



The business value of AI

How Microsoft Commercial Sales empowers seller success with Microsoft Copilot

Copilot helps sellers across Microsoft to create stronger customer connections, build a stronger pipeline, and close deals faster

Microsoft Commercial Sales is one of the largest sales organizations in the world, comprising sales professionals in more than 200 countries. The group manages customers across small, medium, corporate (SMC), digital, and enterprise accounts.

Like many sales organizations, sellers must balance ever-increasing performance expectations with administrative duties while continuing to provide personalized customer experiences. Non-selling duties can take up more than 70% of sellers' time, which can limit time for critical activities, such as developing sales strategies or engaging with customers. Sellers also depend on as many as 40 digital tools to get their work done, which can impact productivity and efficiency.

Now, the Microsoft Commercial Sales team is embarking on a journey to improve the lives of sellers by integrating Copilot into every customer conversation and daily workflows, empowering them to streamline processes and spend more time on high-impact activities.

Approach

The adoption team took a value-based approach when deploying Copilot to sellers, prioritizing specialist sellers who help land some of the largest deals, and then onboarding generalists, managers, support and back-office teams.

The team focused on a specific set of capabilities in Microsoft Copilot for Sales and Copilot for Microsoft 365 to drive immediate value:

Prepare for customer meetings—Sellers can use Copilot to pull insights from across Teams meetings, emails, and the CRM system; ensuring they have an up-to-date understanding of the customer's priorities before a meeting.

Improve customer meetings—During a meeting, Copilot can provide real-time sales tips and a live opportunity summary from the CRM to help keep a meeting focused.

Recap meetings—After the meeting, Copilot provides a summary and action items, which can be added to the CRM from Teams.

View, create, and update CRM records from within Outlook—Copilot can help sellers stay in the flow of work by displaying key customer information and enabling sellers to update and create opportunities from within Outlook.

Collaborate on deals—Copilot can help sellers create structured deal rooms in Teams, automatically inviting the right people, sharing context and tools.

Draft briefs and proposals—Copilot can draft sales briefs and tailored proposals using CRM records as a source while also pulling insights from emails and engagements.

Microsoft Commercial Sales Copilot Objectives

Increase pipeline

Improve pipeline and deal velocity

Improve opportunity conversion rates

Improve seller and customer experience



Copilot streamlines every part of the sale process, from automating contact updates to transcribing sales meetings and summarizing action items. The entire team works more efficiently, and that translates to more deals closed faster.

Nick Fratello
Sales Director, Microsoft

Adoption and Onboarding

To fully embed Copilot in the daily habits and workflows of sellers, the adoption team developed a hub-and-spoke adoption program with centrally aligned key messages, templates, and training resources. A customizable 7-step Copilot Success Kit helped local teams drive adoption with clear leadership sponsorship, grassroots community engagement, and hands-on skilling sessions. Program highlights include:

Dedicated adoption leads—Key divisional leaders devoted 8-10 hour each week to drive Copilot adoption.

AI influencers—A grassroots network of local managers and employees generated excitement for Copilot benefits and capabilities, helping to drive adoption.

Contests and gamified campaigns—Learning games and team competitions helped to get employees engaged and excited to use Copilot while also reinforcing new skills.

Scenario-based training—Upskilling sessions designed to illustrate impact on day-to-day work included guidance on prompt engineering and tips on CRM data hygiene to get the best results.

Dashboard tracking—Adoption dashboards display usage metrics and key stats on field enablement activities, providing visibility to senior leaders and allowing adoption leads to adjust activities as needed.

Impact

Early results demonstrate the impact Copilot is making across sales teams.

90
minutes saved per
week, on average²

78%
of sellers said Copilot helps them stay in
the flow of work²

64%
said they were able to better personalize
customer engagements²

83%
report being
more productive²

67%
report being able to spend
more time with customers²

58%
said they find CRM information
they need faster²

²Microsoft-conducted study, November 2023. Study based on a survey of 133 sellers who use Microsoft Copilot for Sales at least weekly

Lessons learned



Ground adoption with data and dashboards

Use tools like the Copilot dashboard in Viva Insights to measure readiness, adoption, impact, and sentiment.



Align with leadership

Top-down endorsement is key to driving adoption. Enthusiasm is infectious when leaders sponsor and promote adoption, as well encourage innovation, providing a space for employees to experiment with Copilot.



Make it fun

Use skill-building games and friendly competition to encourage adoption and foster expertise.



Build an influencer community

Building a community of supportive power users gives your workforce a friendly face to turn to with questions while also creating "Whoa!" moments when they see colleagues using Copilot at its best.



Map Copilot to user workflows

Tailor Copilot training by workflows and processes for each role, including recommended prompts for the most relevant, impactful results.



Customize Copilot

Train Copilot on company data to help ensure responses are relevant and in context for each role.



Prioritize skills to boost impact

Next-generation AI is easy to use, but training helps to maximize its potential. Prioritize initial training on crafting clear and specific prompts, iterating prompts to fine-tune results, and reviewing Copilot responses to ensure they are error-free and on-target.

The path forward

The sales team's AI transformation is just getting started

The Microsoft Commercial Sales team discovers new ways to leverage AI and Copilot every day, helping to bring sellers closer to customers and closing deals faster.

As the focus shifts from Copilot adoption to fluency, the next phase of the team's journey promises to be even more exciting. The team continues to work with the Product and Engineering team to develop new features that improve the lives of sellers.

The team has an exciting roadmap planned, including additional tools and features to support managers and sales operations roles as it continues to reimagine what's possible in a Copilot-powered sales function.