

E-book

The Benefits of Microsoft Copilot for Sales

How Microsoft transformed its sales organization with AI





We've had a great Customer Zero experience with Copilot for Sales. We've been very pleased with how much it has simplified the lives of our sellers and enabled them to focus more on selling.

Nathalie D'Hers

Corporate vice president of
Microsoft Digital Employee Experience

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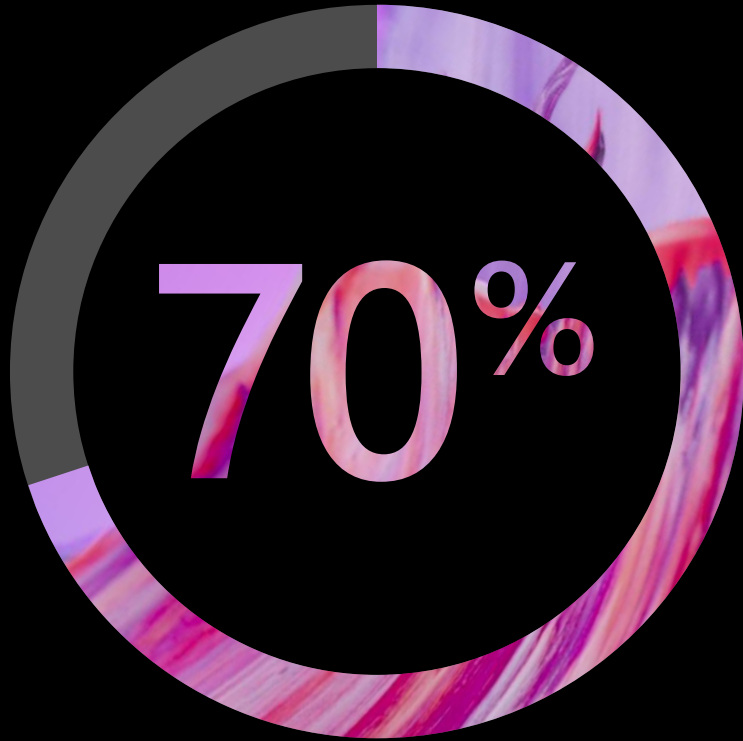
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Transform your
sales org

Sales trends and insights



of sellers' time is spent on administrative and non-selling duties, like researching prospects, manually entering sales data, and preparing for meetings¹

The role of a seller is getting harder

Sellers today must balance ever-increasing performance expectations with countless admin duties—all without sacrificing their ability to provide personalized experiences to their customers. The lack of focus time can negatively impact sellers' ability to enjoy their work, manage time efficiently, and develop sales strategies.

79%

of surveyed sellers say the expectations of success have increased in the last year²

79%

of surveyed sellers support more customers and accounts now than they did one year ago²

¹Microsoft-sponsored Futurum Research. 2022.

²Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include Financial Services, Professional Services, Manufacturing, Retail, Technology, and Healthcare.

The AI opportunity for sales

AI can significantly boost seller productivity—and company revenue as a result.

Top tasks surveyed sellers want AI to help with¹

- Understanding customer needs and preferences by helping collect, analyze, and predict customer data
- Helping automate processes and simplifying tedious tasks
- Providing capacity to improve productivity

99%

of surveyed sellers said that if AI saved them an hour, they would reinvest that time on work tasks²

10-20%

increase in sales ROI and 3-15% boost in revenue for companies that invest in AI³

¹Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include Financial Services, Professional Services, Manufacturing, Retail, Technology, and Healthcare.

²Microsoft. "Sellers' attitudes about AI." June 2023. An Ipsos study commissioned by Microsoft. Study included 700 participants who use professional CRM systems at organizations of at least 300 people. Industries include Financial Services, Professional Services, Manufacturing, Retail, Technology, and Healthcare. Survey question asked about the percentage of sellers who would use the time saved from AI to do something outside of work.

³McKinsey & Company. "AI-powered marketing and sales reach new heights with generative AI." May 11, 2023.



Planning for transformation



Get to know Microsoft's sales organization

>35K employees across Microsoft's sales org

>200 countries where Microsoft's sales employees work

119K total accounts managed by Microsoft sellers



You have the CRM space and then you have the productivity space. Sellers mostly work in Microsoft Outlook and Teams, so juggling apps to work within the CRM is a constant drain on productivity.

Smita Shrivastava

Product strategy and growth lead
for Microsoft Copilot for Sales

Microsoft sellers relied on too many tools

Sellers were switching between as many as **40 tools per day** to get their work done, resulting in a lot of wasted time and stress. Microsoft's IT org also had a hard time managing the increasing tech sprawl.¹

¹Microsoft. ["See how we're simplifying our sales with AI-powered Microsoft Sales Copilot."](#) July 18, 2023.



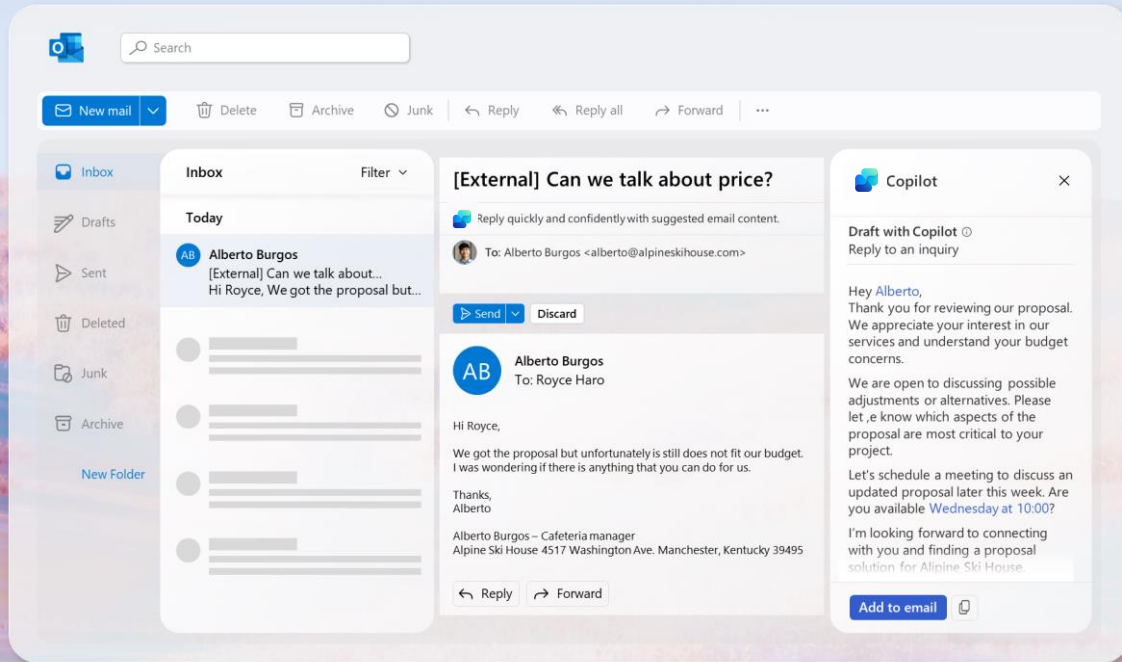
We wanted to alleviate as much of that pain as we could.

Nathalie D'Hers

Corporate vice president of
Microsoft Digital Employee Experience

We realized that the AI and automation that comes baked into **Copilot for Sales** could make the lives of our sellers much better.

Our transformation journey



Introducing Microsoft Copilot for Sales

Assisting sellers with their most tedious tasks, like preparing for meetings, writing emails, and surfacing relevant information so they can focus more time on closing deals

Unlock sales productivity

with AI-generated, emails, summaries, and content

Personalize customer interactions

with AI-assisted insights and recommendations

Stay in the flow of work

with integrated data between Microsoft 365 apps and your CRM



Deploying Copilot for Sales at Microsoft

We've deployed Copilot for Sales to around 60,000 Microsoft employees worldwide¹

Key deployment takeaways

- Start with adding and updating CRM records from Outlook for easy wins
- Use Copilot for Sales as an introduction to generative AI
- Get CRM admins, senior decision makers, and core IT people onboard by demonstrating the most useful features
- Pilot with "champions" to gain insights and build a foundation for deployment
- Ask users where they're finding value, then promote those features

Most used features among Microsoft sellers

Viewing an email summary in Outlook

Generating an email in Outlook

Generating a meeting summary in Teams

¹Deployed solution does not include Microsoft Copilot for Microsoft 365.

Our return on investment

Copilot for Sales gives sellers a more productive way to work

Among Microsoft sellers using Copilot for Sales during our survey, 83% said it make them more productive¹

Greater productivity



of sellers indicated it reduces amount of admin work¹



of sellers said it helps them stay in the flow of work¹



of sellers indicated they can complete tasks more easily¹

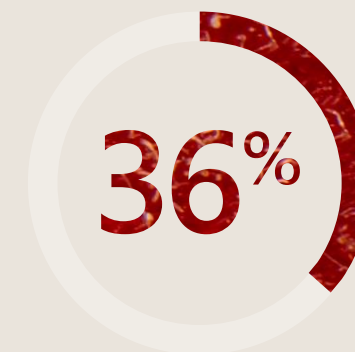
Faster task completion



per week saved for the average seller¹



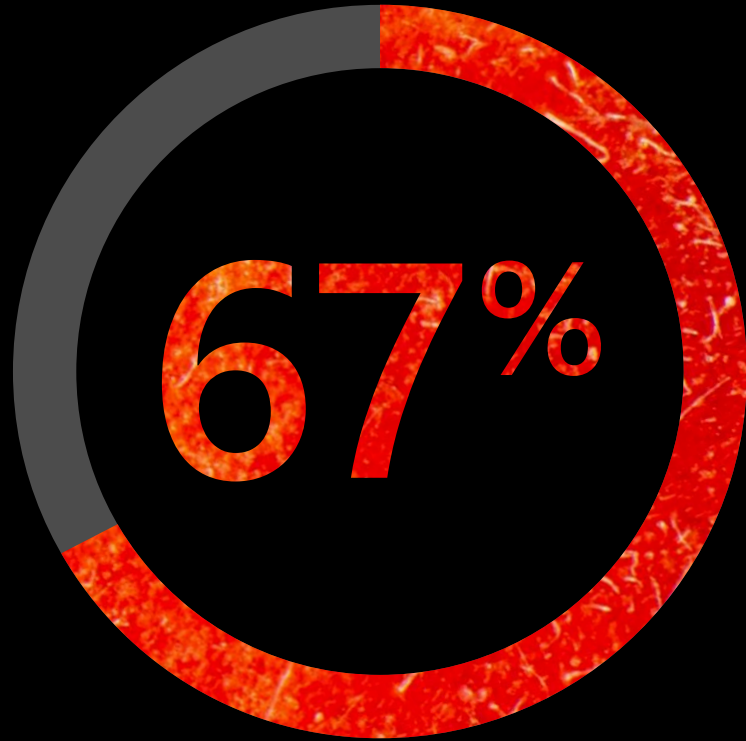
decrease in the number of clicks to identify and add a new CRM contact²



decrease in the number of clicks to create and send a new email²

¹Microsoft-conducted study, November 2023. Study based on sellers who use Microsoft Copilot for Sales at least weekly. Deployed solution does not include Microsoft Copilot for Microsoft 365.

²Microsoft-conducted study, April 2023. Deployed solution does not include Microsoft Copilot for Microsoft 365.



of sellers spent more time with customers thanks to Copilot for Sales¹

Copilot for Sales helps sellers build deeper customer relationships

”

What I find is that it frees you up to be present in the conversation. There's no more going silent or pausing to take hurried notes in the midst of a chat because **[Microsoft Copilot for Sales] captures that value for you.**

Peter Macy

Senior technical specialist at Microsoft

¹Microsoft-conducted study, November 2023. Study based on sellers who use Microsoft Copilot for Sales at least weekly. Deployed solution does not include Microsoft Copilot for Microsoft 365.



[Microsoft Copilot for Sales]
has had a massive impact on our
productivity by integrating with
Outlook and Teams to augment
seller actions and decisions,

Judson Althoff

EVP & Chief Commercial Officer

with AI-powered insights to
drive efficiencies and best-in-
class customer engagement.
**It saves time, cuts down on
redundant work, and lets our
team work to their fullest.¹**

¹Deployed solution does not include Microsoft Copilot for Microsoft 365.

Transform your
sales org

Transform your sales org

Learn more about Microsoft Copilot for Sales

[Copilot for Sales website](#)

[Microsoft AI website](#)

Select the above text to navigate to that resource.





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Reply all

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...

Inbox

Drafts

Sent

Deleted

Junk

Archive

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Inbox

Filter

Today

AB Alberto Burgos
[External] Can we talk about...
Hi Royce, We got the proposal but...

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[External] Can we talk about price?

Do you want to add Alberto Burgos to Salesforce? [Add contact](#) | [Dismiss](#)

To: Alberto Burgos <alberto@alpineskihouse.com>

Send Discard

AB Alberto Burgos
To: Royce Haro 10:23 AM

Hi Royce,

We got the proposal but unfortunately is still does not fit our budget. I was wondering if there is anything that you can do for us.

Thanks,
Alberto

Alberto Burgos – Cafeteria manager
Tel: +1 619 555 0127
Alpine Ski House 4517 Washington Ave. Manchester, Kentucky 39495

Reply Forward

Copilot

Add this contact to Salesforce
Once alberto@alpineskihouse.com is a contact, you'll get customer info and rich insights here.

New contact

First name Last name*
Alberto Burgos

Job title
Cafeteria manager

Email
alberto@alpineskihouse.com

Company
Alpine Ski House

Phone number
1 619 555 0127

Mobile number
1 619 555 0127

Cancel Save



Follow up with Alberto, Alpine Ski House



Mic



Camera



View



Raise



Chat



People



Apps



Copilot



Copilot for Sales



Share



More

Leave meeting



Mona Kane



Lydia Bauer



Alberto Burgos



Daisy Phillips



Erik Nason

Copilot



Meeting prep

Here are some points to consider for the meeting [Follow up with Alberto, Alpine Ski House](#) with [Albert Burgos](#) and [Mona Kane](#) from [Alpine Ski House](#).

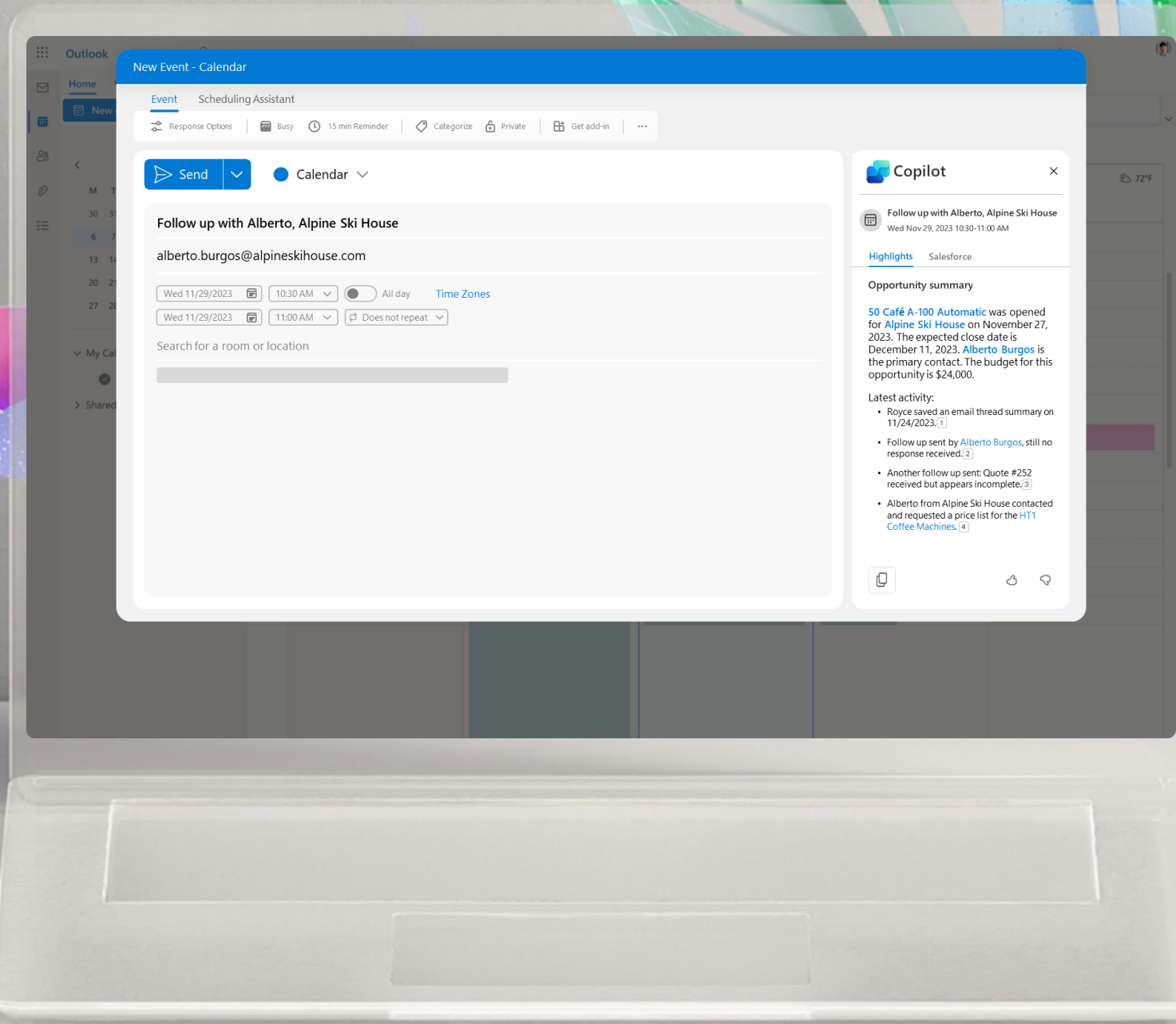
- **Strategic Direction for [Alpine Ski House](#):** Understand their goals for café performance and challenges to provide targeted advice.
- **Marketing Optimization:** Discuss ways to enhance their brand positioning and customer engagement strategies.
- **Digital Integration Solutions:** Recommend technology enhancements for improved café operations.
- **Tailored Approach:** Develop personalized strategies to support their café objectives.



2 references ^

1 Alpine Ski House ...

2 Strategic Advisory Servic... ...



Screenshot is representative;
final product may differ.

