Readiness and Training for Microsoft Sales Copilot for Salesforce

The readiness and training program for Microsoft Sales Copilot for Salesforce aims to enhance sales teams' productivity and efficiency by implementing an AI assistant to streamline work activities.

Microsoft Sales Copilot for Salesforce Readiness Workshop

The readiness assessment and training program to implement and utilize Microsoft Sales Copilot for Salesforce is designed to help sales teams be more productive and efficient with their work activities. Microsoft Sales Copilot is an AI assistant that helps sellers get a quick summary of their opportunity and lead records, catch up on updates, prepare for meetings and read the latest news about their customers. The program includes two phases, Readiness and enAblement.

Key Highlights of the Workshop:

Environmental Readiness: The workshop begins

by helping participants understand their current IT environment and align it with best practices to achieve optimal results when implementing Sales Copilot for Salesforce.

Security Review: Ensuring data security is crucial, and this workshop includes a review of accessibility settings to keep sensitive information secure within the Sales Copilot framework.

Change Management: Sales Copilot can bring significant changes to how teams work. The workshop equips attendees with effective strategies to help their teams embrace and adapt to these changes smoothly.

Hands-on Learning: Participants engage in

practical, hands-on exercises within the Salesforce environment. This hands-on experience reinforces the theoretical concepts learned during the training.

Deployment Roadmap: By the end of the workshop, attendees will have developed a clear roadmap for the implementation of Sales Copilot within their organization. This roadmap helps guide the organization's Sales Copilot deployment process.

Microsoft Sales Copilot for Salesforce enAblement Activities

- Review to align organization goals and how the utilization of Microsoft Sales Copilot will achieve these goals.
- Champion and Enablement rollout planning
- Hands-on training sessions
    - Microsoft Sales Copilot for Salesforce Champions
    - Team Training
- Champion Program
    - Guidelines for feedback loop and review of how teams are being successful with Microsoft Sales Copilot for Salesforce

Benefits of Program

Increase use and adoption with verified system readiness and an the "what's-in-it-for-me" understanding that are aligned to your goals and desired business outcomes through centralized insight and increased productivity with tools that reduce time spent on administrative tasks and more time selling.

Pricing and duration will vary based on project scope. Typical pricing ranges from $4000 - $6000, depending on number of attendees, scope of project and level of detail required

About enVista

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info@envistacorp.com | envistacorp.com