Sales Copilot
Expert-guided Implementation

JOURNEYTEAM

MAXIMIZE YOUR CRM INVESTMENT WITH SALES COPILOT

Looking to empower your sales teams with better tools for managing and connecting to CRM data? Look no further than JourneyTEAM's Sales Copilot offering. Our proven delivery methodology focuses on value, business objectives, and user adoption, ensuring that your team gets the most out of their investment. With Sales Copilot, your team can:

- Manage and connect to CRM data
- Collaborate within Outlook and Teams
- Access enhanced meeting analytics
- Increase employee satisfaction
- Benefit from time and cost savings
- Take more control of the capabilities within Dynamics 365 Sales

Training and Adoption Coaching

Sales Copilot Workshops:
- Outlook Integration
- Teams integration
- Setup and Configuration
- Requires Dynamics CRM or Salesforce CRM
- AI Prompt/Questions
- Best Practices

A General Overview of All Sales Copilot Technologies

1 WEEK IMPLEMENTATION
SERVICE OFFERINGS*:

WORKSHOPS

- 2 workshops sessions from introduction & install, to out of the box feature set training, and go-live preparation.

TRAINING AND ADOPTION COACHING

- 2 one-on-one adoption strategy meetings.
- Access to senior consultants for advice, direction, questions and issues. This is an opportunity to receive specific consulting for unique organizational challenges.

MANAGED SERVICES

- Access to community team to share ideas, resolve issues and gain feedback from workshop colleagues.

Does not include Dynamics 365 or Power Platform licensing, or the cost of the Marketing Module.

Cost: $2,250 per company