

Extend Sales Copilot with Power Connectors

Bharath Varadarajan

Principal Product Manager
Microsoft Sales Copilot

Gaurav Babbar

Principal Software Engineer
Microsoft Sales Copilot

Gaurav Sisodia

Principal Engineering Manager
Microsoft Sales Copilot

Sunil Garg

Principal Group Program Manager
Microsoft Dataverse

Agenda

- What is Sales Copilot?
- Sales Copilot Extensibility
- How to extend Sales Copilot?

What is Sales Copilot?



Microsoft Sales Copilot

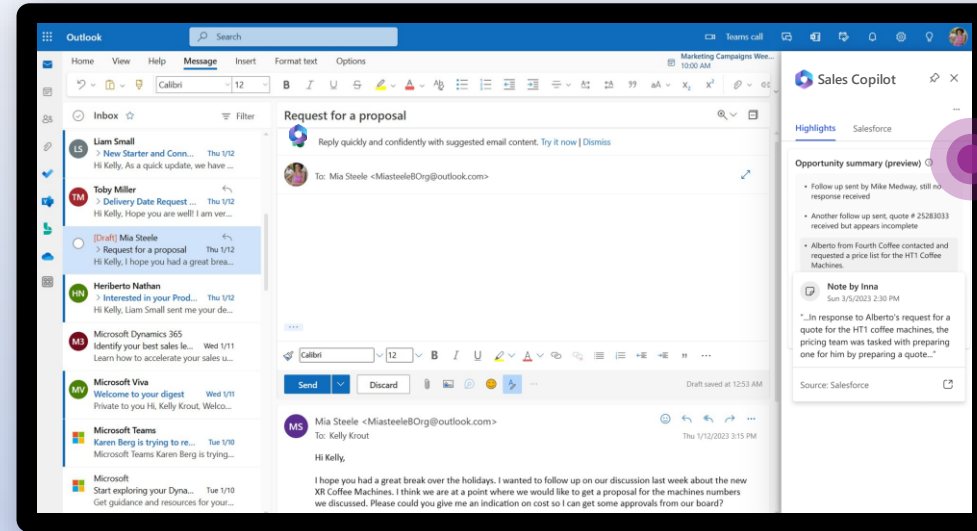
Improve productivity and close more deals faster with an AI-based Copilot designed for sellers

Unlock sales productivity
CRM task automation and auto-generated summaries to optimize your time

Personalize every customer interaction
AI-assisted customized content and recommendations to empower you to strengthen relationships

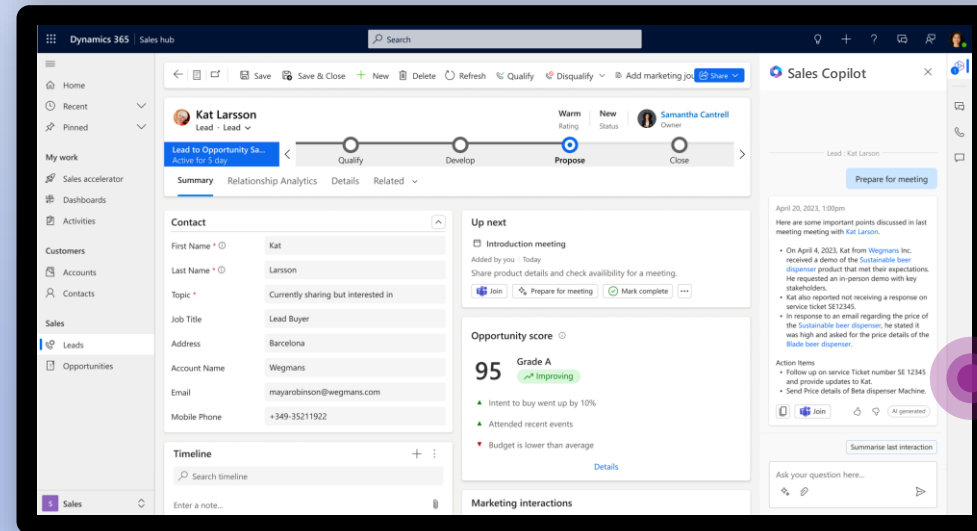
Works in the tools where sellers work
Seamlessly integrated in Microsoft 365 apps like Outlook and Teams and within Dynamics 365

Connects to any CRM system
Automatically retrieves and updates data with your CRM systems like Salesforce and Dynamics 365 without leaving your flow of work



Opportunity Summary

Outlook
Connects to
Salesforce or
Dynamics 365 Sales
and
Dynamics 365 Sales



Sales Copilot Extensibility

The background features a large, solid blue shape on the right side, which overlaps with a lighter, semi-transparent purple shape on the left. The overall design is minimalist and modern.

Let's start with a demo...

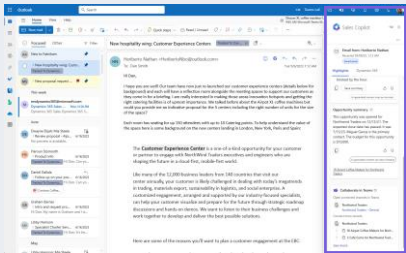
Recap: Extend opportunity summary in Sales Copilot



Sales Copilot App Experiences
in M365 (Outlook and Teams)

Microsoft Outlook

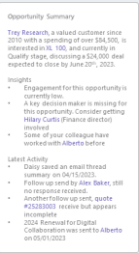
Sales Copilot
App for Outlook
Embedded Experiences



Sales Copilot
skills

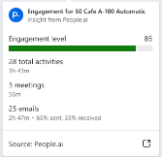
CRM Record summary

Opportunity
summary



Partner data and
insights

Engagement insights
from People.ai




Extend opportunity summary in Sales Copilot



Sales Copilot App Experiences
in M365 (Outlook and Teams)

Microsoft Outlook

 Sales Copilot
App for Outlook
Embedded Experiences



CRM Record summary

Opportunity
summary



Sales Copilot
skills



Partner data and
insights

Engagement insights
from People.ai

Contract updates from
DocuSign

Extend opportunity summary in Sales Copilot with latest contract updates from DocuSign



NANCY
SALES AGENT

Stay on top of latest contract activities in DocuSign related to CRM opportunities record summary in Sales Copilot.

- ✓ *View latest updates from partner applications related to a deal*
- ✓ *Follow a link for additional details in partner application*

The image displays three sequential screenshots of the Sales Copilot interface, illustrating how contract updates from DocuSign are integrated into the CRM opportunity summary.

Left Screenshot: Shows the 'Opportunity summary' for '50 Cafe A-100 Automatic'. The summary includes details about the contract opening on July 6th, 2010, the expected close date of June 20th, 2023, and the primary contact, Alberto Burgos. The latest activity section lists several updates, including a contract signed by Alberto and Tony on 9/7/2023. A 'Contract signed' notification is visible in the bottom right corner.

Middle Screenshot: Shows the 'Contract signed' notification expanded, providing details about the '50 Cafe A-100 Automatic Renewal Contract' signed by Alberto Burgos on 9/7/2023. The source is identified as DocuSign.

Right Screenshot: Shows the 'Account details' for 'Alpine Ski House'. The details include account name, owner (Daisy Phillips), website, type (Prospect), industry (Manufacturing), annual revenue (\$13,000,000), and employees (850). A 'DocuSign contracts' section is also visible, listing the '50 Cafe A-100 Automatic Renewal Contract' signed on 9/7/2023 and the 'ABC Company 2023 Renewal Contract' delivered on 9/3/2023.

Extend Sales Copilot skills with partner data and insights



Sales Copilot App Experiences
in M365 (Outlook and Teams)

Microsoft Outlook

Sales Copilot App for Outlook

Embedded Experiences



Sales Copilot
skills

CRM Record summary

Opportunity summary

CRM Record Details

Opportunity details

Account details



Partner data and
insights

Engagement insights
from People.ai

Contract updates from
DocuSign

Quote details from
PROS

Extend opportunity details in Sales Copilot with quoting insights from PROS SmartCPQ



NANCY
SALES AGENT

Get intelligent quote and pricing information from PROS SmartCPQ related to CRM opportunity or account records in Sales Copilot.

- ✓ *Extend CRM record details in Sales Copilot with data and insights from partner application*
- ✓ *Sellers can follow a link for additional details in the non-CRM application*

The image displays three side-by-side screenshots of the Sales Copilot application interface, demonstrating how data from PROS SmartCPQ is integrated into CRM records.

- Left Screenshot:** Shows the 'Account details' for 'Alpine Ski House'. Fields include Account name, Owner (Daisy Phillips), Website (http://www.alpineskihouse.com/), Type (Prospect), Industry (Manufacturing), Annual revenue (\$13,000,000), Employees (850), and Parent account (Contoso). Below this, a 'Quotes' section lists two items: '50 Cafe A-100 Automatic Renewal Contract' (Draft - \$50,000) and 'ABC Company 2023 Renewal Contract' (Completed).
- Middle Screenshot:** Shows the 'Quote details' for '50 Cafe A-100 Automatic Renewal Co...'. Fields include Quote name, Customer (Tailspin Toys), Opportunity (50 Cafe A-100 Automatic), Status (Draft), Total amount (\$500,000), Room for additional discount (7%), and Owner (Nancy Anderson).
- Right Screenshot:** Shows the 'Account details' for 'Alpine Ski House' with the same fields as the first screenshot. Below, the 'PROS quotes' section lists the same two items as the first screenshot. A tooltip is visible on the right side of this screenshot with the text 'Copy link' and 'Open in SmartCPQ'.

Extend opportunity summary skill in Sales Copilot

Available in 4 different seller experiences in Outlook and Teams

4 Integration Experiences

Opportunity Summary

Description:

Sales Copilot delivers **Opportunity Info** to sellers when they need it most, *include your data* and insights in the flow of work

Integration across 4 experiences:

- 1) **Outlook** Emailing Customers
- 2) **Teams** Collab Spaces
- 3) **Outlook** Scheduling and Prepping for Customer Meetings
- 4) **Teams** During Customer Meetings

Opportunity Summary

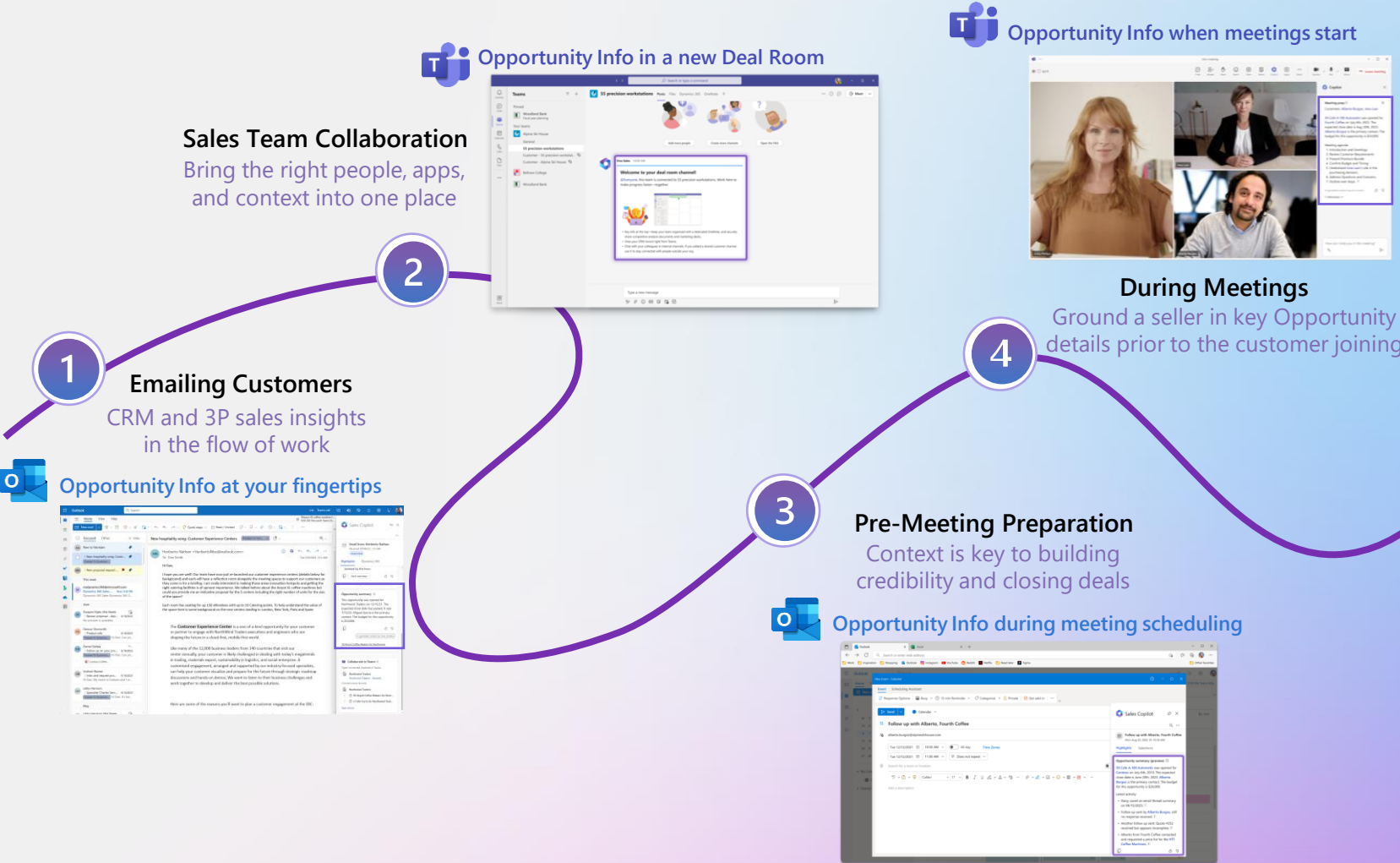
Trey Research, a valued customer since 2010 with a spending of over \$84,500, is interested in XL 100, and currently in Qualify stage, discussing a \$24,000 deal expected to close by June 20th, 2023.

Insights

- Engagement for this opportunity is currently low. [1]
- A key decision maker is missing for this opportunity. Consider getting Hilary Curtis (Finance director) involved [2]
- Some of your colleague have worked with Alberto before [3]

Latest Activity

- Daisy saved an email thread summary on 04/15/2023.
- Follow up send by Alex Baker, still no response received. [4]
- Another follow up sent, quote #25283003 receive but appears incomplete [5]
- 2024 Renewal for Digital Collaboration was sent to Alberto on 05/01/2023 [6]



Extend opportunity summary in Sales Copilot across surfaces



Sales Copilot App Experiences
in M365 (Outlook and Teams)

Microsoft Outlook

Sales Copilot
App for Outlook
Embedded Experiences

Microsoft Teams

Sales Copilot
App for Teams
Embedded Experiences



CRM Record summary

CRM Record Details

Opportunity
details

Account
details



Sales Copilot
skills



Partner data and
insights

Engagement insights
from People.ai

Contract updates from
DocuSign

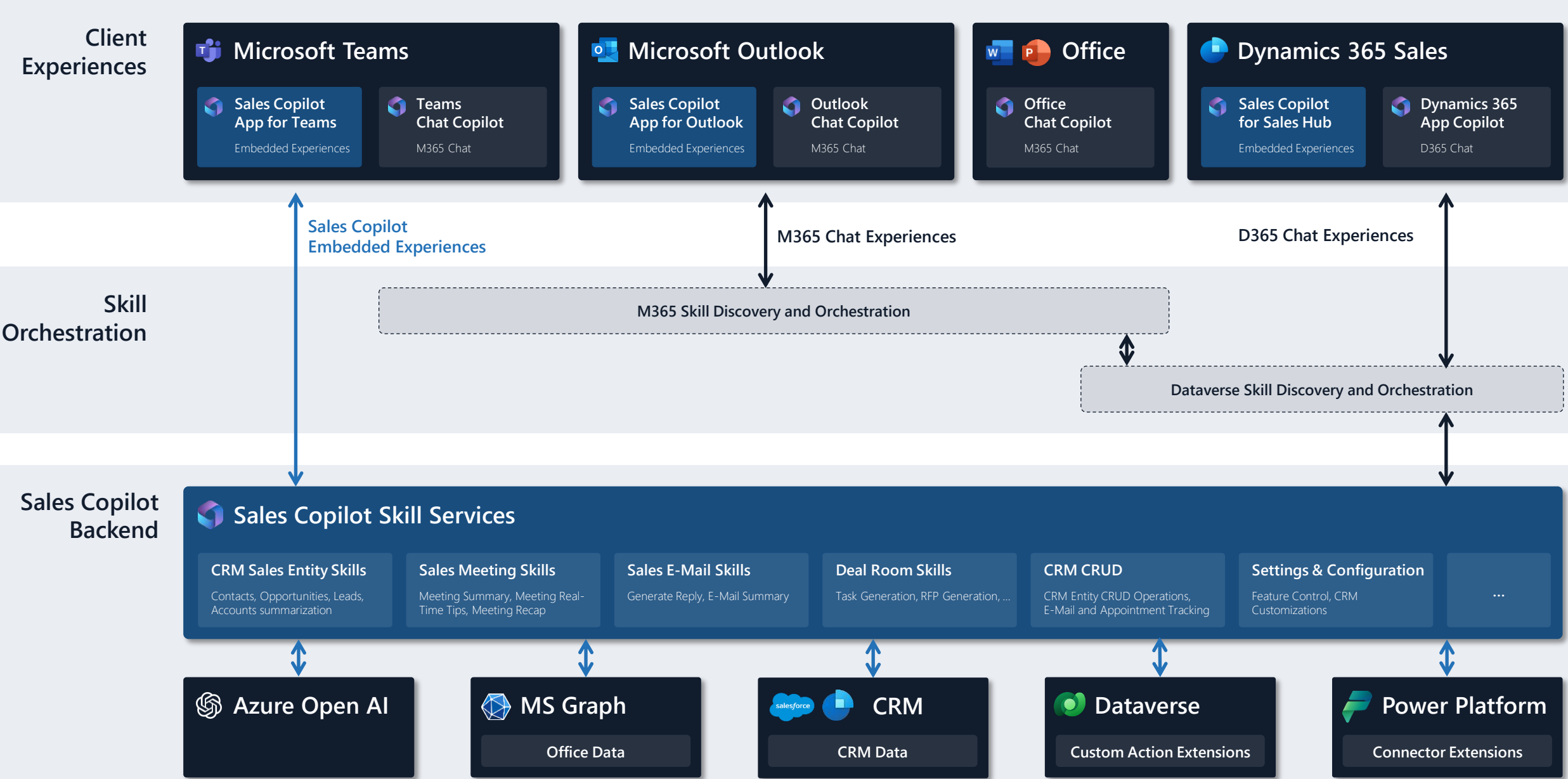
Quote details from
PROS

What it takes to extend Sales Copilot?

How to extend Sales Copilot?

1. Identify the Sales Copilot skills you want to extend
 - Initially, the list of skills available to extend may be limited. Reach out to us to ideate.
2. Build APIs based on API signatures published by Microsoft Sales Copilot
 - In future, we may work with APIs not strongly tied to signatures Microsoft publishes
3. Publish a certified Power Platform Connector Plugin with the APIs
 - Check out session tomorrow (10/11 – 2-3 PM) : Unveiling the Magic: Inside Copilot in Dataverse and AI Builder, Empowering Low-Code Makers

Extend Sales Copilot with Power Platform Connectors



Call to action!

If you are a partner,

- Learn how to use Power Connectors to extend Microsoft Copilots

Check out session on **Dynamics 365 Copilot Extensibility** on 10/11 (8-9 AM) Premier Ballroom 316

Check out session on **Unveiling the Magic: Inside Copilot in Dataverse and AI Builder, Empowering Low-Code Makers** on 10/11 (2-3 PM) Chairman's Ballroom 370

- Reach out to Microsoft to ideate how you can integrate with Sales Copilot experience

<https://aka.ms/SalesCopilotPartnerSignUp>

If you are a customer,

- Stay tuned for preview later this year
- Get updates on DocuSign contracts related to CRM records in Sales Copilot
- Get intelligent quote and pricing information from PROS SmartCPQ related to CRM opportunity or account records in Sales Copilot

Thank you

Bharath Varadarajan

Principal Product Manager
Microsoft Sales Copilot

Gaurav Babbar

Principal Software Engineer
Microsoft Sales Copilot

Gaurav Sisodia

Principal Engineering Manager
Microsoft Sales Copilot

Sunil Garg

Principal Group Program Manager
Microsoft Dataverse