Microsoft

Getting Started with AI

A Microsoft Copilot Guide for Sales Leaders

INTRODUCTION

Welcome to Microsoft Copilot for Sales

Seventy-nine percent of sellers have more customers and accounts than last year.[1] And with sellers now spending as much as 70% of their time on administrative and non-selling duties,[2] their roles are getting harder.

As the pressure rises for sales teams, many organizations are deploying a timesaving, focus-preserving solution: AI.

Integrating an AI-powered assistant into sales processes can help sellers improve how they work and win. This guide will give you the knowledge and confidence to achieve new levels of efficiency, productivity, and customer satisfaction using Copilot for Sales. You'll learn how Copilot for Sales can help you:

- **Streamline your sales processes and workflows.**

- **Simplify how your team uses sales tools.**

- **Enhance your sales data and insights.**

- **Improve your sellers' skills and behaviors.**

[1]Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include financial services, professional services, manufacturing, retail, technology, and healthcare.

[2]Microsoft-sponsored Futurum Research, 2022.
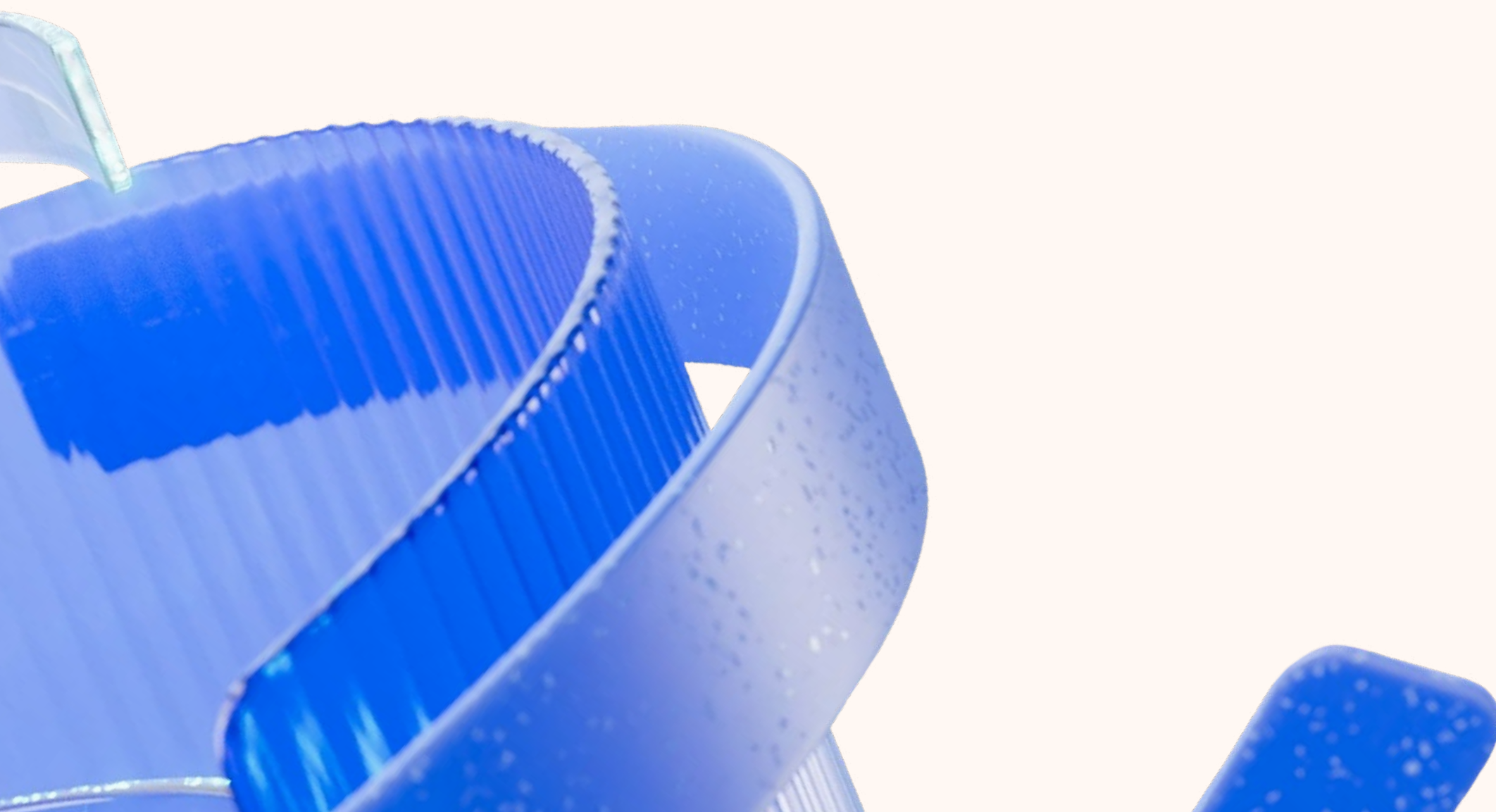
Your guide to AI for sales teams

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Get ahead in a
fast-paced world.

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How AI
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How Copilot
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champions

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impact

Help build
new habits

Prioritize
ongoing training

Celebrate
successes

"

We're at the forefront of integrating AI to not just work faster, but to work smarter.

Karim R. Lakhani

Chair, Digital Data Design Institute at Harvard,
and Dorothy & Michael Hintze Professor of Business Administration at Harvard Business School[3]

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Why now is the time to invest in AI

The world of work is changing fast, with more data, communication tools, and customer demands than ever before. With so much on our plates, finding time for strategic thinking and innovation can be a challenge—but that's the work that really pushes businesses forward.

AI can help your sales teams accomplish more by automating routine tasks, optimizing workflows, and enhancing customer experiences. With greater efficiency, sellers can focus on the work that matters most—deepening customer relationships and improving close rates. AI can also empower sellers to be more strategic and creative in their selling approach.
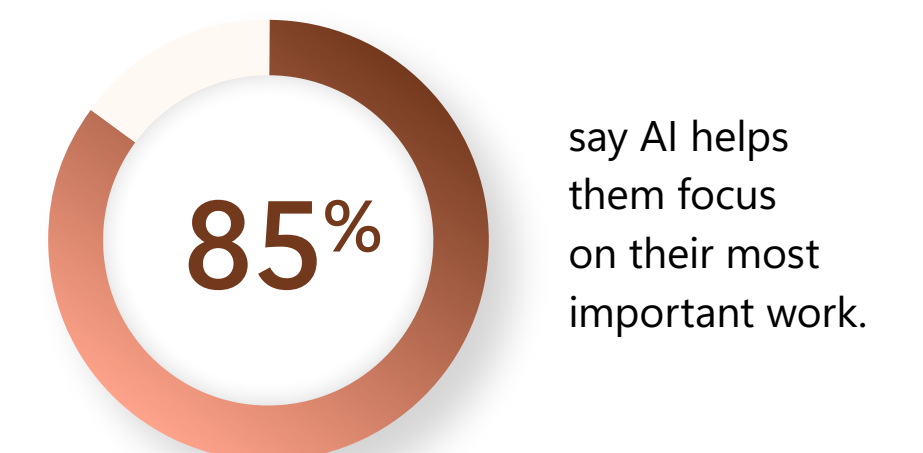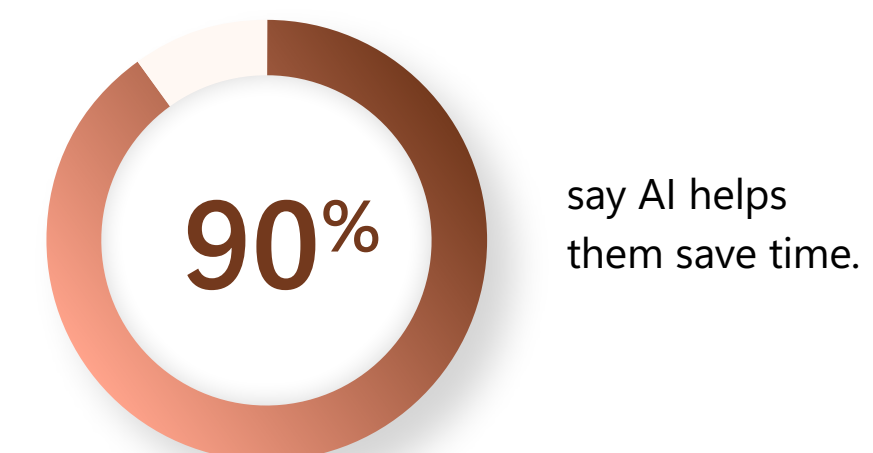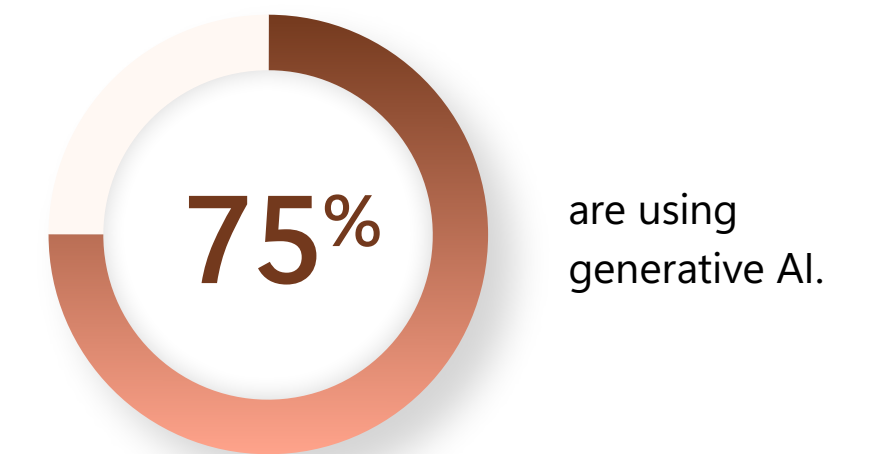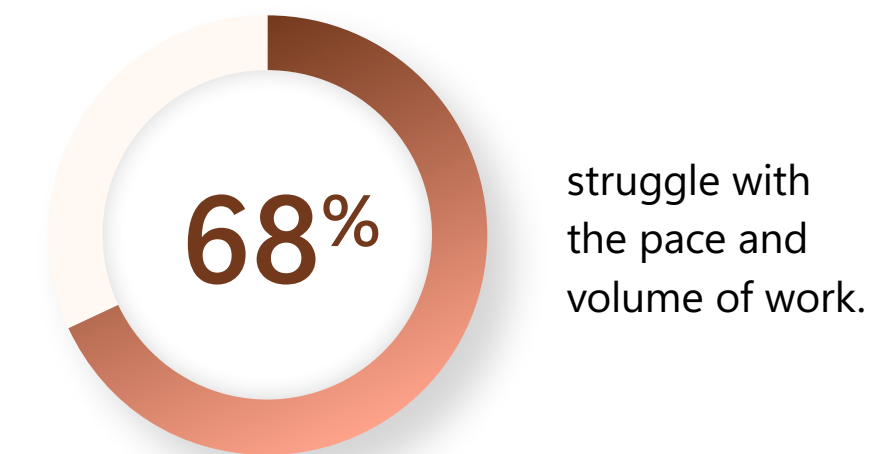
AI has been around for decades, but it's never been more accessible, cost-efficient, and powerful than it is today. Thanks to advances in cloud computing, data science, and natural language processing, AI can now understand, reason, and learn from vast amounts of information and interact with humans using natural language. This means that it's easier than ever to augment your abilities, enhance your creativity, and elevate your performance using AI.

AI is not just a trend; it's a transformation. And that transformation is now fully underway. Bain & Company found that 29% of sellers' time can be automated with AI.[4] To join the next wave of productivity growth and value creation, organizations must invest in AI technology now—or they risk falling behind competitors that reimagine the sales experience.

KEY INSIGHTS

The Microsoft 2024 Work Trend Index explored how workers feel about AI's potential to reshape work.[5] The annual report found that:

68% struggle with the pace and volume of work.

75% are using generative AI.

90% say AI helps them save time.

85% say AI helps them focus on their most important work.

[4]Bain & Company. "How Generative AI Will Supercharge Productivity." August 22, 2023.
[5]Microsoft. "2024 Work Trend Index: Annual Report | AI at Work Is Here. Now Comes the Hard Part?" May 8, 2024.

What sellers want from AI

Microsoft surveyed sales and business development employees to understand how generative AI can transform their typical business processes. According to these employees, AI tools and technologies would have a positive impact on their performance.[6]

- ⊘ 76% would use AI to help locate important information.

- ⊘ 75% would use AI to identify sales opportunities.

- ⊘ 74% would use AI to unify sales and marketing data.

- ⊘ 73% would use AI to identify the right customer contacts.

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> When our sellers can reduce the time spent on sifting through multiple channels to find what matters with Microsoft Copilot for Sales, we can be more focused so that we can deliver with clients and drive our business strategy faster.

Jennifer Ferrara

Global Business Lead,
Avanade[7]

[6]Microsoft. "Microsoft Work Trend Index Special Report 2023." November 15, 2023.
[7]Nelson Rodriguez, "Embracing AI to revitalize sales and catalyze growth," Microsoft, April 11, 2024.

How AI transformed Microsoft sales processes

Incorporating AI into the sales process helped Microsoft better manage tasks, leads, and communications. Copilot for Sales connects with CRM platforms, such as Salesforce and Dynamics 365 Sales, to bring insights and next-generation AI into the flow of work. It's like having a personal assistant that knows your business and customers, helping you make the best decisions.

After deploying Copilot for Sales across the Microsoft sales organization, 133 sellers were asked to share their feedback.[8] The results were impressive; not only did surveyed sellers save time and reduce effort, but they also increased trust and engagement with their customers.

Key benefits of Copilot for our sales team include:

Time savings:

Copilot helped sellers automate repetitive tasks—such as updating CRM entries, sending follow-up emails, creating meeting notes, and recommending next steps—which enabled them to increase efficiency and focus more time on strategic work.

Customer engagement:

Sellers now connect with their customers in a more personalized and relevant way thanks to insights, suggestions, and recommended communications from Copilot.

Trust building:

Establishing and maintaining trust with customers is easier with Copilot generating insights about customers' pain points and goals.

Copilot is not another sales tool for teams to switch between. Built to be used within Microsoft 365 apps like Word and Outlook, Copilot helps reduce the number of tools your sellers need to deliver better experiences, become trusted advisors and partners for their customers, and ultimately drive more revenue and growth.

- ⊘ 90 minutes saved weekly on tasks.

- ⊘ 68% said they can now keep CRM up to date with less effort.

- ⊘ 67% can now spend more time with customers.

[8]Microsoft. "What Can Copilot's Earliest Users Teach Us About Generative AI at Work?" April 20, 2023.

How Copilot protects your data

Microsoft designed Copilot for Sales with a comprehensive approach to enterprise-grade security, compliance, privacy, identity, and responsible AI. That means every seller can improve efficiency without fear of unethical business practices.

When your employees log in and use Copilot, they automatically enable commercial data protection capabilities designed to secure your sensitive data, such as:

- ⊘ **Disabled chat history.** Copilot will not retain any chat prompts or responses.

- ⊘ **Restricted access to organizational data.** Microsoft will not have access to your data.

- ⊘ **Prohibited use of your data.** Copilot will not use your data to train the underlying AI model.

> Trust is more than a handshake. It's the agreement, the bond, between users of digital services and the suppliers of those services that enables us to enjoy, be productive, learn, explore, express, create, be informed.

Satya Nadella

Chief Executive Officer,
Microsoft

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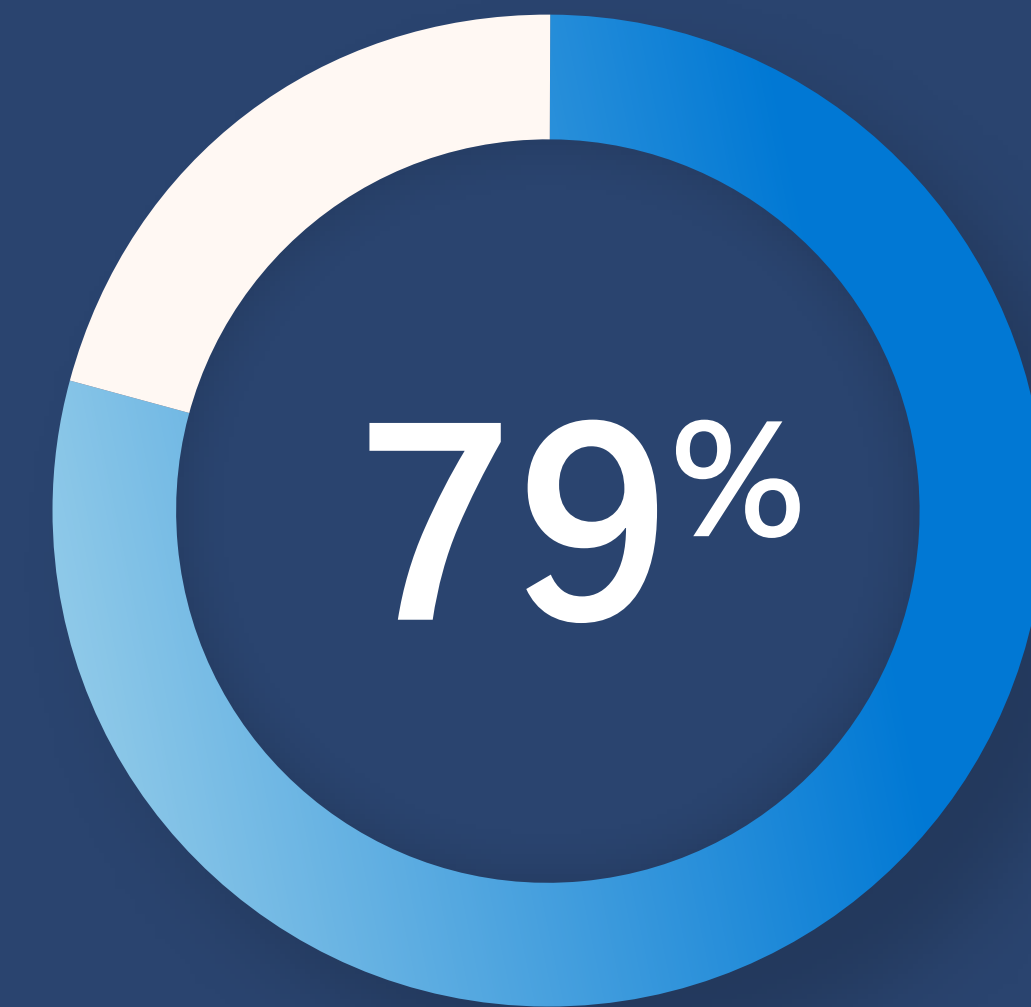opportunities

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Among early adopters of Copilot for Sales, 79% said it reduced the amount of administrative work they have to do.[9]

79%

[9]Microsoft. "What Can Copilot's Earliest Users Teach Us About Generative AI at Work?" April 20, 2023.

Pursue more opportunities

For many organizations, the sales process requires significant manual research across data sources and extensive collaboration between sellers and marketing teams. Copilot helps simplify sales by automating time-consuming tasks and generating the details and customer insights sellers need within the tools they use every day, such as Microsoft Teams and Outlook. When sellers increase the efficiency of everyday responsibilities like tracking tasks, they're empowered to improve performance and engage more customers.

Old manual process

⊙ Prepare for meetings by researching customer and product information, creating proposals, and tracking each sales task.

New Copilot-powered process

⊙ Automatically generate emails, proposals, and update tasks based on the conversation during meetings.

Outcome

⊙ Increased efficiency across sales pipelines

Close more deals

Prospect meetings can be stressful. Sellers must take detailed notes on the discussion while listening carefully to the prospect's questions and answering them accurately. Copilot helps sellers stay focused on customers and engaged in conversations by automatically generating meeting notes and surfacing relevant information and insights. Plus, Copilot helps teams improve pricing analysis and target leads more effectively, empowering sellers to boost close rates.

Old manual process

> Multi-task by listening to the prospect's questions, providing correct answers, and taking detailed notes on the discussion.

New Copilot-powered process

> Focus on the prospect while Copilot generates meeting notes and relevant product information.

Outcome

> ## Improved customer interactions and more effective meetings

Generate more revenue

Sales teams don't just close deals—they address demand. When sellers fail to understand customer needs, they struggle to maximize the value of customer interactions. However, manually researching customer and product information to identify potential sales is inefficient and prone to error. Copilot helps expand sales opportunities by providing sellers with relevant upselling and cross-selling opportunities—plus, it assists in creating quotes and proposals.

Old manual process

⊙ Search across data sources for the customer and product information needed to upsell and cross-sell effectively.

New Copilot-powered process

⊙ Automatically view cross-company insights to quickly identify upselling and cross-selling opportunities.

Outcome

⊙ Faster meeting preparation and more valuable customer interactions

Retain more customers

Engaging customers meaningfully requires personalizing every interaction. However, searching through CRM data manually for relevant insights that help sellers contextualize engagements is tedious and inefficient for many businesses. Copilot provides sellers with actionable insights that help personalize customer interactions and improve retention.

Old manual process

◉ Sift through CRM data to research relevant customer information and personalize engagements.

New Copilot-powered process

◉ Seamlessly view customer summaries within Microsoft Word and Outlook to contextualize emails and proposals.

Outcome

◉ Higher quality sales materials and customer interactions

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Implementing Microsoft Copilot for Sales has saved time, improved skills, contributed to better work-life balance, and increased revenue by 25% in one quarter due to reduced burnout and enhanced efficiency.

David Swenson

Business Development Director,
Netlogic[10]

[10]Nelson Rodriguez, "Embracing AI to revitalize sales and catalyze growth," Microsoft, April 11, 2024.

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Assign licenses

Because sellers spend extensive time and effort prioritizing leads and preparing for customer meetings, sales organizations are uniquely positioned to benefit from Copilot features and capabilities. To maximize the business impact of Copilot for Sales, consider the following factors as you decide on an approach to deploying licenses.

Look at current usage trends

The sales professionals who use Microsoft 365 products most are best positioned to get the full benefits from a Copilot license. One way to evaluate who uses Microsoft 365 the most is with Microsoft Copilot Dashboard, powered by Microsoft Viva. Navigate to the Readiness tab to see technical eligibility and your total number of Microsoft 365 users.

Define specific use cases

Your sales team should have a clearly defined goal or use case for how they'll implement Copilot. Getting specific ensures Copilot is effectively integrated into workflows across various roles and levels. Microsoft, for example, reimagined how sales teams could operate with help from Copilot, defining the use case metrics as:

- ⊘ Eliminating repetitive administrative tasks.

- ⊘ Keeping sellers in the flow of work.

- ⊘ Improving how easily sellers can complete tasks.

- ⊘ Decreasing the number of clicks to identify and add a new CRM contact.

- ⊘ Decreasing the number of clicks to create and send a new email.

By focusing on specific use cases and high-impact areas first, you'll maximize the ROI of Copilot for Sales and prepare your organization for wider adoption. Explore sales use case examples in the Copilot Scenario Library.

Allocate Copilot to your entire team

Some organizations may opt to assign licenses throughout their team to help everyone increase efficiency and transform sales. When entire teams have access, they can share insights, learn from each other, and take on your biggest sales opportunities—and pain points—together. As more sellers use Copilot consistently and effectively, the impact that Copilot brings to your sales organization multiplies.

avanade

Avanade deployed Copilot for Sales to its sales team to summarize emails, update CRM records, and draft emails. The quality of sales information has improved, with sales leads noticing more valuable information about their opportunities than ever before.[11]

[11]"Avanade puts people first, accelerates sales productivity with Microsoft Copilot for Sales," Microsoft, November 23, 2023.

Help build new work habits

Change management is key for implementing an AI tool like Copilot. It helps ensure people across your sales organization view it as not just new technology, but a new way of working. It also requires leaders to gauge attitudes and manage expectations.

Measure attitudes and interest

A key part of managing any change is simply recognizing that diverse perspectives exist. A new AI tool is no different, so you'll likely see a combination of enthusiasm and skepticism. An effective adoption strategy must cater to these diverse attitudes, which requires training, support, and clear communication to transition workflows and mindsets.

Manage expectations

As part of this training and communication, it's important users have a clear understanding of what Copilot can and can't do. Equally important is knowing when to use AI capabilities and when to rely on human expertise. Emphasizing that the user is in the driver's seat—or the pilot, if you will—is a great way to communicate the limitations and strengths of AI overall.

PRO TIP

Show what Copilot can do to help promote transparency and user satisfaction, while minimizing potential misconceptions. For example:

Copilot helps sellers prepare for sales meetings and customer engagements. Use it to help generate more valuable sales meeting briefs.

> **Have Copilot** pull customer data and insights directly into your Word document.

Copilot is good at making sense of vast amounts of data. Use it to help quickly prepare for customer meetings.

> **Have Copilot** find relevant insights from meetings, emails, and CRM data and files—and bring them into Word to prepare meeting documents.

Copilot encourages experimentation. If you don't get the desired output on the first try, adjust the prompt or approach.

> **Have Copilot** revise your email to make it sound friendlier or more professional in Outlook.

Copilot empowers sellers to prioritize follow-up actions and become more responsive. Use it to help organize your day.

> **Have Copilot** show all open tasks and action items within Microsoft Teams.

Identify champions to lead the way

To drive wide adoption of Copilot, you'll need champions and early adopters. This group will lead by example, helping showcase the practical benefits of Copilot in their daily work. Plus, their positive experiences will naturally inspire curiosity and interest among their colleagues—encouraging broader usage.

To identify Copilot champions and early adopters:

- ⊘ Create a Copilot user community. The Microsoft sales team, for example, created a Microsoft Teams channel for Copilot users to discuss how they use AI in their day-to-day work.

- ⊘ Check in with your Copilot user community to see who's sharing tips or giving feedback.

- ⊘ Reach out to managers and ask them to identify a team representative or power user.

- ⊘ Use the Copilot Dashboard to measure usage.

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> We have a young sales team with little industry experience. So not only does using [Copilot for Sales] across our business areas help standardize customer notes, but [it] taught our team a lot about what's involved in an actual sales and contract process.

David Swenson

Business Development Director, Netlogic[12]

[12]Smita Shrivastava, "How Netlogic Computer Consulting is Boosting its Sales Performance with Microsoft Copilot for Sales," Microsoft Copilot for Sales Blog, May 31, 2023.

Prioritize ongoing training

Sales teams will see productivity gains right away with Copilot. But how each seller personalizes their Copilot usage will evolve over a 6-month to 12-month period, so ongoing training is critical.

Prompting—giving clear commands to get the right results with an AI tool—is likely a new skill for many employees. Better inputs lead to better outputs, but this requires practice before Copilot becomes a natural extension of a seller's workday. Explore resources that help your teams generate powerful prompts in the Copilot Lab.

Sales leaders should publicize a variety of resources and guidance and promote collaborative sharing of best practices. This way, Copilot users can stay up to date on new features, troubleshoot issues, and learn from each other's experiences. Also, don't forget to publicly celebrate milestones and acknowledge the efforts of power users to showcase how Copilot can deliver tangible benefits within your sales organization. A culture of continuous learning can increase engagement, satisfaction, and efficiency.

Here are some top training resources to help your organization get started:

- ⊘ Copilot Success Hub: See how Copilot helps boost productivity and save time. Plus, find out how to maximize the impact of Copilot for your business.

- ⊘ Copilot adoption: Get resources for deploying, using, and scaling Copilot at your organization.

- ⊘ Copilot for Work: Discover work scenarios and how Copilot can become your AI assistant.

- ⊘ Copilot for Sales benefits: See how Microsoft transformed its sales organization with AI.

- ⊘ Adoption Planning Workbook: Explore step-by-step guidance that helps your business prepare for and implement Copilot for Sales.

PRO TIP

Sellers who use Copilot to amplify what they're already doing—not just as a search engine—will gain value the fastest. Encourage employees to:

Build a daily habit.

Regularly using Copilot helps sellers quickly learn how to get better responses—and take full advantage of AI capabilities in their everyday routine.

Think like a manager.

Knowing how to delegate tasks to Copilot is essential. To do this, sellers must be able to create clear, concise prompts with defined parameters, evaluate the results, and decide how to use the content Copilot generates.

Make the most of reclaimed time.

Guide sellers to be intentional with the time they save with Copilot. Remind teams it's not about doing more—it's doing more of the things that drive value at both the individual and organizational level.

Provide feedback.

Encourage sellers to give feedback when Copilot prompts them to. This will continue to improve and refine their experience—while also improving customer interactions.

Quantify impact with the Microsoft Copilot Dashboard

Measure usage and adoption at every phase of the rollout with real-time data and insights from the Copilot Dashboard. The dashboard provides insights to help leaders understand where Copilot is adding value and where enablement strategies could see even greater benefits, including the number of active Copilot users per app and the number of times key Copilot features have been used in those apps. Get additional reporting and deeper functionality with a Microsoft Viva subscription.

Celebrate successes

Implementing new technology takes coordinated effort, so be sure to take a step back and celebrate milestones your sales team reaches in your Copilot adoption strategy. Acknowledge the efforts of people who've contributed to the rollout's success and identify your power users, as these stories serve as strong sources of inspiration and showcase how Copilot can deliver tangible benefits within your sales organization. Success stories also play a pivotal role in driving adoption and ensuring that your organization maximizes the impact of Copilot while maintaining transparency and realistic expectations.

NEXT STEPS

The road ahead with Copilot for Sales

Embracing AI is about more than just improving productivity at an individual level. When everyone in your sales organization is more efficient, focused, and effective, it can transform your entire business. Following the best practices and recommendations in this guide will help you start your AI journey with confidence and clarity, generating buy-in at every level of your organization so you can build an AI-centric culture—which is the true secret to gaining a competitive edge with this technology.

At Microsoft, we're committed to empowering every person and every organization on the planet to achieve more with AI. We're constantly innovating and developing new AI capabilities for Copilot, and we offer resources and support to help you learn, adopt, and optimize AI in your sales processes and beyond.

We invite you to explore Copilot and discover how you can transform your sales organization. Together, we can make AI work for everyone on your sales team.

→ **For more guidance on how to optimize your sales activities, check out our <u>Copilot for Sales adoption site</u>.**