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Microsoft Sales Copilot

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About Slalom



WHAT WE DO

Slalom is a **purpose-led, global business and technology consulting company.**

From strategy to implementation, our approach is fiercely human. We deeply understand our customers—and their customers—to deliver practical, end-to-end solutions that drive meaningful impact.



Achieve more together

2022 US Analytics Partner of the Year

Our business was built on Microsoft, and for nearly two decades, we've delivered innovation together. It starts with our shared purpose: realizing greater impact through collaboration and enabling every person and organization on the planet to achieve more.

We're partnering with change-making clients to shape the future around Microsoft technology—that's because as we look to the next two decades and beyond, we know the future will be built on Microsoft, too.

350+

Microsoft clients served in 2021

53+

Microsoft partner awards








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01

Microsoft Sales Copilot Overview

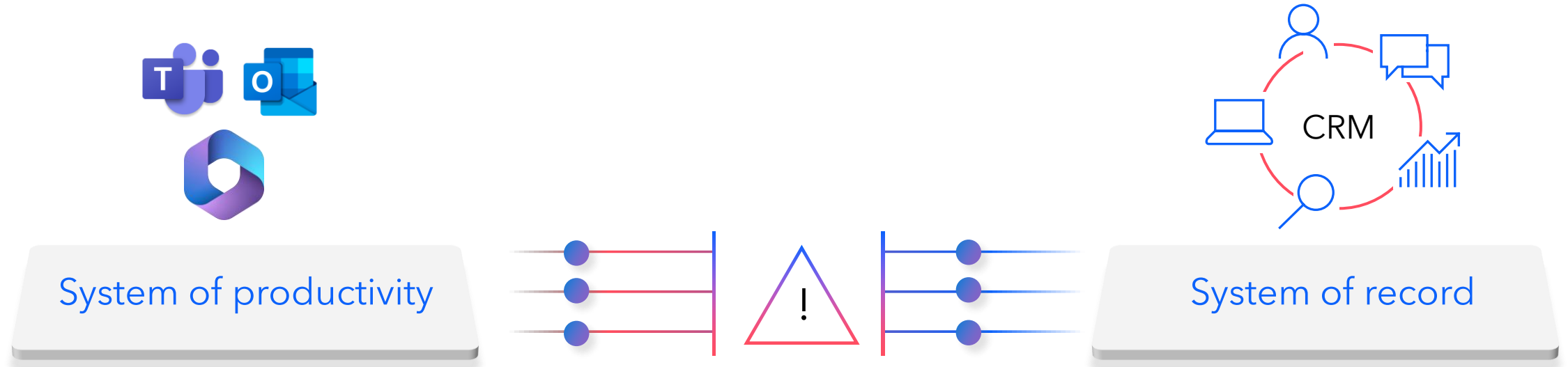
Microsoft Sales Copilot - Microsoft Viva Suite Overview

The Viva Suite supports Employees across these 5 experience areas:

CONNECTION	INSIGHT	PURPOSE	GROWTH	ROLE-BASED EXPERIENCES
 <p>Solutions designed to help communicate organizational information, enable connection across teams, and drive employee engagement.</p> <p>Product(s)</p> <ul style="list-style-type: none">• Viva Connections• Viva Engage• Viva Amplify*• People in Viva*	 <p>A data-driven solution focused on helping employees take actionable steps to improve the quality of their work-day.</p> <p>Product(s)</p> <ul style="list-style-type: none">• Viva Insights• Viva Pulse*• Glint	 <p>A goal-setting and objectives and key results (OKR) management solution that aligns teams to your organization's strategic priorities, driving results and a thriving business.</p> <p>Product(s)</p> <ul style="list-style-type: none">• Viva Goals	 <p>Solutions focused on helping break down information siloes and providing employees with a career development path to learn and thrive.</p> <p>Product(s)</p> <ul style="list-style-type: none">• Viva Learning• Viva Topics	 <p>Solution(s) focused on reducing manual tasks with automation and leveraging AI to drive business outcomes.</p> <p>Product(s)</p> <ul style="list-style-type: none">• Microsoft Sales Copilot

Microsoft Sales Copilot Overview

Perceived Seller Challenges

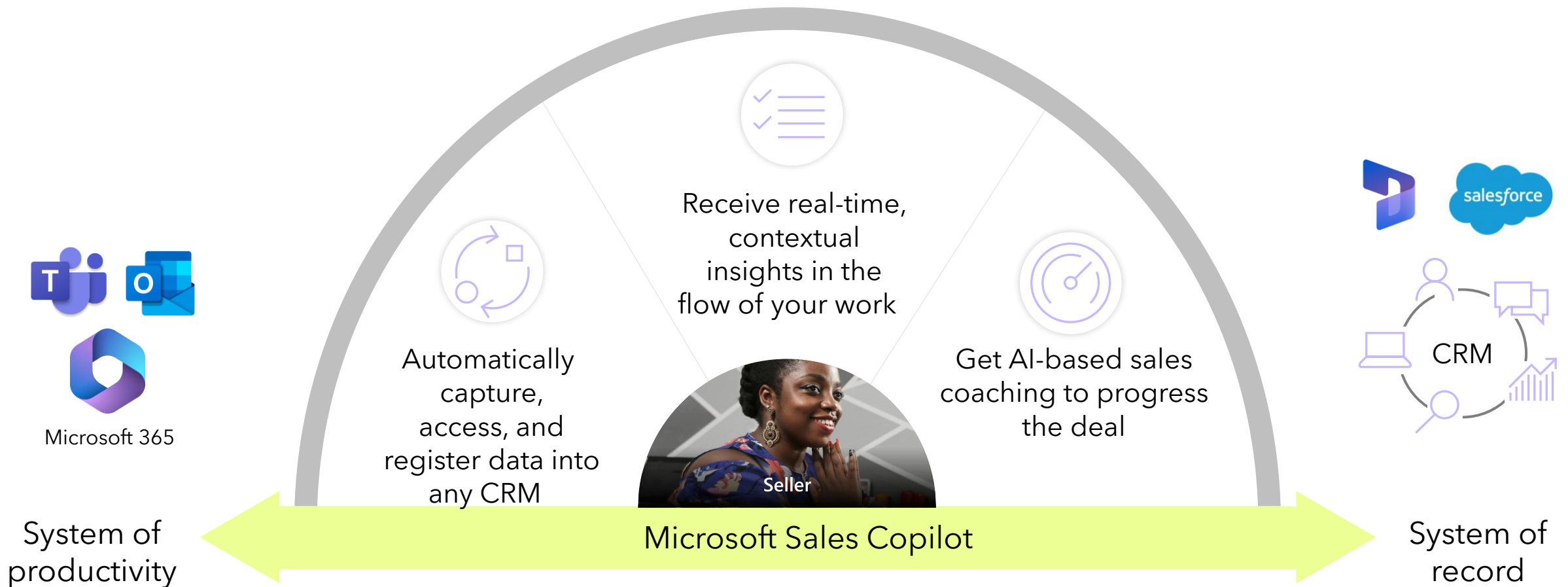


Sellers spend **34% (13 h)** of their time on admin and tasks versus **32%** on selling¹

¹"Selling in the Age of Ceaseless Change," CSO Insights. 2019.

Microsoft Sales Copilot Overview

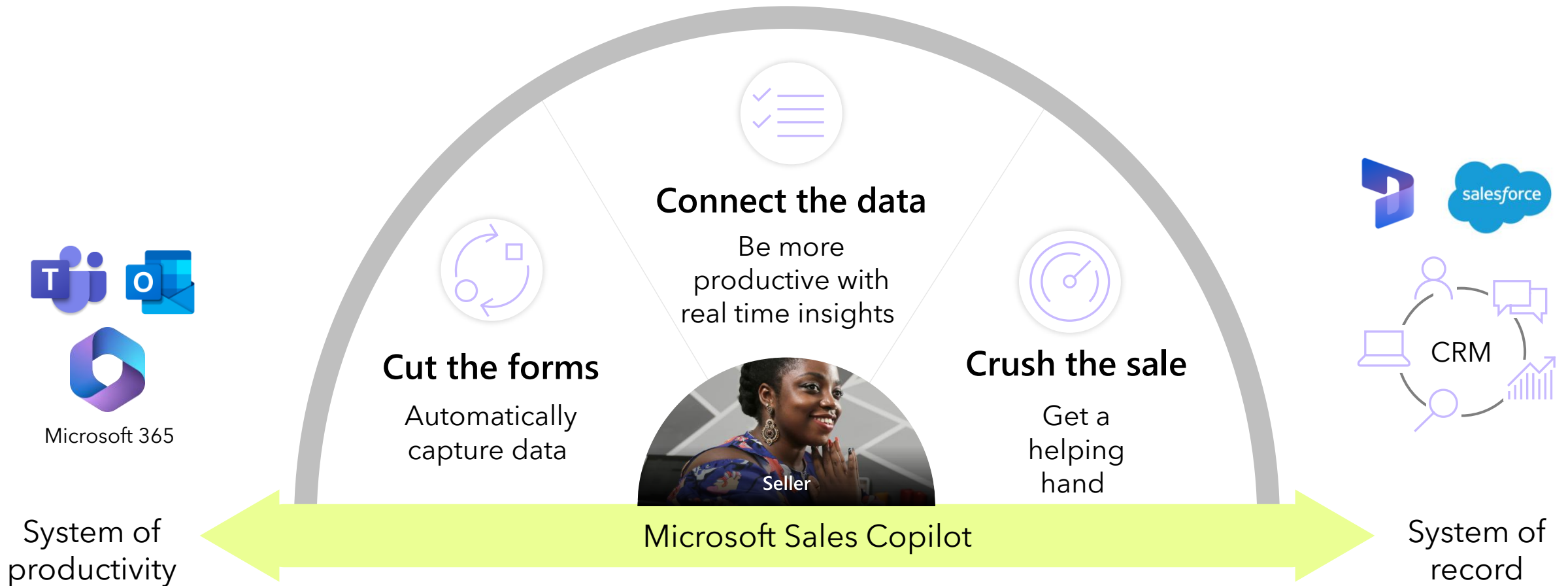
Supercharge your CRM - Automation, Insights and Coaching



Microsoft Sales Copilot is a seller experience app that automatically captures Office 365 and Microsoft Teams data into any CRM tool, eliminating manual data entry to help you focus on selling.

Microsoft Sales Copilot Overview

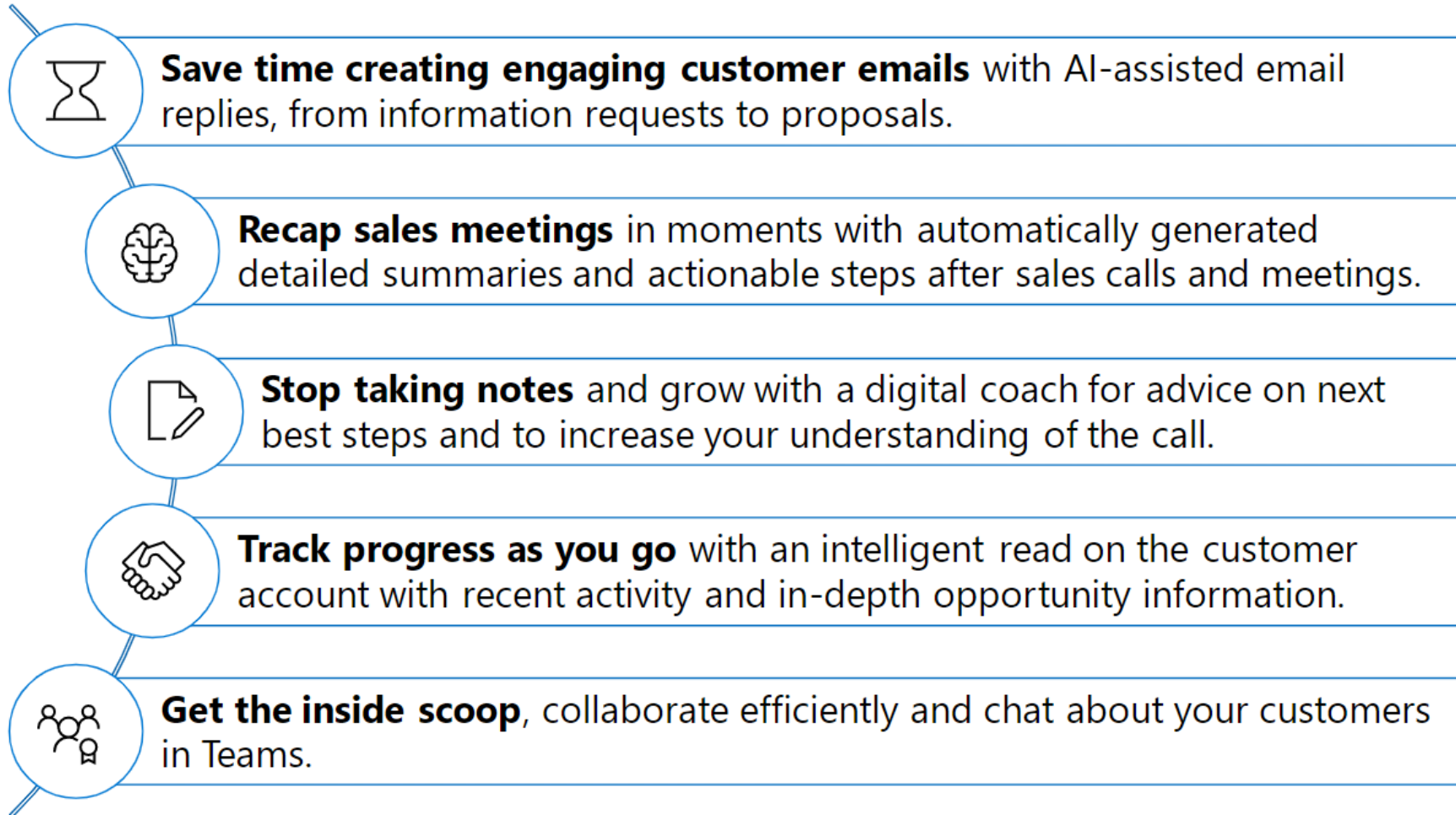
Supercharge your CRM - Automation, Insights and Coaching



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Microsoft Sales Copilot Overview

Initial Feedback from early customers



Microsoft Sales Copilot Overview

Cost & Licensing Implications

General Customer Information

Microsoft Viva Sales

USD\$40.00 user/month
Price does not include tax.
(Annual subscription—auto renews)¹

[Try now](#)

[Buy now >](#)

Dynamics 365 Customers

Sales	First Dynamics 365 app	Subsequent qualifying ¹ Dynamics 365 app
<u>Sales Professional</u>	\$65 per user/month	\$20 per user/month
<u>Sales Enterprise²</u>	\$95 per user/month	\$20 per user/month
<u>Sales Premium²</u>	\$135 per user/month	
<u>Microsoft Relationship Sales²</u>	\$162 per user/month	

Microsoft Sales Copilot is included in Sales Enterprise, Sales Premium and Relationship Sales at no extra cost.

Salesforce Customers

All editions supported by their public APIs (Professional with API access enabled, Enterprise, Performance, Unlimited, and Developer Editions.)

*A Microsoft 365 for enterprise or Office 365 for enterprise product license is required to use the Microsoft Sales Copilot app in Outlook and Microsoft Teams.



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Microsoft Sales Copilot POV & Offering

Microsoft Sales Copilot - Slalom Point of View

What's this all about?

What is Microsoft Sales Copilot?

- New Microsoft 365 add-on designed to improve seller productivity and enable deeper customer engagement by bringing customer context into the seller's flow of work
- User experience, back-end integration and artificial intelligence enhancements to Microsoft 365 collaboration products (MS Teams, Outlook) specifically **targeted to seller scenarios**

What are the key features?

- Intuitive prompts to capture, update and surface client data directly in collaboration apps
- Conversational intelligence from meeting transcriptions
- Real-time coaching and advisement on next steps / action items

Why should customers consider it?

- Sellers will see productivity gains through reduction in app flipping, manual note taking, improving data capture and resulting insights
- Organizations will see improved adoption, data quality and insights from their CRM investments

General Assessment

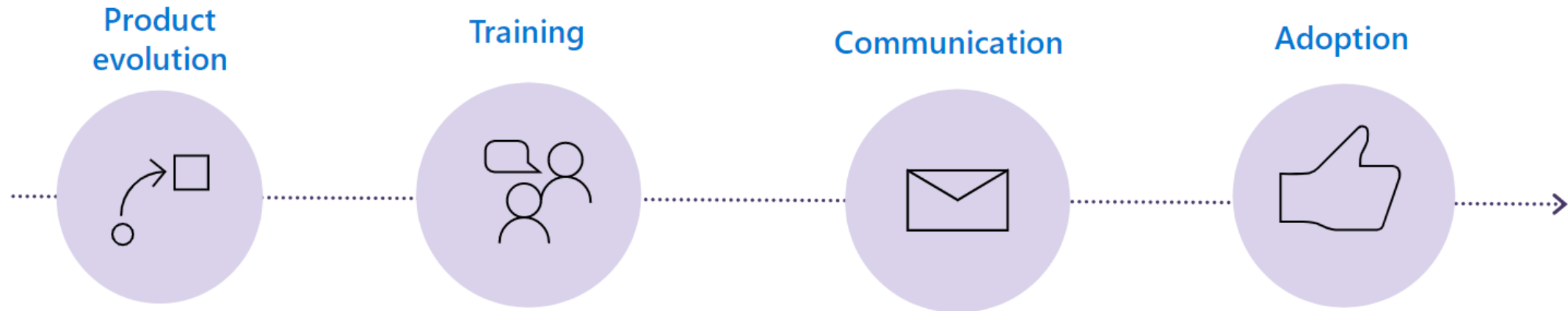
- Dynamics 365 clients with premium licenses (MSFT funding also available)
- Microsoft 365-based Salesforce customers seeking to improve productivity, data capture

Solution Prerequisites

- Microsoft 365 suite providing core collaboration functions (Outlook / MS Teams) internally and externally
- Use of Dynamics 365 CE or Salesforce as core CRM platforms
- Strong regulatory & data privacy governance regarding transcription of customer meetings

Microsoft Sales Copilot - Implementation Considerations

Change Management - Key to Good Adoption



Do make sure to have at **least one person responsible for driving change** in the project organization.

Example changes:

- New releases to the solution
- New workloads
- Significant changes to a process
- Microsoft Releases

What's next for **you**?

Connect with us to schedule your Briefing and unlock the full potential of Microsoft Sales Copilot for your organization

At the end of the workshop you can expect to:

- **Understand how Microsoft Sales Copilot can play a role in improving seller productivity, data quality and related insights**
- **Identify opportunities and related key performance indicators to inform implementation success for your organization**
- **Receive recommendations for a successful implementation of Microsoft Sales Copilot tailored to your specific business needs**





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03

Microsoft Sales Copilot Features

Microsoft Sales Copilot Features

Autopilot in Outlook - Automate data entry

Capture customer records in the flow of work and add customers to your CRM

Capture customer data automatically

Tag and record ambient information

Sync data to CRM automatically

The screenshot displays the Microsoft Outlook interface with an email thread open. A Viva Sales overlay is active, prompting the user to add a new contact. The overlay contains the following information:

- First name:** Alberto
- Last name:** Burgos
- Job title:** Cafeteria manager
- Email:** alberto@alpineskihouse.com
- Company:** Alpine Ski House
- Phone number:** +1 619 555 0127
- Address:** 4517 Washington Ave. Manchester, Kentucky 3

The overlay also includes a "Cancel" button and a "Save" button. The background shows an email thread with the subject "[EXTERNAL] Intro and pricing..." and a list of contacts including Alberto Burgos, Jacob Jones, Eleanor Pena, and Annette Black.

Microsoft Sales Copilot Overview

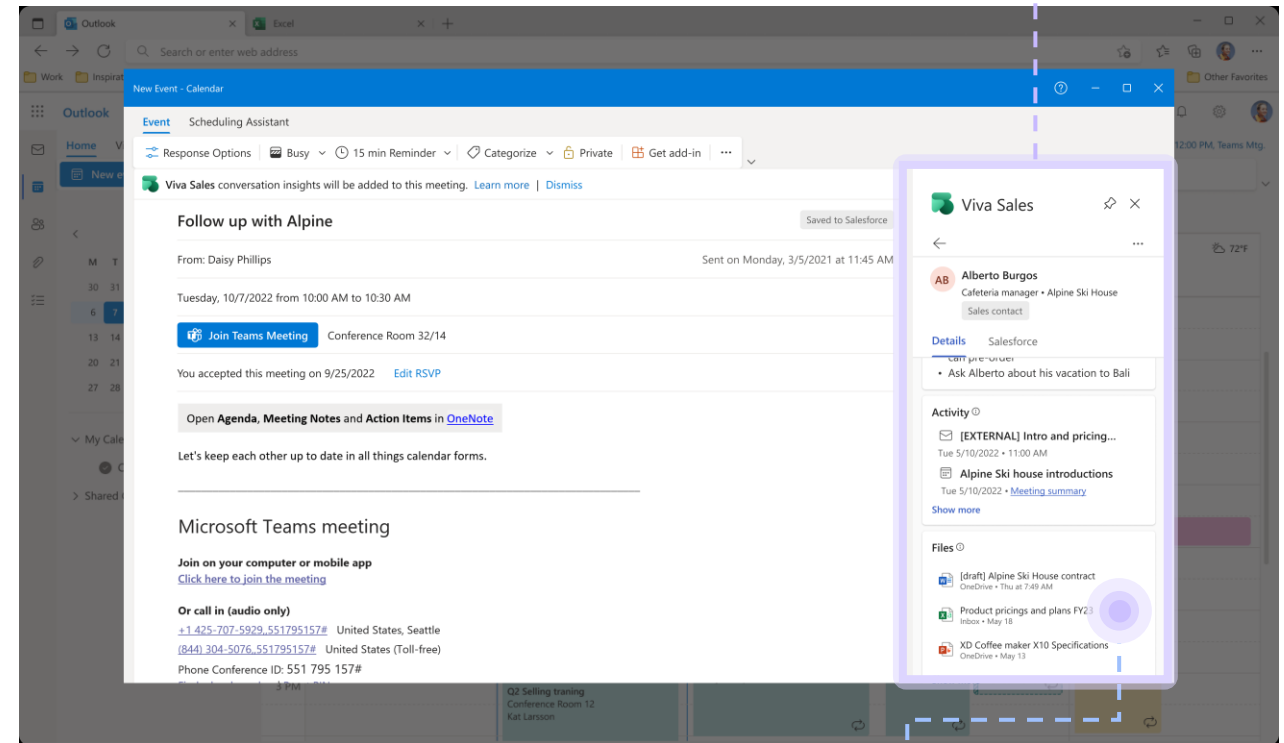
Track Progress as you go

See a history of interactions across touchpoints

Get an intelligent read on the customer account

Quickly access in-depth account information

Develop real time understanding of activity with continuously updated adaptive card



Gather customer engagement data through emails, documents, virtual meetings, and conversations

Microsoft Sales Copilot Overview

Reduce Note Taking

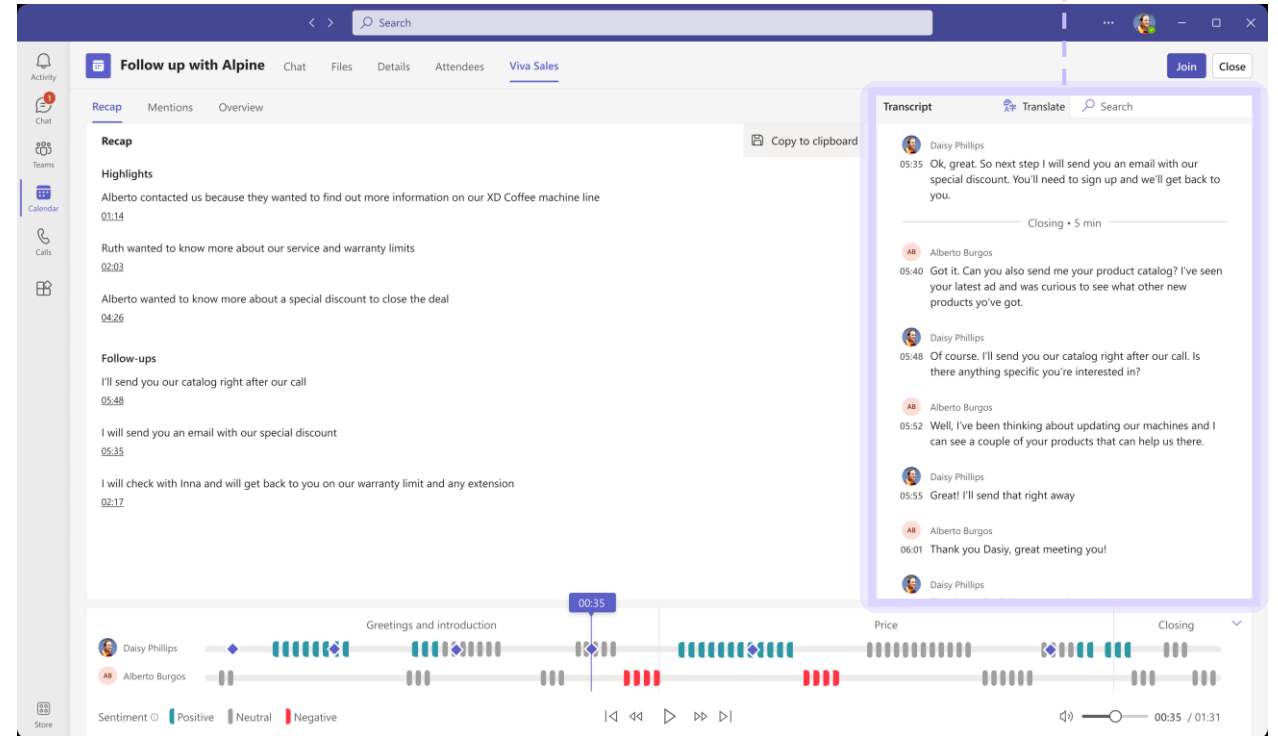
Easily record and transcribe meetings

Surface key topics automatically with AI

Search and translate transcripts

Attach call notes to customer record

Get caught up in the conversation and use the searchable transcript for reference



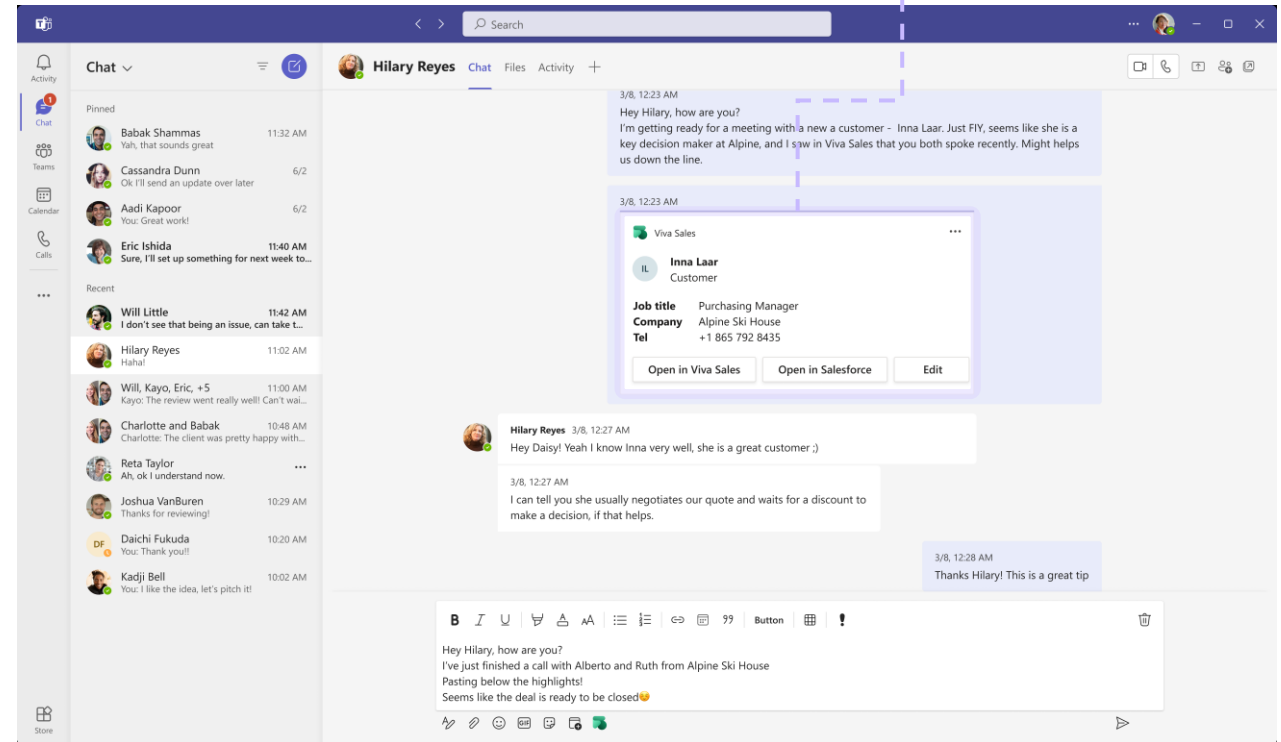
Microsoft Sales Copilot Overview

Collaborate in Context

View customer information in Teams

Chat about customers with your team

Collaborate with teammates and share prior knowledge and relevant information



Microsoft Sales Copilot Overview

Real-Time Coaching and Advisement

Receive advice for next best steps

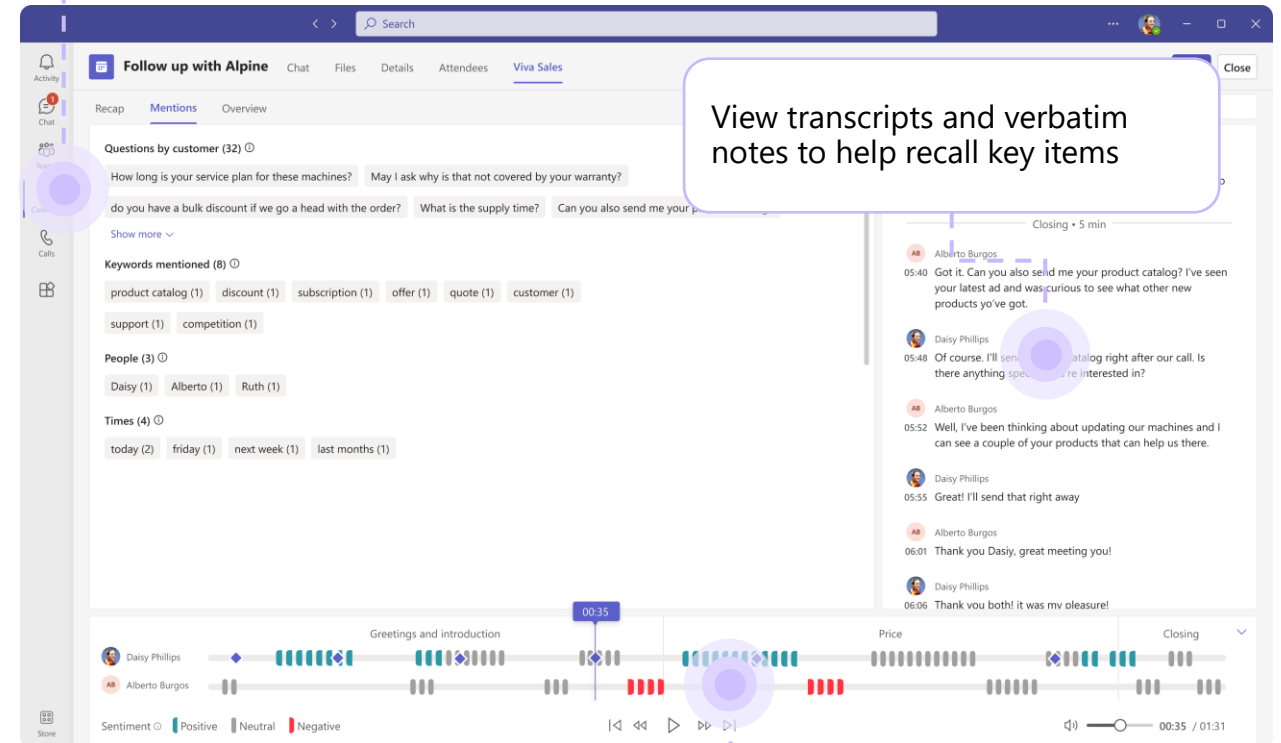
Schedule well-timed follow ups

Increase your understanding of your call

Improve your meeting outcomes with real-time insights you can view as a coach

View transcripts and verbatim notes to help recall key items

Review the success of your meeting with sentiment analysis





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Microsoft Sales Copilot Architecture

Microsoft Sales Copilot - Architecture

Microsoft Sales Copilot is a **Spoke app**; uses Dataverse as a repository

When a customer installs Microsoft Sales Copilot, Microsoft provisions a Dataverse for an organization using Salesforce in the Microsoft 365 tenant region when the first user from this organization opens the Microsoft Sales Copilot panel. Dynamics 365 customers use the existing Dataverse instance for their organization

To connect to Salesforce, Microsoft Sales Copilot leverages the Power Apps data connector.

CRM data (e.g., COLA, tracked activities such as email copy from Outlook, etc.)

- Organization CRM is the sole source of truth
- Data is not copied from Salesforce to Dataverse. While the user is using Microsoft Sales Copilot, we directly read data from the Salesforce CRM
- For Dynamics 365 users, data remains in the organization Dataverse instance

Microsoft Sales Copilot data (e.g., seller private notes, pointer to new/existing contacts); stays forever until org discontinues using Microsoft Sales Copilot or per GDPR related requests

- SFDC users: Microsoft Sales Copilot data is saved in Dataverse that was provisioned
- Dynamics 365 users: Microsoft Sales Copilot data is stored in the existing Dynamics 365 instance
- Stays forever until org discontinues using Microsoft Sales Copilot or per GDPR related requests

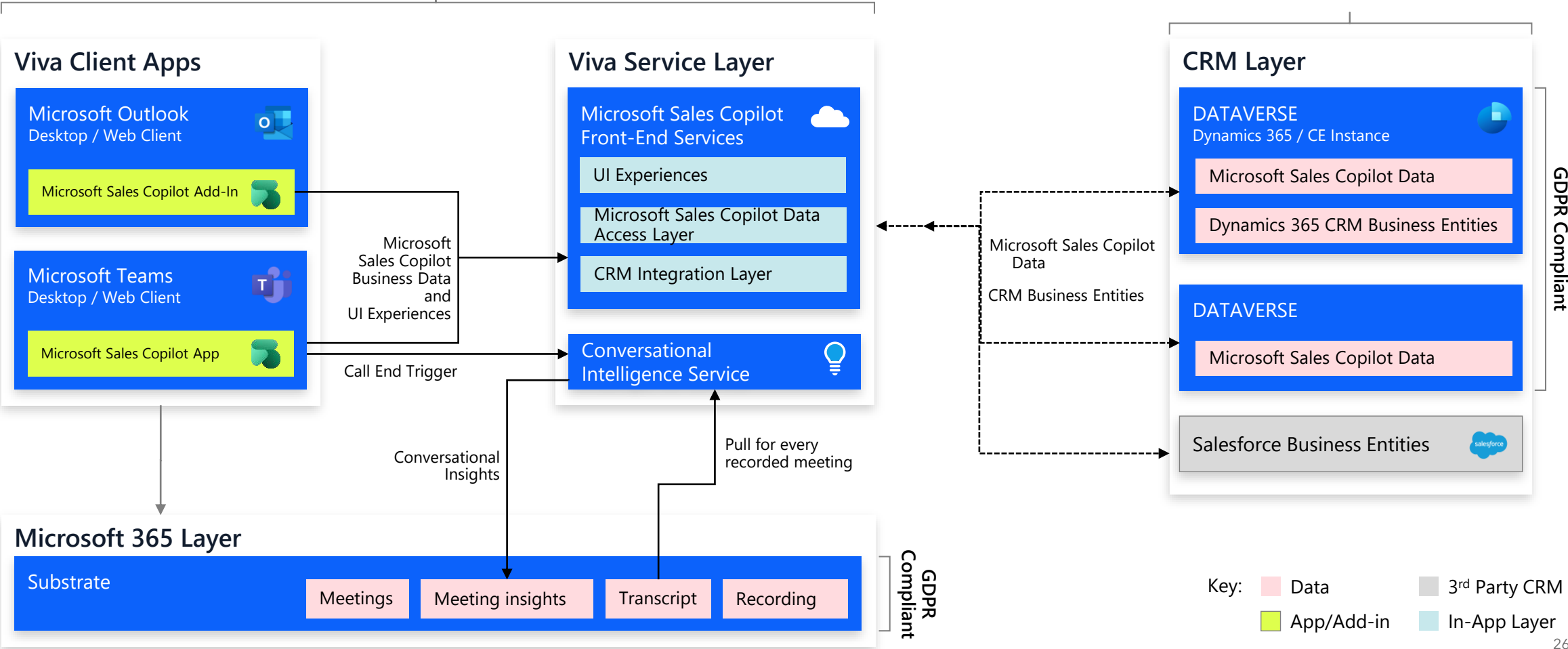
Microsoft 365 data (e.g., emails, call transcripts, insights - KPIs, keywords, Teams meeting recording, etc.)

- Remains in substrate
- Conversation intelligence moves emails and meeting data out of the Substrate to calculate insights and write insights back to the substrate
- Follows office retention policies

Microsoft Sales Copilot - Architecture

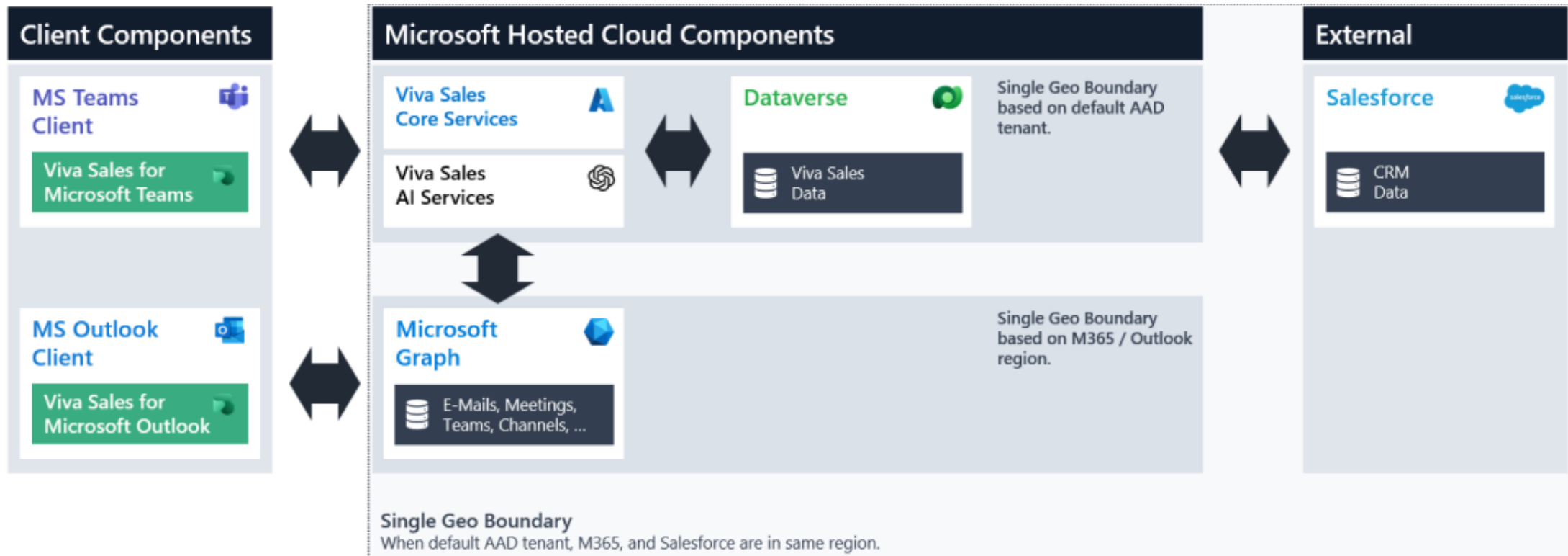
Single Service Layer for all core Microsoft Sales Copilot integrations
All end-user facing experiences will integrate with a single service layer to serve up business data.

No Data Sync between CRM and Dataverse
In the current architecture, we do not support data sync between the CRM and Dataverse. The CRM remains the system of record for all business entities not directly related to Microsoft Sales Copilot generated data (e.g., conversational insights).



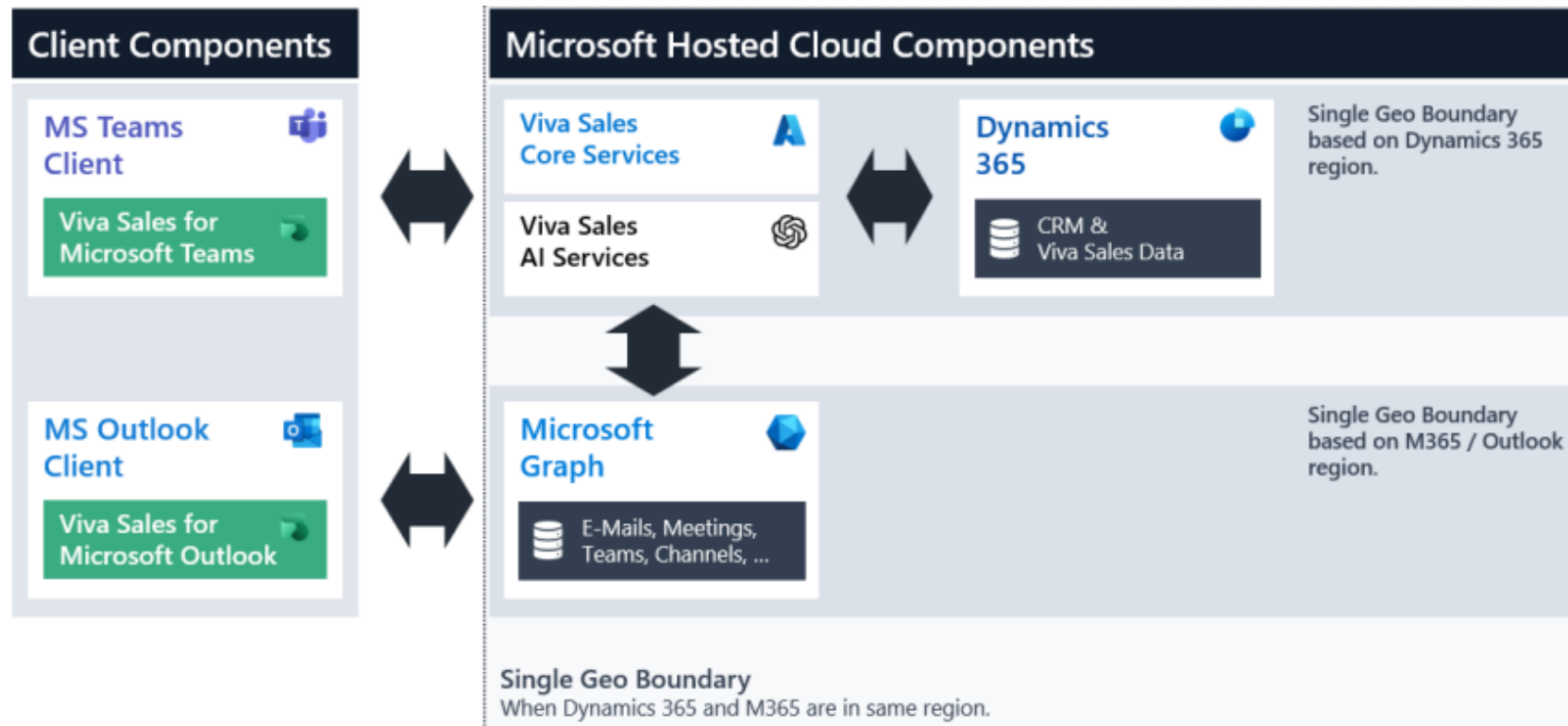
Microsoft Sales Copilot - Architecture

Salesforce Architecture



Microsoft Sales Copilot - Architecture

Dynamics 365 Architecture



Microsoft Sales Copilot - Architecture

Entities involved in Dataverse Storage

The Dataverse environment is storing connection data for each seller, tracking data such as the CRM ID (unique identifier for a salesforce record) and personal notes. Viva Sales consumes a **negligible amount of storage space** and there is no need to purchase additional storage.

For **Salesforce customers, the Dataverse environment will not store customer data**. Currently, the Dataverse environment must be promoted to production when the trial period is ending. This must be preceded by licensing purchase. Microsoft is working on automatic promotion to the production environment.

Entity Name	Purpose
<i>msdyn_taggedrecord</i>	Contains the list of Contacts that are connected to the CRM via Viva Sales. Automatically tagged based on email if there is 1 contact matching, if multiple, user will need to select.
<i>msdyn_vivaorgsetting</i>	Contains org wide settings including the CRM Customization settings for Viva Sales. In particular, the specific fields that are configured for each of the entities in Viva Sales.
<i>Privileges for these entities are included in the OOB roles such as Sales Manager, Salesperson, VP of Sales Viva Sales User and Viva Sales admin. If using custom roles, add Viva Sales Users and Viva Sales Admin roles to your sales users and respectively CRM administrators.</i>	
<i>These are technical entities and there is no scenario currently where you would need to access these or add them to your model driven apps in Dataverse.</i>	

Microsoft Sales Copilot - Architecture

Security Considerations

Enterprise security respects CRM's RBAC

- Microsoft Sales Copilot services run in the context of current user and respects the CRM security model. All CRM data access (read and write access) in Microsoft Sales Copilot is managed via real-time integrations with the underlying CRM system
- The end-user's Microsoft 365 / Office data is always accessed in the end user's auth context
- We comply with CMK policies as Microsoft Sales Copilot data is in O365 substrate and Dynamics 365

Responsible AI by design

- Our work is guided by a core set of principles: fairness, reliability and safety, privacy and security, inclusiveness, transparency, and accountability.
- No personal data leaves Microsoft services when creating the reply, and any customer data stored in the CRM is secured by the CRM's policies and governance model.

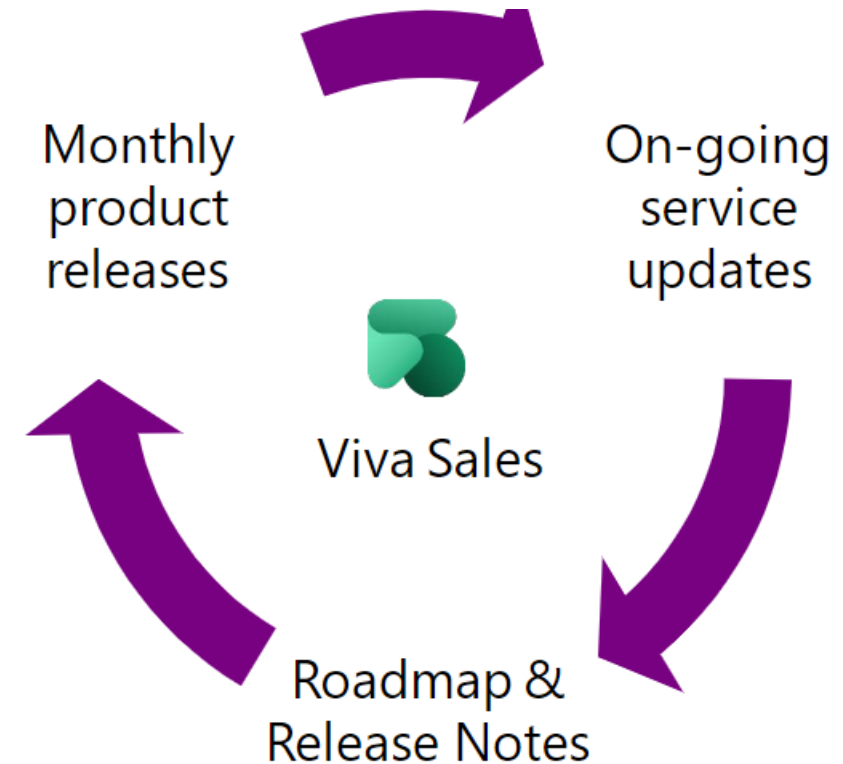
Data residency and retention

- Respects the data privacy, data security, data retention, and compliance boundaries of the underlying data store for data at rest and uses Transport Layer Security (TLS) to protect data in transit and does not store data outside any of the data stores described previously (Microsoft 365, CRM and Dataverse).

Microsoft Sales Copilot - Architecture

Application Lifecycle

- Viva Sales is offered as a **SaaS service** and is fully managed by Microsoft.
- Once the Viva Sales for Microsoft Outlook Add-In and Viva Sales for Microsoft Teams App are installed, Microsoft will fully manage updates to all components across the Viva Sales stack:
 - **Monthly product releases**, which include major product capabilities.
 - **Ongoing service updates**, which include product hotfixes and minor product changes.
 - In rare circumstances, a new version will require explicit consent and update from the admin or end-user. In these circumstances, admins and users will see that a new update is available via the **M365 Admin Center** or **Teams Store**.





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Microsoft Sales Copilot Feature Assessments

Microsoft Sales Copilot - Feature Overlap

Review of Existing MSFT Functionality Overlap

Dynamics Customers

- *Dynamics 365 App for Outlook* - **Overlap, not conflicting** - Not achieved parity on existing app functionality (e.g. create contact vs. lead) but significant new features
- *Dynamics 365 Teams App* - **Overlap, not conflicting** - Comparable functionality for sharing customer records (chat) with significant enhancements to meeting functionality
- *Dynamics 365 Sales Insights* - **Overlap, not conflicting** - Significant overlap, provides AI-driven enhancements to existing functionality.

Salesforce Customers

- *Salesforce Teams App* - **Overlap, not conflicting** - Somewhat limited functionality as you cannot currently edit records inline from the Microsoft Sales Copilot Teams app

Microsoft Sales Copilot – Feature Overlap

Microsoft Sales Copilot vs. Dynamics 365 Outlook App Deep Dive Comparison

Features	Viva Sales Outlook	D365 Outlook App
AI powered insights & productivity features	AI GPT for email suggested replies and *proactive suggested updates Unlimited conversation Intelligence with meeting summary, highlights, follow up tasks etc. Email signature parsing for quick contact creation <i>*More AI insights to come early in Q2 CY 23</i>	Scan business card.
Collaboration features	Copy link and paste into Teams chat for rich adaptive cards with link unfurling. <i>*Collaboration spaces to access and easily create Teams channels to come in Q2 CY 23.</i>	No. Dynamics 365 App in Teams offers comparable capabilities e.g., message extension.
Update customer engagement data	Scope: contact, account, opportunity (COA) including custom fields. <ul style="list-style-type: none"> For contact, create and update and parsing email signature prefilled for quick contact creation. For account and opportunity, update. <i>*Expanding entities scope from COA to all OOB and custom entities including support for create to become available in early Q2 CY23</i>	Scope: sales and customer service OOB key entities and makers could add more including custom entities. Support for create, update for all entities.
Forms used for data input	Viva Sales forms. Can be customized to include your custom fields.	UCI forms. (same forms you would use in your model driven apps).
Does it require Server Side synchronization (SSS) ?	No. It can work with or without SSS. Without SSS, all tracking will be manual.	Requires SSS.
Tracking Emails	Yes , and we can use as regarding an account or opportunity. Email attachments are not tracked.	Yes , and regarding can any OOB or custom entities as configured. Attachments are tracked.
Tracking Appointments	Yes. Attachments are not tracked. <i>*For SFDC, multiple participants tracking depends on setting 'Allow users to Relate Multiple Contacts to Tasks and Event'.</i>	Yes. Attachments can be tracked if setting enabled by admin.
User experience	Overall cleaner UI and more users friendly that App for Outlook as per early users' feedback	