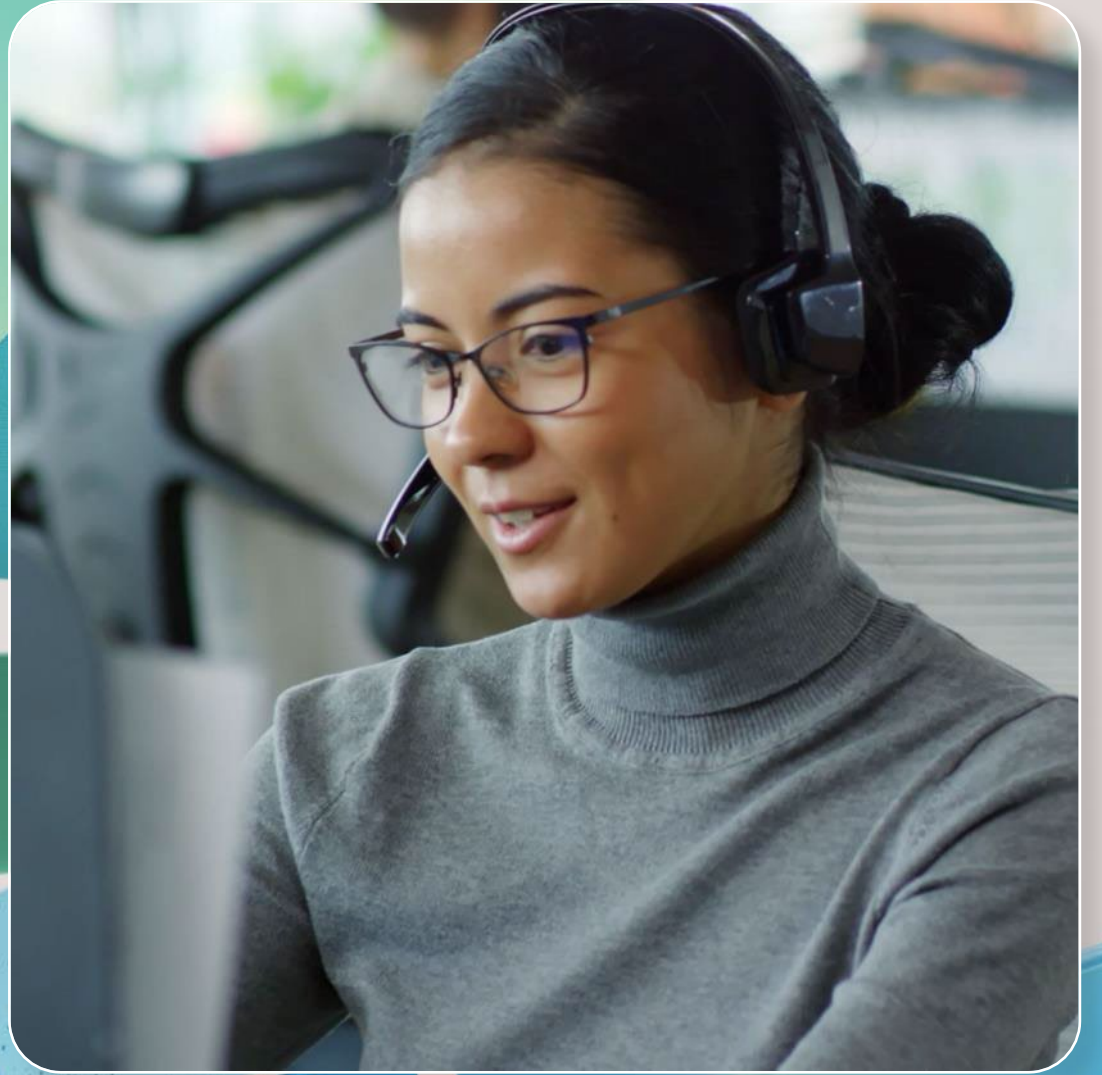# Copilot scenarios for
Sales

Copilot scenarios for
Sales

Overview and KPIs

KPIs play a crucial role in organizations, providing a compass to navigate toward success. Let's dive into KPIs for Sales and how Copilot can assist.

Use Case by Role

Copilot can simplify the tasks that execs perform every day. Look at key use cases and how Copilot can be your AI assistant along the way.

Day in the Life

See how real-life sellers are using Copilot in their day to day.

Using Copilot in Sales

Goals and challenges

Based on Microsoft research selling is getting harder with 79% of sellers saying they need to support more account and are spending 70% of their time on administrative tasks such as research, planning, generating proposals, data entry, and internal meetings.

Copilot can assist with...

Copilot assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal. Improve lead quality

- Improve customer meetings
- Make a pitch
- Improve time to respond to an RFP or produce a quote
- Create an unsolicited proposal
- Respond to a customer complaint

Sales roles

- Account manager
- Technical sales
- Telesales
- Customer Success

Microsoft Copilot opportunity to impact key departmental KPIs

Number of opportunities pursued
Simplifying and automating tasks like preparing for meetings, tracking tasks. sending emails, creating proposals, and researching customer and product information can allow sellers to pursue more opportunities. Research shows an increase of 0.4-0.5% in opportunities.[1]

Improve close rate
Improving the customer of marketing content and customer interactions such and emails and meetings can help to improve close rates. In addition, improving targeting, pricing analysis, and creating effective promotions can also improve close rate.

Increase revenue per sale
Copilot helps expand opportunities through cross selling. Sellers can use Copilot to get suggestions for cross selling opportunities and then research a better together story. Copilot also assists in pulling together quotes and proposals. Research shows a 2.5-3.1% increase in upsell or cross-sell.[1]

Increase customer retention
Improving the quality of sales materials and interactions helps with retention, But the rest of the company can contribute as well from improved support interactions and first call resolution to improved customer feedback processes to product development. Research shows a 0.8-1% increase in revenue from improved retention.[1]

Note, sales efficiency and sale effectiveness benefits are non-exhaustive. [1]Percentage improvements were calculated based on a sample set of Copilot for Sales customer deployments, third-party analyst reports from Boston Consulting Group, Bain & Company, and McKinsey, and Microsoft's internal business value management database.

Accelerate growth   Cost savings and avoidance   Employee retention

KPI – Increase number of opportunities pursued

Sales is about building relationships and pursuing opportunities. But these things take time and so anything that Copilot can do to reduce the time salespeople spend on tasks can be used to increase customer face time and pursue more deals.

How Copilot can help increase the number of opportunities pursued

Improve customer meetings

- Use Copilot to organize information from past interactions
- Research company information
- Learn how to pitch the product
- Completely focus during the meeting

Respond to an RFP

- Use Copilot to gather proposal information
- Have Copilot assist with emails
- Create a bot with RFP responses

Roles

Pursuing more opportunities can require input from:

- Account Manager
- Technical Sales
- Training staff
- Product teams
- Customer Success

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

KPI – Improve close rate

Closing a deal often requires bringing many elements together from an entire team to ensure that both the customer and seller are satisfied.

How Copilot can help improve the close rate

Improve quality of customer-facing materials

- Improve marketing content
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Create pricing and promotions

- Use Copilot to research market conditions
- Use Copilot to compare sales across regions or other variables

Improve targeting

- Analyze current product mix and cross sell success

Improve customer meetings

- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Roles

Improving close rates can require input from:

- Account Manager
- Technical Sales
- Training staff
- Product teams
- Product Marketing
- Finance

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

KPI – Impact on revenue per sale

Revenue achieved per sale can have many factors, but the most common way to increase it would be through cross selling to include more items in the sale.

Use cases

Improve quality of customer-facing materials

- Improve marketing content with clear value propositions
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Create a proposal

- Improve product training content
- Use Copilot to compare sales across regions or other variables

Improve targeting

- Analyze current product mix and cross sell success

Improve customer meetings

- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Roles

Increasing revenue per sale can require input from:

- Account Manager
- Technical Sales
- Training staff
- Product teams
- Product Marketing
- Finance

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

KPI – Impact on customer retention

Keeping customers happy after a sale is a team effort. The efforts by the customer success team and product team to resolve any issues in a timely manner are critical. Follow up by the sales team is helpful and can lead to additional sales.

Use cases

Improve quality of customer-facing materials
- Improve marketing content with clear value propositions
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

Improve customer meetings
- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Respond to a customer complaint
- Respond quickly
- Access customer records
- Gets answer fast

Roles

Customer retention can require input from:

- Account Manager
- Technical Sales
- Product support
- Product teams
- Customer Success

Microsoft AI solutions

- Copilot for Microsoft 365
- Copilot in Dynamics 365 for Sales
- Copilot for Sales

Sales use case | Improve customer meetings

Potential benefits | Improve close rate | Increase customer retention | Increase revenue per sale |

1. Prepare for a meeting

Summarize recent customer communications across emails, chats, and documents with Copilot Studio's connection to your CRM. Then create a customer meeting brief using Copilot for Sales.

**Copilot Studio
Copilot for Sales**

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

2. Create a presentation

Use Copilot to generate a presentation for the meeting using branded templates. Copilot can suggest important topics, customer requests, and organize slides into a logical flow.

Copilot in PowerPoint

Using higher quality presentations makes it easier to convey a clear message and can reduce the time to close the deal.

3. Stay focused during the call

Since Copilot is listening in there is no need to take notes and keep track of action items. Stay focused on the call and have a better discussion.

Copilot in Teams

Having a better discussion during the call can help to raise and resolve issues quicker, leading to increased customer satisfaction and potentially reduce the time to close the deal.

6. Send a follow up email

Have Copilot turn the meeting notes and action items into an email for all participants.

Copilot in Outlook

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Summarize the meeting

After the meeting is over review the meeting recap for a summary of key points and action items. Update the opportunity details in the CRM system.

**Copilot in Teams
Copilot for Sales**

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Ask Copilot to suggest next steps

During the meeting you can ask Copilot for suggestions on questions to ask or next steps to discuss to keep the conversation on track.

Copilot in Teams

Keep the conversation flowing onto meaningful topics can help to cover the agenda quicker and reduce meeting times.

Sales use case | Make a pitch

Potential benefits (Improve close rate) (Increase customer retention) (Increase revenue per sale)

1. Refine discovery session

Work with the sales team to refine the customer discovery session goals and components using Copilot in Loop.

Copilot in Loop

Collaborate as a team using Copilot as a key contributor of creative ideas.

2. Research the company

Discover information on the customer using Microsoft Copilot to summarize their Annual Report for goals, risks, and financial information.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

3. Find the asks in your emails

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.

Copilot

Save time searching for information in chats and emails and get a more complete picture than you may have if you quickly scanned the threads.

6. Create the proposal

Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.
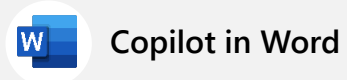
Copilot in Word

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Summarize the meeting

After the meeting is over review the meeting recap for a summary of key points and action items.

Copilot in Teams

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Update the sales presentation

Refine a sales presentation with a new slide using customer details from the email summary and visuals relevant to their industry.

Copilot in PowerPoint

Quickly personalize pitch presentations with talking points and data specific to your customer.

Sales use case | Respond to a RFP

Potential benefits [Improve close rate] [Number of opportunities] [Increase revenue per sale]

1. Summarize the RFP

Use Copilot to organize the information required for the RFP by generating a list of required items sorted by category.

Copilot in Word

Get started quickly by skipping over non-essential portions of the RFP.

2. Gather opportunity information

Use Copilot to summarize information from the company website and annual reports to understand financials, goals, and challenges.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

3. Use Copilot to research responses

Use custom RFP repository copilot built with Copilot Studio to ask for responses to the RFP questions.

Copilot Studio

Using defined content to answer customer questions ensures accuracy of the responses.

6. Create email with response

Have Copilot turn a list of bullet points into a professional email summarizing the RFP response.

Copilot in Outlook

Quickly create professional emails that are concise and more likely to be read and can lead to higher close rates.

5. Revise responses

Use Copilot to revise the document content to make it more readable. Go back to the RFP bot to get answers to additional items.

Copilot in Word

Quickly make responses more readable to improve the quality of the RFP response.

4. Meet with team to review

Discuss required changes and opportunities for cross-sell. After the meeting generate a list of suggestions for updates.

Copilot in Teams

Don't miss any updates by asking Copilot for all of the suggestions made during the meeting.

Sales use case | Create an unsolicited proposal

Potential benefits   (Improve close rate)   (Increase number of opportunities pursued)   (Increase revenue per sale)

1. Get targeting information

Easily access CRM information to pull current licensing and targeting recommendations.

Copilot for Sales

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

2. Perform company research

Use Copilot to summarize information from the company website and annual reports to understand financials, goals, and challenges.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time and helps to target the proposal.

3. Gather product information

Ask Copilot to gather production information and create a summary of how they will help to meet the customer's specific goals.

Copilot

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy

6. Create email with proposal

Have Copilot turn the meeting notes and action items into an email for all participants.

Copilot in Outlook

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Meet to review

Ask Copilot to review chat and emails about the proposal and create an agenda. Use Copilot during the meeting to highlight disagreements and then create a set of action items after the meeting.

Copilot in Teams

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Generate the proposal

Use Copilot to turn the information you have collected into a great presentation including images and tables.

Copilot in PowerPoint

Generating a first draft quickly so you can append more time on the details.

Sales use case | Respond to a customer compliant

Potential benefits (Improve close rate) (Number of opportunities) (Increase revenue per sale)

1. Summarize customer emails

Combine recent customer communications across emails, chats, and documents with deal information from CRM systems to create a customer brief in Word.

Copilot for Sales

Rapidly get up to speed to on the concern raised across all of the communications you have received.

2. Research product info

Ask Copilot to gather product information and create a summary of if this issue has been seen before and how it might be addressed.

Copilot

Gathering product information from multiple sources and asking Copilot to prepare a summary can save time and increase accuracy.

3. Meet with product team

Ask Copilot to suggest questions to ask the product team based on the customer request and potential solutions.

Copilot in Teams

Copilot can help boost creativity by suggesting solutions from its vast knowledge base.

6. Meet with the customer

Have Copilot turn the meeting notes and action items into an email for all participants.

Copilot in Teams

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Create email with response

Have Copilot create an email summarizing the presentation and highlighting how the issues will be resolved.

Copilot in Outlook

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Draft proposed response

Use Copilot to turn the information you have collected into a great presentation including images and tables.

Copilot in PowerPoint

Create a **draft presentation** directly from the meeting recap.

# A day in the life of a service agent

8:00 am

Ethan, an agent at Fourth Coffee, receives an email from his customer Joanna about extending her coffee machine's warranty. Ethan uses Copilot for Service to generate a case summary.

Copilot in Outlook
Copilot for Service

Generates a case summary in Outlook that includes details from Salesforce and other knowledge sources to help Ethan get up to speed.

8:15 am

Now, one of Joanne's coffee machines is making a strange noise. Ethan uses Copilot for Service to quickly draft a reply in Outlook pulling in the case details from the CRM. He adds an invitation to a Teams call so he can help diagnose the issue.
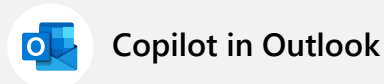
Copilot in Outlook

Draft a reply in Outlook in the case details from the CRM. He adds an invitation to a Teams call so he can help diagnose the issue.

9:00 am

Ethan uses Copilot for Service to draft an email response to Joanna. Copilot analyzes CRM data, internal knowledge, and historical cases to generate the personalized reply about the warranty, which Ethan then reviews and sends.

Copilot in Outlook
Copilot for Service

Copilot analyzes CRM data, internal knowledge, and historical cases to generate the personalized reply.

4:00 pm

After ending the call with Joanna, he uses Copilot for Service to summarize the meeting and adds the summary to her Salesforce contact record directly from Teams.

Copilot in Teams
Copilot for Service

Summarize the meeting and adds the summary to her Salesforce contact record directly from Teams.

2:00 pm

A few minutes later, Ethan receives a live chat inquiry in Salesforce from another customer asking about a sales promotion. He uses Copilot for Service to get a concise summary of the promotion from ServiceNow and craft a response.

Copilot for Service
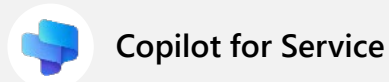
Get a **concise summary** of the promotion from ServiceNow and craft a response.

11:00 am

Ethan gets a quick reminder of the case details directly in Teams before joining the meeting. On the call, Ethan learns more about the noise, and uses Copilot for Service in Teams to identify and suggest a fix, which he then communicates to Joanna on the call.

Copilot in Teams

Uses Copilot for Service in Teams to identify and suggest a fix, which he then communicates to Joanna on the call.

Ethan
is a customer service agent
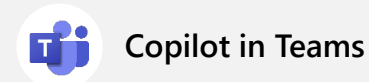
A day in the life of an Account Manager

Cassandra is a sales lead at Contoso

8:00 am
Cassandra needs to prepare for her big pitch to Contoso so she summarizes the emails and chats from her main client.

Copilot

Summarize all the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 am
Cassandra commands Copilot to create a message to confirm the meeting.

Copilot in Outlook

Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 am
Cassandra received the latest financial numbers from her business planning lead. She uses Copilot to create some amazing charts to showcase the value of the offer.

Copilot in Excel

Show all data insights.

4:00 pm
Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and commands Copilot to summarize the conversation to quickly catch up.

Copilot in Teams

Summarize this chat and make sure to include the key points and who made them.

2:00 pm
It's time for the pitch. Cassandra can focus on her presentation knowing Copilot is taking notes. She commands Copilot to list the questions asked so she can be sure everything gets answered during the call.

Copilot in Teams

What questions were asked during the meeting that have not been answered?

11:00 am
Cassandra puts the final touches on the pitch presentation by adding a slide based on the summary of the annual report she had Copilot draft.

Copilot in PowerPoint

Add a slide based on [copy in annual report summary].