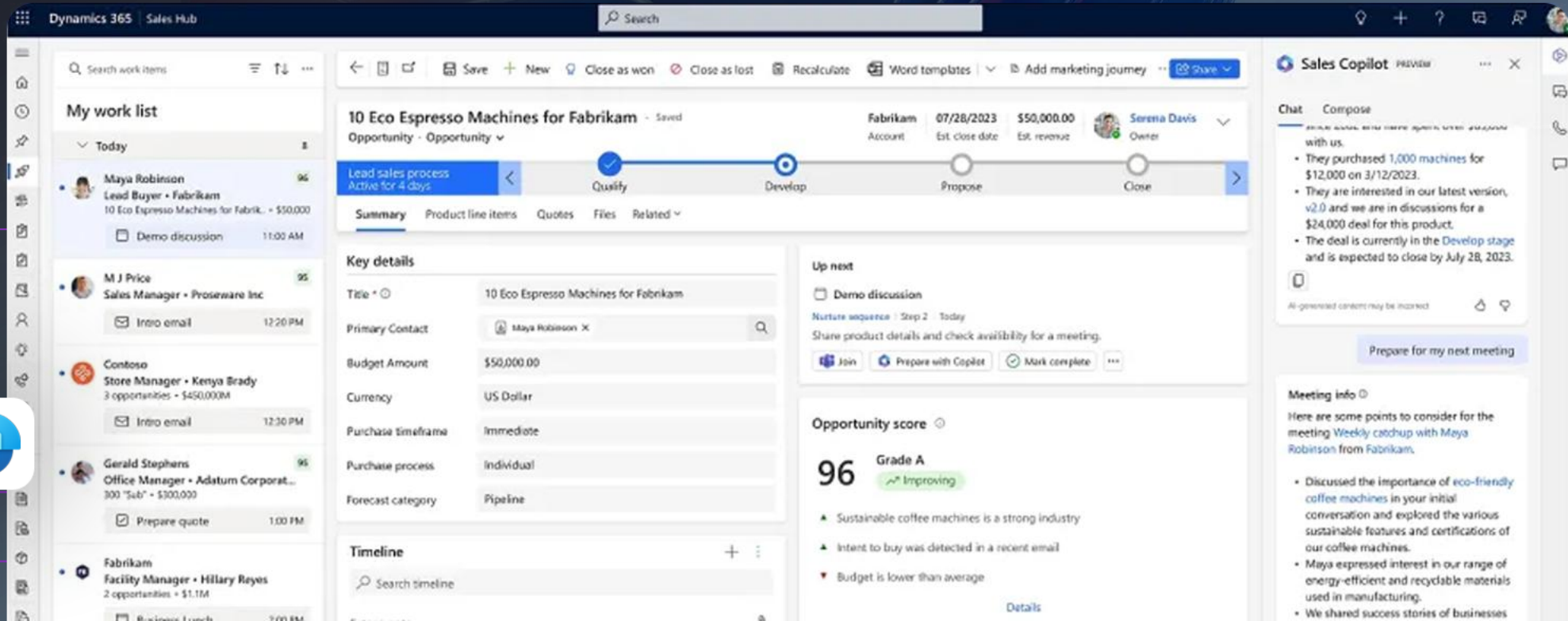


# Copilot for Sales Catalyst



The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main view shows a sales opportunity for "10 Eco Espresso Machines for Fabrikam" with a score of 96 (Grade A, Improving). The opportunity is in the "Develop" stage of a sales process. The interface includes a "My work list" on the left, a "Key details" section with fields like Title, Primary Contact, Budget Amount, and Currency, and a "Timeline" section. On the right, the "Sales Copilot" chat window is open, displaying a chat history and a "Prepare for my next meeting" button. The chat history includes a message from the user and a response from the AI assistant.

**My work list**

- Today
- Maya Robinson (Lead Buyer - Fabrikam) - 96  
10 Eco Espresso Machines for Fabrikam - \$50,000  
Demo discussion - 11:00 AM
- M J Price (Sales Manager - Proseware Inc) - 95  
Intro email - 12:20 PM
- Contoso (Store Manager - Kenya Brady) - 95  
3 opportunities - \$450,000M  
Intro email - 12:30 PM
- Gerald Stephens (Office Manager - Adatum Corporat...) - 95  
300 "Sub" - \$300,000  
Prepare quote - 1:00 PM
- Fabrikam (Facility Manager - Hillary Reyes) - 95  
2 opportunities - \$1.1M  
Business Lunch - 2:00 PM

**10 Eco Espresso Machines for Fabrikam** - Saved  
Opportunity - Opportunity

Fabrikam Account | 07/28/2023 Est. close date | \$50,000.00 Est. revenue | Serena Davis Owner

Lead sales process Active for 4 days

Summary | Product line items | Quotes | Files | Related

**Key details**

Title	10 Eco Espresso Machines for Fabrikam
Primary Contact	Maya Robinson X
Budget Amount	\$50,000.00
Currency	US Dollar
Purchase timeframe	Immediate
Purchase process	Individual
Forecast category	Pipeline

**Up next**

- Demo discussion
- Next sequence: Step 2 - Today
- Share product details and check availability for a meeting.
- Join | Prepare with Copilot | Mark complete

**Opportunity score**

96 Grade A Improving

- Sustainable coffee machines is a strong industry
- Intent to buy was detected in a recent email
- Budget is lower than average

**Sales Copilot** PREVIEW

Chat Compose

with us.

- They purchased 1,000 machines for \$12,000 on 3/12/2023.
- They are interested in our latest version, v2.0 and we are in discussions for a \$24,000 deal for this product.
- The deal is currently in the Develop stage and is expected to close by July 28, 2023.

Prepare for my next meeting





**Meeting info**

Here are some points to consider for the meeting Weekly catchup with Maya Robinson from Fabrikam.

- Discussed the importance of eco-friendly coffee machines in your initial conversation and explored the various sustainable features and certifications of our coffee machines.
- Maya expressed interest in our range of energy-efficient and recyclable materials used in manufacturing.
- We shared success stories of businesses

# Is your company reaching its full sales potential?

Designed for sellers, Copilot for Sales brings sales data and insights in the flow of work to help sellers save time, focus on customers, and close more deals.

-  **Automate** repetitive tasks.
-  **Unlock** data-driven insights.
-  **360° view** of customers.
-  **Optimize** operations for peak efficiency.



# Deploy your Copilot for Sales in 4 weeks

01

Consultation and needs  
assessment planning

02

Configuration + Deployment

03

User training + onboarding

04

Q&A + 1 week user support



**Dynamics 365 Sales  
Copilot Catalyst**

**4 weeks**  
**100 hours**  
Up to \$15,000  
(MS Programs eligible)

# Guidance by departament



Using Copilot in  
Finance



Using Copilot in  
Human Resources



Using Copilot in  
IT



Using Copilot in  
Marketing



Using Copilot in  
Sales

# Implementation



## Copilot implementation

### Copilot readiness checklist

- ✓ Sponsor
- ✓ Scenarios
- ✓ Security

**You are here**

### Human change

Prepare organization and employees for the AI transformation journey through user enablement programs

Workstreams support each other for maximum value and ROI  
Get ready > Onboard & engage > Deliver impact > Extend & optimize

### Technical readiness

Address technical deployment and optimization, including governance, security, compliance, and management

**Leadership journey**

# Expected Results with Copilot for Sales Catalyst



**80%**

reduction in time spent on repetitive tasks.

**Boost your team's productivity**



**50%**

reduction in time spent on alignments and meetings.

**Enhanced collaboration**



**30%**

Improvement in closing new deals

**More efficient operations**



# Transform the way your company works

Measurable results in productivity, innovation, and sustainable growth.



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