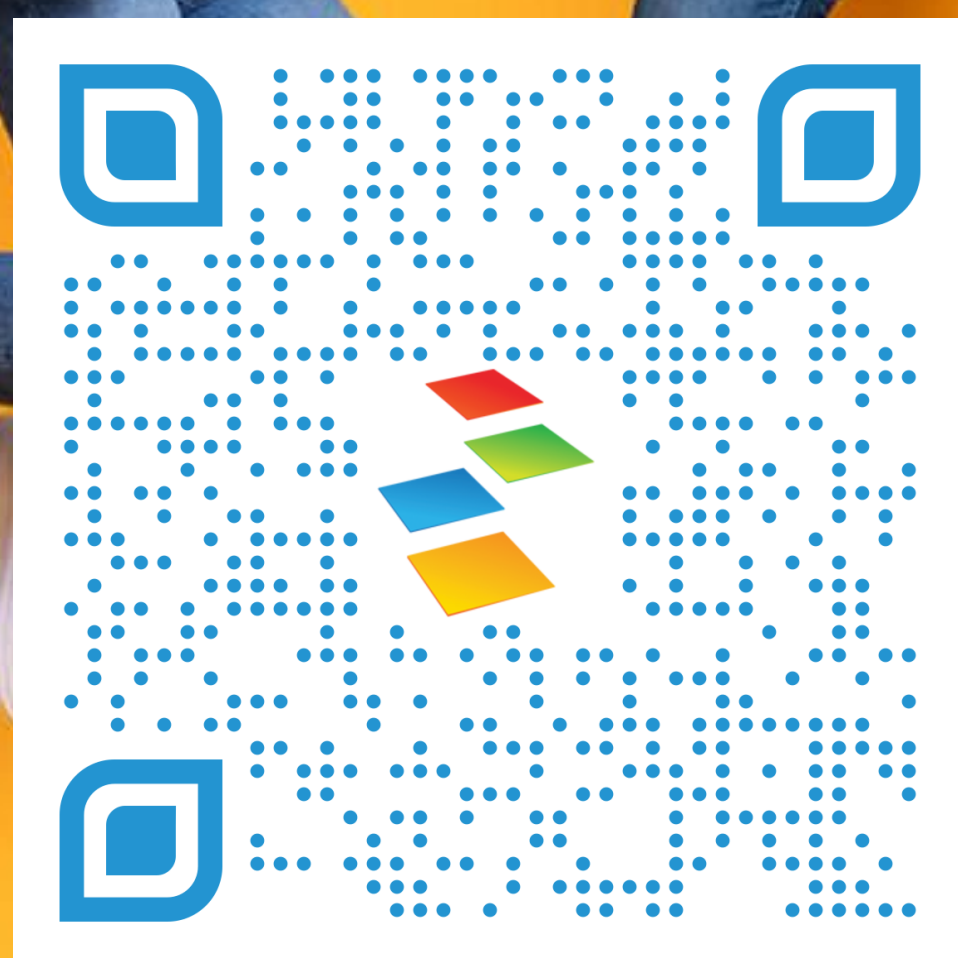




Leveraging D365 Copilot for Sales and Service

- Presented by the Customer Relationship Management Practice





Housekeeping

- Please silence your phones.
- If you need to take a call, feel free to step outside and come back in.
- Sessions are being recorded and will be available after.
- Please take the survey at the end of the session using this QR Code.
- Survey responses get you more entries into the raffle at the end of the day. (prizes included surface headphones, Smart Ray Bans, RayBan Meta Smart Bluetooth Glasses, and lots more).
- Wifi Info: BusinessTechnologySummit
Password: journeyteam!



Presenters



BRANDON GORTON
CRM PRACTICE DIRECTOR



RIGO SIERRA
SENIOR SOLUTION ARCHITECT



Guide Sales Teams and Improve the Customer Experience





Topics

- **Copilot for Sales:**

- Designed to maximize productivity and close more deals.
- Here's how it helps sellers and sales managers:
 - Sales Meeting Preparation Briefs
 - Email Summarization
 - Email Generation
 - Lead Management
 - Real-time Insights

- **Copilot for Service:**

- Tailored for customer service professionals.
- Key features include:
 - Automated Task Execution
 - AI-powered Recommendations



Overview

- Sellers today face more challenges than ever. A recent survey revealed that 79% (MSFT Survey) of sellers are supporting more customers and accounts than the previous year.
- [Gartner® research](#) recommends that to drive better sales impact, “sellers must relinquish some control over customer interactions and give AI-powered technology—generative AI, emotion AI and digital humans—more responsibility to execute core selling activities...Let salespeople focus on where they excel: engaging buyers on a human level to understand their needs, motivations and objections, and ultimately validate that a purchase is right for them.”²

Sales

- **Sales Meeting Preparation:**
 - Copilot assists sales professionals by generating **meeting briefs** in Microsoft Word. These briefs include relevant information about the client, their preferences, and previous interactions.
 - Sales reps can quickly review these briefs before meetings, ensuring they are well-prepared and can tailor their pitch effectively.
 - Handle mission-critical outcomes - Design tailored conversations for predictable scenarios that require specific responses.
- **Email Summarization and Insights:**
 - Copilot automatically summarizes lengthy emails. It identifies key points, buying intent, and other relevant details. Turning conversations to actions.
 - Salespeople can focus on critical information without spending excessive time reading lengthy emails.

Sales

- **Automated Email Generation:**

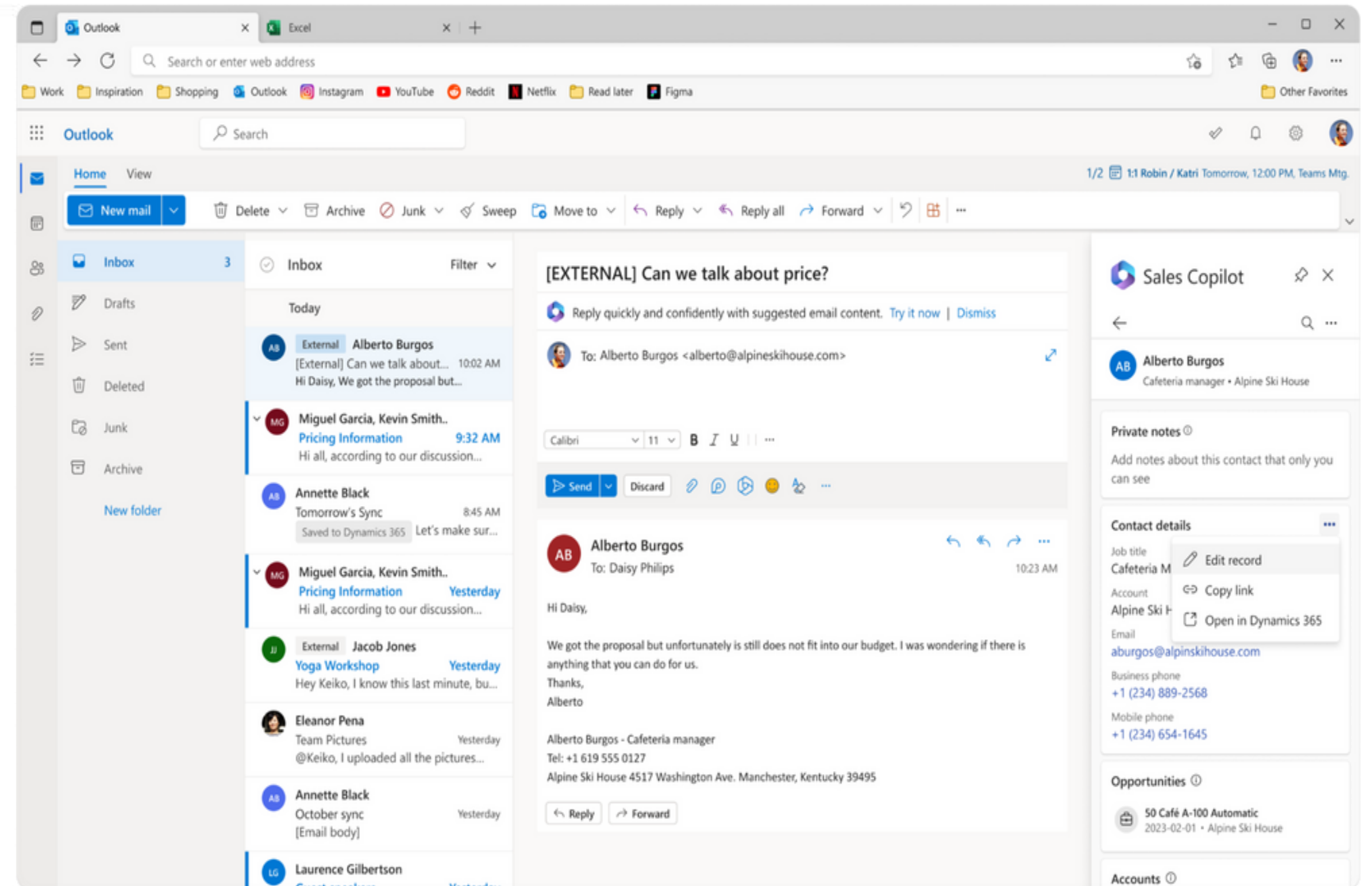
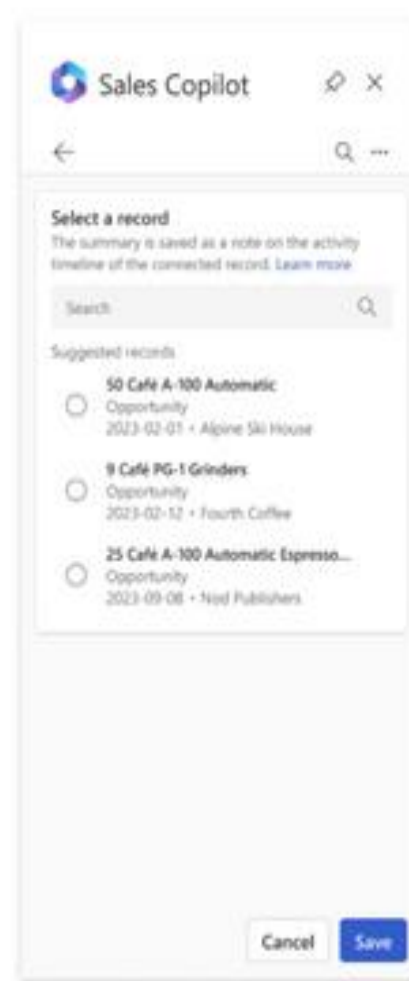
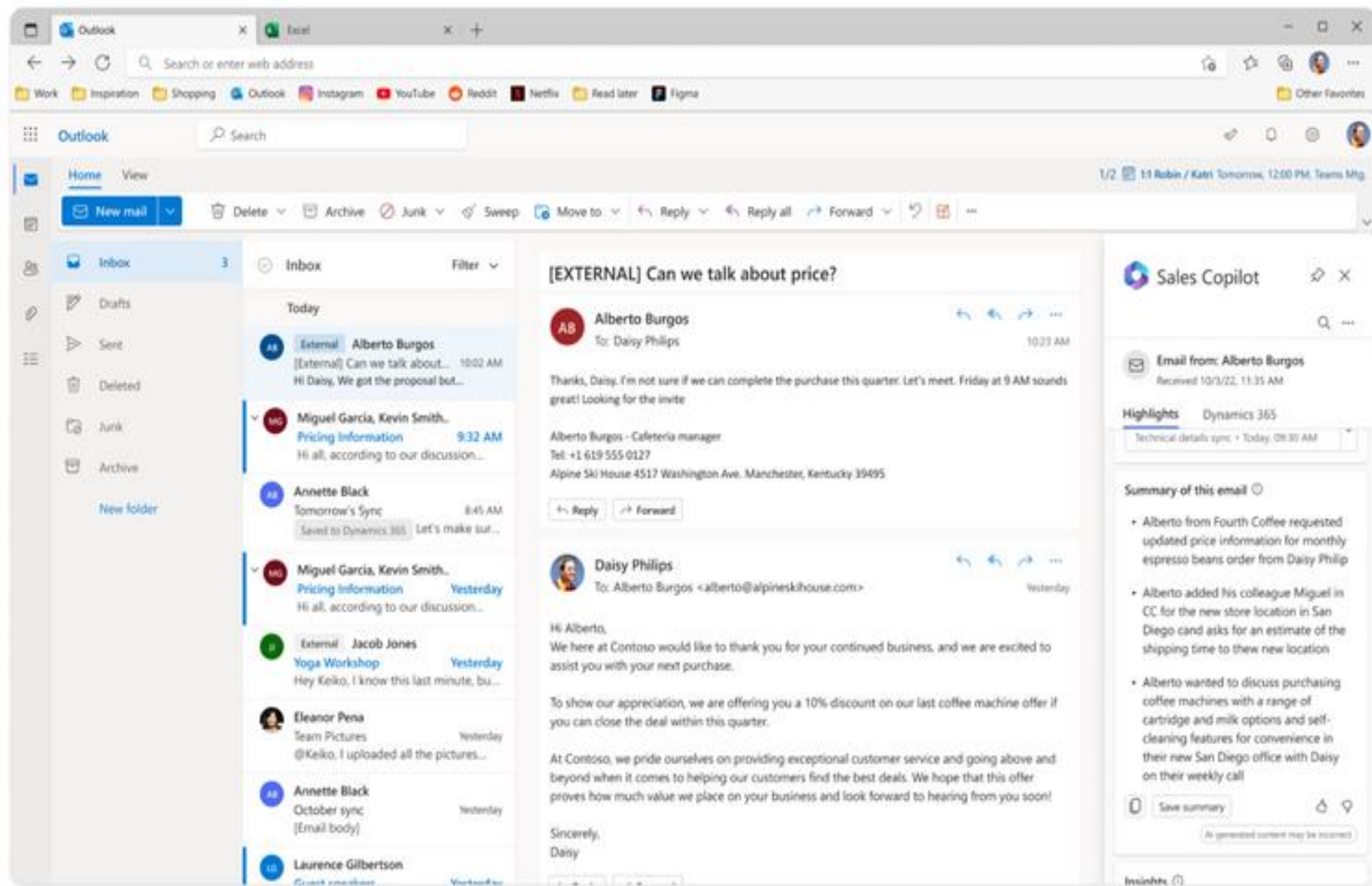
- Copilot generates personalized emails within Outlook. It pulls data from the CRM system and Microsoft Graph to create contextually relevant messages.
- This feature streamlines communication and ensures consistency in messaging.

- **Lead Management:**

- Sales reps can add leads and update CRM records directly from Outlook using Copilot.
- This simplifies lead management and keeps the CRM system up-to-date.
- Create personalized response, enhance experiences, engage users, and drive customer engagement with rich dynamic responses, and personalized interactions.

Sales - Outlook Capabilities

- AI-generated email content tailored to sales
- Email thread summaries convert prolonged email interactions into a few bullets
- Extract essential information from relevant opportunities, notes, and activities so you can prepare for customer meetings quickly.
- The ability to save emails and meetings to your CRM - organization always has easy access to the customer engagement information.
- Copilot supports both out-of-the-box and custom CRM record types



Sales Outcomes

1. **Copilot for Sales** helps sales teams save time and energy
 - Generate innovative ideas
 - Prioritize tasks
 - Build stronger customer relationships
 - Close more deals





Demonstration: Copilot for Sales

- **Copilot for Sales:**
 - Record Catch Up
 - Prompts for Sales
 - Sales Copilot in Outlook



COPILOT RECORD CATCH UP

BRANDON GORTON



SUBSCRIBE



Customer Service

- **Real-time Insights during Calls:**

- Copilot provides real-time sales insights during calls conducted via **Microsoft Teams**.
- Sales professionals receive relevant information, helping them make informed decisions during conversations.

- **Service Case Resolution:**

- Copilot for Service assists customer service agents in resolving cases efficiently.
- It connects to popular your D365 CRM system and provides auto-generated summaries and relevant information.
- Agents can quickly understand customer inquiries and take appropriate actions.

- **CRM Task Automation:**

- Copilot automates repetitive tasks related to CRM systems.
- Service agents can focus on solving customer issues rather than manual data entry.

Customer Service

- Copilot understands the context based on the current live conversation; identifies relevant and crafts a response that the agent can review and send to the customer.

The screenshot displays a Microsoft Dynamics 365 customer support interface. The main chat window shows a conversation with Claudia Mezzanti regarding a coffee machine issue. The customer's message is: "Yes I've reset the machine and cleaned the frother, but I'm still having trouble. There's noise but no pressure or heat". The agent's response is: "Here are the steps to resolve the auto frother issue: 1. Cancel any current coffee operation that might be running. 2. Tap on the menu and choose 'settings'. 3. Scroll down to the last option called 'reset firmware settings' 4. Wait for about 2-3 minutes, then try the auto-frothing again." The Copilot (preview) sidebar on the right provides a generated response: "How do I fix autofrother on Barista1400? Customer reports noise but no pressure or heat". Below this, it lists other agents' reported resolutions: "Cleaning autofrother assembly", "Resetting the machine", and "Replacing the on/off switch to the autofrother". The interface also shows a customer profile card for Claudia Mezzanti, a timeline of related events, and a "Past purchases" section.

Customer Service Outcomes

- **Copilot for Service** - It provides real-time assistance to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks so you can focus on delivering high-quality service to your customers.
 - Generating personalized email responses to customer inquiries.
 - Analyzing customer feedback for improved service strategies.
 - Automating repetitive support tasks for efficiency.
 - Enhancing agent productivity with AI-powered insights and guidance.





Sales Co-Pilot offer

Weekly Coaching Sessions: To help your company be successful in a self-guided implementation with the focus on:

- Following best practices of Sales Copilot to support multiple aspects of the Employee Experience
- Guiding conversations to ensure that each organization is focusing on meeting business objectives and strategic initiatives
- Adoption and change management

Workshops: To give your company guided training and instruction to learn the basics of each Sales Copilot module:

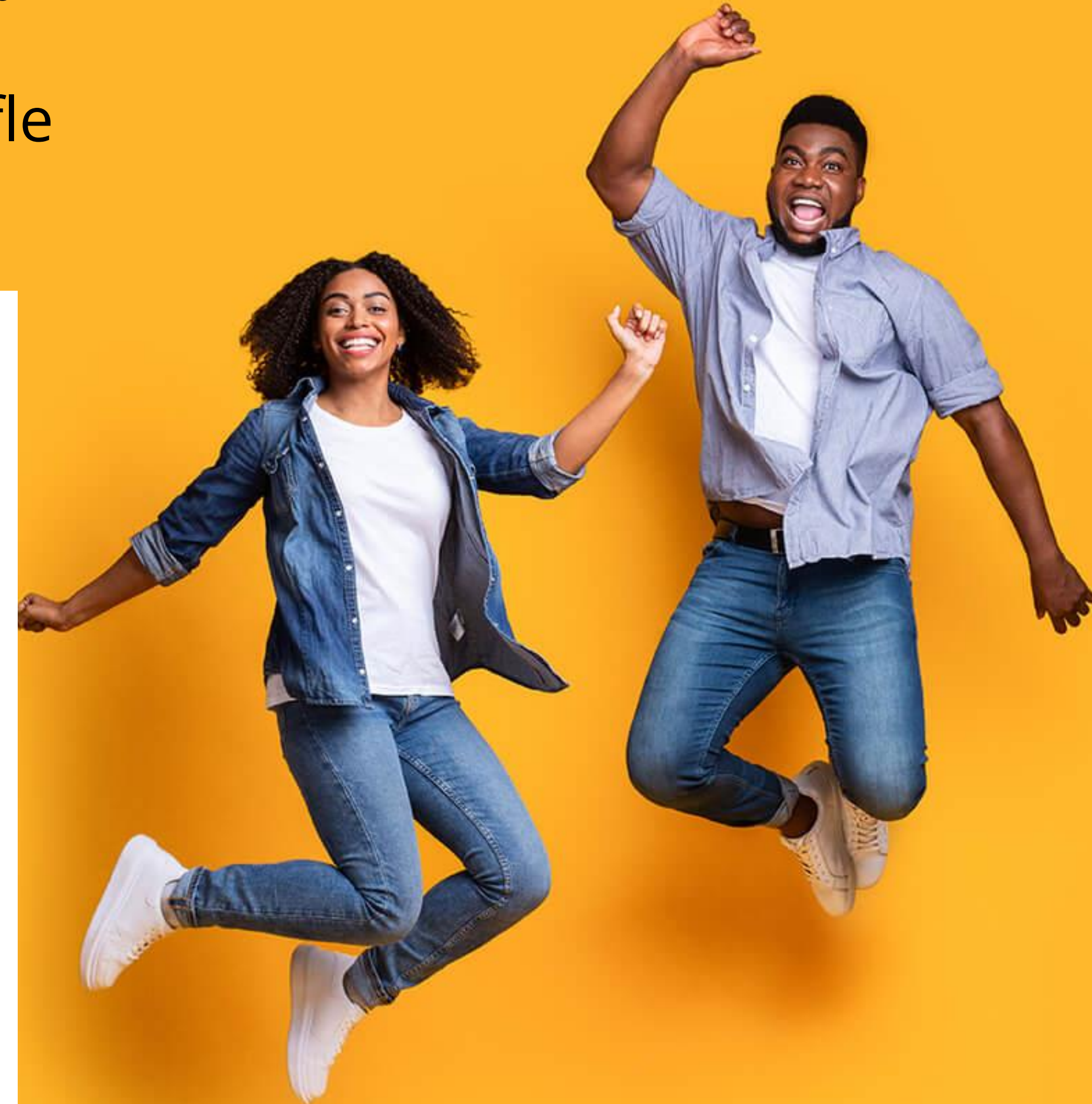
Engage – Connections – Learning - Topics - Insights – Goals: **\$6,500**



Q & A

We love feedback!

Please complete the session survey for an extra giveaway raffle ticket!





Thank You!

Let's Connect: Brandon Gorton & Rigo Sierra

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