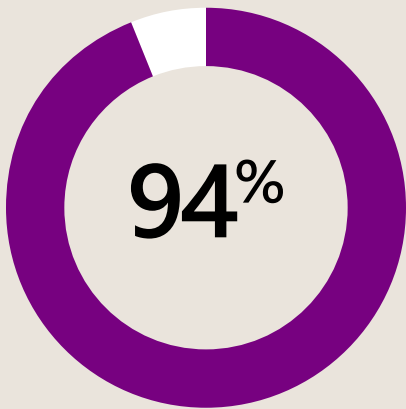


# The Future of Sales

Elevating Customer Connection  
and Productivity with AI

# Embracing the Future of Sales



94% of consumers say a positive customer experience makes them more likely to purchase again.<sup>1</sup>

Customer expectations are high and continue to rise. They want salespeople to respond instantly with seamless, personal, data-informed interactions.

As millennials become the primary buyers in B2B settings, their preferences for digital sales interactions and well-informed, authentic experiences become increasingly important.

How can sales teams keep up with growing demands—without making customers feel like just a number?

How do they tackle gigantic and ever-increasing needs for rapid response and personalized engagement?

How can chief revenue officers and sales leaders help sales teams step into the future?

## The solution: AI-powered tools and hybrid collaboration capabilities that help them:

- **Understand and connect with customers:** AI-powered insights help sellers forge more meaningful customer relationships and save valuable time.
- **Accelerate sales by focusing on what matters most:** Intelligent automation and AI content generation free salespeople from admin tasks, helping them to concentrate on customer interactions and valuable opportunities.
- **Level up their abilities:** Data-driven coaching and real-time customer sentiment insights help sellers develop skills and approaches that make a difference.
- **Team up to deliver great experiences:** Hybrid collaboration tools unite sellers with various skills in real time, breaking down silos and enabling seamless productivity anywhere.

As we explore the potential of these capabilities, we'll also provide tips for using them in ethical, secure, and people-centric ways.



01

# Understand customer needs

Today's customers expect sellers to know their needs and preferences. They want to feel seen, heard, and understood. And with every interaction with your brand—regardless of channel—customers provide essential data to win them over.

As sellers engage with more customers, there's no way for them to maintain personal connections, meet revenue targets, and handle admin tasks without help.

Sellers now have the tools to gain insights into customer needs in real time while

focusing on person-to-person interaction. With Dynamics 365 Sales, they always know what to focus on next. Here are four ways it can help.



**Customer-obsessed B2B companies are 3x as likely to expect a 10% or higher growth rates than non-customer-obsessed companies.<sup>2</sup>**

## When sellers need to...

- Increase emotional intelligence, connect deeply, and converse with empathy
- Promote the right differentiated features and benefits
- Make sure customers feel heard and prioritized
- Give customers the answers they need in the moment

## AI can help them...

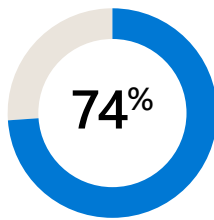
- Detect customer sentiment in conversations
- Note mentions of competitors
- Measure how much sellers talk versus listen
- Highlight all questions asked in a conversation



02

# Accelerate sales

Drafting emails. Updating CRM data. Tracking deals. Managing leads. Sellers spend a lot of time doing administrative tasks instead of selling.



**74% of sellers say they spend too much time on activities that don't generate revenue.<sup>3</sup>**

Those tasks are essential, but they aren't the best use of time for talented sellers. Instead, they should be engaging with the most valuable leads to close more deals.

Next-generation AI and intelligent automation will help your team do precisely that. Here are some ways sellers can use technology to free up time and focus on the bottom line.

## When sellers need to...

- Focus on the highest-priority activity with the best probability to close
- Make the best use of their time
- Review the most important conversations
- Personalize communications without having to draft every response individually
- Stay in the flow of work instead of switching apps
- Follow up with the correct details every time

## AI can help them...

- Streamline sales cycles through suggested next best actions
- Minimize manual data entry with contextual, real-time suggestions for updating and creating records
- Automatically categorize calls based on content and priority
- Draft email responses to customers using next-generation AI
- Enable sellers to create and edit customer CRM data in Microsoft Teams and Microsoft Outlook
- Create an automatic email summary of a Teams meeting, including data from CRM

With Microsoft Sales Copilot, your sellers can harness next-generation AI to automate tasks, gain insight, and get tailored recommendations, allowing them to focus on building customer relationships and closing deals. Sales Copilot, included with Dynamics 365 Sales Enterprise and Premium, streamlines workflows and improves engagements, helping accelerate revenue generation.



## AI adoption tips

The proportion of companies adopting AI more than doubled from 2017 to 2022.<sup>4</sup>

Sales Copilot makes work easier for sellers. To help them benefit from new technology, organizations should:

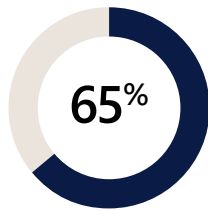
- **Communicate the benefits:** Make the features relevant to their daily work and share tips and tricks regularly.
- **Provide training and support:** Host a lunch-and-learn or a training day to help sellers understand what the new tools can do for them.
- **Showcase success:** Track the impact of AI and automation on sales performance and share these success stories with the team.





03

# Maximize potential with data-driven coaching



**65% of sales managers at high-impact sales organizations spend 20% or more of their time coaching.<sup>5</sup>**

Effective coaching works—but what makes it effective? In the past, it was a matter of intuition and experience. Now, the most influential mentors add data and AI to the mix.

AI can analyze conversations, enabling managers to identify best practices for their seller teams. By basing recommendations on proven results, managers can guide their teams more effectively and confidently.

## When managers need to...

- Design sales strategies and training with business insights on trending tracked keywords, brands, competitors, and more
- Get insights into best practices by learning more about the behaviors of top sellers
- Coach sellers about what works with customers
- Set seller quotas

## AI helps them...

- Instantly search and view conversations
- Review, compare, and highlight what's working for the highest-performing sellers
- Analyze customer sentiment and seller conversation styles
- Use insights on the status of the current sales period to set realistic goals



## Make AI a constructive part of coaching

Being transparent with sellers about using conversation intelligence and AI-driven tools in coaching and mentoring helps them understand how it will benefit them. Ensure they know how it will help them improve performance and meet their numbers.



04

# Empower collaboration



Hybrid selling is expected to be the most dominant sales strategy by 2024 due to workplace shifts and customer preferences for remote-first engagement.<sup>6</sup>

With more people working remotely, the right technology is essential to connect teams. By uniting, sharing data, and learning from insights as a community, sales teams can deliver the seamless experiences customers need.

AI and collaboration technology simplify sales collaboration wherever people work.

## When employees need to...

- Perform seamless handoffs whenever needed
- Keep records up to date based on the latest knowledge
- Keep deals moving forward wherever they're working

## Collaboration tools help them...

- Share records within a chat or collaboration channel
- Allow others to perform actions on CRM records in a conversation
- Manage the sales process from mobile devices using intuitive apps

# Keep people at the center with ethical AI



AI is a powerful tool, so it's essential to use it responsibly. Microsoft has focused firmly on ethical AI since the industry's early days. Here are a few things to keep in mind:

- **Transparency:** Be upfront about data collection and how it enhances the customer experience.
- **Privacy:** Implement stringent data privacy and security measures to protect customer information. Ensure compliance with relevant data protection regulations, such as GDPR, and respect customers' privacy preferences.
- **Bias reduction:** Be aware of potential biases in AI algorithms, which may inadvertently lead to unfair treatment of specific customer segments.
- **Accountability:** Establish clear guidelines for AI usage within the organization and hold teams accountable for ethical practices.

Microsoft explicitly designs AI solutions in its products with ethical principles built in. Learn more about [Responsible AI](#) from Microsoft.

# Optimize sales potential with AI

Empower your sellers with the right tools to balance increasing workloads and foster genuine customer connections.

Microsoft Sales Copilot frees sellers' time and talent to prioritize customer relationships, drive deals forward, and continually hone their skills. Get the full Sales Copilot experience with Dynamics 365 Sales, which includes Sales Copilot, so sellers can access copilot capabilities from their app of choice - whether that's Dynamics 365 Sales or Microsoft 365 applications.

Experience solutions that work together to deliver a comprehensive and efficient sales ecosystem for your business.

[Take a guided tour](#)

<sup>1</sup> [Top CX Trends Coming Down the Pike in 2023](#), CMSWire.com, 2022

<sup>2</sup> [Launch Your B2B Customer-Obsessed Growth Engine](#), Forrester blogs, 2023

<sup>3</sup> [Why are salespeople spending so much time working, but not selling?](#), Customer Think, 2022

<sup>4</sup> [AI Index Report 2023 – Artificial Intelligence Index](#), Stanford University, 2023

<sup>5</sup> [The WHY Behind Sales Coaching](#), Sales Readiness Group, 2023

<sup>6</sup> [The future of B2B sales is hybrid](#), McKinsey, 2022



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