

Activate – Copilot for Sales Integration with Third Party CRM

Proof of Concept

Duration: 1 Day [Remote / Onsite]

Difficulty Level: 300 - Advanced

Description

The goal of this course is to help you with clarity in your understanding of Copilot for Sales and help accelerate the deployment of Microsoft Copilot for Sales connected to your 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 Apps as a Salesforce CRM user.

Objectives

- Understand the business value of Copilot for Sales
- Learn how to setup and configure Copilot for Sales
- Enable salespeople with knowledge about Copilot for Sales, educate on how to gain in productivity and save time on common tasks leveraging Copilot for Sales capabilities to explore sales data and act based on their unique scenarios.
- Enable salespeople with knowledge on how they can capture Outlook activities into their CRM system to build CRM system data accuracy and insights into engagement level. Copilot for Sales provides all around customers 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/relationships with Copilot for Sales conversation insights and take guided actions.

Outcomes

- Enable salespeople to understand value/benefits and usage of Copilot for Sales on business scenarios such as management of Outlook activities, meetings experience and Teams collaboration experience
- 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/or Microsoft Teams.

Hands-on

- Configure and Enable Copilot for Sales in Outlook and Teams connected to Salesforce.

Scope

- The scope is limited to learning to use Copilot for Sales features with Salesforce where all applications & environments are present in a single tenant.

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Description	This course is designed to educate and demonstrate the value of Microsoft Copilot for Sales to empower Salesforce Sellers to stay in the flow of their work while capturing all around customer data, save time on common tasks and improve customer interaction and conversation where they move deals forward efficiently using Outlook and Teams and/or other M365 apps.
Detailed Agenda	<p>Everyone</p> <ul style="list-style-type: none"> • Envision and empower the future of work for salespeople. • Understand the value of Copilot for Sales and AI insights • Understand the licensing model • Learn Copilot for Sales Roadmap • Learn Copilot for Sales Features <p>Administrators and Technical profile</p> <ul style="list-style-type: none"> • Understand Copilot for Sales Architecture. • Understand the deployment prerequisites. • Understand how to setup & configure Copilot for Sales • Enable Microsoft Copilot for Sales in Outlook and Teams connected to Salesforce
Participants	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 and/or Teams • Basic understanding of salesforce administration • Experience with baseline salesforce sales topics • Experience with using business applications
Delivery Requirements	<p>The scoped Salesforce (sandbox/uat) environment is required.</p> <ul style="list-style-type: none"> • Sandbox Environment available in customer tenant and ready to complete activate Copilot for Sales agreed upon by engineer and customer • Microsoft Outlook and Teams for remote deliveries • A modern browser capable of rendering web sites that use current web standards • Microsoft Copilot for Sales Standard (seeded in D365 license) or Copilot for Sales new SKU , Microsoft 365 for enterprise or Office 365 for enterprise