

# Microsoft Sales Copilot



## 2 DAY WORKSHOP

### Let Sikich help you supercharge your sales with Microsoft Sales Copilot

Microsoft Sales Copilot is a seller experience application that lets sellers use Office 365 and Teams to automatically capture, access and register data into any CRM system, eliminating the administrative burden of manual data entry and giving them more time to focus on selling. By enriching your CRM data with customer engagement data from Microsoft 365 and the power of AI, Sales Copilot enables sellers to be more connected with their customers. This results in more personalized engagement and faster deal closure.

Sellers want more time on selling, less time on admin. Sellers like to focus on the activities they value most: They want to set goals, connect with customers, and build strong relationships, not spend time on data entry. And to be as successful as possible—and to help their sales organization succeed—sellers need to capture and keep up with customer engagement data, all while staying in the flow of work.

### Key benefits of Sales Copilot

Cut the forms <b>Skip the data entry</b>	Connect the data <b>Get actionable insight in real time</b>	Crush the scale <b>Know the best next action</b>
Sales Copilot automatically collects data from all Microsoft 365 apps across every customer touchpoint, so sellers don't have to enter data manually.	Intelligence in Teams calls, automatically including an executive summary, call transcript, and helpful KPIs like average talking speed.	Sales Copilot delivers AI-driven recommendations that create a better seller experience and optimize follow-through for more sales.

### What is included in the workshop

We will follow our proven methodology which is designed to get you where you need to be with minimum fuss. Designed specifically to meet the needs of organizations with CRM Sales users, our workshop process follows these steps:

- Evaluate**  
Prerequisites for Microsoft applications and licensing
- Conduct**  
Setup of Sales Copilot Applications

- Provide**  
Configuration of Applications related to Sales Copilot (including... Outlook, Teams, and Exchange)
- Facilitate**  
Training on benefits and usage

### Why Sales Copilot

- Reduces time with automatic data entry between systems.
- Designed to improve a seller's experience through the apps they already use day-to-day: Outlook, Excel, Teams, etc.
- Attach Teams transcripts to CRM records instead of taking notes.
- AI guided coaching to help move the sale forward.
- Includes natural language processing, action items detection, insights, recommendations, and more...



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