Achieving Sales Success with AI:

Key considerations you need to know



Next-generation AI can transform seller productivity and customer experience

Cut the drudgery

Generate email content including data from CRM and past interactions

Summarize meetings instantly

Simplify tasks like updating customer records while reducing context switching

Connect the data

Answer customer questions immediately

Build connections with summaries of the latest interactions

Get relevant CRM data during meetings

Crush the sale

rolling with reminders and recommendations

Keep the momentum

Focus on highquality leads with auto-generated opportunity reports

Receive nextbest action recommendations

Continuously improve

Learn from real-time analysis of conversations and interactions

Quickly search content using natural language

Identify best practices and practical techniques



89 percent of workers with access to automation and AI-powered tools feel more fulfilled because they can spend time on work that truly matters.1

Sellers are more likely to adopt and use tools that

What do people want from AI?

solve their most critical challenges. Surveys show that employees want AI to help them:

- Save time³
- Be more agile⁴
- Automate daily tasks⁵
- Make information more accessible⁶



spent selling

32% of seller time is



revenue-generating activities²

68% is spent on non-

3 top skills to train Next-generation AI is easy to use, but training can

take results to the next level. Here are three things to focus on. 1. Crafting prompts: Many AI features respond

prompts deliver better results. 2. Iteration: Unlike traditional computer programs, where there is only one way to

do things, AI responds to subtle changes in

to user input. Clear, specific, and detailed

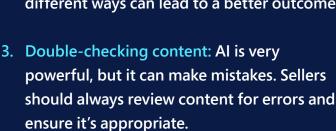
your approach. Trying something in several different ways can lead to a better outcome. powerful, but it can make mistakes. Sellers



drive sales growth⁷

owners expect AI to

60% of business



84% of executives believe When you're looking to empower your sales that audit of AI models team with AI capabilities, it's important to choose solutions that meet high standards of ethics and will be required within responsibility. Microsoft uses six principles to the next 1–4 years⁸

Microsoft follows 6 principles

1. Fairness 3. Privacy and security 2. Reliability and safety 4. Inclusiveness

guide development and use of Al-enabled tools.

of responsible Al



5. Transparency 6. Accountability

Get practical guidance

for empowering your sales team with Al

generation tools", for a framework on choosing, implementing, and using Al to help sellers and sales leaders transform how they work.

Read our e-book, "The AI Advantage: Driving sales performance with next-

Microsoft Sales Copilot is a role-based Al copilot designed for sellers and sales teams to help them automate everyday tasks and unlock creativity.

Read now

They empower sellers to deliver personalized customer experiences efficiently, focus on the most valuable opportunities and tasks, and identify best practices to close more deals. Sales Copilot is experienced in Microsoft Dynamics 365 Sales and Microsoft 365 apps like Microsoft Teams and Outlook, and also connects to other CRMs like Salesforce.

Can Al Really Help You Sell?, Harvard Business Review, 2022 ³ Work Trend Index | Will AI Fix Work?, Microsoft, 2023 ⁴ 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan ⁵ 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan ⁶ 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan How Businesses Are Using Artificial Intelligence In 2023 - Forbes Advisor ⁸ 2023 KPMG US AI Risk Survey Report, KPMG, 2023

¹ 2023 Microsoft Business Trends Survey of 4,500 business decision makers

(BDMs) in the United States, the United Kingdom, and Japan

Microsoft Dynamics 365

reference purposes.

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