

Microsoft Copilot for Sales

Our approach to a lean & agile 4-week implementation



Business First.
Technology Second.



Introduction

Microsoft have invested in the Copilot for Sales product that connects your Microsoft 365 ecosystem with your incumbent Sales/CRM system. It is an extension to Copilot for Microsoft 365.

Velrada have experience in implementing Copilot for Microsoft 365, Copilot for Sales, and Dynamics 365 Sales – which makes us the perfect partner to assist you with this endeavour.

Velrada have designed a lean and rapid implementation process to jumpstart your adoption of Copilot for Sales to ensure it delivers return on investment to your sales team within weeks.

Contents of this deck:

- 1) Introducing Microsoft Copilot for Sales
- 2) Our Implementation Engagement

MICROSOFT PARTNER OF THE YEAR AWARDS

	2024 Microsoft Partner of the Year Finalist Dynamics 365 Service		2023 Microsoft ANZ Business Applications & Industry Winner
	2023 Microsoft Partner of the Year Finalist Microsoft Mixed Reality		2023 Microsoft Partner of the Year Finalist Dynamics 365 Services
	2022 Microsoft Partner of the Year Finalist Dynamics 365 Services & Field Service		2021 Growth Partner of the Year Winner
	2021 Microsoft Partner of the Year Finalist Dynamics 365 Field Service		2019 Microsoft Partner of the Year Finalist Dynamics 365 Field Service
	Microsoft Power Platform Advisory Board Member		2018 Microsoft Partner of the Year Winner Dynamics 365 Field Service

OTHER RECOGNITIONS



OUR GOLD LEVEL COMPETENCIES



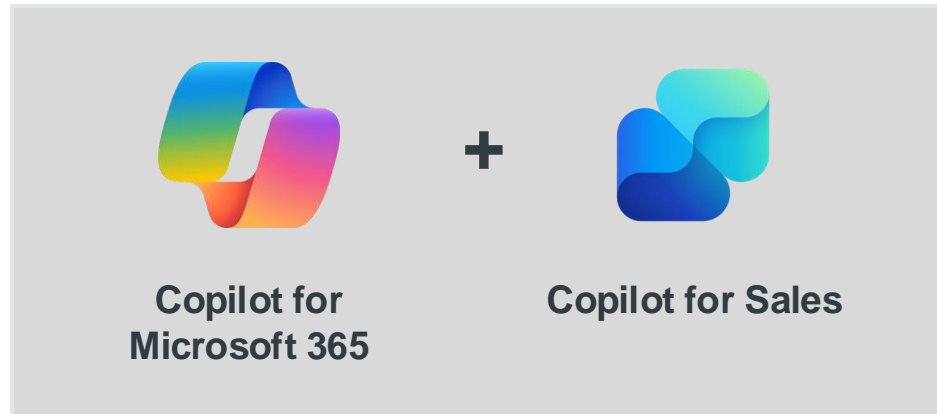
- Gold Application Development
- Gold Application Integration
- Gold Cloud Business Applications
- Gold Cloud Platform
- Gold Cloud Productivity
- Gold Collaboration & Content
- Gold Data Analytics
- Gold Data Platform
- Gold Datacenter
- Gold Enterprise Resource Planning
- Gold Project & Portfolio Management

MICROSOFT SOLUTIONS PARTNER



Introducing Microsoft Copilot for Sales

Introducing Microsoft Copilot for Sales



Improve sales productivity

Leverage Gen-AI and multiple data sources to work smarter.

Improve e-mail handling

Summarise threads of conversation and generate responses with context.

Efficient meetings

Generate preparation notes, view in-call insights, and generate meeting minutes.

Generate documents

Leverage Sales/CRM data from within Word, Excel, and PowerPoint documents.

Stay in the flow of work

Leverage data from your CRM/Sales platform from M365 to reduce app switching.

Personalise interactions

Analyse signal and interactions with insights and next-action recommendations.

Automate tasks

Create and update records for customers & opportunities and sync to CRM/Sales system.

Collaborate seamlessly

Create deal rooms in Teams that sync with data and files in CRM/Sales systems.

Microsoft Copilot for Sales is an AI assistant for sellers in Microsoft 365 that connects to sales solutions to bring next-generation AI and CRM platform updates and insights across productivity workflows.

Copilot for Sales currently works with Dynamics 365 Sales and Salesforce Sales Cloud. It can be configured to work with other solutions.

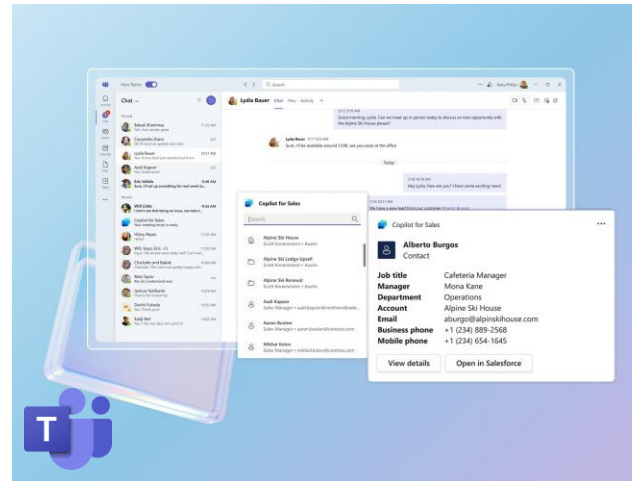
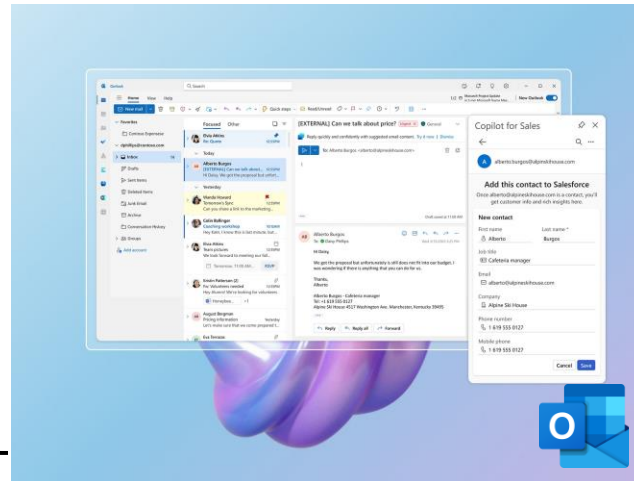
Copilot for Sales includes Copilot for Microsoft 365. Customers already licensed for Copilot for Microsoft 365 can purchase Copilot for Sales as an add-on.

Connect Copilot to your Sales Solution

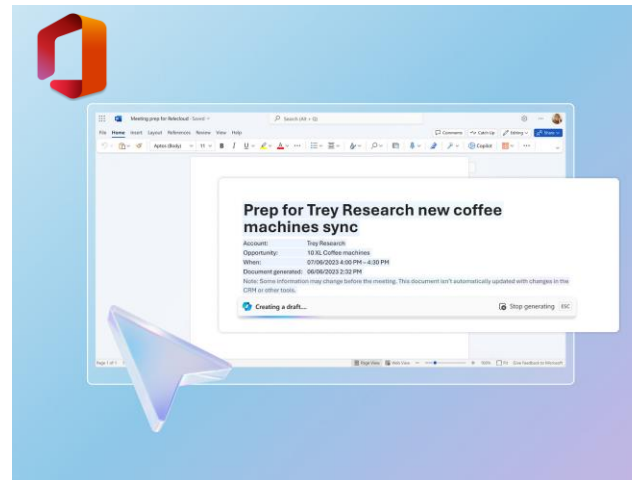
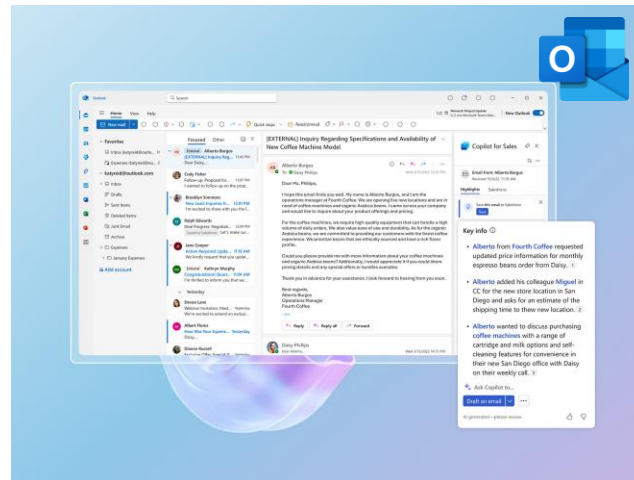
ENABLING NEXT-GEN AI ASSISTANT FOR SALES INSIGHTS & PRODUCTIVITY



Copilot for Microsoft 365



Your Sales System



Our Implementation Engagement



Our Implementation Process

FLEXIBLE ENGAGEMENT FOR COPILOT FOR SALES

1

Discovery & Planning

Session to showcase Microsoft AI & Copilot capability to set the table. Workshop to understand current processes, systems, data sets, and how Copilot for Sales capabilities can transform them. Onboard Velrada consultants with access to commence implementation.

2

Implementation & Configuration

Agile implementation of the Copilot for Sales with your compatible incumbent CRM & Sales system. Copilot for Microsoft 365, if not already configured, will be done in a targeted manner for the Copilot for Sales mission.

3

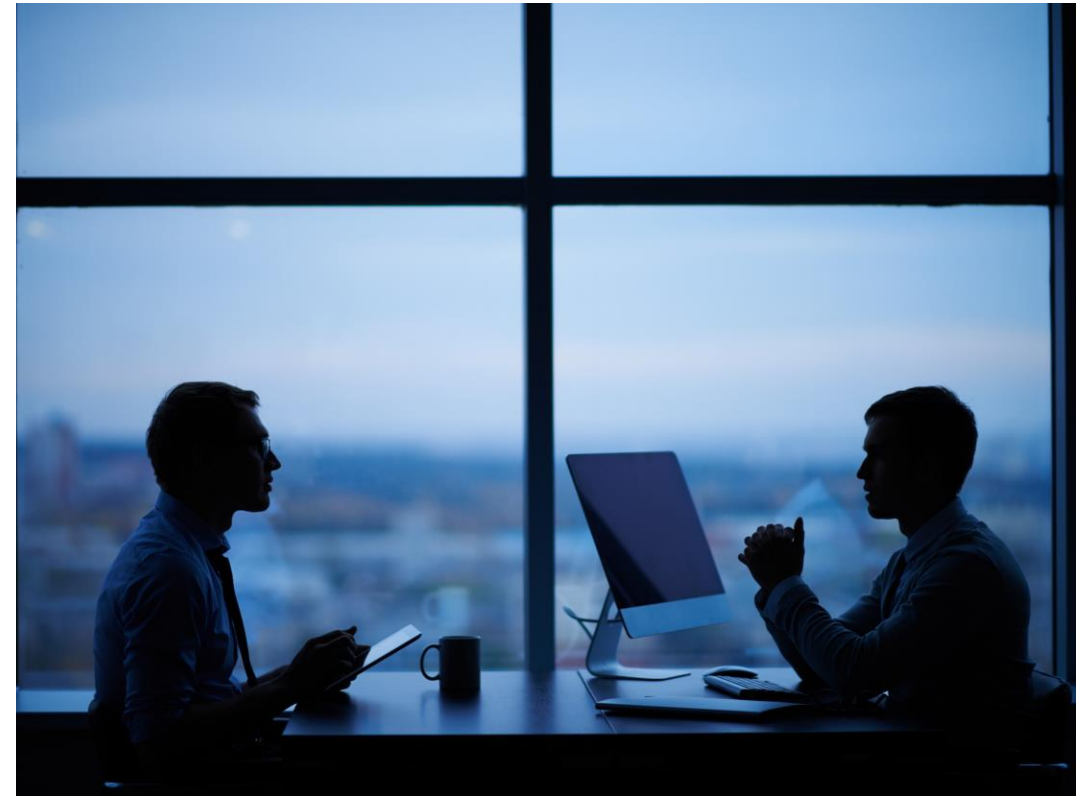
Pilot, Refinement & Preparation

Perform a series of pilot activities with a small cohort to test and refine the configuration. Prepare an intranet landing page or document to help the sales team use Copilot for Sales.

4

Handover & Go-Live

Perform a training session with sales team. Assign licensing and access to sales team to prepare for go-live. Brief post-go-live support.



Engagement Overview

MICROSOFT COPILOT FOR SALES IMPLEMENTATION

Engagement Length



Generally delivered between 3-4 weeks

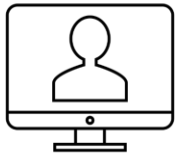
- Week 1: Discovery and Planning
- Week 2 & 3 – Implementation and Pilot
- Week 4 – Handover and Go-Live

Investment



- Engagement start at AUD \$45,000 (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:

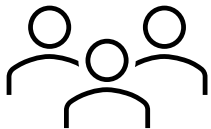
- In person (your office or Velrada's)
- Remotely using Microsoft Teams

Pre-Requisites



- Client must be prepared for participating workshops to perform discovery & planning.
- Ability to showcase current usage of Sales system.
- Provision access & licensing to Velrada for implementation.

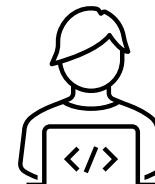
Client Participants



The engagement is collaborative & benefits from your input by:

- IT strategy & architecture leadership.
- CRM/Sales system custodians.
- Sales team leaders.

Velrada Resources



Our experienced resources utilised in this engagement:

- Delivery Manager
- Copilot for Sales Consultant

Progress is impossible without change.

velrada
AN NRI COMPANY



velrada.com



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**PROGRESS
IS THE POINT**

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