

Accelerate - Value Realization from Copilot for Sales with Dynamics 365

Adoption Service

Duration: 3 Days [Remote]

Difficulty Level: 200 - Intermediate

Description

Work with Microsoft experts to accelerate your realisation of quantified business value and benefits, with 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.
- Keep informed and influence the roadmap for Copilot for Sales with Dynamics 365.

Outcomes

- Copilot for Sales use-cases defined, including identification of extension scenarios.
- Expected and actual business value quantified according to agreed success measures.
- Internal control functions supported to approve adoption of Copilot for Sales where necessary.
- Approach defined to drive user adoption.
- Understanding of the product roadmap and next steps.

Methodology

Envision

Understand your solution and goals and define how Copilot for Sales will be used to deliver business value.

Adopt

Support the planning and execution of activities to overcome internal barriers and accelerate user adoption of Copilot for Sales, including weekly office hours.

Assess

Quantify the business value and benefits achieved, gather feedback, and agree next steps.

Scope

Customers who have completed initial activation of Copilot for Sales with Dynamics 365 (in either sandbox or production) and want help to accelerate adoption and maximise business value.

Agenda Outline

The agenda and timeline will be tailored according to your current situation and needs, for example:

- Week 1: Envision
- Weeks 2-5: Adopt
- Week 6: Assess

Delivery Outline

Requirements

Participants

- Dynamics 365 architects, administrators, Customer Sales Operations and Enablement Team/Decision maker/Early Adopter and Champions users

Skill Requirements

- Understanding of your Dynamics 365 business and sales processes and administration activities
- Understanding of Microsoft 365 applications and Dynamics 365 Sales app

Time Commitment

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

Delivery Requirements

- Access if needed to the targeted production or sandbox environment with Copilot for Sales for assessment.

Assessment and Knowledge Transfer

Scoping	Welcome call	<ul style="list-style-type: none">▪ Scope the engagement, review the prerequisites, and define roles and responsibilities
Week 1-2	Envisioning session	<ul style="list-style-type: none">▪ Review of the overall planning▪ Listening session with customer feedback questionnaire for customer to review and complete▪ Create a Sales Copilot Adoption project team including early adopters and champions▪ Establish preferred communication channel with the Copilot for Sales Adoption project team
Week 3-4	Data analysis-Interactive discussion-Adopt	<ul style="list-style-type: none">▪ Review of questionnaire and Interactive discussion with a Microsoft architect on ways to unlock blockers to drive adoption▪ Prepare your organization and staff with the knowledge to implement Adoption practices based on Copilot for Sales features useful for the business.
Week 5-6	Assess	<ul style="list-style-type: none">▪ Prepare your organization and staff for series of 30-min planned Office hours with users to asks questions and provide feedback▪ Track Copilot usage for Sales

For more information: Please contact your Microsoft Representative for more details.