

Activate - Dynamics 365 Sales - Copilot for Sales



Proof of Concept

Duration: 1 Day [Onsite/Remote]

Difficulty Level: 100 - Basic

Description

In this offering, you will learn about the Copilot for Sales in M365 apps (experienced in Outlook and Teams) and Copilot in Dynamics 365 Sales.

You will also learn how Copilot for Sales and Copilot AI-powered features can help you capture all-around customer data insights to help evaluate your engagement level, develop stronger business relationships, and choose the best path forward.

You will learn how to implement Microsoft Copilot for Sales in your organization.

Objectives

- Understand the business value of Copilot for Sales.
- Learn how to set up and configure Copilot for Sales.
- Educate salespeople on Copilot for Sales: How to increase productivity by saving time on common Outlook and Teams tasks.
- Understand how to capture Outlook activities into a CRM system to build accurate data and improve insights into an engagement level.
- Understand how to improve sales conversations and relationships with Copilot for Sales conversation insights and take guided actions.

Outcomes

- Educate salespeople about the value and benefits of Copilot for Sales and how to use it for business scenarios such as management of Outlook activities, meetings experiences, and Teams collaboration experiences.
- Accelerate 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.

Hands-on

- Configure and enable Copilot for Sales in Outlook and Teams connected to Dynamics 365 Sales.
- Configure and enable Copilot for Sales in Dynamics 365 Sales.

Scope

The scope is limited to activating the Copilot features included with Dynamics 365 Sales or activating Copilot for Sales connected to Dynamics 365 Sales for a single, existing Dynamics 365 Sales sandbox environment. All applications and environments must be present in a single tenant.

Agenda

Select one of the following agendas based on your scenario:

1-Day: For Copilot for Sales Standard capabilities

You want to deploy the seeded capabilities of Copilot for Sales and work with a Microsoft CSA to understand best practices and recommended configurations.

1-Day: For Copilot for Sales Premium capabilities

You want to deploy the Premium (new SKU) capabilities of Copilot for Sales and work with a Microsoft CSA to understand the Best Practices and recommended configurations.

Delivery Outline

Service	Activate - Dynamics 365 Sales - Copilot for Sales
Participants	<ul style="list-style-type: none">• Dynamics 365 Admins• Customizers• Business users• Business Development Team• Sales Leadership team
Skill Requirements	<ul style="list-style-type: none">• Understanding of D365 Sales app navigation and usage.• Basic understanding of D365 administration.• Experience with Outlook or Teams.• Experience with baseline D365 sales topics.• Experience with using business applications.
Time Commitment	1-day engagement.
System requirements	<ul style="list-style-type: none">• Computer with a supported version of Windows.• Audio equipment.• Internet access.• Modern browser and at least 1-Mbps bandwidth per participant.• Microsoft Teams for remote deliveries.
Agenda Day 1 - Everyone	<ul style="list-style-type: none">• Envision and empower the future of work for salespeople.• Understand the benefits and value of Copilot for Sales and AI capabilities.• Understand the licensing model.• Learn Copilot for Sales Roadmap.• Learn Copilot for Sales features.
Agenda Day 1 - Administrators and Technical profile	<ul style="list-style-type: none">• Understand the Copilot for Sales Architecture.• Understand the deployment prerequisites.• Understand Copilot for Sales setup and configuration.• Enable Copilot for Sales in Outlook and Teams connected to the D365 Sales app.

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