Copilot for Sales

Accelerator Workshop



Workshop & **Feature Training**

Provide an overview and training on core functionalities. Cover relevant user scenarios for client.



Post Go-Live Support & Wrap-up

Ensure users are confident and systems are running smoothly.



Initial Configuration

Align settings with organizational workflows. Set up CRM data sync, meeting analytics and key users.



Go-Live Prep & Launch

Transition Copilot for Sales to active use, ensuring a smooth client launch.



Copilot for Sales Installation

Set up Copilot for Sales environment and integrate with Dynamics 365, Outlook and Teams.



One-on-One **Adoption Coaching**

Coach team leads/superusers on best practices. Address user adoption challenges and strategies.



Kickoff Meeting

Introduce plan and timeline. Define objectives and align on project goals.



Validate functionality for client's specific business use cases (example: sales tracking or meeting prep).



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