

Dynamics 365 FastTrack Architecture Insights

Viva Sales - Introducing new
seller role tailored app

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Oct 2022



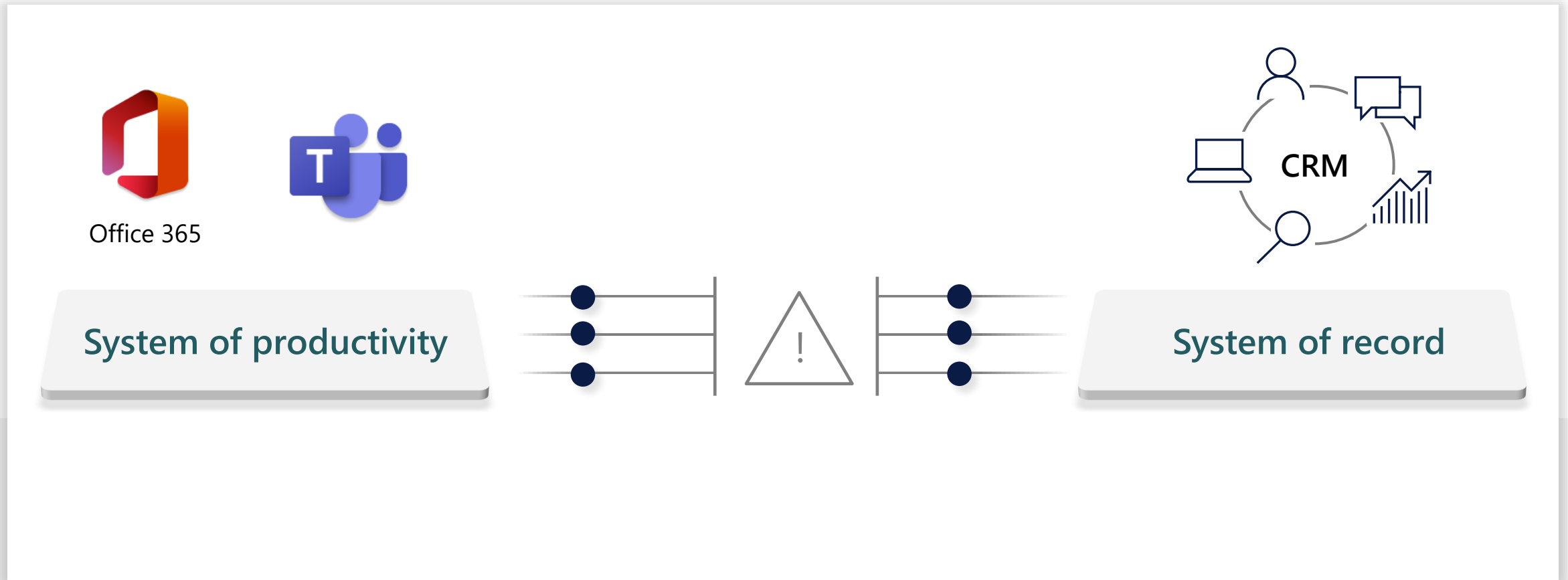
Agenda

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- Viva Sales overview and vision
 - Viva Sales licensing
 - Getting started with Viva Sales
 - Viva Sales features at general availability (GA)
 - Architecture review
 - Resources



Viva Sales overview and vision

Disconnected tools tie sellers up with busywork



Sellers spend only **32%** of their time on selling¹

¹"[Selling in the Age of Ceaseless Change](#)," CSO Insights. 2019.

Microsoft Research + Insights Asana Anatomy of Work Index, 2021; On average, information workers switch between 10 apps up to 25 times a day

Per sellers, they spend too much time on busy work



Inputting into CRM



Managing emails



Logging activities



Finding right person to contact



Creating follow-up tasks

Majority of seller time & customer data is outside CRM



**Seller time spent outside
CRM app¹**



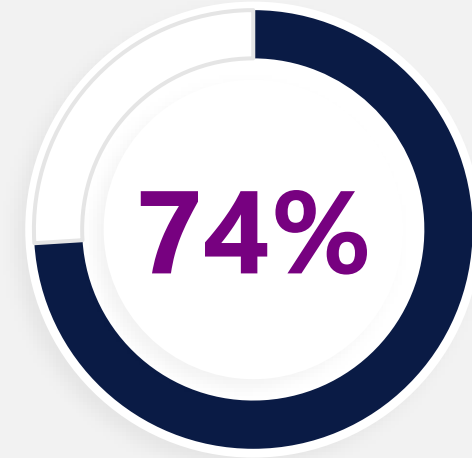
**Customer data in productivity
tools that are not being
captured in CRM²**

¹ MS Seller interviews (multiple CRM experience)

² Microsoft Research

Sellers expect more from their technology today

- ✓ Automatic data entry between systems
- ✓ Ability to work in the app of their choice
- ✓ A seamless, intelligent selling experience



of sellers described sales intelligence tools as critical or extremely critical in closing deals¹

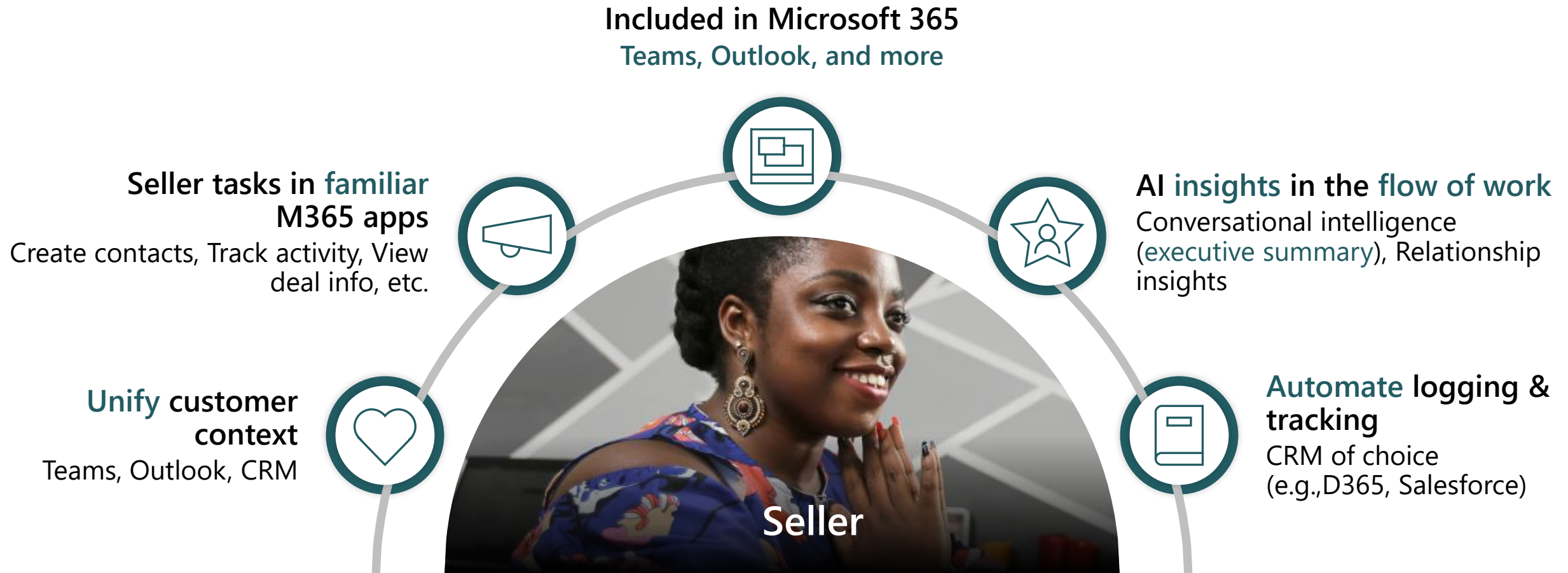
¹[The LinkedIn State of Sales Report 2020](#), LinkedIn, 2020.



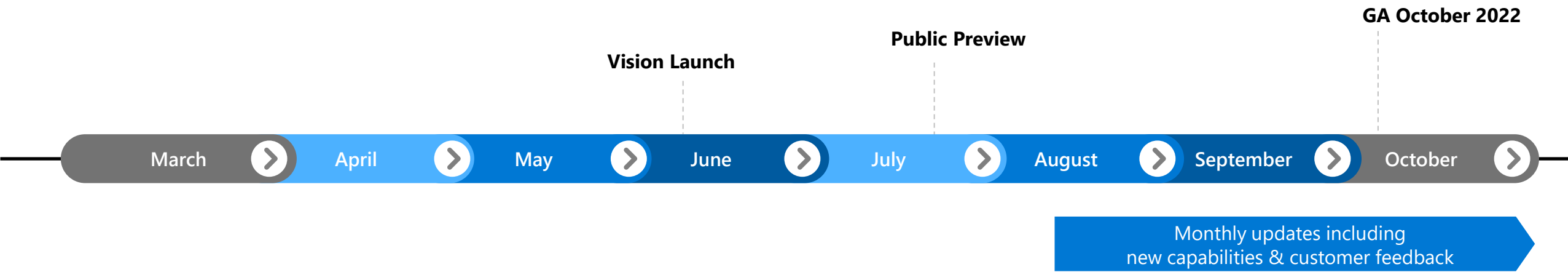


Meet Microsoft Viva Sales

New M365 add-on designed to improve seller productivity and enable deeper customer engagement by bringing customer context into the seller's flow of work



Viva Sales timeline





Viva Sales licensing

Viva Sales supports D365 and Salesforce CRMs at GA

Viva Sales is free for Dynamics 365 Sales Enterprise and Sales Premium customers



Dynamics 365

Dynamics 365 Sales Enterprise

*Includes
Viva Sales*

Dynamics 365 Sales Premium

*Includes
Viva Sales*



Editions that support public APIs

Professional (with API access enabled)
Enterprise
Performance
Unlimited
Developer

*Viva Sales: \$40
pupm*



Getting started with Viva Sales

Get started with Viva Sales quickly



M365 Outlook and Teams license/account

- You can use Viva Sales without Teams, but some key features will not be available
- You must have Outlook: Desktop and Web supported
- Only Exchange online is supported



D365 or Salesforce account

If you don't have CRM account, you must get one.

- D365 only; not for Dynamics on-premises
- Salesforce: all editions supported by their public APIs (Professional with API access enabled, Enterprise, Performance, Unlimited, and Developer Editions.)

Get started with Viva Sales quickly

[Installing Microsoft Viva Sales Application from the M365 Administration Center - YouTube](#)

The screenshot shows the Microsoft 365 Admin Center interface. The left sidebar contains the navigation menu with the following items: Home, Users, Teams & groups, Roles, Resources, Billing, Support, Settings, Domains, Search & intelligence, Org settings, Integrated apps (highlighted), Partner relationships, Setup, Reports, Health, Admin centers, and Security. The main content area is titled 'Integrated apps' and includes a search bar. Below the title, there is a description: 'Discover, purchase, acquire, manage, and deploy Microsoft 365 Apps developed within your organization. For advanced management of these apps go to the respective admin center or...'. A section titled 'Popular apps to be deployed' features two app cards: 'Adobe Acrobat Sign for Microsoft Word' and 'Office2SharePoint - working with Office 365 and Teams the easy way'. The 'Microsoft Viva Sales for Microsoft Outlook (Preview)' app is also visible. The 'Usage' tab is selected, showing a toggle for 'Is this a test deployment?' set to 'No'. Under 'Assign users', the 'Entire organization' option is selected. A search bar for users or groups is present. The bottom right corner has a 'Help & support' button.

Microsoft 365 admin center

Home > Integrated apps

Integrated apps

Discover, purchase, acquire, manage, and deploy Microsoft 365 Apps developed within your organization. For advanced management of these apps go to the respective admin center or...

Popular apps to be deployed

Adobe Acrobat Sign for Microsoft Word
Web apps
Get more done by sending and signing documents all from within M365 apps.
[Get it now](#) [View details](#)

Office2SharePoint
Outlook
Office2SharePoint - working with Office 365 and Teams the easy way
[Get it now](#)

[View more apps](#)

[Get apps](#) [Upload custom apps](#) [Refresh](#)

| Name | Host products |
|--|---------------|
| Microsoft Viva Sales for Microsoft Outlook Microsoft Viva Sales automates data entry and ... | Outlook |
| Ant Text Email Templates Write personalized compelling emails with your ... | Outlook |
| Sales Productivity for Excel ... | ... |

Overview **Usage** Usage

Is this a test deployment? ☒ No

Assign users

☐ Just me (admin@dcieoconnector.onmicrosoft.com)

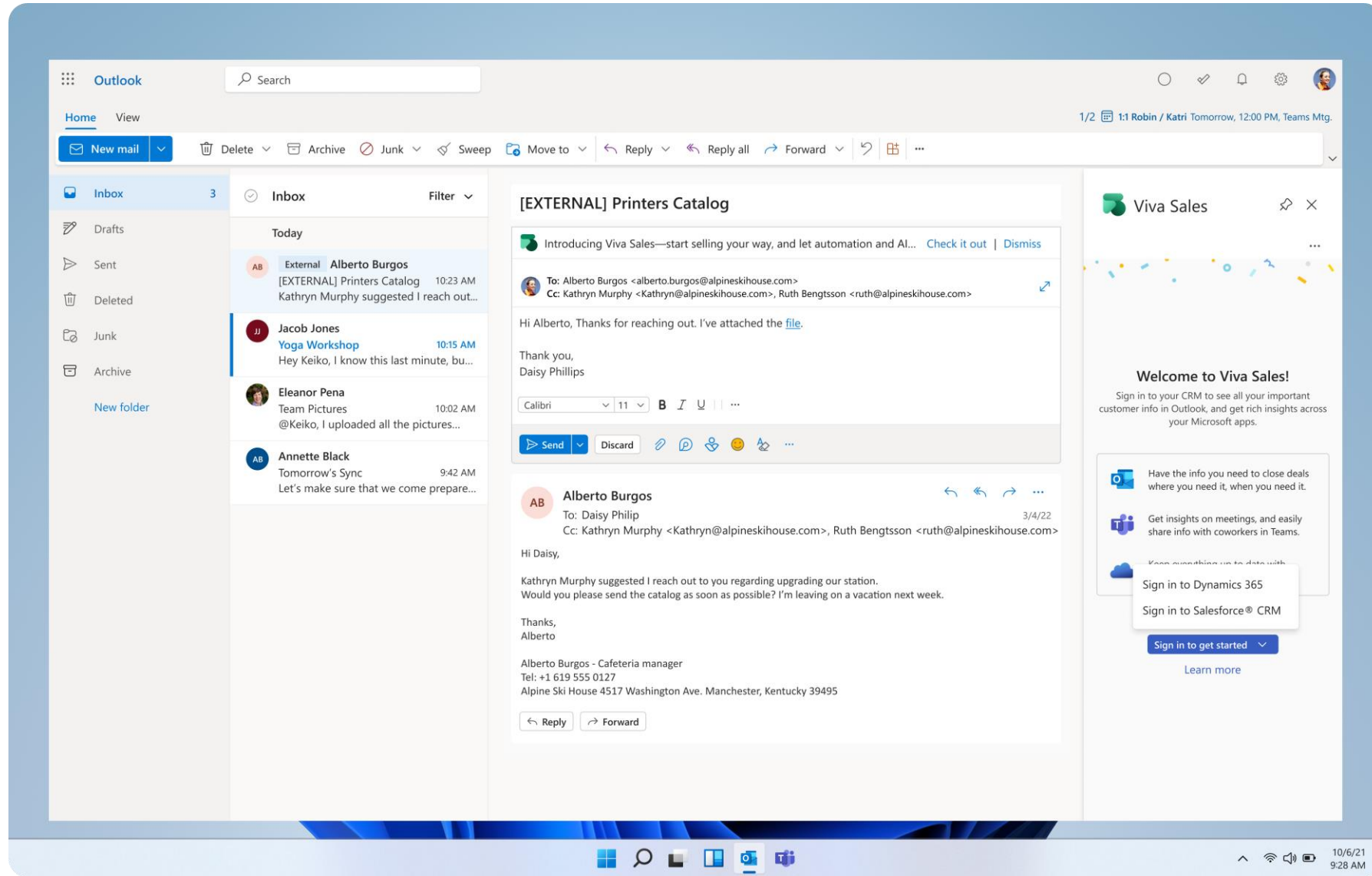
☒ Entire organization


☐ Specific users/groups

[Help & support](#)

Get started with Viva Sales quickly

[Users activate Viva Sales app by logging into their CRM after discovering app via an Outlook banner](#)









Viva Sales features
at general
availability (GA)

Viva Sales Scenarios

GA Scope

| Scenario | Surface | GA Features (10/3) |
|---|--|---|
| View CRM data in Outlook and sync customer engagement data in the flow of work to Salesforce CRM and D365 |  Outlook | <ul style="list-style-type: none">• Sellers can connect to their CRM system from Outlook• Sellers can create a new contact in CRM, contact information is prefilled using email signature if present• Sellers can view account and opportunity information from Outlook• Sellers can save emails to CRM from Outlook• Sellers can see recent emails and meetings, meeting summary links associated with the contact (from Outlook to Teams) |
| Collaborate with colleagues easily by sharing business data easily within Teams and Outlook |  Outlook  Teams | <ul style="list-style-type: none">• Sellers can copy contact, account and opportunity information from Outlook and share it in Teams as a link which is unfurled into a rich preview card.• Sellers can share CRM information in Teams chat using Message extensions |
| Improve productivity by leveraging intelligent Teams meeting insights and action items for follow up |  Teams | <ul style="list-style-type: none">• Sellers can access CRM information when scheduling a meeting from Outlook• Sellers can save the meeting details to CRM from Outlook• Sellers can leverage meeting insights such as detailed executive summary, sentiment analysis and action items to follow up on (Conversational Intelligence) |

Sellers connect to CRM from Outlook



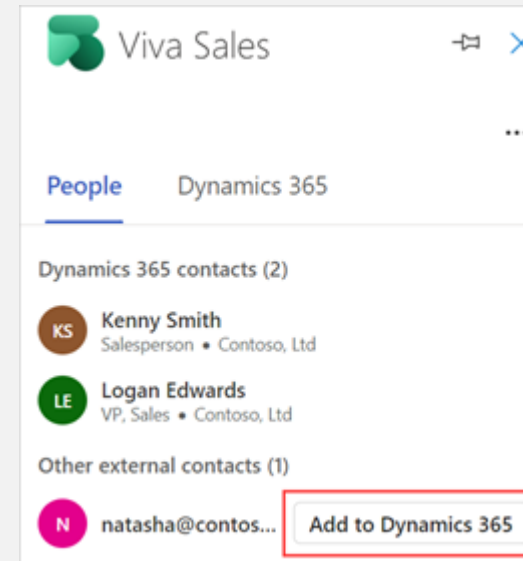
Sellers can connect to CRM from Outlook

View & Sync customer data in Outlook

Sellers can connect to CRM from Outlook desktop or web

Sellers can manually create and edit a contact from Outlook (using email signature if available)

Sellers can open the CRM contact form from Outlook



The screenshot shows the 'New Contact' form in the Viva Sales interface. The form is titled 'New Contact' and includes a message: 'We automatically filled in details from the email we think belong here. [Learn more](#)'. The form fields are as follows:

- First name:
- Last name:
- Job title:
- Email:
- Account:
- Phone number:
- Mobile phone number:

At the bottom right, there are 'Cancel' and 'Save' buttons. A purple box highlights the entire form area.

View contact recent activities, account and related opportunities

Sellers can view recent and upcoming meetings and emails

Sellers can view contact account details

Sellers can view related opportunities details

The screenshot shows the Viva Sales mobile app interface. At the top, there's a header with the Viva Sales logo and navigation icons. Below the header, the contact name 'Kenny Smith' is displayed along with his role 'Salesperson • Contoso, Ltd' and a 'Sales contact' tag. There are two tabs: 'Details' (selected) and 'Dynamics 365'. The 'Details' tab contains three sections: 'Private notes' with a prompt to add notes, 'Recent activity' which is highlighted with a purple box and lists three items: 'Product demo meeting' (Mon 10/3/2022 • 4:30 PM), 'Discuss final quotation' (Tue 9/6/2022 • 5:50 PM), and 'RE: Product demo' (Fri 4/29/2022 • 4:34 PM), and an empty 'Opportunities' section.

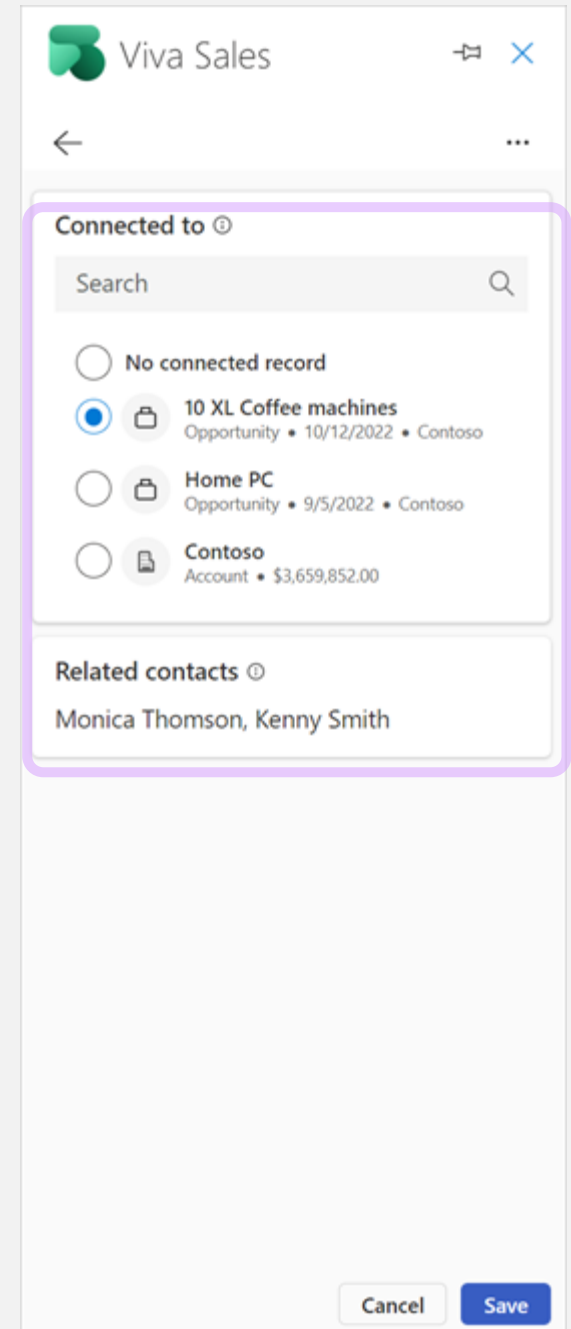
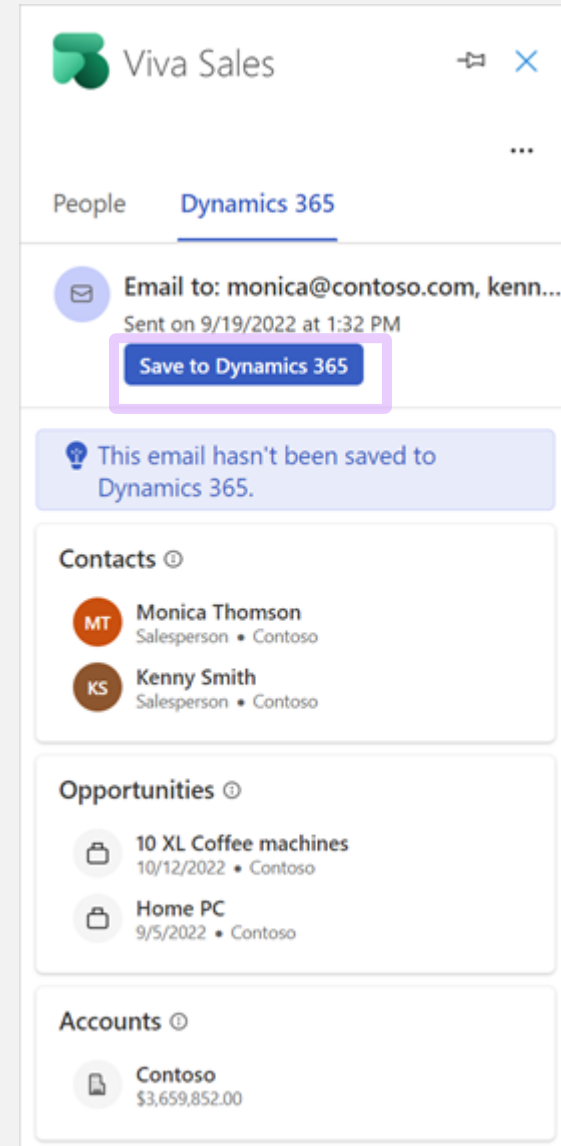
The screenshot shows the Viva Sales web interface. At the top, there's a header with the Viva Sales logo and navigation icons. Below the header, the contact name 'Kenny Smith' is displayed along with his role 'Salesperson • Contoso, Ltd' and a 'Sales contact' tag. There are two tabs: 'Details' (selected) and 'Dynamics 365'. The 'Details' tab contains three sections: 'Contact information' with fields for 'Salesperson', 'Contoso, Ltd', and 'kenny@contoso.com', 'Opportunities (1)' which is highlighted with a purple box and shows 'Home PC' with details like 'Amount: \$30,000.00', 'Close date: 9/5/2022', 'Account name: Contoso, Ltd', and 'Owner: Shubham Jaiswal', and 'Account' which shows 'Account name: Contoso, Ltd'.

Save Outlook activities to CRM

Sellers can track emails and meetings to CRM

Sellers can connect tracked emails and meetings to records (and change connected record)

Sellers can view tracked emails and meetings in CRM timeline



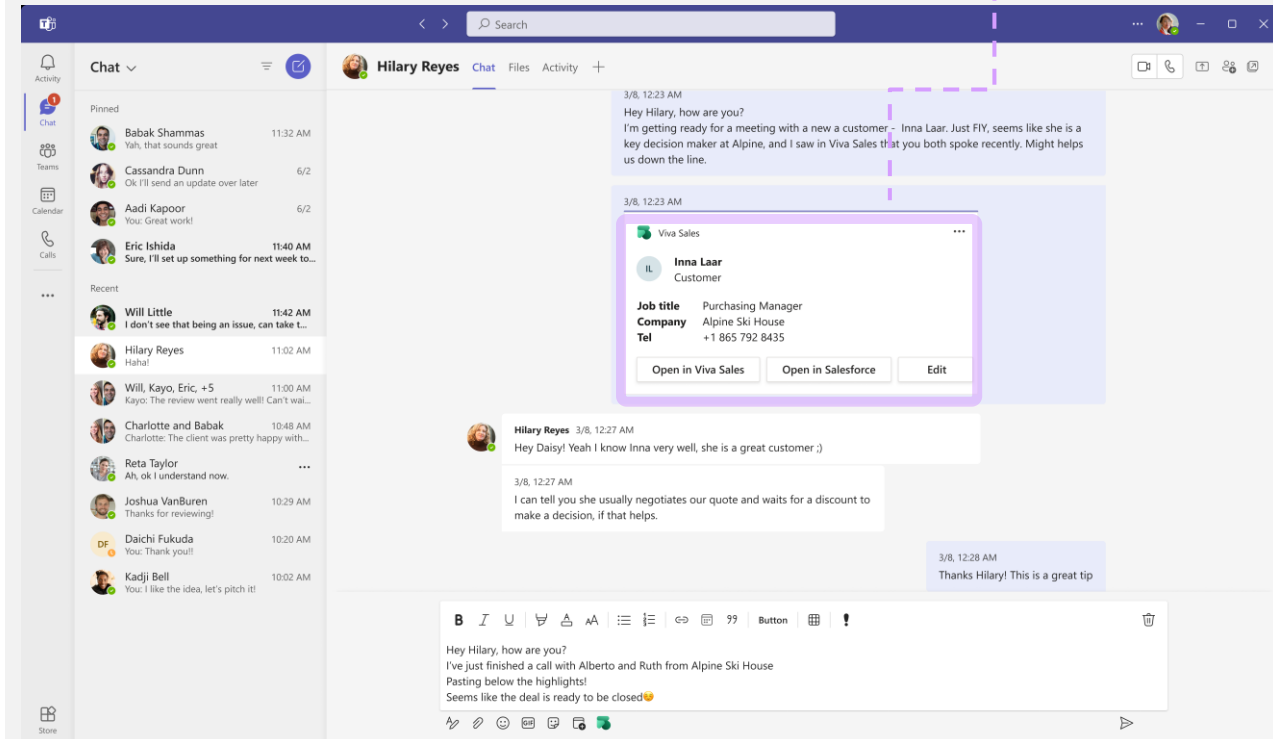
Share business data easily between Teams and Outlook

Sellers can copy contact, account and opportunity information from Outlook to Teams

Copied links are unfurled into rich adaptive cards

Sellers can share information in chat using message extensions

Collaborate with teammates and share prior knowledge and relevant information



Leverage meeting insights with Viva Sales



Sellers can access relevant CRM information when scheduling a meeting from Outlook

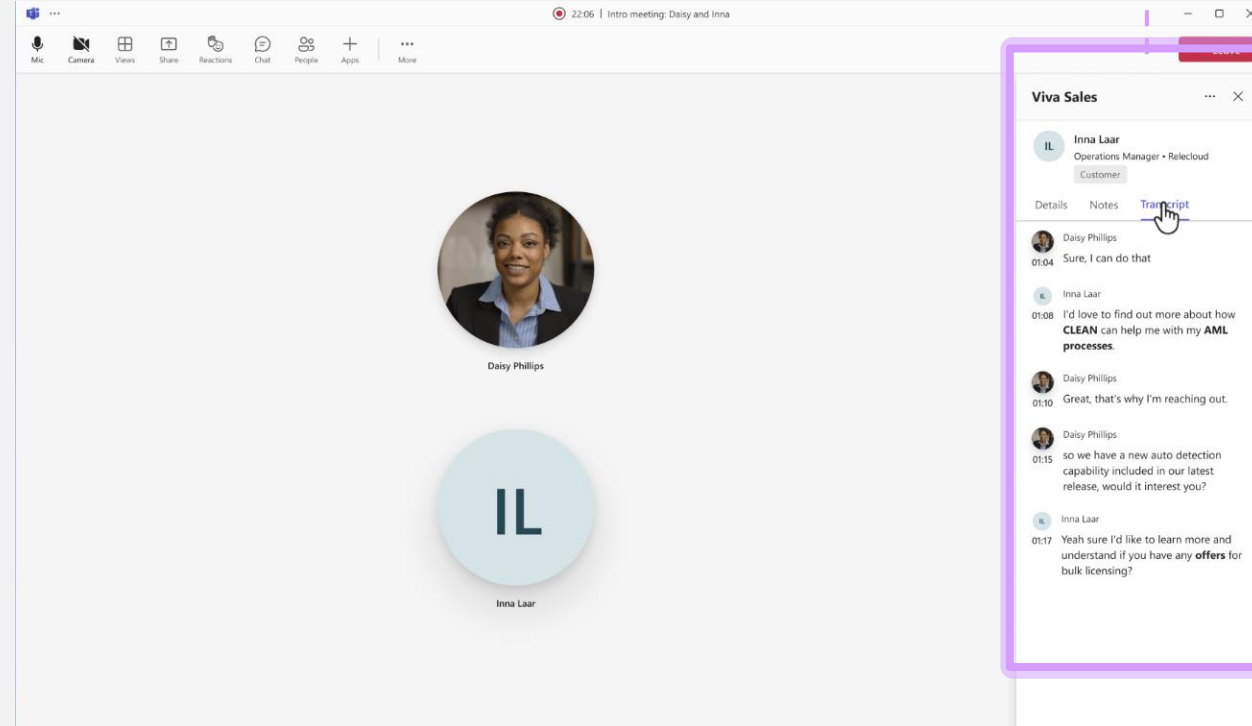
Stop taking notes

Easily record and transcribe meetings

Surface key topics automatically with AI

Search and translate transcripts

Get caught up in the conversation and use the searchable transcript for reference



Grow with a digital coach

Receive advice for next best steps

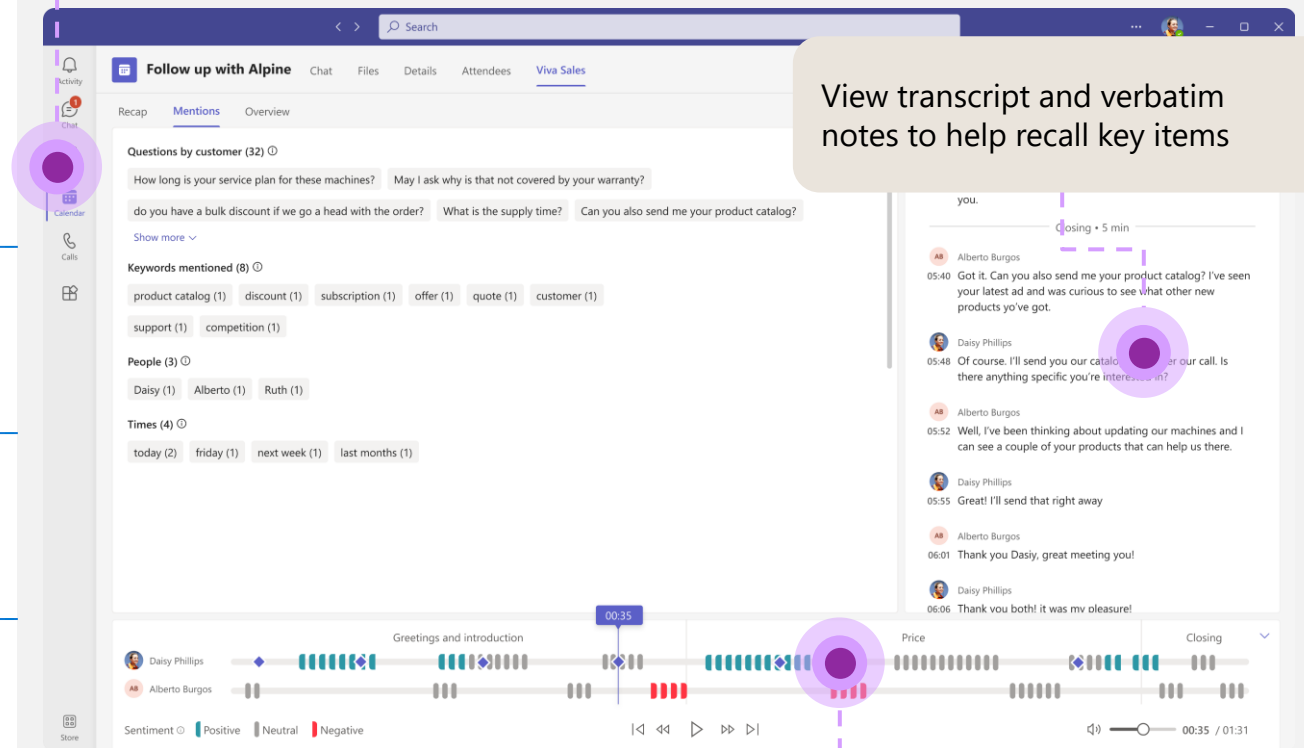
Schedule well-timed follow ups

Increase your understanding of your call

Improve your meeting outcomes with real-time insights you can view as a coach

View transcript and verbatim notes to help recall key items

Review the success of your meeting with sentiment analysis





Viva Sales
architecture

Architecture Overview

Viva Sales is a spoke app; it uses Dataverse as repository

- For Dynamics 365 connected: The existing Dataverse (DV) instance is used.
- For Salesforce (SFDC) connected: A Dataverse (DV) organization is provisioned in the M365 tenant region when the first user open Viva Sales panel.

CRM data (e.g. COLA, tracked emails from Outlook, etc.)

- Organization CRM is the sole source of truth
- Data is not copied from SFDC to DV. While the user is using Viva Sales, data is read from SFDC directly
- For D365 users, data is read from the existing instance

Viva Sales data (private notes, pointer to new/existing contacts) stays forever until org discontinues or per GDPR related request

- SFDC: Viva Sales data is saved in DV provisioned
- D365 users: Viva Sales data is saved in the existing D365 instance

M365 Data (e.g., emails, call transcript insights, recording, etc.) remains in substrate

- Conversation intelligence moves emails and meetings out of substrate to calculate insights and write insights back to the substrate
- Follows office retention policies



Viva Sales
resources

Learn more about Viva Sales

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- Learn how to install Viva Sales in Outlook and Teams from [Install Viva Sales](#)
 - For an overview about how data is handled see [Data handling in Viva Sales](#)
 - Learn more about the current Viva Sales features at [Viva Sales help center](#)
 - Learn about the Microsoft vision for CRM in the [Official Microsoft Blog](#)
 - Stay up on the latest announcements through [the Dynamics 365 blog](#)

Thank you