

# Using Copilot in Sales



## Goals and challenges

Based on Microsoft research, selling is getting harder, with 79% of sellers saying they need to support more account and are spending 70% of their time on administrative tasks such as research, planning, generating proposals, data entry, and internal meetings.



## Sales roles



Account  
Manager



Customer  
Success



Technical  
Sales



Telesales

## Microsoft Copilot opportunity to impact key functional KPIs



### Opportunities pursued

Simplifying and automating tasks like preparing for meetings, tracking tasks, sending emails, creating proposals, and researching customer and product information can allow sellers to pursue more opportunities.



### Close rate

Improving the quality of marketing content and customer interactions such as emails and meetings can help to improve close rates.



### Deal Size

Sellers can use Copilot to get suggestions for cross selling opportunities and then research a better together story. Copilot also assists in pulling together quotes and proposals.



### Customer retention

Improving the quality of sales materials and interactions helps with retention, but the rest of the organization can contribute as well from improved support interactions and first call resolution to improved customer feedback processes to product development.



Revenue growth



Cost savings and avoidance



Improve employee  
experience

Copilot assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal.



## Copilot can assist with...

- [Accelerate customer research and sales preparation](#)
- [Improve customer meetings](#)
- [Make a customized pitch](#)
- [Quicker customer response and CRM Updates](#)
- [Respond to an RFP](#)
- [Create an unsolicited proposal](#)
- [Targeted prospecting](#)
- [Create personalized offers](#)
- [Post-sale customer insights](#)