

Copilot Activation Assessment for Dynamics 365 Sales.
1-week engagement.

velrada
AN NRI COMPANY

Business First.
Technology Second.

**THAT'S
THE POINT**



In this deck

Microsoft is releasing new AI functionality within their Dynamics 365 suite each month. This is a fast-moving landscape in the era of AI.

Velrada run this Copilot Assessment engagement for our Dynamics 365 Sales customers to help them plan for new AI capabilities for users.

Allow us to discover where these capabilities can deliver value into your organisation and foster an understanding of how it will benefit users, improve processes, and customer experiences.

Some of these new AI capabilities in Dynamics 365 are automatically activated for your users, so you would want to be prepared. Some of opt-in and require activation manually, so you might want to know what capabilities are being paid for but not leveraged.

During this engagement, we will discuss the challenges that your current Dynamics 365 users are facing to author a summary of potential solutions that use the latest platform capabilities to overcome them.

Contents:

- 1) Overview of Copilot Capability with Dynamics 365 Sales
- 2) Our Activation & Assessment Engagement



Microsoft Solutions Partner



Business Applications
Data & AI
Digital & App Innovation
Modern Work

Microsoft Gold Partner



Gold Application Development
Gold Application Integration
Gold Cloud Business Applications
Gold Cloud Platform
Gold Cloud Productivity
Gold Collaboration & Content
Gold Data Analytics
Gold Data Platform
Gold Datacenter

Gold Enterprise Resource Planning
Gold Project & Portfolio Management
Gold Security
Advanced Specialization –
Windows Server &
SQL Server Migration to Azure
Advanced Specialization –
Low Code Application Development

Microsoft Partner



2023 Microsoft ANZ Business Applications & Industry Winner

2023 Partner of the Year Finalist
Microsoft Mixed Reality & Microsoft Dynamics 365 Services

2022 Partner of the Year Finalist
Microsoft Dynamics 365 Customer Service & Field Service Partner of the Year Award

2023/2024 INNERCIRCLE

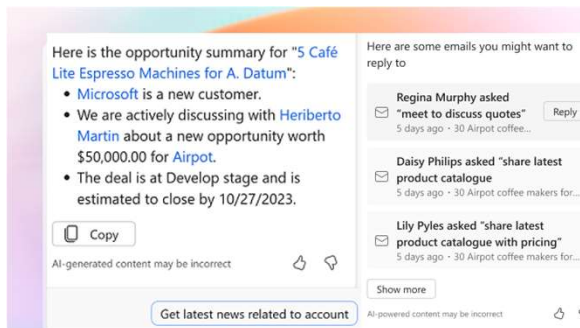
for Microsoft Business Applications



Overview of Copilot & AI capability with D365 Sales

Two Dynamics 365 Sales Copilots

FOUNDATIONAL UNDERSTANDING OF THE TECHNOLOGY



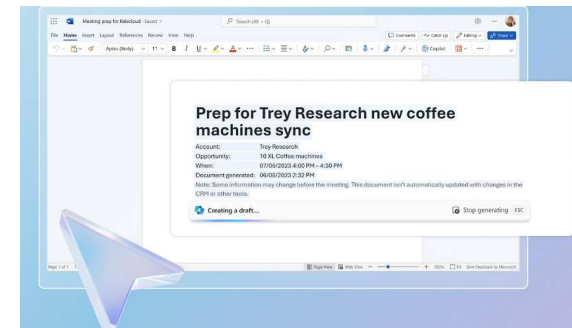
COPILOT IN D365 SALES

Overview

- AI-enriched features and capabilities **within** the Dynamics 365 Sales application in your web browser.
- Generate e-mails from within Dynamics 365
- Leverage the Copilot chat with suggested prompts in the sidebar of the standard user interface.
- Benefit from toolbar & in-process AI-driven automations
- View generated summaries within the standard forms.

Licensing

- Included within D365 Sales Enterprise & Premium tiers.
- Not included within D365 Sales Professional tier - Add-on required.



COPILOT FOR SALES

Capability

- Two-way interaction with your Dynamics 365 data from Microsoft 365.
- Generate documents within Microsoft Word, Excel PowerPoint using data found in your Sales application.
- Summarise & generate e-mails within Microsoft Outlook.
- Summarise meetings in Microsoft Teams and send directly into Dynamics 365 Sales.

Licensing

- For existing 'Copilot for Microsoft 365' customers, there is an add-on for Copilot for Sales.
- Procuring the full Copilot for Sales includes a Copilot for Microsoft 365 license.

Slide 4

JOJ

[@Matthew Pontel] this certainly does make sense. Though are you 100% sure you cant use Copilot in outlook to generate email responses etc.? This was a standard Viva Sales feature which I understood was included in the Enterprise license.

Jordan O'Halloran, 2024-03-13T03:04:30.240

Copilot in Dynamics 365 Sales

USE AI TO KNOW YOUR CUSTOMERS DEEPLY

Ask questions

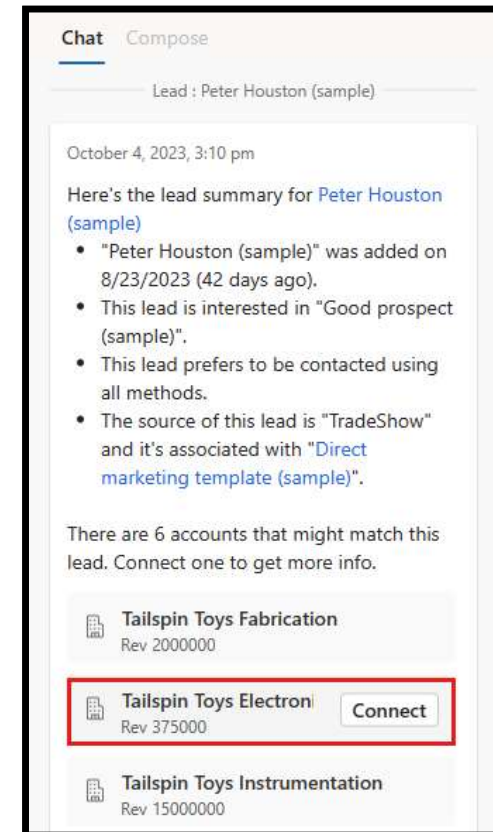
Ask questions about prospect records such as what's new and what's changed for a lead or an opportunity record. Copilot provides answers in natural language detailing the latest changes on the prospect records.

Get info

Copilot helps to get latest news on an Account record from over the Internet such as recent board meetings, mergers, acquisitions, expansion plans, market movements, annual results, or movement of key personnel.

Summarise prospect

Copilot summarises the lead or opportunity record in natural language. Copilot generates the summary from a set of predefined fields. For example, estimated revenue, close date, contact, pipeline stage, and proposed solution may be the first things you look for in an opportunity.



Copilot in Dynamics 365 Sales

AUTOMATE & ENRICH COMMON SALES PROCESSES USING AI



Recap sales meetings

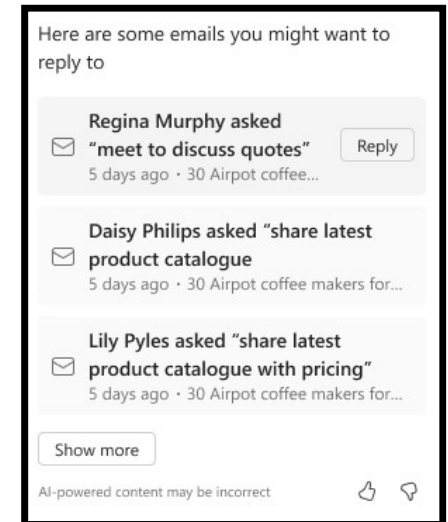
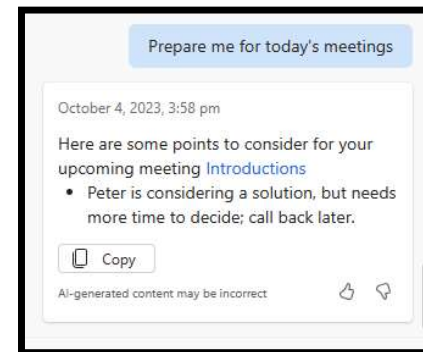
Automatically generate detailed summaries and actionable steps after sales calls and meetings. Use natural language capabilities powered by Azure OpenAI Service to intelligently draft a recap of a call with action items and follow-up dates, based on CRM and meeting data.

Prepare for upcoming sales meetings

Copilot helps the sellers prepare for sales meetings scheduled in the next 24 hours. Helps sellers with helpful summary of notes from the last three months and the most recent email thread on the timeline of the related record.

Surface emails requiring follow up

Copilot can help make sure that the sellers don't miss important emails by reminding them of any that they haven't replied to.



Copilot in Dynamics 365 Sales

LEVERAGE AI TO SELL EFFECTIVELY



Compose or reply to an email

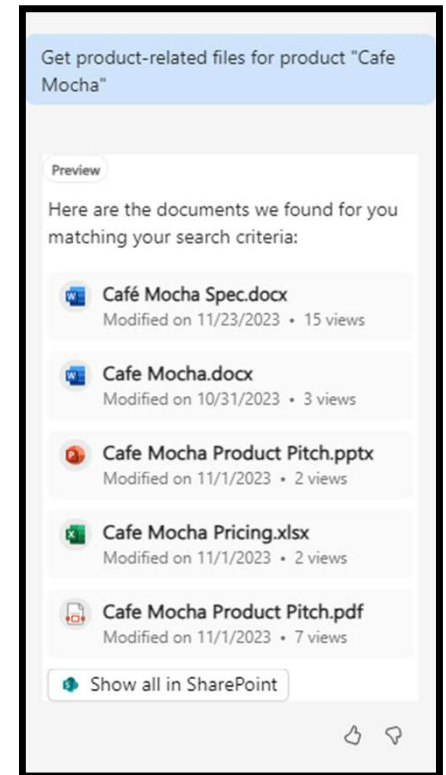
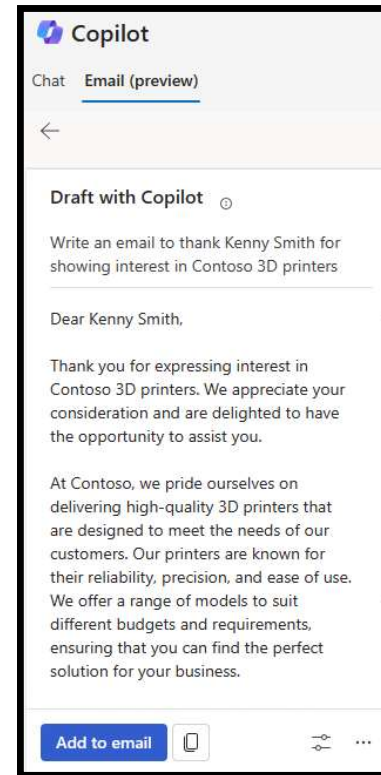
Sellers sending an email, can provide the context for the email in the Copilot composer, and a draft is generated. Sellers can review the draft, copy the content to the email, and send it to recipients.

Show pipeline

Sales leaders can lean on to the Copilot to show that latest updates in their sales pipeline instead of relying on technical team or system users to prepare a sales pipeline report or dashboard.

Content recommendations

Sellers can get content recommendations from SharePoint to fetch documents from SharePoint site that is associated with the Dynamics 365 tenant. This allows sellers be aware of the latest product information – product brochures, pricing, sales pitch or specifications typically stored in documents.



Copilot for Sales

INTERACT WITH SALES DATA & PROCESSES WITHIN MICROSOFT 365



We need a slide talking about
Copilot for Sales

Overview of Key Benefits



THE VALUE OF COPILOT IN YOUR SALES FUNCTION

Copilot & AI Capability provide reprieve to the following common challenges faced in Sales:

- Over 66% of a seller's day is devoted to e-mail.
- Repetitive e-mails are commonly composed from scratch.
- Time spent searching for past correspondence, chats, documents and account details.
- Time spent devoted to recapping conversations, summarising meetings and producing action items. Some of which are inaccurate or missing details.

Advantage your Sales team with Copilot & AI Capability within the software they use daily:

- Generative AI to produce e-mail responses modelled from templates, context and tone.
- Integrate into product, pricing and promotional data.
- Automatically summarise meetings and produce action items.
- Produce recaps and summaries of an Account or Opportunity from recent interactions and captured data.
- Leverage Dynamics 365 Sales data and processes from within Microsoft 365 – Word, Excel, OneNote, Teams, Outlook, etc.

Reduce e-mail fatigue

Improve quality of customer engagement

Drive efficiency in your sales function

Our Activation Assessment Engagement.

Our Assessment Process



ACTIVATING COPILOT CAPABILITY AROUND DYNAMICS 365 SALES

Velrada perform this engagement across 3 sessions and provide a final deliverable with outcomes & a roadmap.

- 1 Session: Getting Up to Speed on AI Landscape**
Engaging session to bring the customer up to speed with the estate of technologies and solutions available in the Microsoft Ecosystem.
- 2 Session: Discovery Workshop**
Collaborative workshop designed to discover the current usage of Dynamics 365 Sales within the organisation. This will identify the current licensing model, userbase, workflows that will benefit from Copilot capability, and approach to introducing it.
- 3 Report: Assessment Outcomes & Roadmap**
Velrada will take the discussion and decisions from the discovery workshop and curate an approach to activating the Copilot “in & for” Dynamics 365 Sales. This includes licensing, training, communications, performing a pilot, benefits, and next steps.
- 4 Session: Playback Session**
Velrada will take you through our assessment outcomes & roadmap deliverable in a final session.



What comes next

Work with Velrada through the next stage for **Activation**. We can support implementation & change management in turning on in-product capabilities and producing tailored Copilot workloads

Engagement Overview



ACTIVATING COPILOT CAPABILITY AROUND DYNAMICS 365 SALES

Engagement Length



Delivered typically across 1 week:

- Workshop 1 – Intro to Microsoft Platform AI (90 mins)
- Workshop 2 – Discovery Workshop (120 mins)
- Workshop 3 – Roadmap Playback (90 mins)

Investment



- Engagement start at AUD \$19,500 (excl. GST)
- Available in both fixed-price and time & materials
- Not inclusive of Microsoft licensing
- Microsoft funding can be available – *if applicable*

Session Delivery



Engagement can be delivered either:

- In person (your office or Velrada's)
- Remotely using Microsoft Teams

The final assessment report will be delivered as a PDF.

Pre-Requisites



- Client must be prepared for participating in discovery & design workshops
- Ability to showcase current usage of Dynamics 365

Client Participants



The engagement is collaborative & benefits from your input by:

- IT strategy & architecture leadership
- D365/Power Platform leads/owners
- Critical process owners – benefiting from AI

Velrada Resources



Our experienced resources utilised in this engagement:

- Delivery Manager
- D365 Consultant– *Copilot & AI specialisation*

Progress is impossible without change.

velrada
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velrada.com



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Australia. Europe. North America.



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**PROGRESS
IS THE POINT**

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Adelaide SA 5000

Melbourne

11/446 Collins Street
Melbourne VIC 3000

Sydney

1/40 Millers Street
North Sydney NSW 2060

Brisbane

7/348 Edward Street
Brisbane QLD 4000

London

45 Gresham Street, London,
EC2V 7BG, United Kingdom

Texas

6160 Warren Parkway, Suite 600,
Frisco, TX 75034 U.S.A

Copilot in Dynamics 365 Sales

TRANSFORMING THE WAY YOUR SELLERS WORK WITH AI



Summarise

Here is the opportunity summary for "5 Café Lite Espresso Machines for A. Datum":

- Microsoft is a new customer.
- We are actively discussing with [Heriberto Martin](#) about a new opportunity worth \$50,000.00 for [Airpot](#).
- The deal is at Develop stage and is estimated to close by 10/27/2023.

Copy

AI-generated content may be incorrect

Get latest news related to account

Stay Ahead

Here are some emails you might want to reply to

- Regina Murphy asked "meet to discuss quotes" 5 days ago - 30 Airpot coffee...
- Daisy Philips asked "share latest product catalogue" 5 days ago - 30 Airpot coffee makers for...
- Lily Pyles asked "share latest product catalogue with pricing" 5 days ago - 30 Airpot coffee makers for...

Show more

AI-powered content may be incorrect

Prepare

Prepare me for today's meetings

October 4, 2023, 3:58 pm

Here are some points to consider for your upcoming meeting [Introductions](#)

- Peter is considering a solution, but needs more time to decide: call back later.

Copy

AI-generated content may be incorrect

Ask

Copilot

Chat Compose (preview)

What's new with my sales records

Here are the latest updates with your sales records:

- Opportunity updates
- Lead updates
- Account updates

AI-generated content may be incorrect