Enhancing Sales Team Productivity With AI

November 7, 2024

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Partner

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U.S. Presence

Top 10
U.S. Public
Accounting Firm*

$2bn+
Revenue (2023)

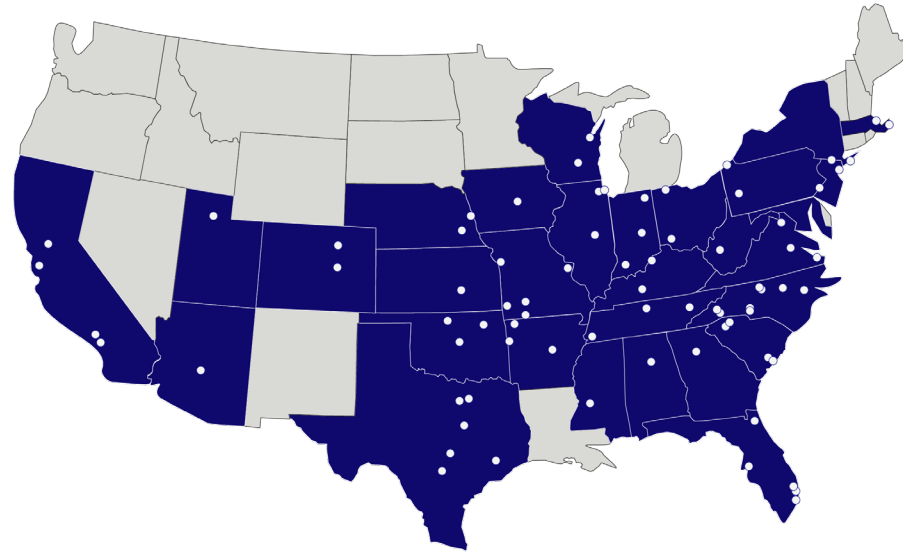**76**
Markets

29
States

600+
Partners & Principals

7,000+
Employees

*Source: Inside Public Accounting, based on most recent rankings
2023 combined revenues: FORVIS $1.7bn, Mazars USA (expected) $305m

As of August 2024

○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Jacksonville
Miami
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago Downtown
Chicago Oakbrook Terrace
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston State Street

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro

North Carolina (cont)
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Erie
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Spartanburg
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons, VA

West Virginia
Charleston

Wisconsin
Appleton, WI
Madison, WI
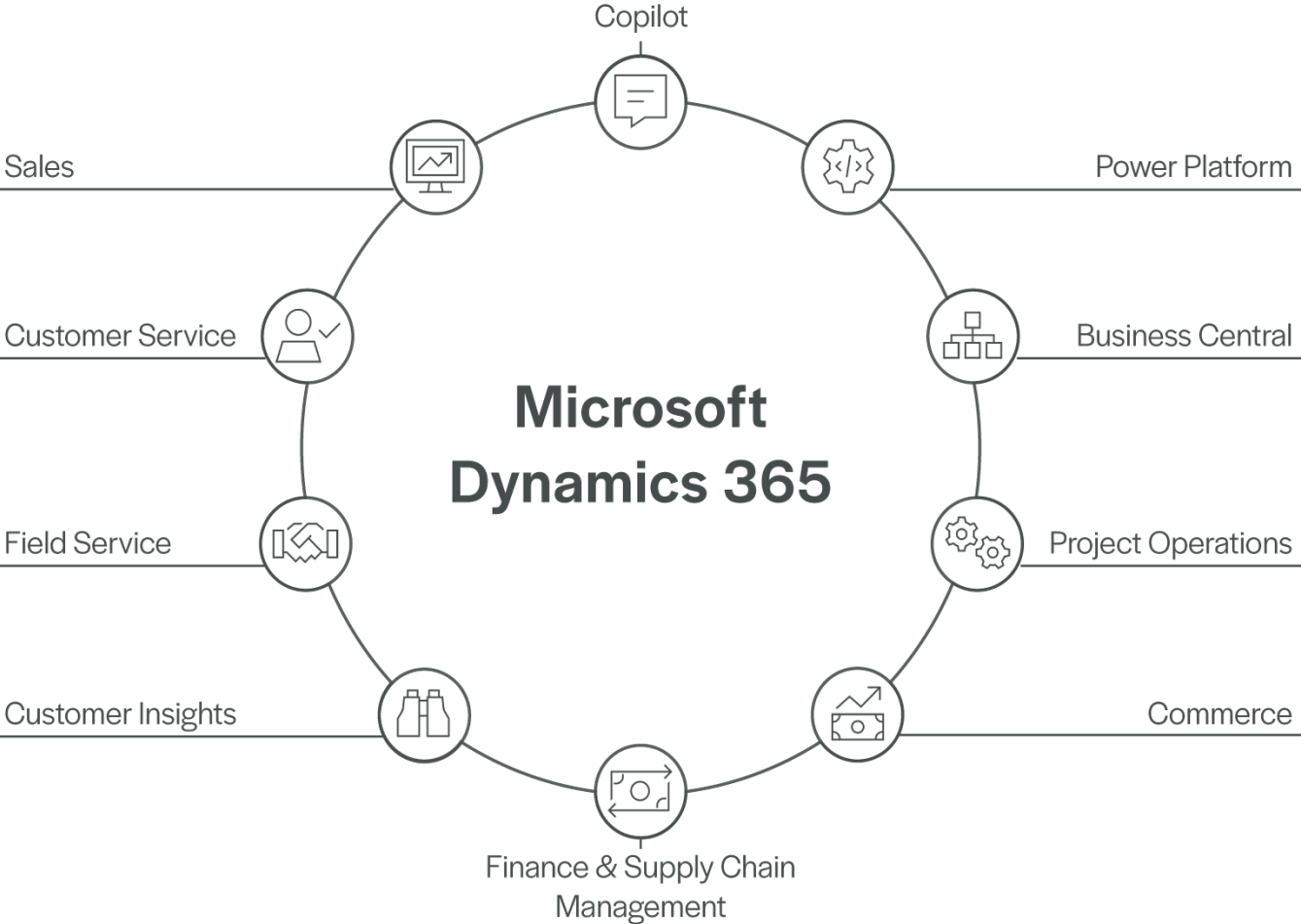
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Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations

- Designing & implementing modern operational systems

- Reviewing new business-facing technologies

- Leveraging existing investments in legacy technologies

- Integrating data solutions

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Forvis Mazars Microsoft Partnership

Microsoft Dynamics 365

- Copilot
- Sales
- Customer Service
- Field Service
- Customer Insights
- Finance & Supply Chain Management
- Commerce
- Project Operations
- Business Central
- Power Platform

Microsoft Dynamics® 365

Microsoft Power Platform

Microsoft Azure

Microsoft Solutions Partner
Modern Work

Microsoft Solutions Partner
Business Applications

Microsoft Partner

INNERCIRCLE
for Microsoft Dynamics

PRESIDENT'S CLUB
for Microsoft Dynamics

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Today's Presenter

Microsoft Practice

"Our team is focused on delivering an Unmatched Client Experience® on every engagement."

– Chad Back, Partner

Tom Gioielli

Senior Managing Consultant

tom.gioielli@us.forvismazars.com

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Agenda

Copilot for Sales

Application connects to CRM platforms to provide sales insights & generative AI capabilities. It's available in Microsoft 365 & Microsoft Teams applications & can be configured to connect to other sales applications.

Copilot for Dynamics 365 Sales

AI assistant that's integrated with Dynamics 365 Sales within model-driven apps. It uses generative AI to summarize opportunities & leads & generate meeting preparation notes.

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01

Copilot for Sales – Teams & Outlook

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24|25
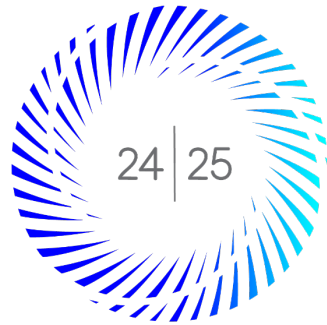
INNER CIRCLE
FOR MICROSOFT BUSINESS APPLICATIONS

Copilot for Sales
Introduction

Sales Copilot >>>>> Copilot for Sales

- AI assistant designed for sellers to enhance productivity & close more deals
  - Record summarization & updates
  - Sales call insights
  - Meeting preparation documentation
  - Meeting summaries
  - Task creation
  - Email summarization & creation

- AI & sales insights from CRM platform into Microsoft 365 productivity tools
  - Microsoft Outlook: Access calendar events, contacts, read & write emails
  - Microsoft Teams: Participate in Teams meetings, access meeting recordings, analyze sales calls, extract insights & action items
  - Microsoft Word: Read & write documents to prepare for meetings

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Copilot for Sales
Install

- Admin Permissions for Admin-Deployed
  - Microsoft 365 Administrator: Copilot for Sales add-in for Outlook & Microsoft 365 Apps
  - Teams Administrator: Deploy & install Copilot for Sales for Teams

- Deploy
  - AppSource or Microsoft 365 Admin Center for Outlook
  - Teams admin center for Teams
  - Allow up to 48 hours for apps to appear

- User-Deployed Available to Install Outlook Add-In or Teams App
  - If installed by end users, app is considered user-deployed & will not have full feature support
  - User-deployed

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Copilot for Sales
CRM Capabilities in Outlook

- Connect contact to CRM (only EmailAddress1)
- Create & edit contacts from Copilot for Sales
- Create new records
  - Admin enabled setting
- Save Outlook activities from highlight card
  - Emails if server-side sync is enabled
  - Draft emails & draft appointments
  - Appointments (except recurring)
  - Emails from shared mailboxes not supported
  - Option to save attachments when connecting record (admin setting)
- View recent & upcoming activities (up to 10 activities)
- View record details (open in CRM)
- Add private notes only you can see
- Copy link to CRM record to share in Teams chat or email

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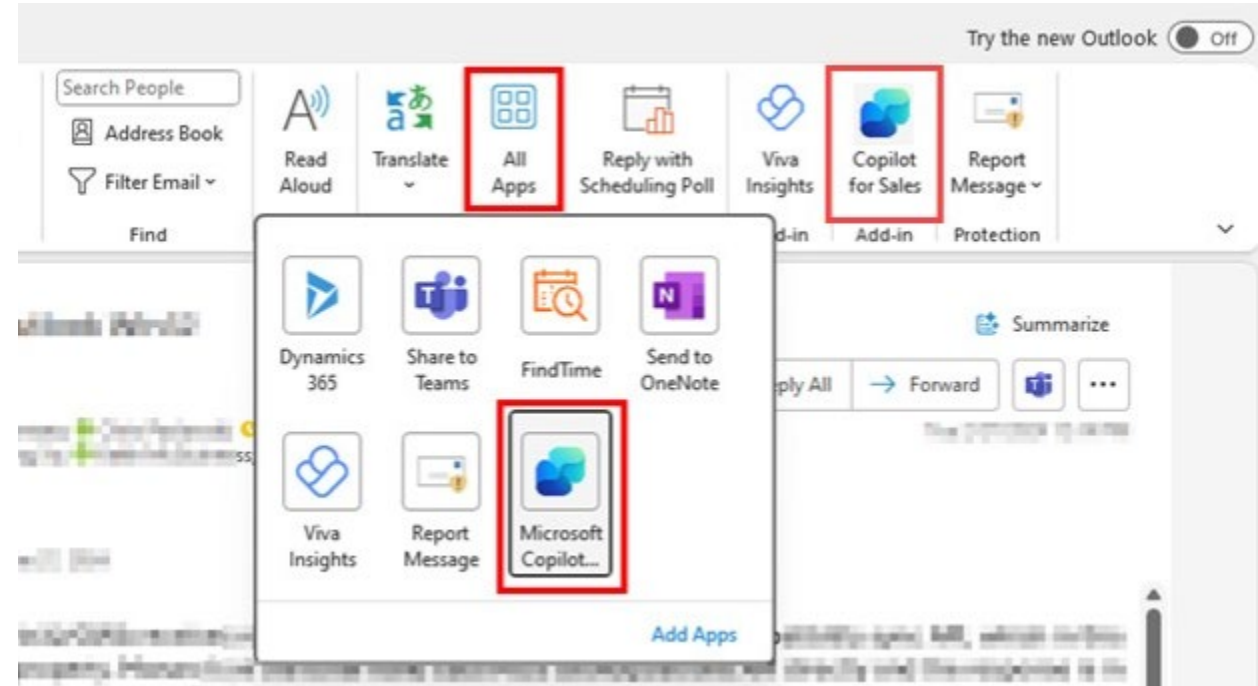
Copilot for Sales

Outlook AI Capabilities

- Generate email content
  - Choose from pre-defined response categories or enter own text & AI generates suggested content
  - Meeting times automatically added to email content based on calendar availability in Outlook
- Refine generated content
  - Provide new prompts that builds upon previous suggestions
- See data sources behind generated content
  - Hover over any highlighted areas of text to view data sources behind generated content
- Summarize last meeting
  - Generate summary, relevant action items, & next steps
- Email conversation summary
  - View summary of an email thread & save to CRM as a note to an opportunity
- Opportunity summary
  - View concise summary of recent notes added to an opportunity

Key email info ⓘ

- **Kenny Smith** inquired about purchasing 10 coffee machines and requested the best price and any available discounts. [1] **1**

- Logan Edwards offered a 10% discount for bulk orders, bringing the total cost for 10 machines to $900. [2]

- **Kenny Smith** accepted the offer and requested information on the payment process and estimated delivery time. [3]

✦ Ask Copilot to...

[Draft an email ⌄] [...] **2**   **3**

AI generated—please review   👍 👎
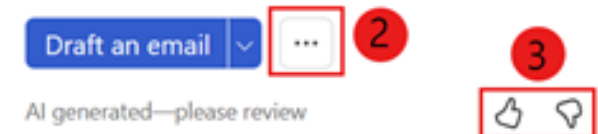
1. Citation to show email text used to generate
2. Save email summary as Note or copy to clipboard
3. Share feedback

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Copilot for Sales
Copilot for Sales vs. Dynamics 365 App for Outlook

Capability	Copilot for Sales	D365 App for Outlook
Save Outlook emails & calendar appointments to Dynamics 365	Supported	Supported
Available across Dynamics 365 (Sales, Customer Service, Field Service)	Only Sales	Supported
Create new CRM contacts	Supported	Supported
Create non-contact records in Dynamics 365	Supported	Supported
Delegate access (allow user to act on behalf of another)	Not Yet Supported	Supported
Mobile access	Not Yet Supported	Supported
Save draft emails & appointments to Dynamics 365	Supported	Supported
Generate email content when composing email	Supported	Not Supported
Refine generated content with new prompts	Supported	Not Supported
Summarize meetings with action items, next steps, summary	Supported	Not Supported
Email conversation summary, save to CRM as a note	Supported	Not Supported
Opportunity summary to quickly catch up	Supported	Not Supported
Capture email signature for contact creation	Supported	Not Supported
View recent & upcoming activities	Supported	Not Supported
Untrack emails & appointments	Supported	Supported
Apply email templates	Not Supported	Supported
Track email or appointment attachments	Supported	Supported
Global search	Supported	Supported
Switch CRM environments	Supported	Not Supported

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Copilot for Sales
Microsoft Teams

Capabilities in Teams

Create a Meeting

- Copilot for Sales added automatically to Teams when one external participant is invited
- Meeting set to transcribe so insights can be generated
- Meeting organizer manually add app to meeting

During a Meeting

- Use Meeting Preparation Card (general meeting info, participants, recent communication, opportunity info, notes from CRM, open tasks, related records)
- Real-time sales tips (information about competitors or brands)
- View & edit records in CRM

After a Meeting

- Post-meeting actions
- Suggested follow-ups
- Questions asked during meeting
- Participant statistics (talk-to-listen ratio, switches between rep & customer, avg. pause, longest monologue)
- Keywords mentioned (brands, times, people, others)
- Create CRM tasks from meeting summary

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Copilot for Sales
Capabilities in Teams

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Copilot for Sales
## Capabilities in Word

- Generate pre-meeting report (Preview)
  - Draft with Copilot
    - Will display if meeting is upcoming in next 30 days
    - Meeting has at least one external participant
    - Meeting invite includes the user as required or optional attendee
  - Report format
    - Meeting participants (names, job tile, role in opportunity, status of meeting acceptance)
    - Opportunity summary
    - Open tasks for opportunity (up to three)
    - Recent meeting insights (highlights & follow-up action items)
    - Summary of recent email
    - Related records (Open opportunities, open cases – up to three of each)
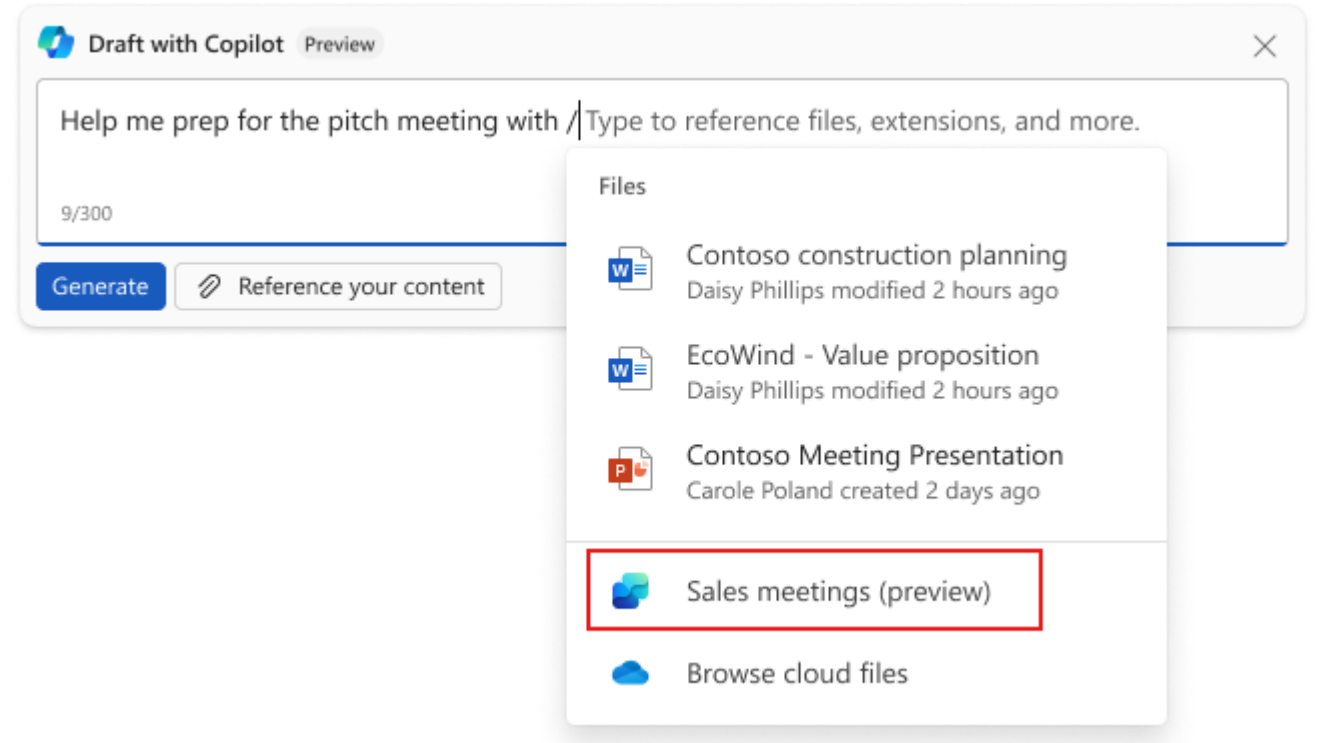
02

Copilot for Dynamics 365 Sales

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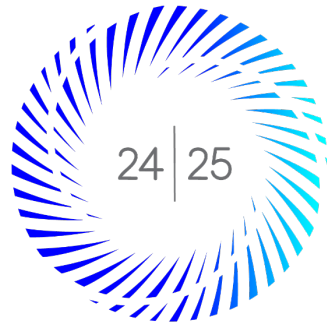
INNER CIRCLE
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Copilot for Dynamics 365 Sales

Setup

- License & Roles
  - Dynamics 365 Sales Premium or Dynamics 365 Sales Enterprise
  - System administrator (for setup)
- Setup: Sales Hub > App Settings > General Settings > Copilot
- Required for "Recent Changes"
  - Turn on audit for tables
  - Audit history access required
- Configure specific fields for summary & recent changes
- Add Copilot widget to custom forms
- Configure summary information
- Timeline highlights

Copilot
| Setup
Opportunities
Leads
Accounts
Knowledge sources

Set up Copilot in Dynamics 365 Sales

Help your sellers stay ahead with an AI-powered copilot by their side. Learn more

Requires Copilot licensing

ⓘ You can turn these capabilities on for Copilot to work even better. ⌃

Audit is currently off. Turning audit on allows Copilot to summarize recent changes since a seller last logged in or summarize changes made in the past 7 days. Learn more   [Turn audit on]

Dataverse search is currently off. Sellers won't be able to search for records unless it's turned on. Learn more   [Turn dataverse search on]

⌄ 🖥 **All apps**
Set up or modify Copilot for all apps.

Copilot ⓘ   [Default ⌄]

Turning on Copilot turns on chat and other related features for all Dynamics 365 Sales apps.

☐ Try our newest preview features before they're rolled out to everyone. See what's in preview

Choose which other Copilot features you'd like to turn on.

Email (preview) ⓘ   [Default ⌄]

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Copilot for Dynamics 365 Sales
Record Summarization

- Record Summarization
  - Copilot opens in a side pane
    - Basic information
    - Key information (how long associated with your org, total value of closed opportunities, most recently closed opportunity, most recent activity)
    - Related records
    - Product, quote, competitor insights (opportunity)
    - If LinkedIn Sales Navigator licensed, prompt available to open LinkedIn Sales Navigator Accounts associated
  - Opportunity Summary widget
    - Appears above Up Next
    - Displays details like Opportunity Summary
  - Administrator sets fields in configuration to appear

Here's the summary for 6 orders of Product SKU JJ202

💼 **Opportunity summary**

💵 **Est. revenue:** 1,00,00,900.00$

📅 **Est. close date:** 14-05-2024

👤 **Contact:** Maria Campbell

🏢 **Account:** Fabrikam, Inc.

Key info
- Fabrikam, Inc. has been a valuable customer that has spent over 1,31,565.66$ with us since 15-04-2024.
- Our last successful opportunity with Fabrikam, Inc. for test was worth 67,999.000₹. We've successfully closed 4 opportunities with them so far from a total of 5.
- SYSTEM updated the opportunity stage from 2-Develop to 3-Propose on 13-05-2024 18:01.
- Maria Campbell is a common stakeholder for 2 other opportunities associated with the account
- The customer needs rare offerings at an affordable price.
- The proposed solution suggests SKU JJ202 or SKU JJ203 based on budget.
- The estimated revenue amount for the opportunity is $1,00,00,900.00.
- The estimated closing date of the opportunity is 14th May 2024.
- The annual revenue for the account is $90,000.00 under the Account entity represented by Maria Campbell as the Primary Contact with a job title of Purchasing Manager.

📦 **Product insights**

📄 **Quote insights**

🔗 **Competitor insights**

📋 Copy   ✉ Copy to email

AI-generated content may be incorrect

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Copilot for Dynamics 365 Sales
Enrich Leads

- Enrich Leads with information from Dynamics 365 Sales, LinkedIn, Bing
  - Possible contacts based on lead's email
  - Latest news from Bing
  - Suggested LinkedIn profiles for contact (LinkedIn Sales Navigator license required)

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Copilot for Dynamics 365 Sales

Timeline Highlights

- At-a-glance view of actionable record updates

- Shows three most recent key events from timeline

- Enabled by default

- Works within all modules (Sales, Customer Service, Marketing, custom apps)

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Copilot for Dynamics 365 Sales
Recent Changes

- **What's New**

  - Prompt > What's new with my sales records

    - Fetches list:

      - Account, lead, opportunity

      - Five most recent records modified in last seven days

      - Owned by you (account: owned by you or your team)

      - Fields updated based on admin config
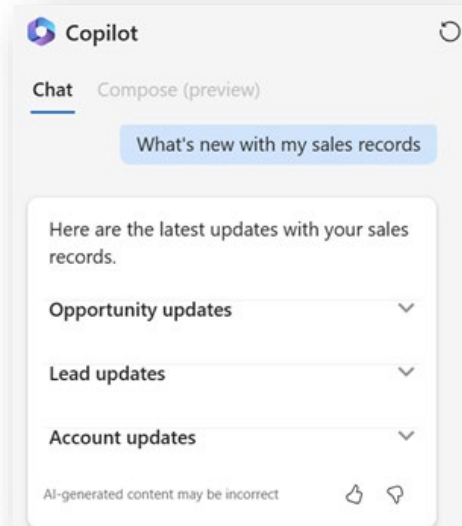
- **Newly Assigned to Me**

  - Prompt > What's newly assigned to me

    - Records created & assigned to you in last 15 days

    - Records without activity (email, call, appointment)

- **Recent Changes**

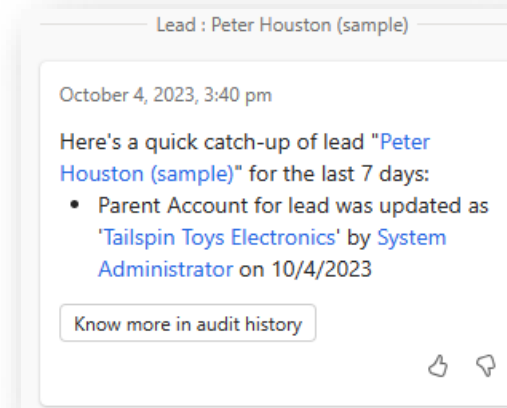 - Prompt > What's changed for _____ (record type)

  - Auditing enabled + user has access to audit history

    - When record opened, displays list of changes

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Copilot for Dynamics 365 Sales
Content Recommendations

- Get recommended documents related to products & accounts in sales records

- Ask questions about products & get answers from documents stored in SharePoint

- Prerequisites:
  - SharePoint Online license
  - Read permission to documents

- Show related files

- Prompt > Show related files _____ (record name)

- Word, Excel, PowerPoint, PDF

- File must be related to the product or account associated with the record

- Get answers from SharePoint

- Prompt > Get info from SharePoint about _____
  - Natural language also an option, include SharePoint directly in the prompt

- Get Answers from SharePoint & Dataverse

- Prompt > Ask a direct question

- Copilot will search Dataverse first, after results select prompt for Search answer in SharePoint

Show product-related files for product "Cafe Mocha"

Preview

Here are the documents we found for you matching your search criteria:

Café Mocha Spec.docx
Modified on 11/23/2023 • 15 views

Cafe Mocha.docx
Modified on 10/31/2023 • 3 views

Cafe Mocha Product Pitch.pptx
Modified on 11/1/2023 • 2 views

Cafe Mocha Pricing.xlsx
Modified on 11/1/2023 • 2 views

Cafe Mocha Product Pitch.pdf
Modified on 11/1/2023 • 7 views

Show all in SharePoint

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Copilot for Dynamics 365 Sales
Stay Ahead

- Ask Copilot to help prepare for meetings or catch up on emails using predefined prompts or ask questions in natural language

- Currently only available for Opportunities (doc date: 10/15/24)

- Prepare for sales appointments

  - Copilot > Stay Ahead > Prepare for sales appointments

    - Lists meetings for current day + next seven days from records you have access to

    - Meetings must have an external participant with email linked to a D365 Contact

    - Contact must be associated with an Opportunity

      - Select Prepare from list of meetings. Insights gathered from:

        - Notes added to Timeline

        - All open Tasks

        - Related Open Opportunities or Cases of the associated Account

- Display unanswered emails

  - Copilot > Stay Ahead > Show emails that need follow-up

    - Displays unanswered emails if on a record, list of emails if on grid view

    - In mailbox, unanswered, for past three to seven days

    - Contain a buying intent, a question, a query, or action item

    - Regarding a Lead or Opportunity

Here are details to prepare you for upcoming meeting

Subject: Car Test drive

Date and time: Tue, Apr 23, 2024 from 04:00

Connected to: CONTOSO V6

Meeting invitees:

A

Didn't respond 1

Meeting insights:

- This opportunity was opened for Contoso LLC on 3/29/24. It's currently in the Qualify stage. The expected close date is 4/30/24. Maria Campbell is the primary contact. Source
- Wants to complete the purchase by 15th April.
- There are no open tasks for this opportunity. Source
- This account has 1 more open opportunity. Of 2 open cases, none are high priority. Source

Open Meeting

AI-generated content may be incorrect

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Copilot for Dynamics 365 Sales
News Updates

- Ask Copilot to stay current with latest news about accounts

- Curated by Bing

- Be sure to read articles & validate source/content

- Prompts > Get info > Get latest news for account

  - If record open: Lists news articles related to that account

  - If in grid view: Lists news articles for top 10 accounts you work with, sorted by revenue associated with the account

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Copilot for Dynamics 365 Sales
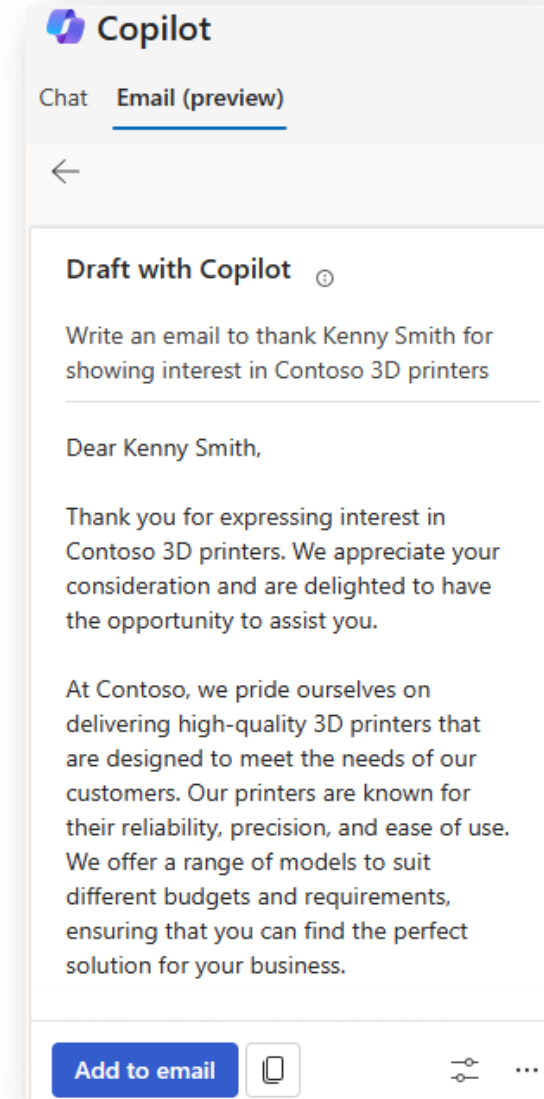## View & Copy Emails

- Summarize email conversations & options to view & copy summary as note
  - Email summary only for emails or threads with more than 1,000 characters
  - Summary contains up to 400 characters

- Available from opening an email from timeline or Up Next widget

- Copilot > Compose > Summary

- Use copy icon to save summary
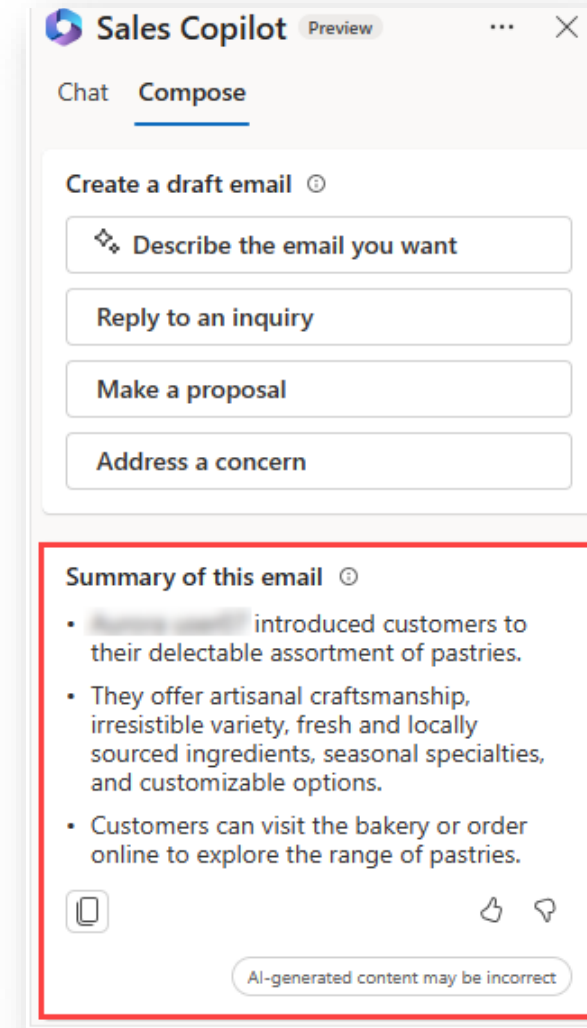
Copilot for Dynamics 365 Sales
Compose & Send Emails (preview at time of doc 10/15/24)

- Copilot for email
  - Suggests content while composing or replying to emails
  - AI-generated drafts based on input, recent emails, & related information
  - Select from predefined response categories or input own text

- Available for emails regarding lead & opportunity
  - Open email from a record using Up Next widget, timeline, or quick create email activity

- Copilot > Email (preview) tab > Describe email you want
  - When generated, add to email or adjust draft
  - Adjust tone option: Formal, Professional, & Friendly

Copilot

Chat   **Email (preview)**

←

Draft with Copilot ⓘ

Write an email to thank Kenny Smith for showing interest in Contoso 3D printers

Dear Kenny Smith,

Thank you for expressing interest in Contoso 3D printers. We appreciate your consideration and are delighted to have the opportunity to assist you.

At Contoso, we pride ourselves on delivering high-quality 3D printers that are designed to meet the needs of our customers. Our printers are known for their reliability, precision, and ease of use. We offer a range of models to suit different budgets and requirements, ensuring that you can find the perfect solution for your business.

Add to email   ⧉   ⚙   ⋯

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Q&A

Business Technology Services

Questions?

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Contact

Forvis Mazars

Tom Gioielli

Senior Managing Consultant

tom.gioielli@us.forvismazars.com

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