

Agenda

Infosys – Copilot for Sales “implementation factory”

About Microsoft Copilot for Sales

Microsoft Copilot for Sales is designed to help sellers work the way they want to without unnecessary context switching and manual data entry. It brings together the applications you work with daily—your CRM, Microsoft 365, and Microsoft Teams—to provide a more streamlined and AI-powered selling experience.

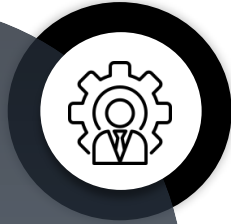
Copilot for Sales is a new, modern way of selling. As a smart CRM companion, Copilot for Sales makes sellers' lives easier while enriching their CRM. Let's say you have all your customer information and deal insights in Outlook and Teams chats. You need to capture everything manually in your CRM system—not an easy task. In the past, you had to rely on your memory, your email history, and your CRM to get context and keep deals moving forward.

Now with **Copilot for Sales**, external contacts are connected to CRM contacts automatically. Data from your CRM populates in Copilot for Sales, placing customer information at your fingertips. When you meet with customers in a Teams call, you can record and transcribe the meeting to get a rich summary using conversation intelligence. The meeting summary helps you understand the overall sentiment of the call and track helpful conversation KPIs, such as your talk-to-listen ratio, to become an even better seller.

What is Microsoft Copilot for Sales?

Copilot for Sales is a CRM companion application, meaning it works with **Dynamics** and **Salesforce CRM** solutions to intelligently automate customer updates, share AI-based recommendations and insights, and allow collaboration and productivity in tools sellers already use in Microsoft 365.

MANAGE



Create and edit customer CRM data directly in your commonly used apps, such as Teams and Outlook
Gain rich data from productivity tools for a more robust customer profile

CONNECT



Eliminate the busy work by automatically linking your CRM tool to your Microsoft 365 suite which keeps you up to date, whether your organization operates in Salesforce or Dynamics 365 Sales.
Real time data update via teams, outlook, and CRM application.
See relevant sales data from your CRM tool within the Copilot for Sales customer sidebar.

COLLABORATE



Pull in relevant Copilot for Sales customer information from Outlook into Teams seamlessly or easily share a customer card to ensure your team has the latest details.
Share knowledge with teammates and easily update CRM customer information within Teams.

ENGAGE



Gain deeper understanding with conversational intelligence call summaries and call action items by utilizing AI to track the positive or negative sentiment of the conversation, eliminating note taking by getting a full transcript of your customer meeting as well as follow-up actions and by utilizing filters, in-call data, and suggestions to create a customer plan that fits your style.

Microsoft Copilot for Sales - Features

CRM Application Integration



- Connect to either Dynamics 365 Sales, or Salesforce CRM for direct integration
- Full read-write capabilities via MS Outlook or MS Teams
- Connect your CRM customer list automatically into your Microsoft 365 applications

Microsoft Outlook Integration



- Identify customers, add or update records in CRM application directly through Copilot for Sales tab in MS Outlook
- AI generated email responses
- Track conversations with customers and prospects directly in MS Outlook as well as CRM applications

Microsoft Teams Integration



- Share contact details & notes directly in MS Teams with relevant groups and people in the organization
- Leverage AI enabled insights in the form of meeting sentiments, and automated note taking through transcripts, other meeting insights
- Utilize filters, in-call data and suggestions to create a customized approach

Copilot for Sales Features

Enable generative AI content in Microsoft Copilot for Sales

Microsoft Copilot for Sales is now available with GPT based capabilities to help sellers efficiently and effectively respond to customer emails. GPT is a large-scale autoregressive language model that uses deep learning to produce human-like text.

Use Copilot for Sales in Outlook

As a seller, you communicate with a lot of potential customers by email. Copilot for Sales helps you prepare for your engagements. It gathers information from your CRM system and Microsoft Office and enriches it with actionable insights, so you can be more effective right where you spend most of your day.

Use Copilot for Sales in Teams

Backed by AI, the Copilot for Sales app in Teams provides recommendations and information to help you stay connected to your customers, minimize data entry, and personalize your engagements to close deals faster with higher win rates. Get a deeper understanding of your customers' needs from transcribed call summaries with conversation intelligence, and take the right action at the right time with automat

Implementation of Copilot for Sales in USD

App	Feature
Copilot for Sales for Outlook	<ul style="list-style-type: none">• User can connect to their CRM system from Outlook.• When CRM user receives a mail, Copilot for Sales gives suggestion for creating it to a contact in USD app.• User can link any associated account and opportunity with the contact.• User can edit Contact, Account and opportunity information from Outlook app itself via Copilot for Sales.• User can save emails to CRM from Outlook.• Based on the email, Copilot for Sales creates AI generated emails which can be sent to a contact for proposals, quotes etc.• Copilot for Sales gives the whole summary of a thread.
Copilot for Sales for Teams	<ul style="list-style-type: none">• User can access CRM information when scheduling a meeting from Outlook.• User can save the meeting details to CRM from Outlook.• User can leverage meeting insights such as detailed executive summary, sentiment analysis and action items to follow up on(Conversation Intelligence).• When teams meeting takes place using Copilot for Sales, it gives an option to send AI generated meeting summaries to attendees either in teams chat or via outlook.• User can share Contact, Account and Opportunity information from in Teams chat with message extension which is unfurled into a rich preview card.

Business Value

- Customer is excited to use this game changing time saver that is powered by AI
- They feel that this will allow their users to work smarter and not harder, allowing to focus on selling instead of some of the mundane tasks throughout the day
- They are excited that this feature when enabled will truly set them apart from competition & even create better customer engagement
- A lot of their users are not used to such an extensive CRM platform and what it requires to incorporate it into their daily life. This will ease some of the current growing pains of users in entering data entry into the CRM application

One of the District Manager says "***Wonderful to hear we're embracing these technologies to help us focus on selling. The capabilities of Copilot for Sales is really impressive. Incorporating AI tools into our ecosystem will really help Sales capture more important activities into USD/Dynamics as well as deliver more value to customers and vendors.***"

Discovery Phase Plan

Activities	Team	Plan & Prep					Business & Technical Workshops							Previews & Validations					Review & Playback						
		d1	d2	d3	d4	d5	d6	d7	d8	d9	d10	d11	d12	d13	d14	d15	d16	d17	d18	d19	d20	d21	d22	d23	d24
Project Kick-off	PM, PO, PS	█																							
Org Struct & Stakeholders	PM, PS	█																							
Objective & Goal Setting	PM, PS	█																							
Logistics & Meeting planning	PM, PS	█	█																						
As-Is Business Process	PM, PS		█																						
Requirements Overview	PM, PS		█																						
Infra Setup, Access etc	Admin	█		█																					█
Governance Agreement	PM, PS					█																			
Deep Dive Sessions	App SMEs					█	█	█	█	█	█	█	█	█											
Architecture Refinement	PM, AR					█	█	█	█	█	█	█	█										█		
E2E Impact Analysis	App TL, AR											█	█	█											
Copilot for Sales Product Previews	PM, BS, PO, IT											█		█					█		█				
POC Led Solution Decisions	PM, PO, Arch													█	█	█	█	█	█	█	█	█	█	█	█
FitGap Analysis	PM, PO																					█	█	█	
e2e Process Flow	PM, PO, BS						█	█	█	█	█	█	█	█									█		█
Funct Decomposition	PM, PO, BS						█	█	█	█	█	█	█												
User Story Document(MVP1)	PM, PO, BS						█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
High Level Design	PM, IT																			█	█	█			
Testing Strategy	PM, IT, PO, BS																			█	█	█			
UI/UX - wireframes	PM, IT, PO, BS											█	█	█					█			█	█	█	█
Prioritization & Release Plan	PM, PO, PS																				█	█			
Exec Review	PM, IT, PO, BS																								

LEGEND

BS	Business	PO	Product Owner
IT	IT	PS	Project Sponsor
AR	Architect	PM	Project Manager
TL	Tech Lead		

Available on Appsource

Here is the link to our Consulting offering on Microsoft Copilot for Sales, that is available on Appsource
- [Infosys Copilot for Sales Implementation Factory 2-week assessment – Microsoft AppSource](#)