MICROSOFT SALES*. COPILOT TRANSITION PLAYBOOK

Ensure optimal transition to Microsoft Sales Copilot from Dynamics 365 App for Outlook

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Purpose and scope

The SITUATION

Microsoft Sales Copilot (previously named Viva Sales) has been introduced in August 2022, with monthly new features available in Outlook, including CRM data CUD operations, Al-powered copilot automatic email replies, easy create and access for Teams collab space, and it has been in rapid development ever since.

We have now reached a point where all the widely used features of Dynamics 365 App for Outlook can be achieved in Sales Copilot.

Purpose

This guide aims to provide an introduction into the main features available inside Sales Copilot and guide the customers in their transition from Dynamics 365 App for Outlook to Sales Copilot.

Sales Copilot is available across Outlook, Teams and Dynamics 365.

This playbook focuses on Sales Copilot in Outlook and Teams features as they relate to the Dynamics 365 App for Outlook capabilities.

User personas relevant for this playbook:



Users of Dynamics 356 App for Outlook who are Sales Enterprise or Sales Premium license holders

Audiences:



Customer Solution Architects



Partner Solution Architects



FastTrack Solution Architects

Inside this playbook

- Understand the benefits of Sales Copilot
- Comparison between Sales Copilot and Dynamics 365 App for Outlook
- Considerations for a strategy for transition
- Understand the items and techniques needed for transitioning

Chapter 1 Introduction

Explore

Transition

Understand functionality cover of Sales Copilot

Copilot?

What and Why Microsoft Sales

- Microsoft Sales Copilot is a seller companion app which lives in the apps sellers love and use (Outlook, Teams, CRM). It brings customer engagement data in the seller's flow of work.
- Infused with Al-powered capabilities, it allows sellers to be more efficient, to unlock productivity and uplevel skills.

Detail the transition for each feature

Sales Copilot in Outlook vs Dynamics 365 App for Outlook

- Parity with Dynamics 365 App for Outlook core features.
- Identify the existing Dynamics App for Outlook functional components in use and equivalent Sales Copilot features.
- Understand the similarities and differences between apps.

License Prerequisites & Technical considerations

Plan and execute

Approach

- Determine transition approach for your organization.
- Establish a plan.

Train users, super users and administrators on new processes

 Leverage the comprehensive public resources available as training quides.

FAQ

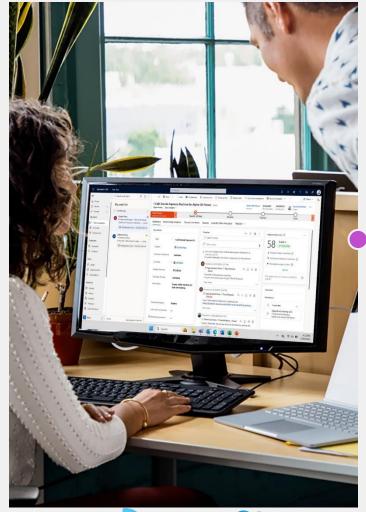
Resources

Resources

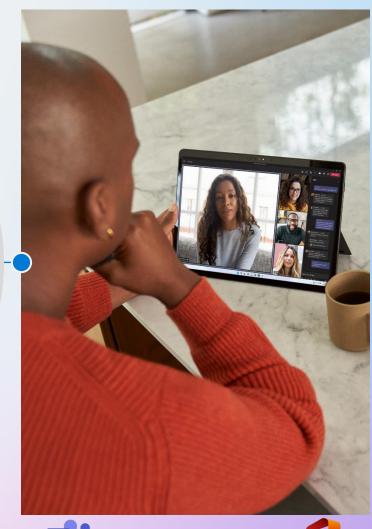
Resources

Chapter 1: Introduction

Empower sellers in the flow of work

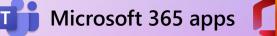






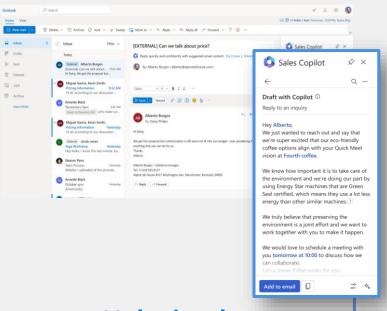






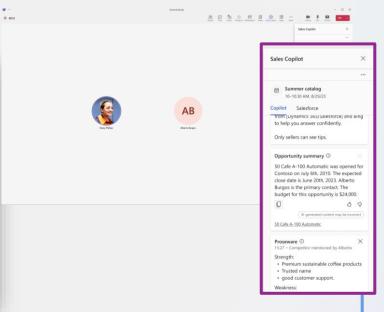
Microsoft Sales Copilot

The future of work for salespeople



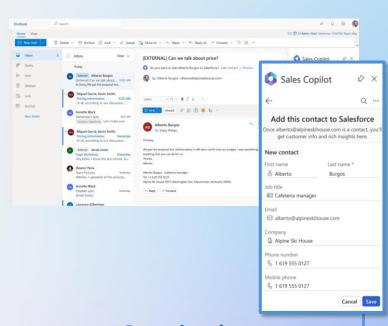
Unlock sales productivity

Al-generated summaries, transcriptions, and emails



Personalize customer interactions

Al-assisted insights, content, and recommendations



Stay in the flow of work

Seamless data integration and updates between Microsoft 365 apps and your CRM

Sales Copilot reimagines how sellers work. Work smarter not harder and show up as the best version of yourself.

Key Advantages of Sales Copilot

CRM Data in the flow of work

 Never miss a stakeholder, create sales contacts right from Outlook. View/update CRM data and track Outlook activities to the CRM.

Out of the box Sales copilot

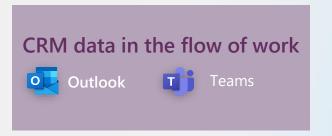
 A suite of Al powered productivity features readily available to minimize busy work

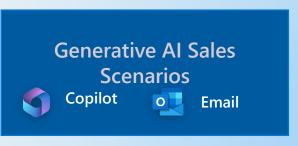
Premium sales meeting experience

- With Sales Copilot Conversation Intelligence stop taking notes during customer meetings and remain actively engaged with your customer.
- After the meeting, Sales Copilot generates a rich meeting summary with follow-up action items, relevant keywords, question detection, sentiment analysis, and more.

Maximize time selling and collaborating

 Efficient collaboration with Teams and channels created using deal room templates with pre-pinned apps and CRM records. Your 'out-of-thebox' Sales Copilot Supercharged AI Productivity





Maximize Time Selling & Collaborating

Build relationships and close deals faster

Premium Sales Meeting
Experience and Recaps



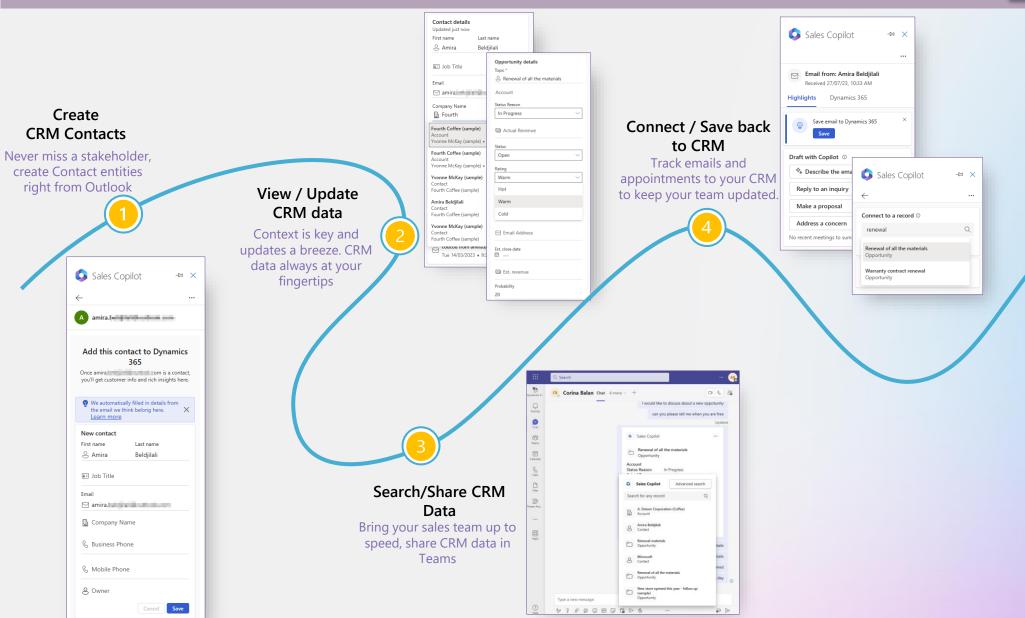


CRM data in the flow of work

Open in Dynamics 365







View recent and upcoming activities

Have your recent customer interactions through Outlook & Teams



Generative AI Sales Scenarios

→ ◆

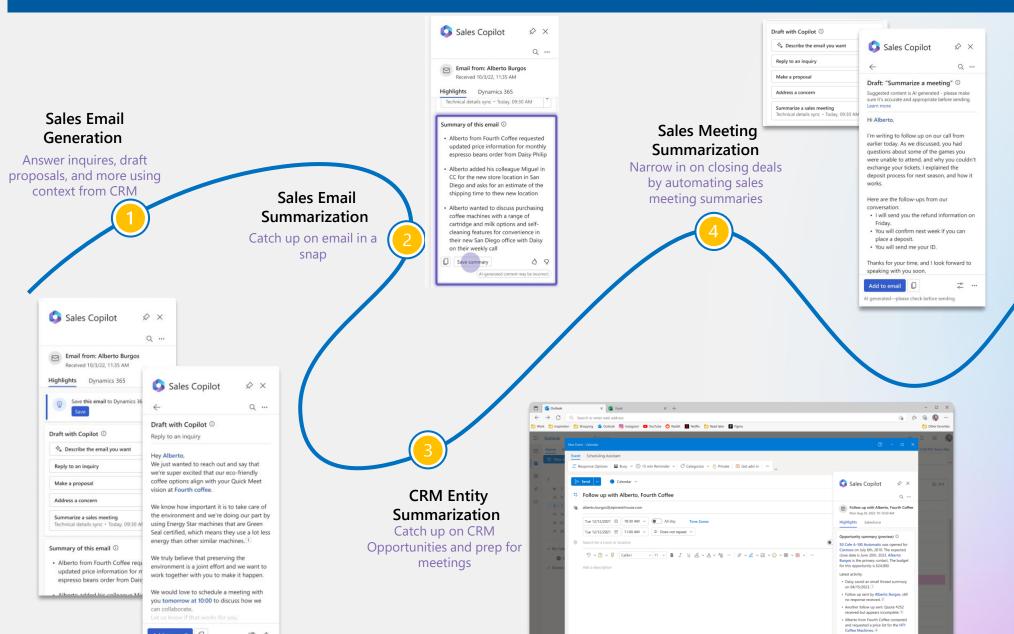
Add to email

Suggested content is Al generated—please make sure it's accurate and appropriate before sending.



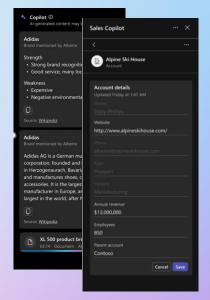








Have all your sales insights are your fingertips

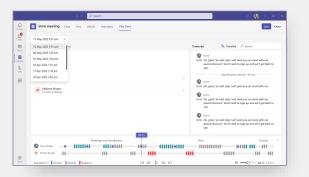


Premium Sales Meeting experience – Al generated meeting summaries





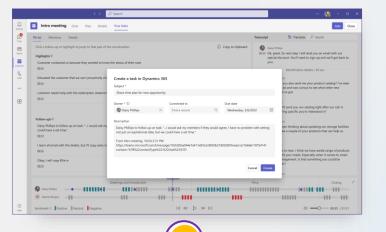




Stop taking notes

During the meeting focus on the customer as the meeting summary is automatically generated with highlights and action items.



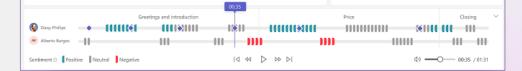


Create follow up tasks

After the meeting, convert the suggested action items to a task and save it in CRM directly from Teams.

Grow with a digital coach

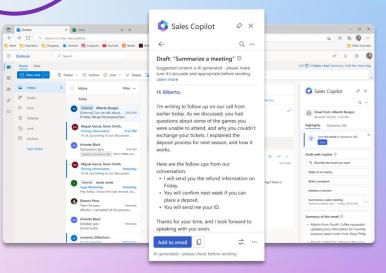
After the meeting, gain a deeper understanding of the call with sentiment analysis.





Summarize a sales meeting

Quickly follow up after a meeting with automatically generated email capturing the meeting highlights and next steps.



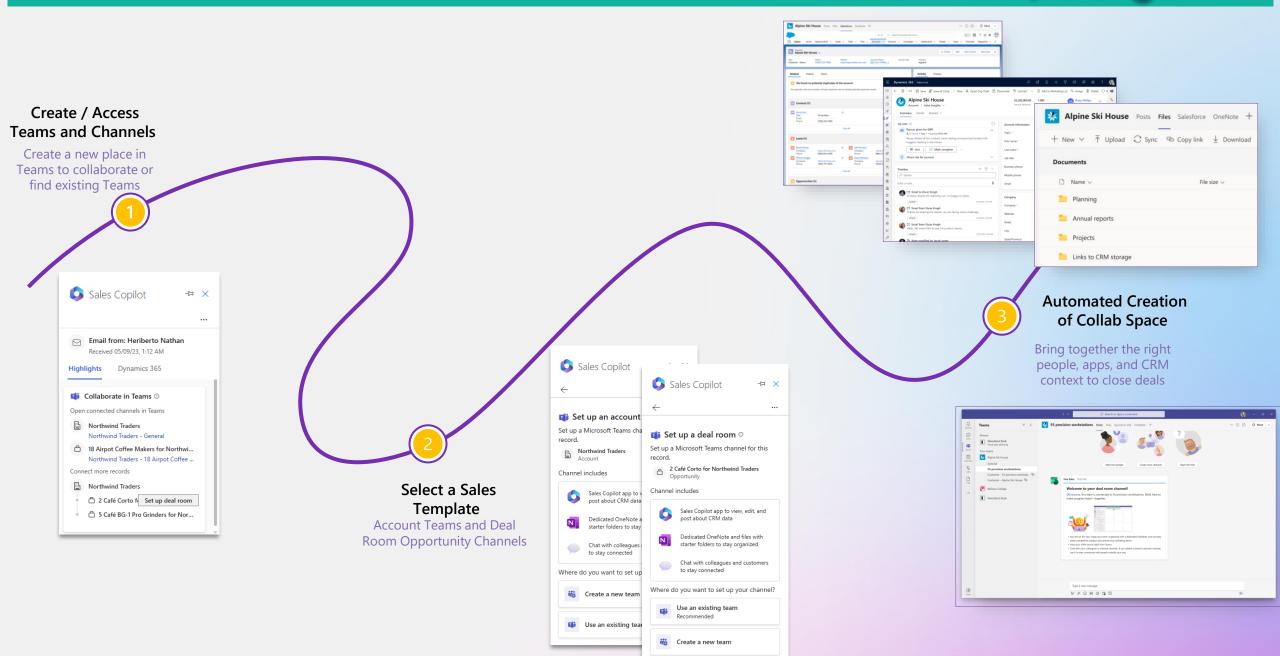
Collab Spaces – Teams Sales Templates









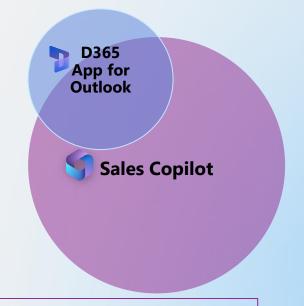


Chapter 2: Explore

Dynamics 365 App for Outlook

Focused on Enablement across all D365 model driven apps

Productivity app focused on comprehensive platform integration – track, read, write from M365 (Outlook) and Teams to D365.



Sales Copilot

Focused on Empowerment of Sales Teams – the app for sellers

Al-powered sales productivity app which delivers the next capabilities:

- The most used Dynamics 365 App for Outlook features e.g., tracking CRM data from the Outlook flow of work, saving Outlook emails and appointments to your CRM.
- Al powered features e.g., email suggested replies, automatic thread summarization, meeting summaries with sentiment analysis, highlights, keywords and follow up items for customer meetings.
- **Seamless collaboration with Teams and channels** organized in a predictable manner and accessible in Outlook and Dynamics 365 apps.

Sales Copilot vs Dynamics 365 App for Outlook

Capability available only in Sales Copilot in Outlook	Sales Copilot	Dynamics 365 app for Outlook
AI - Generate email content when you compose a new email or reply to an existing email	~	×
AI - Refine and fine-tune generated content with new prompts that build upon previous suggestion	~	×
AI - Summarize with a single click customer meetings with action items, next steps and interaction summary	~	×
AI - Email conversation summary and save it to your CRM as a note	~	×
AI - Opportunity summary so you can quickly catch up on the latest updates and prepare for customer meetings	~	×
AI - Automatically capture email signature for contact creation	~	×
Collab spaces - Set up teams and channels with pre-pinned apps and predictable structure to foster collaboration directly from Outlook	~	×
Collab spaces - Access linked teams and channels from Outlook	~	X
General productivity - View Recent and Upcoming Activities for your customers	~	X



Outlook

Sales Copilot vs Dynamics 365 App for Outlook



Outlook

Capability	Sales Copilot	Dynamics 365 app for Outlook
Save Outlook emails and calendar events to Dynamics 365	~	~
Connect saved Outlook emails and events to Dynamics 365 tables (OOB or custom)	~	~
Create new CRM contacts from Outlook	~	~
Create non-contact records in Dynamics 365	Coming soon	~
Delegate access (allow a user to act on behalf of another user)	Coming soon	~
Mobile access – already available for Teams	Coming soon	~
Save draft emails to the CRM	~	~
Save draft appointments to the CRM	✓	~

Sales Copilot vs Dynamics 365 App for Outlook

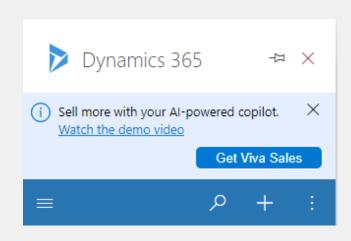
Capability	Sales Copilot	Dynamics 365 app for Outlook
Un-track emails and appointments from CRM		~
Apply email templates	Coming soon with improved new approach – Al generated content	
Track email or appointment attachments	Coming soon	~
Global Search	Coming soon	~
Switch CRM environments		×







Sales Copilot in Outlook



Sellers are encouraged to migrate to Sales Copilot

A notification is published in the D365 App for Outlook add-in

The notification initiates the end-user to the installation path <u>Install Sales Copilot - Microsoft Support</u>



Sales Copilot installation from the App Source is considered user-deployed instead of admin-deployed and will not have full feature support. Work with your CRM administrator, for an admin-deployed Sales Copilot installation for full feature support. Learn more <u>Sales Copilot deployment guide for Dynamics 365 customers</u> | <u>Microsoft Learn</u>.



- You can use Sales Copilot in Outlook, Teams and Dynamics 365.
- Outlook: Desktop or Web supported.
- Only Exchange online is supported.
- Mobile is not supported.

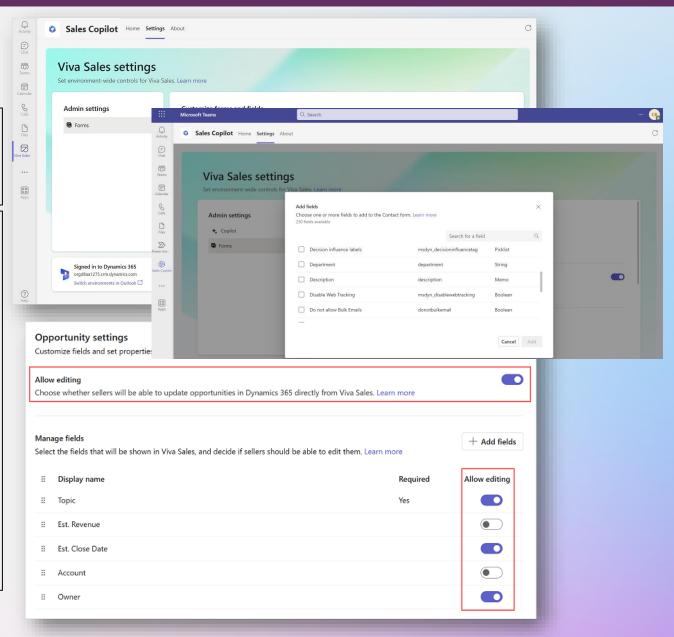


- CRM account is mandatory with 2 CRMs supported currently: Dynamics 365 online and Salesforce.
 - Dynamics 365 Sales online only; not for Dynamics on-premises.
 - Sales Copilot is included with Dynamics Sales enterprise and premium licenses.

Customizations in Sales Copilot

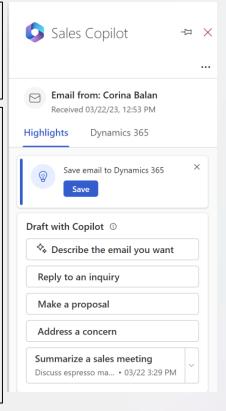
Extensibility capabilities available for Sales Copilot:

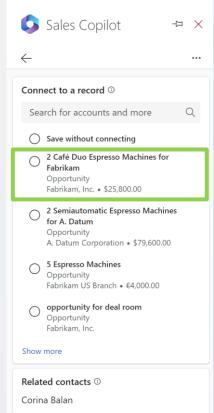
- **Expand** scope from default Contact, Opportunity, Account (COA) to **all first party or custom entities**.
- Edit all entity forms for Sales Copilot Outlook and Teams as per your business needs.
- Define if objects & fields on forms are **editable**.
- Select contacts creation behavior. (using Outlook or CRM forms)
- Save emails and appointments regarding first party or custom entities.
- For fields order, Sales Copilot can leverage CRM views for opportunity, account and other first party or custom entities.

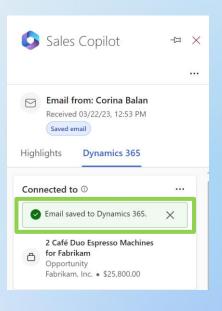


Server-Side Synchronization in Sales Copilot

- Server-Side synchronization (SSS) enables Dynamics 365
 App for Outlook to track Outlook activities and objects to the CRM system. It allows for automatic synchronization of emails based on configuration from Dynamics 365 app.
- Sales Copilot works in the same way as Dynamics 365 App for Outlook with SSS. And with the recent release, SSS has become a prerequisite for tracking emails and appointments in Sales Copilot.
- As such, capabilities such as Category Tracking, Tracking draft emails or appointments, Un-tracking emails or appointments are available with Sales Copilot.







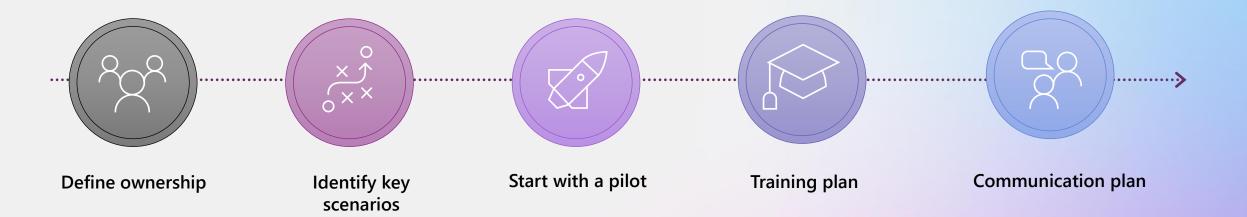
Chapter 3: Transition

Considerations

At this stage, you have already identified the key features of Sales Copilot and the added benefits for your sellers over Dynamics 365 App for Outlook.

For any transition project to be successful, there are a few steps that need to be followed, and transitioning to Sales Copilot is no exception.

In this section, we will discuss some important considerations for a successful transition.



Identify key scenarios

Start with a pilot

Training plan

Communication plan

Considerations

As any other project, defining the **ownership** is critical for success as it will define **responsibilities** for each area or task that will encourage and motivate each individual or team to complete the assignment.

Leaving open items or in grey zone can contribute to not achieving desired progress with the transition activities.



Project Owner

Be sure to identify an owner for the adoption process to co-ordinate the activities and ensure the steps are followed.

Business Stakeholders

Any impact from the Dynamics 365 App for Outlook will affect the business user, for this reason key users from the business should be active and receive the ownership from activities as fit-gap analysis, testing and training.

- Designated Early adopters will learn and explore the capabilities of Sales Copilot. They
 will promote sales transformation across the organization and ensure an effective
 feedback loop.
- Designated *Champions* will learn and help others to use Sales Copilot. They will be part of the change management team and facilitate user onboarding.
- An SME who is familiar with the existing implementation of the existing Dynamics 365
 App for Outlook would also be required.



Project and activities ownership will build a sense of responsibility that will contribute for the success of the project.

Identify key scenarios

Start with a pilot

Training plan

Communication plan

Considerations

Before planning the transition to Sales Copilot, you should:

- Review how the business is using today Dynamics 365 App for Outlook and identify pain points, inefficiencies and opportunities for improvement.
- Consider how Sales Copilot will be able to make your sellers work life better whilst addressing current challenges or opportunities.
- Identify and prioritize most important scenarios.

The following examples of scenarios can be the scope for your pilot. The recommendation is to start with a limited set of features and after concluding your first pilot, you can expand the scope and include more capabilities.



- <u>Email thread summarization</u> Use email summaries to catch up on a long email thread. Save the summary to your CRM as a note to keep your CRM updated with the latest information.
- <u>Suggested email replies</u> Sellers can move a deal forward quicker using generated email content based on pre-defined response categories or seller's own prompt.
- <u>Track emails and appointments to your CRM</u> As a seller, you can save all
 outgoing and incoming communication with your customers in the CRM
 system so that everyone in the company has full visibility in the CRM for
 relevant activities



Performing the assessment exercise could transform the transition into an opportunity to improve your sales processes by using the latest capabilities of Sales Copilot.

Identify key scenarios

Start with a pilot

Training approach

Communication plan

Start with a pilot

An important step in any transition project is performing a pilot. Once you have validated all the prerequisite requirements, defined the scope, obtained business approval, identified the transition scenarios, it is highly recommended to perform a pilot transition.

A pilot transition will help you validate:

- High level plan
- Transition approach
- Transition timeline
- Transition architecture

A pilot transition will also help you reduce problems during the actual transition and refine your overall execution plan.

Identify key scenarios

Start with a pilot

Training approach

Communication plan

Considerations

Sales Copilot is highly intuitive and does not require extensive training. To ensure that no one is left behind and that the transition is smooth, you can provide your users trainings and specific workshops.

Here are some examples of training material that could be prepared for your users:



<u>Admin and early adopters</u> – IT enthusiasts who typically don't require extensive training.

<u>Champions</u> – They help others using and onboarding Sales Copilot, so they should have access to more deep-dive resources.

<u>Support team</u> – They should be aware of the troubleshooting resources and if needed how to raise tickets to Microsoft Support.

<u>Business users</u> – They need access to the detailed Sales Copilot training guides.

Make sure to leverage the Microsoft Sales Copilot documentation for your training materials:

- Training module for sellers
- <u>Use Sales Copilot in Outlook</u>
- <u>Use Sales Copilot in Teams</u>



Testing activities can be included during training phase as users could be running their daily activities in Sales Copilot.

Identify key scenarios

Start with a pilot

Training approach

Communication plan

Step 5: User Communication

It is time to start drafting the user communication plan to include what, when, and how information will be shared across different teams and stakeholders.

The user communication information may include:

- That the change is coming, and highlight the key benefits of moving to Sales Copilot
- Provide regular updates on the progress to allow users to feel empowered
- Update training information and share these updates to the users
- A few days before remind users of the change
- The day after the adoption of Sales Copilot, let users know the change has been implemented, and where they can share feedback or ask for support



Here's an example email message to share with your sellers <u>Template to</u> <u>welcome sellers in your organization to Sales Copilot</u>

Sales Copilot Deployment and Administrator Tasks

Install Sales Copilot Outlook and Teams apps

- ✓ Verify licensing prerequisites, build a transition plan and **start** with a pilot before deploying Sales Copilot to the whole organization.
- ✓Work with your M365 Admin to install Sales Copilot for Outlook and Teams.
- ✓ <u>Allow transcription</u> for Teams meetings. For meeting insights generated by Sales Copilot conversation intelligence, **only transcript is required**.

2. Verify security roles and email syncronization rules

- ✓ For admins of Dynamics 365, Sys admin, Sys customizer or Sales Copilot administrator role is required to customize Sales Copilot for Outlook and Teams.
- ✓ For sellers, they require either OOB role (salesperson or sales manager) or Sales Copilot user role.
- ✓Ensure Server Side
 Syncronization setup is
 complete and user mailboxes
 are successfully enabled. (this
 should already be the case for
 your existing Dynamics 365
 App for Outlook users).
 Otherwise SSS is configured as
 a user will track the first
 Outlook activity to your
 Dynamics 365.

3. Customize Sales Copilot if OOB forms are not suitable

- ✓ Log in Sales Copilot Outlook app **first** then access Sales Copilot app in Teams. <u>Update</u> <u>the forms and fields</u> for your business and publish.
- ✓When customizing, don't recreate your CRM forms and only consider the essential fields for good data quality and data required by your sellers to be their most productive. Sales Copilot customizations are not yet solution aware so you will need to replicate the forms configuration across environments.

4. Configure Sales Copilot and enable other features such as Al copilot features

- ✓ From Sales Copilot app in Teams, enable <u>suggested email</u> <u>content</u> also referred to as email insights or email suggested replies.
- ✓ Ensure a healthy change management is in place and consider that as the app evolves monthly, more features will be added. Stay up to date with the monthly update blog.
- ✓Once Sales Copilot has been deployed to your whole organization, consider removing Dynamics 365 App for Outlook if not used anymore.

Raising and tracking issues in production

When it's time to find answers to your Sales Copilot questions, there are a variety of self-support and assisted support options to provide the help you need.

The Troubleshooting Guide helps you locate the most relevant information for the problems you're trying to solve. <u>FAQ</u>

Can't find a solution yourself? Send a question to the Community and receive answers from other customers, partners, MVP's, and Microsoft employees. https://community.dynamics.com/

Raise support requests for expedited live site support. Your support ticket will be appropriate tracked and routed to a team of experts that will help you resolve your problems. CRM Support

"Leveraging AI to gain better insights faster from the data in Dynamics is a strategic priority area for Sandvik Coromant. We are very excited about Viva Sales and Sales Copilot helping us accelerating here with 'opportunity summary.' The feedback from our pilot groups has been very positive."

—Peter Hoffner CRM Product Owner Sandvik Coromant

"At Investec, we are very excited to see how we can leverage Microsoft Sales Copilot and AI within the Microsoft stack to connect our internal teams and to enhance our understanding further of prospective and current clients to ensure we are providing a best-in-class experience."

—Dan Speirits
CRM Product Manager
Investec

"The overall value of Dynamics 365 isn't contained to individual applications, it's the landscape, integrations, and data flow. Now, all of our colleagues are working with more data, in less time, to continue to exceed customer expectations."

Pepijn Karsmakers Chief Information Officer Azelis "Using Copilot for meeting summaries has saved me at least 30 minutes per meeting. Now I can copy, paste, adjust a few things, and quickly send. It has increased my velocity tenfold; my opportunities are closing faster, and my closing rate has climbed."

David Swenson
Business Development Director at Netlogic Computer Consulting

"Opportunity summary in Microsoft Sales Copilot is a huge and important leap in our direction to save more time for our sales personnel. With this capability in the hands of our sellers, they can spend more time equipping organizations with best-in-class security solutions to help make our world a safer place."

—Philip Eklund
VP of Client Engagement Platform
Securitas

"Teleperformance believes in being agile and does not want to be weighed down by analysis paralysis. While we are cautious of trying out any recent technology, we trust Microsoft products and prefer to try them quickly"

Jeff Koehler

Vice President of Enterprise Technologies at Teleperformance

Success Stories

FAQ

Q:Which license do I need to use Sales Copilot?

A: Dynamics 365 Sales Enterprise license or premium includes Sales Copilot at no extra cost. For SFDC backend CRM, there is a Sales Copilot SKU that can be purchased.

Q:Do I need CRM connectivity to use Sales Copilot?

A:Yes, a Dynamics 365 online or SFDC are required as CRM.

Q: Should I move all my Dynamics 365 Sales enterprise users who use Dynamics 365 App for Outlook to Sales Copilot?

A: Yes, Sales Copilot already covers the core features of App for Outlook with lots of added value with features such as AI copilot, conversation intelligence and collaboration spaces. You can start the transition in phases by moving a portion of your sellers first as a pilot, and later the rest of the users.

Q: If I don't use Dynamics 365 App for Outlook today, should I still consider Sales Copilot?

A: If tracking Outlook activities or bringing CRM data in Outlook was not required in the past, and thus, the App for Outlook was not installed, do consider the additional features of Sales Copilot such as AI copilot, conversation intelligence or collaboration spaces, and how these can help your business.

Q: I have 300 Dynamics 365 Sales enterprise licensed users and 500 Dynamics 365 Customer Service enterprise licensed agents using Dynamics 365 App for Outlook. Should we move all 800 to Sales Copilot?

A: No, Sales Copilot is role tailored for seller persona. Your customer Service agents can continue using Dynamics 365 App for Outlook, while sales users should transition to Sales Copilot. For hybrid personas, covering both sales and customer service, consider which app has more weight, if all use cases are supported in Sales Copilot or if feasible to use both apps as needed.

Q: Will Dynamics 365 App for Outlook be deprecated?

A: There are no plans to deprecate Dynamics 365 App for Outlook currently.

Q:Why should I transition to Sales Copilot?

A:Sales Copilot bring tremendous value for sellers: Al powered copilot for high efficiency, premium meeting experience with conversation intelligence, facilitated collaboration flow and CRM data in the flow of work. It is a SaaS application with monthly releases with new features and enhancements. Most platform energy is focused on Al-powered Sales Copilot which is available across Outlook, Teams and Dynamics 365 Sales apps.

For more FAQ, see Sales Copilot FAQ - Microsoft Support.

Sales Copilot Resources

Administrator resources

Sellers resources

Sales Copilot architecture | Microsoft Learn

Sales Copilot deployment guide for Dynamics 365 customers | Microsoft Learn

Administrator settings for Sales
Copilot | Microsoft Learn

Use Sales Copilot in Outlook

<u>Use Sales Copilot in Teams - Microsoft Support</u>

Use AI to kickstart email replies

Boost sales performance with Microsoft Sales Copilot - Training

To stay informed of upcoming updates, consult the monthly update blog.





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Appendix

- Transition Pilot Timeline Example
- UI Language support for Sales Copilot

Start with a pilot – timeline example

Define ownership Identify key scenarios Start with a pilot Training approach Communication plan **Business users launch Early adopters** IT activation for early adopters Enable early adopters' training and daily Enable deployment and initial tests by IT Enable champions and business users' training and weekly touchpoints. touchpoints Regular Office Hours for users to ask questions and provide feedback **PILOT ENABLEMENT GENERAL AVAILABILITY** Timeline Week 1 Week 2 Week 3 Week 4 Week 5 Week 6 Week 7 Week 8 Weekly steering committee meetings Gather, review and address feedback **Technical enablement** Early adopters' **Early** Early adopters' readiness adopters' pilot training materials pilot kickoff Set pilot Business users' and **KPI** review **Business users' and champions GA kickoff** goals / champions readiness Gather, review and address feedback and trainings **KPIs** materials presentation

Sales Copilot UI

User Interface Languages

Sales Copilot

Dynamics 365 App for Outlook

Arabic, Chinese (simplified), Chinese (traditional), Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hebrew, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Portuguese (Portugal), Spanish, Swedish, Thai, and Turkish.

Bulgarian, Hebrew, Portuguese (Brazil), Chinese (People's Republic of China), Hindi (India), Portuguese (Portugal), Chinese (Taiwan), Hungarian, Romanian, Croatian, Indonesian, Russian, Czech, Italian, Serbian, Danish, Japanese, Slovak, Dutch, Kazakh, Slovenian, English, Korean, Spanish, Estonian, Latvian, Swedish, Finnish, Lithuanian, Thai, French, Malaysian, Turkish, German, Norwegian, Ukrainian, Greek, Polish, Vietnamese.