

Activate – Copilot for Sales Integration with Third Party CRM



Proof of Concept

Duration: 1 Day [Onsite/Remote]

Difficulty Level: 300 - Advanced

Description

This engagement will help you to clearly understand Copilot for Sales and will help accelerate the Microsoft Copilot for Sales deployment, which is connected to the Salesforce CRM in your organization.

You will also learn how Copilot for Sales and Copilot AI-powered features can help you keep track of all the essential information across your M365 apps and CRM system to improve business productivity, collaboration and engagement level when you use Outlook, Teams, and other M365 applications as a Salesforce CRM user.

use Copilot for Sales for business scenarios such as Outlook activities management, meetings experiences, and Teams collaboration experiences.

- Accelerate the Copilot for Sales deployment and configuration.

Methodology

Learn by example

Work closely with a Microsoft resource to learn key concepts and best practices to enable and use Copilot for Sales for Microsoft Outlook and Microsoft Teams.

Objectives

- Understand the business value of Copilot for Sales.
- Learn how to setup and configure Copilot for Sales.
- Help salespeople understand Copilot for Sales and how to achieve productivity gains to save time on common tasks that use Copilot for Sales capabilities, such as to explore sales data and act based on their unique scenarios.
- Help salespeople understand how they can capture Outlook activities in their CRM system to build CRM system data accuracy and insights into an engagement level. Copilot for Sales provides customer data insights to help evaluate your activities in relation to previous successes, develop stronger business relationships, and choose the best path forward.
- Understand how to improve sales conversations and relationships with Copilot for Sales conversation insights and take guided actions.

Hands-on

Configure and enable Copilot for Sales in Outlook and Teams, which are connected to Salesforce.

Scope

Learn to use Copilot for Sales features with Salesforce where all applications and environments are present in a single tenant.

Agenda

Morning

An instructor will present the Copilot for Sales features. Attendees will learn about Copilot for Sales features and how to enable, configure, and use Copilot for Sales with Salesforce.

Afternoon

A Microsoft engineer will work with you to connect Copilot for Sales to a Salesforce CRM test environment as a Proof of Concept. Activated features will be agreed upon during the scoping call.

Outcomes

- Help salespeople understand the values and benefits of Copilot for Sales. Also help salespeople understand how to

Delivery Outline

Service	Activate – Copilot for Sales Integration with Third Party CRM
Participants	<ul style="list-style-type: none">• Salesforce Admins• Customizers• Business users• Business Development Team• Sales Leadership team
Skill Requirements	<ul style="list-style-type: none">• Understanding of Salesforce Sales app navigation and usage.• Experience with Outlook or Teams.• Basic understanding of Salesforce administration.• Experience with baseline Salesforce Sales topics.• Experience with using business applications.
Delivery requirements	<ul style="list-style-type: none">• Sandbox environment available and ready to activate Copilot for Sales as agreed upon by you and an engineer.• Microsoft Outlook and Teams for remote deliveries.• Modern browser, such as Microsoft Edge (or equivalent).• Microsoft Copilot for Sales Standard (seeded in D365 license) or Copilot for Sales (new SKU).• Microsoft 365 for enterprise or Office 365 for enterprise.
System requirements	<ul style="list-style-type: none">• Supported version of Windows.• Audio equipment.• Internet access.• Modern browser and at least 1-Mbps bandwidth per participant.• Microsoft Teams for remote deliveries.
Agenda - Everyone	<ul style="list-style-type: none">• Envision and empower future work for salespeople.• Understand the value of Copilot for Sales and AI insights.• Understand the licensing model.• Learn the Copilot for Sales roadmap.• Learn Copilot for Sales features.
Agenda Administrators and Technical profile	<ul style="list-style-type: none">• Understand Copilot for Sales architecture.• Understand the deployment prerequisites.• Understand how to setup and configure Copilot for Sales.• Enable Microsoft Copilot for Sales in Outlook and Teams, which is connected to Salesforce.

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