

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
- Summarise 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

- Keep the momentum rolling with reminders and recommendations
- Focus on high-quality leads with auto-generated opportunity reports
- Receive next-best 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

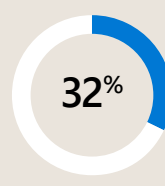


89 percent of workers with access to automation and AI-powered tools feel more fulfilled because they can spend time on work that truly matters.¹

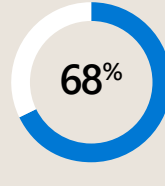
What do people want from AI?

Sellers are more likely to adopt and use tools that 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



32% of seller time is spent selling

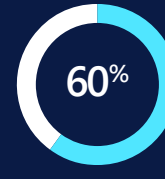


68% is spent on non-revenue-generating activities²

Three 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.

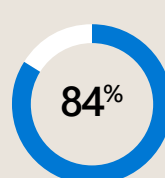
- Crafting prompts:** Many AI features respond to user input. Clear, specific and detailed prompts deliver better results.
- Iteration:** Unlike traditional computer programs, where there is only one way to do things, AI responds to subtle changes in your approach. Trying something in several different ways can lead to a better outcome.
- Double-checking content:** AI is very powerful, but it can make mistakes. Sellers should always review content for errors and ensure it's appropriate.



60% of business owners expect AI to drive sales growth⁷

Microsoft follows six principles of responsible AI

When you're looking to empower your sales team with AI capabilities, it's important to choose solutions that meet high standards of ethics and responsibility. Microsoft uses six principles to guide development and use of AI-enabled tools.



84% of executives believe that audit of AI models will be required within the next one to four years⁸

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|---------------------------|-------------------------|-------------------|
| 1. Fairness | 3. Privacy and security | 5. Transparency |
| 2. Reliability and safety | 4. Inclusiveness | 6. Accountability |

Get practical guidance for empowering your sales team with AI

Read our eBook, "The AI Advantage: Driving sales performance with next-generation tools", for a framework on choosing, implementing and using AI to help sellers and sales leaders transform how they work.

[Read now](#)

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

¹ 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom and Japan
² Can AI 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
⁷ How Businesses Are Using Artificial Intelligence In 2023 – Forbes Advisor
⁸ 2023 KPMG US AI Risk Survey Report, KPMG, 2023