



Sales 360



Risk Assessment – Market Opportunity

Target Segment

- Mid-market & Enterprise B2B organizations running Microsoft 365 and Dynamics 365 Sales (or planning to), 500–50,000 employees
- Industries with complex, multi-stakeholder deals: Financial Services, Healthcare & Life Sciences, Hi-Tech/SaaS, Professional Services, Manufacturing
- Teams with partner/co-sell motions, RFP/RFI-driven sales, or field + inside hybrid models

Target Persona

- Chief Revenue Officer / Head of Sales, Regional Sales Leaders
- Revenue Operations / Sales Operations
- SDR/BDR Managers & Account Executives
- Partner/Alliances Managers
- IT / Microsoft Platform Owners & Power Platform CoE

Key Business Challenges

- \ Inefficient financial data recording and financial insights to assess borrower credibility and repayment capacity.
- \ Lack of automation in analysis of non-financial parameters of a firm such as competitive strength, management's reliability, macroeconomic factors etc. harnessing credible online sources
- \ Traditional mortgage workflows are manual, time-consuming, and prone to errors.
- \ Lack of Real-Time commercial property search Intelligence.
- \ Manually validating the NAICS code is time taking effort.

Sales 360 – Persistent Gen AI Powered Sales Solution Harnessing Dynamics & Copilot

AI enabled salient features

What Does the Solution Contain?



GenAI Lead Enrichment
for personalized
engagement

Intelligent Lead Scoring,
Qualification, and
Routing

Copilot-Guided
Opportunity
Qualification

Copilot led Next Best
Action
Recommendations

Quote Builder with
Branded Templates

Streamlined
Opportunity Processing

Sales Pipeline Analytics
Dashboard for real-time
decision making

Unique Value Proposition



360° view of leads,
accounts, and
contacts

Auto-routing of
high-potential
opportunities to
senior reps

Reduced manual
effort with AI-
generated tasks,
notes, and follow-
ups

Smart
segmentation for
personalized
campaigns

Accelerated
proposal
generation with
human-editable
templates

Tech Stack



Dynamics 365 | Power App Portal | Power Automate| Power BI | Microsoft Copilot Studio | Azure AI Builder

Azure DevOps | Azure App Insights | Web APIs | Azure Function Apps & Logic Apps

What Does It Offer?



- **20–30% increase in lead conversion** through intelligent scoring and fast response
- **40% reduction in qualification time** with AI-assist for opportunity triage
- **25% improvement in sales rep productivity** by eliminating manual steps
- **Up to 50% faster proposal turnaround** with pre-built templates and Copilot-generated content
- **Enhanced forecasting accuracy** due to real-time insights and risk alerts
- **Higher customer engagement** with AI-personalized outreach and follow-ups

Thank You

