • Dynamics 365 Sales functional awareness is required
Delivery mode	Online