

Accelerate - Value Realization from Copilot for Sales with Dynamics 365



Adoption Services

Duration: 5 Days [Remote | Onsite]

Difficulty Level: 200 - Intermediate

Description

In this engagement, you will work with Microsoft experts to quantify business value and benefits, receive support to overcome internal barriers, and boost end-user adoption of Copilot for Sales scenarios tailored to your business.

Objectives

- Envision Copilot for Sales scenarios and extensions to deliver increased value to your sellers.
- Quantify expected and actual business value and benefits.
- Boost adoption through support with change management and compliance.
- Influence and keep informed of the roadmap for Copilot for Sales with Dynamics 365.

Outcomes

- Define Copilot for Sales use cases, which include identifying extension scenarios.
- Quantify expected and actual business value according to agreed success measures.
- Support internal control functions supported to approve Copilot for Sales adoption where necessary.
- Define an approach to drive user adoption.
- Understand the product roadmap and next steps.

Methodology

Learn by example

Work closely with a Microsoft engineer to learn change management concepts and best practices.

Hands-on

Participate in group discussions with a Microsoft specialist.

Scope

Customers who completed an initial Copilot for Sales with Dynamics 365 activation (in either a sandbox or in production) and want help with accelerating adoption and maximizing business value.

Agenda

Day 1

- Envision

Day 2

- Adopt

Day 3

- Assess

Delivery outline

Requirements

Participants

- Dynamics 365 Architects
- Administrators
- Customer Sales Operations and Enablement Team, Decision Makers, and Early Adopters
- Champion users

Skill Requirements

- Basic knowledge on Power Apps fundamentals, adoption, and change management

Time Commitment

- 3-day engagement with relevant roles.
- Time usage is spread across 6 weeks.

Delivery Requirements

- An understanding of your Dynamics 365 business and Sales processes and administration activities.
- Access (if needed) to the targeted production or sandbox environment with Copilot for Sales for assessment.

Adoption

Scoping

Scope

- Scope the engagement, review the prerequisites, and define roles and responsibilities.

Day 1

Envisioning Session

- Review of the overall planning.
- Attend a listening session with your feedback and a questionnaire for you to review and complete.
- Create a Sales Copilot Adoption project team, which includes early adopters and champions.
- Establish a preferred communication channel with the Copilot for Sales Adoption project team.

Day 2

Data Analysis/Discussion

- Review the questionnaire and have an interactive discussion with a Microsoft architect to remove blockers and drive adoption.
- Prepare your organization and staff with the knowledge to implement Adoption practices based on Copilot for Sales features that are useful for the business.

Day 3

Assess

- Prepare your organization and staff for a series of planned 30-minute office hours to ask questions and provide feedback.
- Track Copilot usage for Sales.

If you are interested in this engagement for your organization, contact your Microsoft Account Representative.