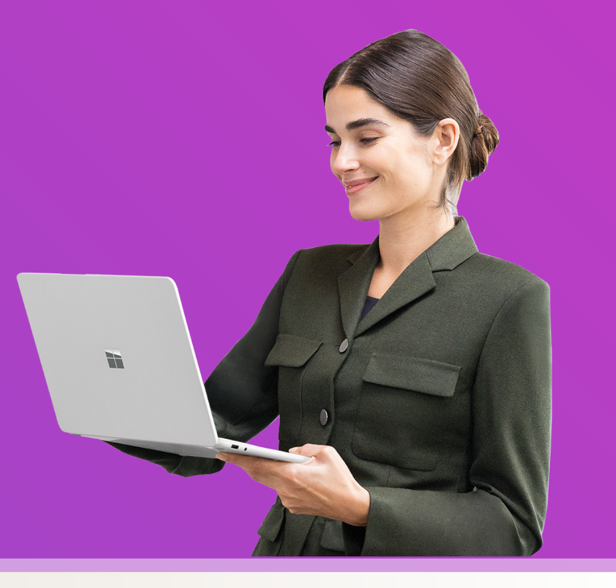
Dynamics 365 Sales



Sales Qualification Agent in Dynamics 365 Sales

Automate pipeline qualification and enable improved lead quality

Sales Qualification Agent in Dynamics 365 Sales is an AI assistant that:

- Proactively researches information about the lead, contact, and company
- Can engage multiple leads at once with personalized emails and follow-ups
- Identifies customer fit and stage in buying journey and qualifies the lead

Sales Qualification Agent enables improved lead quality and provides deep lead analysis, which can lead to higher close rates

FROM	TO	WITH
Priority overload	Contextual information about every lead	Continuous and proactive research
Manual lead pursuit	Optimized customer interactions	Personalized outreach at scale
Missed opportunities	Leaving no leads unprocessed	Autonomous execution of next-best actions

Sales Qualification Agent eliminates hours of manual work, giving you more time to increase your close rate.

- Taps internal and external sources to surface what sellers need, before they ask
- Engages multiple leads with personalized emails and prompt follow-ups
- Spots intent and qualified prospects quickly

The result?

- You can have more time to build relationships
- Help ensure no important leads are left behind
- Autonomous next steps help accelerate the sales cycle

SQA acts autonomously, while also allowing you to choose how much autonomy to grant

LEVEL 1: RESEARCH-ONLY

Automates lead qualification research for sellers:

- Investigates assigned leads based on lead source, rating, geography, and other selected criteria
- Provides insights about each lead's background, recent opportunities, news about their company, and much more
- Evaluates the lead's fit with your ideal customer profile
- Generates an initial outreach email for leads that meet your criteria

Prefer to engage with leads yourself?
Use research mode to make informed decisions about which leads to pursue.

Unlock time savings
through automated research and access to insights[1]

LEVEL 2: RESEARCH AND ENGAGE

Automates engagement along with the lead qualification research:

- Includes all the processes of Research mode—research, insights, evaluation, initial outreach email
- Autonomously engages with each lead, follows up, and evaluates fit based on your seller hand-off rules
- Hands only leads that demonstrate purchase intent over to sellers for qualification
- Disqualifies any other leads so sales focuses only on high-potential opportunities

Got high lead volumes?
Use research and engage mode to manage outreach and interaction.

Enhance customer response
through timely engagement and personalization

How Sales Qualification Agent works for many leads at the same time

Sales Qualification Agent: Key concepts

- **Ideal customer profile (ICP)**: The target-fit checklist the agent uses to score every lead.
- **Purchase interest**: Signals from replies, clicks, and activity that show who's ready to talk.
- **BANT (budget, authority, need, timeline)**: A classic readiness check the agent runs to gauge deal potential.
- **Close Rate**: The percentage of projected deals that actually close within a set period.

Lead generation
New lead is added to the CRM

Agent activation
Agent picks up leads that match the ICP

Research phase
Agent researches using CRM and web data
In Research mode:
- Suggests a customizable email reply for you to review and send

In Research and Engage mode:
- Autonomously sends a personalized message on your behalf
- Responds to customer questions

Sends personalized message

Customer responds

Agent answers using knowledge base

Qualified lead? Yes / No

Continues engagement
The agent continues until it detects no intent and disengages

Blocker? Yes / No

Routes to human seller
Admins can determine the sellers and teams that receive leads from the agent

Seller gets summary + context

Escalates to supervisor

Supervisor resolves issue

Agent resumes engagement

Sales Qualification Agent: Key concepts

- **Win Rate**: The ratio of won opportunities to total pursued ones. It shows how effectively qualified leads convert to sales.
- **Sales Cycle**: The full journey from lead identification to deal closure. A shorter cycle means faster revenue generation.

How to set up the Sales Qualification Agent

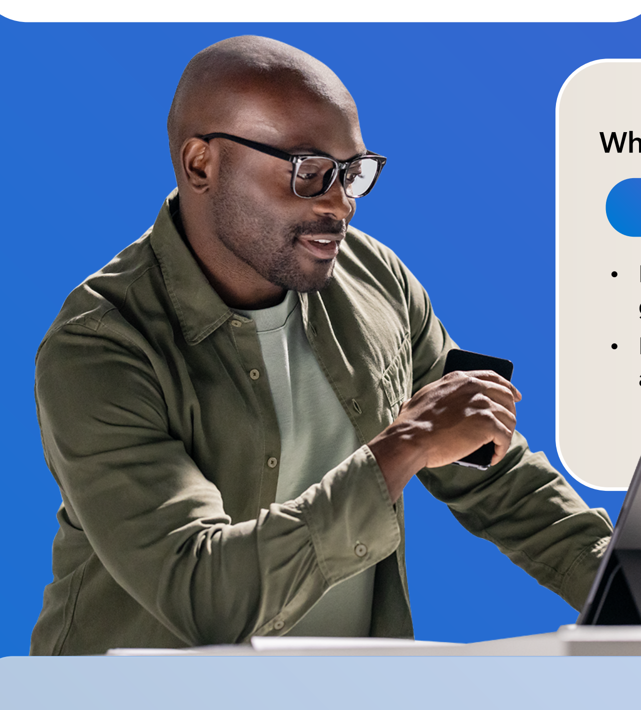
Admin

1. **Have an active Dynamics 365 license with Copilot Studio credits**
2. **Prepare your systems**
   Integrate Dynamics 365 Sales, Exchange email, and optional SharePoint/OneDrive for internal documents.
3. **Define the autonomy level**
   Choose Research-only or Research and engage (you can upgrade later).
4. **Tune the basics**
   Add your company and products, define your ICP, and set lead selection rules.
5. **(Engage) Set outreach**
   Add your email signature, provide messaging guidance, and set handoff criteria (BANT and purchase interest).
6. **Assign and go live**
   Choose who receives qualified leads, run a quick simulation, then start the agent.

How to use the Sales Qualification Agent

Seller

1. **Check your Copilot Studio credits**
   Make sure you have the credits assigned to start using it.
2. **Know your setup**
   Ask your admin about the agent mode, lead selection criteria, ICP and BANT, and assignment rules so you know what will be handed to you.
3. **Access in Dynamics 365 Sales**
   - In Sales Hub → Leads, choose Leads handed over by AI Agent
   - Open a lead to see the research summary
   - Select See full research for details. You'll also get an in-app handover notification
4. **Work the handover**
   On the Suggested action panel, draft and send email, qualify the lead, or follow up. Recommendations include the "why" behind each action.



What handover means by mode

RESEARCH MODE

- High/medium ICP → you get the lead for outreach.
- Low ICP → agent disqualifies and alerts a supervisor.

RESEARCH AND ENGAGE MODE

- You get the lead when ICP and BANT are met or intent looks positive.
- You may also get it if intent is unclear, the agent is blocked, or a lead's email needs to be updated.
- Review and proceed.

Responsible AI

Sales Qualification Agent is built with responsible AI principles in mind. The agent has been carefully evaluated to ensure that it meets quality standards and is designed to be used as a productivity tool. For more information about the agent's responsible AI practices, go to the following articles:

[Responsible AI FAQ for the Research-only mode]

[Responsible AI FAQs about Research and engage mode]

Help accelerate your qualification process, enable smarter engagements, and empower your organization to build more relationships with your around-the-clock ally in Dynamics 365 Sales.

With Dynamics 365 Sales, it's not just about efficiency; it's about transforming how you sell.

Learn more about Microsoft Dynamics 365 Sales

How to get started

- If you don't have Dynamics 365 Sales, contact your Microsoft Sales Rep.
- If you upgrade to Dynamics 365 Sales Premium, Copilot Studio credits are included to help you get started right away.
- If you already have Dynamics 365 Sales and want to activate SQA, contact your Microsoft Sales Rep to purchase Copilot Studio credits.

[1]Microsoft internal research 2025

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