Hitachi Solutions

Microsoft Copilot for Sales PoC for Salesforce

2-Week Proof of Concept

CONTACT US today to get started!

PoC Overview

In today's hyper-competitive market, sales organizations need innovative tools to boost productivity and drive revenue growth. Microsoft Copilot for Sales, seamlessly integrated with Salesforce and Microsoft 365, offers **an AI-driven solution to enhance your sales team's efficiency**.

Our two-week Proof of Concept (PoC) engagement **showcases Copilot for Sales' powerful capabilities, tailored to your business needs**. We handle the initial setup and configuration, provide comprehensive training, and identify key use cases through a Business Value Discovery Workshop, ensuring your team fully benefits from generative AI.

Why Take Action?

Sales organizations often encounter challenges such as inefficiencies in sales processes, difficulties in managing customer relationships, and the need for real-time data insights for informed decision-making.

Copilot for Sales addresses these issues by automating routine tasks and streamlining workflows, **allowing sales teams to focus on high-value activities**. It optimizes CRM utilization using AI to enhance Salesforce, ensuring better data management and customer insights.

Additionally, real-time analytics and insights aid **data-driven decision-making, improving sales outcomes**.

Outcomes

Copilot for Sales empowers sales organizations to **boost productivity, improve customer relationship management, and drive revenue growth** through innovative AI-driven solutions.

How Our POC Will Help:

- Executive advisory sessions that identify business metrics and determine configuration requirements.
- Assign licenses and roles, configure users and administrators, review end-user experience, and review privacy settings.
- Demonstrate Copilot functionality with use cases identified during the Executive Advisory phase.
- Evaluate the pilot's effectiveness from the users involved, assess the capabilities of the solution, and consider any challenges or improvements needed.