



AI-Powered Sales: How Premium Helps You Sell Smarter, Not Harder.

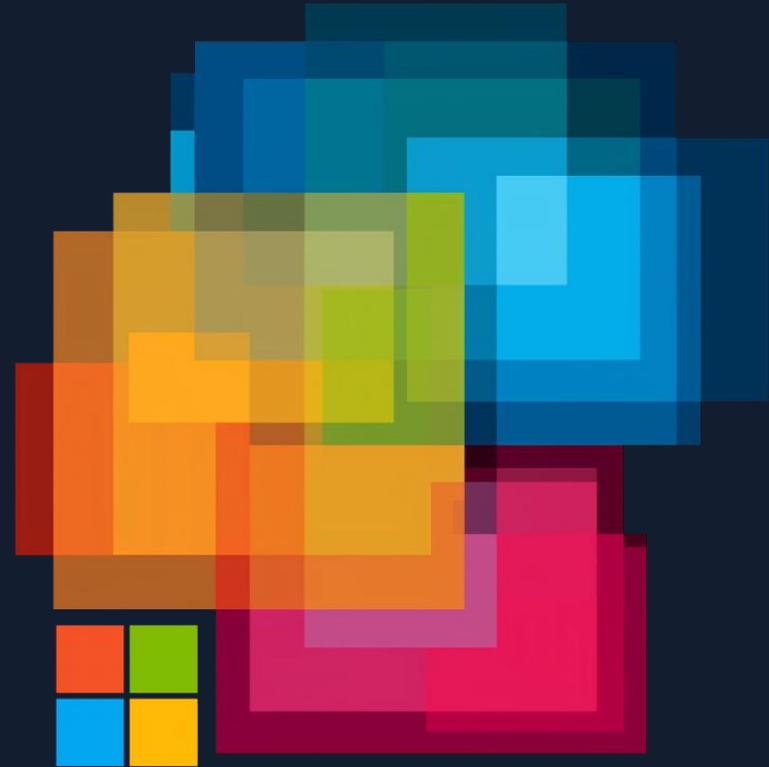
Hosts:

Sara Hiatt

Principal Technical Specialist

Bill Whalen

Principal Technical Specialist



Master
SERIES

Agenda

- What to expect
- Team introductions
- Intro: Rethinking Sales and Organizational Process
- Roadmap: What's next
- Demos: Agentic Sales Action.
- Q&A
- Closing

Meet Our Speaker



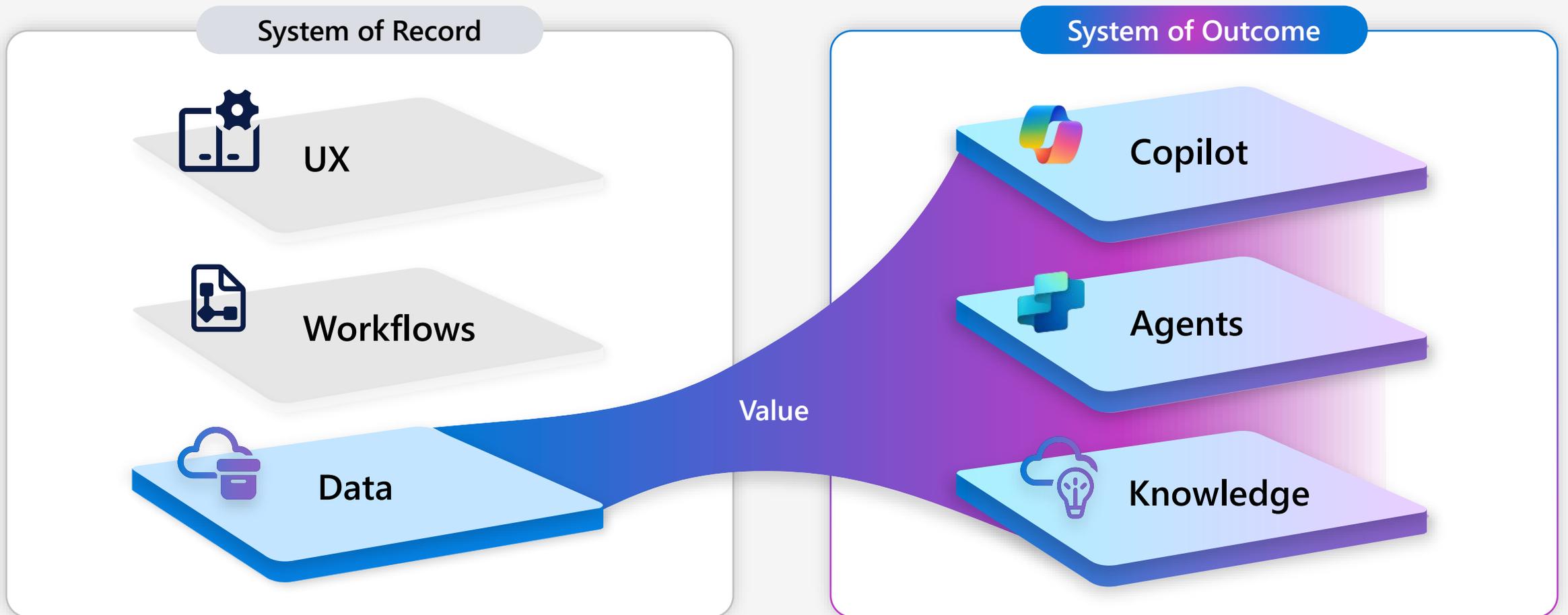
Matthew Mead

Matthew is a Director in the Global Black Belt Americas team, bringing energy and momentum to every engagement while helping organizations unlock the full power of Dynamics 365 and AI-driven tools. As a Microsoft sales and solutions leader, he partners with global teams to drive bold digital transformation and show customers what's possible with the Microsoft Cloud.



Organizations need to
rethink and retool
every business process
in the age of AI

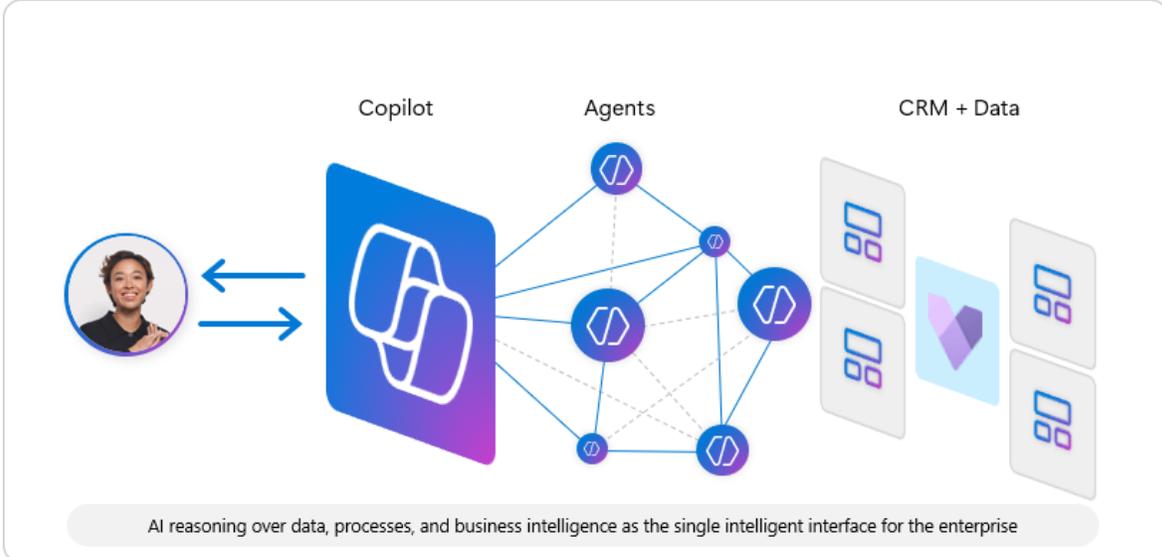
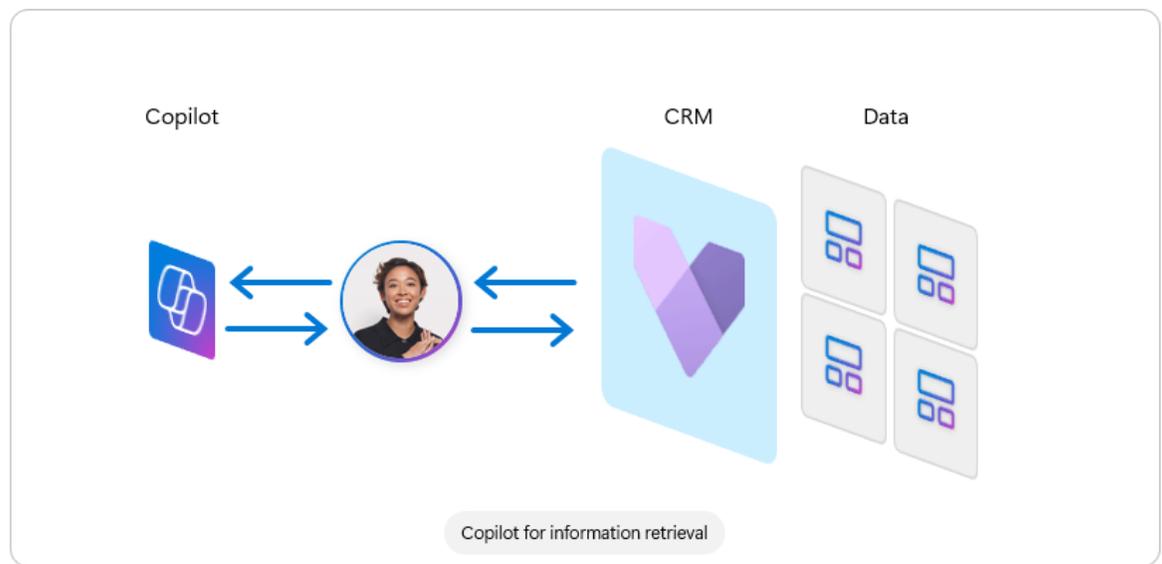
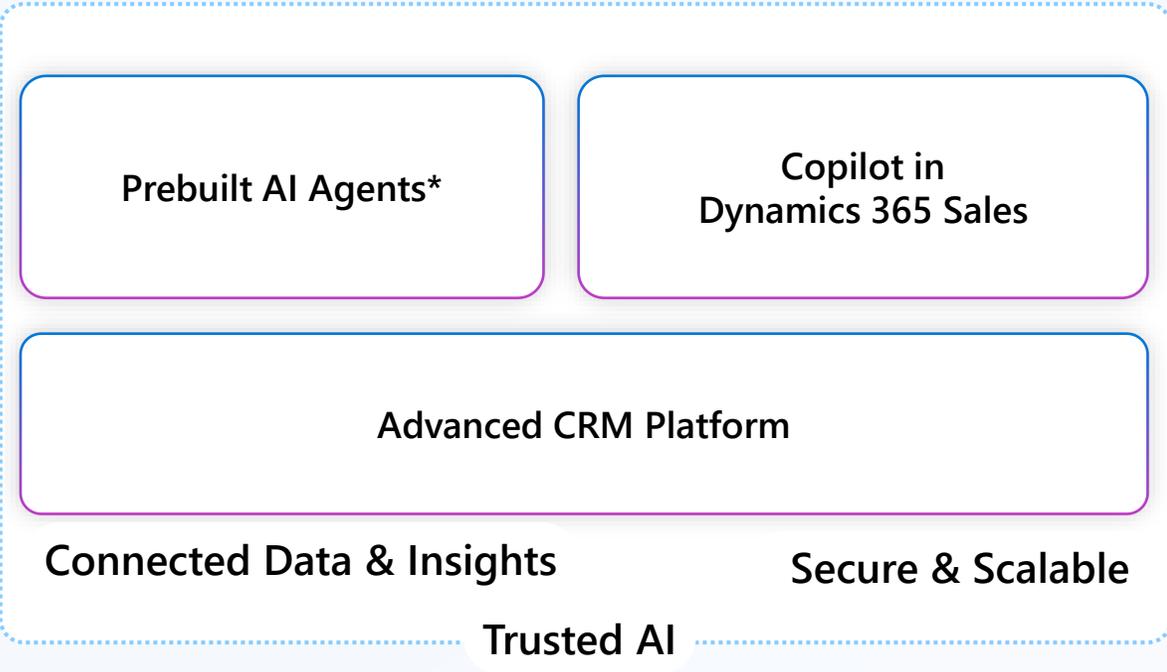
Shifting value from systems of record to systems of outcome



Meet the unified, secure, and trustworthy agentic sales platform



Dynamics 365 Sales



Accelerate sales from lead to close with agentic AI in Dynamics 365 Sales



Dynamics 365 Sales

Copilot + Agents



Customers

- LinkedIn
- Email
- Messages
- Calls
- Meetings

Roles

- Sales Reps
- Sales Managers
- Sales Operations

Jobs to Be Done

Generate Pipeline

- Sales Qualification Agent
- LinkedIn Integration

Win Deals

- Copilot Meeting Preparation
- Sales Close Agent**

Grow Revenue

- Opportunity Analysis
- Predictive Opportunity Scoring

Improve Results

- Sales Research Agent **
- Conversation Intelligence

Ensure Trust & Security

- Data Loss Prevention
- Citation and Traceability

Connected Data & Insights

Trusted AI

Secure & Scalable

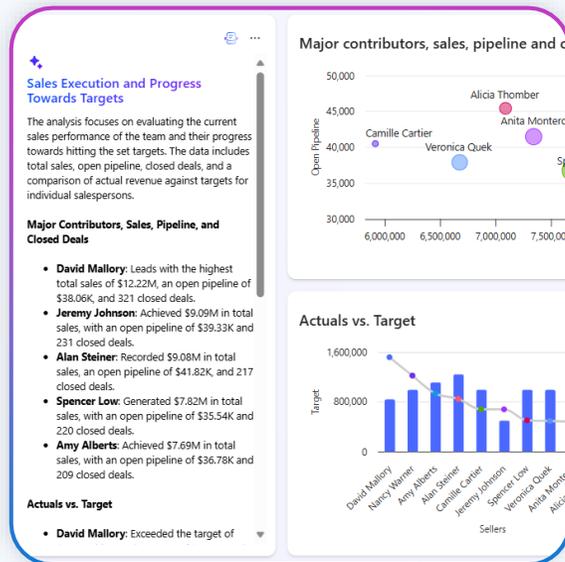
** Agentic AI features in Preview
Refer to slide 42 for an expanded list

1. Sales Managers: Scale Winning Teams

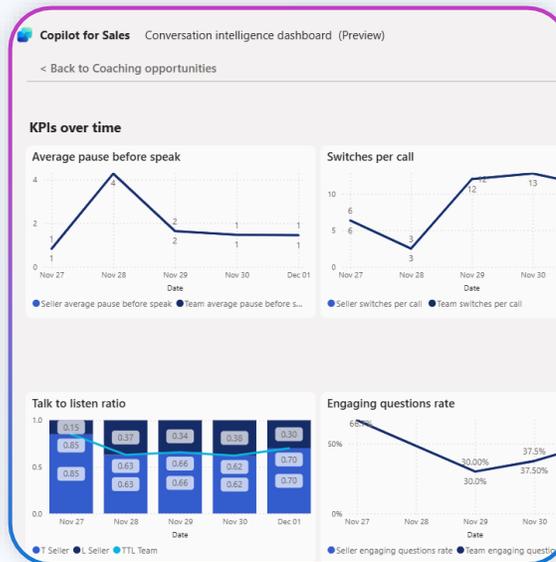
If your CRM doesn't offer essential features for managers such as deep research, conversation intelligence, and sequence designer, you're already behind.



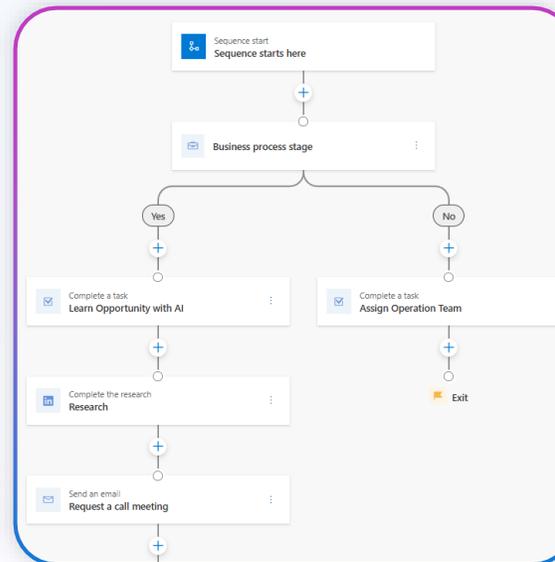
→ Sales Research Agent



→ Conversation intelligence



→ Sales sequence designer



By the numbers

75%

of sales organizations have invested in AI and Sales Analytics.¹

29%

of sales time can be automated.²

¹ Boston Consulting Group – GenAI and the Path to Profit in B2B Sales, [link](#)

² Bain & Company – "How Generative AI Will Supercharge Productivity," August 2023.

2. Sales Reps: Improve customer experience

Every minute your team spends loading or extracting data from the CRM is one less minute they're building and nurturing relationships



→ Copilot meeting preparation

Prepare for my next meeting

Meeting info ⓘ

Here are some points to consider for the meeting **Weekly catchup with Maya Robinson from Fabrikam.**

- Discussed the importance of **eco-friendly coffee machines** in your initial conversation and explored the various sustainable features and certifications of our coffee machines.
- Maya expressed interest in our range of energy-efficient and recyclable materials used in manufacturing.
- We shared success stories of businesses that have transitioned to our sustainable coffee machines and experienced positive results.

→ Relationship intelligence

Summary Details Relationship Analytics Related

Client's contacts ⓘ

Last updated: 31/01/2023 18:07

- Yvonne McKay (sample) 1/2 2 1
- Nancy Anderson (sample) 1/2 1 1
- Scott Ekersmann (sample) 5/4 2 0

Your colleagues ⓘ

Last updated: 31/01/2023 18:07

- Jason Smith 1/2 2 1
- Nancy Anderson 1/2 1 2
- Roni Jacob 1/2 2 0

Customer interactions ⓘ

Compare interactions with the customer

Learn more about the interactions you've had with your customers.

Email engagement ⓘ

Last updated: 31/01/2023 18:07

Do you need to work on your emails?

Summarize your customers' email engagement with the emails sent by your sales.

→ Built-in collaboration (Microsoft Teams)

Meeting With Kat

8:48 am
Hi! Thanks for letting me know.
Are we able to expedite and additional order for Kat Larsson?

9:03 am
Yes we can do that. We can have the order processed and ready in the next few weeks for Kat.

Suggested action items

- Kat Larsson said: We have added... expedite an...
Add to notes

By the numbers

46%
of customers will buy more when given a personalized experience.³

27%
of sellers' time is spent actually selling.⁴

³ "Top Customer Experience Trends In 2024 – Forbes Advisor," August 2023, [link](#)

⁴ LinkedIn, "The LinkedIn State of Sales Report 2022," 2022. ([link](#) to download page, page 23)

3. Sales Reps: Boost sales outcomes

Sellers are more efficient when they're able to let technology tackle the manual tasks and help determine the best course of action.

→ Sales Qualification Agent

Alex Baker > Lead insights Preview

Alex Baker from Trey Research
Topic: Café A-100 Automatic Espresso Machines
Title: Senior Procurement Manager

Key insights

Moderate fit: Engage but focus on your best leads first

This lead has a moderate likelihood of conversion as it matches some attributes of your ideal customers. The Durable Manufacturing industry in San Francisco, has 150 employees, generates \$70M in revenue, is interested in Espresso Machines, has a Warm rating, came from a Seminar, and has confirmed interest.

Who can make an introduction (3)

Jeremy Johnson
jeremyj@contoso.com

Alan Steiner
alansi@contoso.com

Business overview

- Company background: Trey Research is a company that focuses on providing innovative research solutions in the technology or research industry, given their name and the context provided. The company size and speed can be inferred that they operate in a B2B environment, providing services to other businesses. Their mission is to help businesses make informed decisions and drive innovation.
- Strategic priorities: Trey Research's strategic priorities likely include investing in advanced research methods in the competitive research industry. They may also focus on expanding their service offerings to cater to a broader market.

→ Predictive opportunity scoring

Introduction call to check availability for in-person meeting.

Call Mark complete

Opportunity score

91 Grade A
Improving

- Security is a strong industry
- Intent to buy was detected in a recent email
- Budget is lower than average

Details

Relationship health

Good relationship and Steady

→ Prioritized work list

Up next

SQA Lead Qualification and Nurturing

- First customer call
Step 5 • Due by 2/24/2025 10:00 AM
Call the customer to know more about the requirements.
Call Mark complete
- Review customer call
Step 6
Review the customer call with Copilot from the Conversation Intelligence.
- Qualify for opportunity
Step 7
Determine the next step with the lead by qualifying for opportunity or disqualifying in sales team meeting.

Previous steps

Timeline

Search timeline



By the numbers

54%

Of sales leaders believe that increasing sales rep's effectiveness should be top priority.⁵

10-20%

Uplift in sales ROI is witnessed by teams investing in AI.⁶

⁵ Accenture. "Reinvent sales for accelerated revenue growth", [link](#)

⁶ McKinsey. "AI-powered marketing and sales reach new heights with generative AI," May 2023, [link](#)

AI is creating a once-in-a-generation opportunity to reimagine sales

83%

of sellers believe nurturing buyer relationships leads to success, but only 24% of their time is actually spent selling.¹

98%

of sellers feel their CRM data is inaccurate and inconsistent.²

43%

of sellers spend 10-20 hours per week on manual tasks—up to half a working week in all.²

1. Sales Leader Compass, LinkedIn, 2024.

2. The State of Sales, LinkedIn, 2024



So, what is coming
next...

Please note that this information is purely directional and subject to change

The Sales Premium Advantage – Visionary Roadmap

Key Capability	Description	Enterprise	Premium
Sales Qualification Agent ²	Proactively researches leads and companies, engages 100s of leads with personalized outreach, and identifies those ready to buy.		
Sales Close Agent ¹	Engages the right stakeholders and helps ensure timely follow-ups, automates simple deals and equips sellers with research and insights to help win complex deals.		
Opportunity Management* (Sales Close Agent Capability)	Continuous opportunity assessment proactively prioritizes alert sales leaders and sellers to key risks that may delay or jeopardize a deal's success. Each opportunity is evaluated against a multiple risk criteria and health indicators to maintain 24/7 pipeline oversight.		
Sales Research Agent ¹	Supports natural language dialogue with enterprise data, delivers unique AI-powered answers, and suggests actions users may not know they needed to take without delay		
Sales Operations Research (Premium Sales Research Agent Capability)	Built-in Sales Operations - a premium feature of Sales Research Agent - offers agent orchestration and instructions to deliver the highest-quality operations results. The DataLake connector delivers out-of-the-box data connectivity, unifying Dataverse with external data.		
Included Copilot Credits	1,000 Copilot credits per user, per month, pooled at the tenant level. Run agents in the scenarios most meaningful for the business.		
AI-Ready Storage Capacity	Expanded Dataverse storage entitlements in Premium to support growing data needs – reducing overage risk and enabling AI-driven workflows at scale.		
Next Best Action	AI-generated, prioritized recommendations for what a seller (or an autonomous agent) should do next to advance an account, opportunity, or workflow.		
Data Enrichment	AI-powered record hygiene tasks enrich records, adding missing details and keeps opportunities current through research and extractions conversations and notes.		
Portfolio Planning	Enable sales leaders to segment accounts, identify high-value opportunities, and optimize team strategies powered by AI.		

¹In Public Preview. ²Generally available

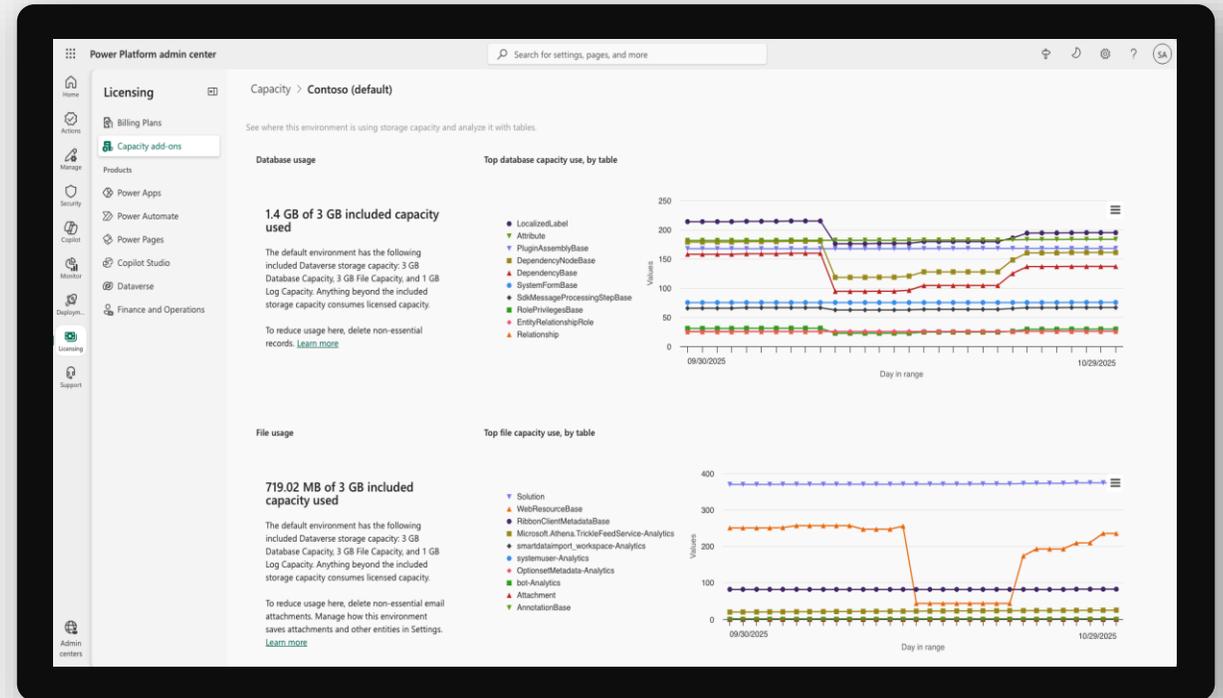
AI Ready Storage Capacity

Additional storage capacity to capitalize on AI powered data enrichment

Ready your organization to grow in the era of AI without added friction for storage acquisition and configuration

Effortlessly support higher data volumes generated with the AI-powered data collection available with autonomous research and data enrichment

Capitalize on the richer data estate to deliver better decision support for sellers and managers in the flow of work



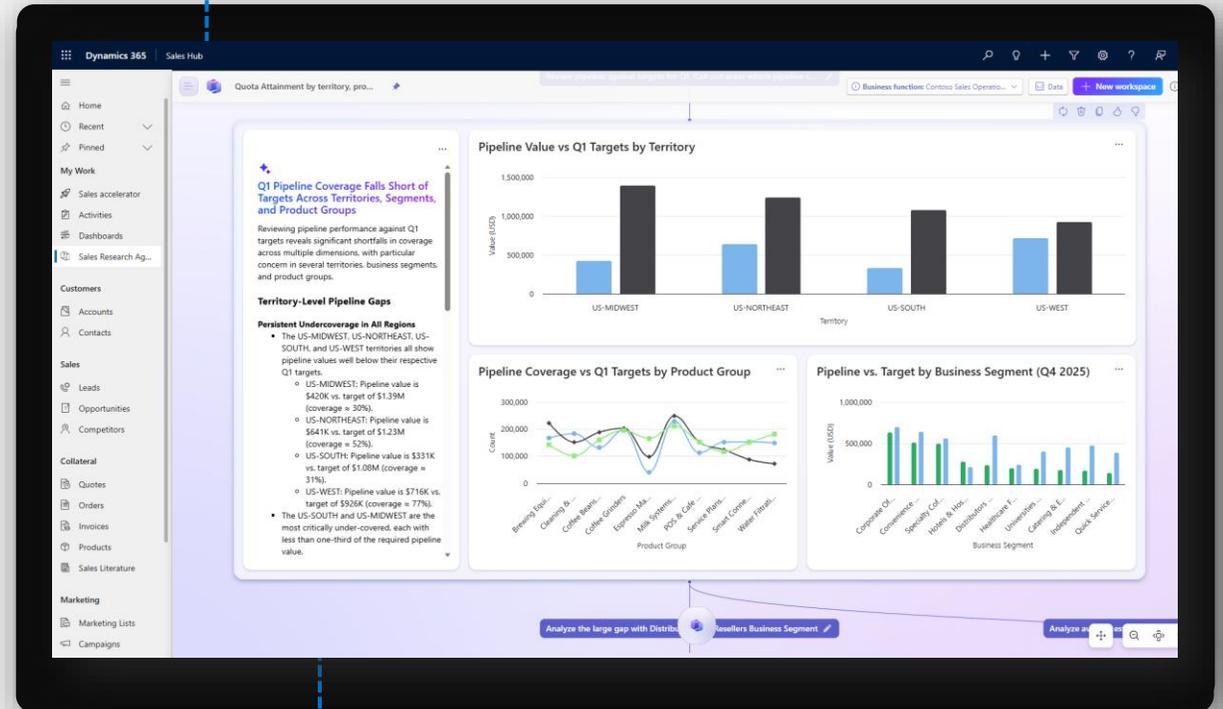
Sales Operations Research

Agentic research business function, optimized for sales operations

Optimize sales operations with pre-build research journeys to generate key sales insights

Supercharge your sales operations managers with instant business insights

Connect operational data budget, targets, actuals and invoiced information with (available in Fabric Lakehouse),



What's the general health of my business?
Which sales territories are at risk for Q2?
What geographies are resource constrained?

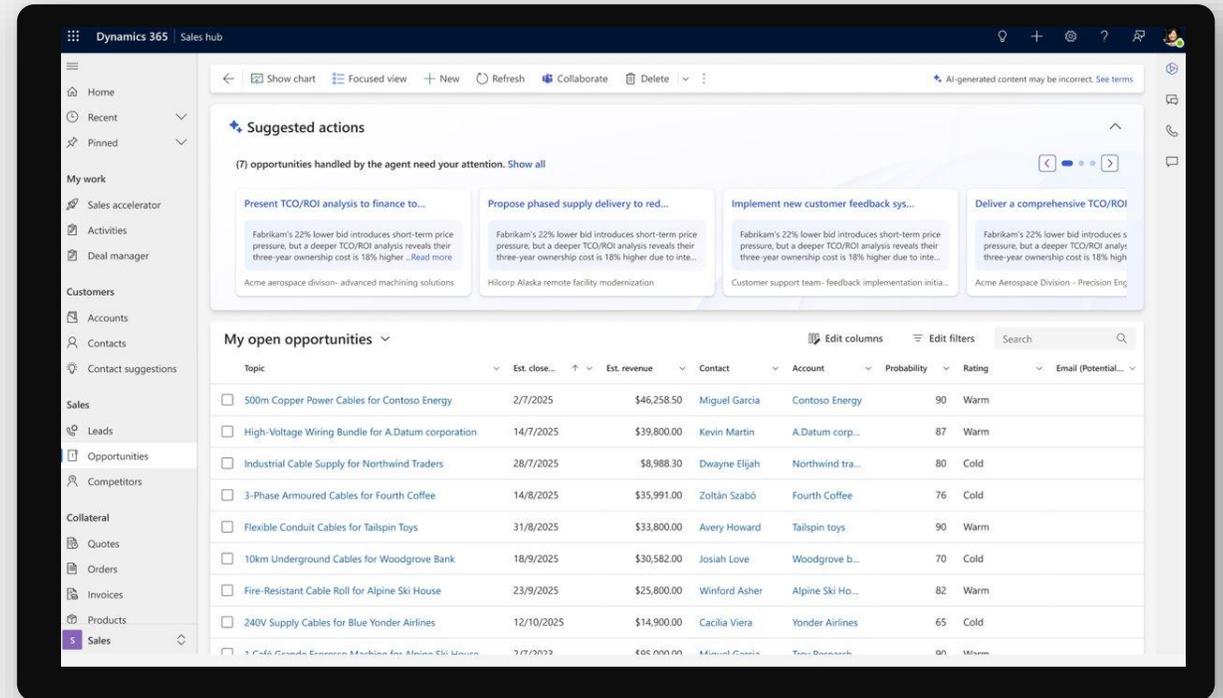
Next Best Action

Prioritizes the most impactful actions at any point in time.

Continuously identifies and surfaces key actions within seller's workflow

Assists in seamless execution with intelligent insights and pre-filling drafts

Multiplies the value generated by agents and workflows by highlighting the right actions at the right time



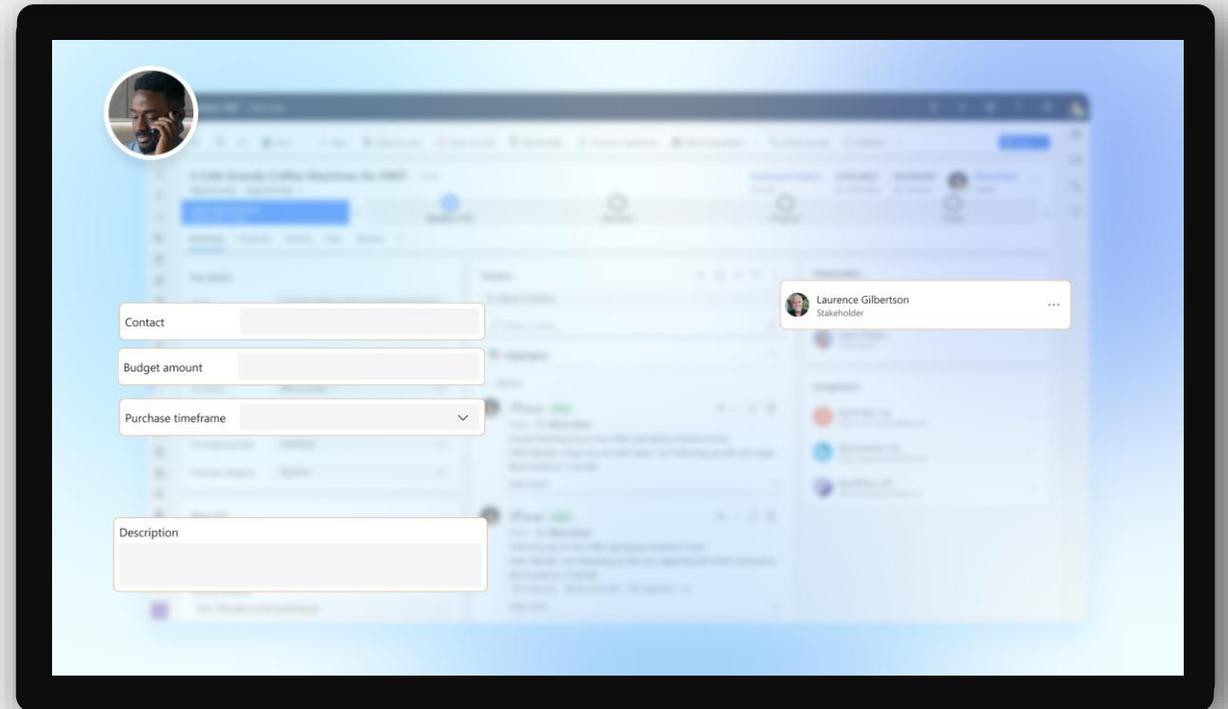
Data Enrichment

Agentic capabilities to autonomously keep data accurate, and always up to date

Continuously maintains data quality through research, email, meeting, and external data

Detects information gaps as deals evolve and enriches records using trusted conversation signals

Improves seller confidence in pipeline and forecasting with complete sales records



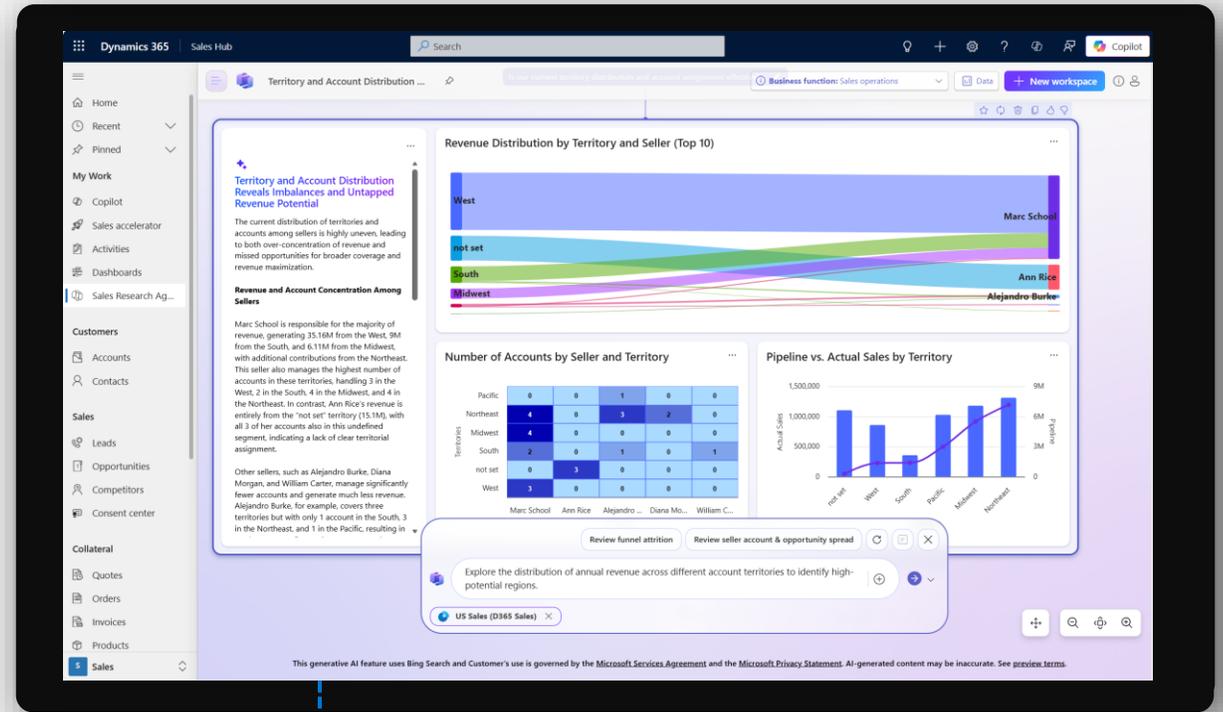
Portfolio Planning

Agentic research business function, optimized for portfolio planning

Optimize team and account planning across the entire portfolio with pre-build research journeys

Boost organizational efficiency by aligning strategic objectives to resource allocation

Empower managers to quickly identify where to focus and where to load balance before initiating deeper account planning



What product are doing well? In which markets? Which segments are growing? Where are we losing share? For which accounts do we need deeper planning?



Let's look at some
Demos!



How will you **thrive** in
the new CRM era?



Customer:

Lenovo

Industry:

Manufacturing

Size:

Corporate (10,000+)

Country:

China

Product and Services:

Dynamics 365 Sales

Power Platform



We're seeing the benefit of having **one standardized system** and a global view to all geographies' activities. This is the foundation for Lenovo's sales digital transformation – enabling better connections and an increase in sales productivity and actionable insights”

— Wei Bi,
Business Strategy Senior Manager, Lenovo

Situation	Solution	Impact
Lenovo needed one centralized and harmonized system with integrated sales collaboration and AI capabilities for all sales teams and a modern and future-proof platform with significant integration, centralization, and security benefits	Lenovo replaced its legacy Salesforce systems with Dynamics 365 Sales and Power Platform integrated with SAP and Adobe Marketo Engage. Today, Dynamics 365 is changing the way 70% of Lenovo's global sales teams work, regardless of location or business focus	<ul style="list-style-type: none">• Increase in gross profit margin with a high performing, connected CRM system• Cost savings with efficient IT support• Streamlined system management and data analytics with a common data model• Standardized business processes across regions



Customer:

First West Credit Union

Industry:

Banking and Capital Markets

Size:

1,000–9,999 employees

Country:

Canada

Product and Services:

Dynamics 365 Sales

Dynamics 365 Customer Service



One of the key value points of the Dynamics 365 platform is that need for need, the capabilities are there... That really helped us fast-track this initiative”

— Darrell Jagers,
CIO & Chief Transformation Officer, First West Credit Union

Situation	Solution	Impact
First West Credit Union is one of Canada’s largest credit unions, built on authentic connections with its members. It aims to bring the power and promise of cooperative banking to more Canadians and keep local decision making and community connectedness	To anchor its transition, First West Credit Union made a deliberate, strategic bet on Microsoft Dynamics 365. The implementation was complete in 11 months, seamlessly transitioning from and decommissioning its outdated system	<ul style="list-style-type: none">• First West Credit Union saw 100% adoption within seven weeks• Member complaints are being resolved well under the federally required timeline, with 87% being resolved in 14 days or less, compared to 49% prior to the implementation

Value of Dynamics 365 Sales Premium

Driving agentic workforce and productivity transformation for frontier sales organizations, helping to deliver improved seller productivity and revenue per seller

Agentic workflows across the sales cycle



Leverage the latest agentic capabilities increasing productivity at every interaction

Get started with agents - day one



Accelerate agent adoption with additional storage and built-in AI credits for every sales rep, accelerating your time to value

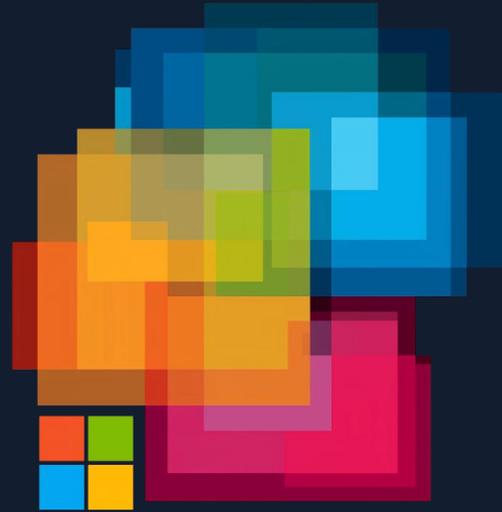
Help deliver higher revenue per seller



Continuously enrich and maintain your sales data to support better prioritization, faster pipeline creation, and high-confidence forecasting

Predictable per-user licensing with pay-as-you-go AI usage

THANK YOU



Master SERIES



<https://masterseries.powerappsportals.com>