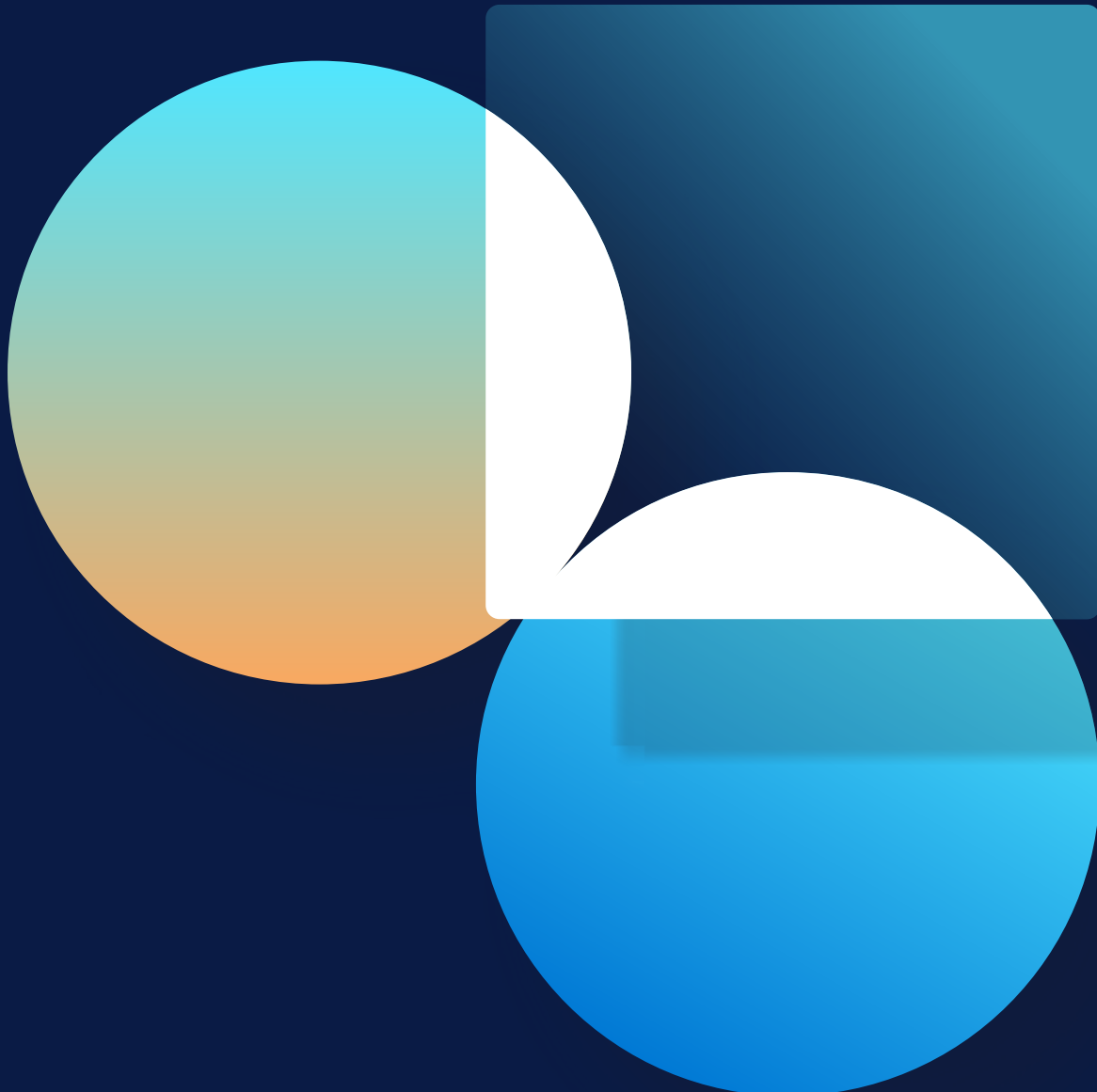


Accelerating Revenue with AI-Powered Solutions

A CRO's Guide



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This e-book is for

CROs looking to use advanced AI to help sellers increase sales, close deals, and generate more revenue.

Introduction: Help sales teams achieve more with help from AI copilots

Successful Chief Revenue Officers (CROs) understand that achieving revenue goals goes beyond just numbers. It's about creating a collaborative culture where every seller can excel, focusing on customer experience and deploying the right technology to support these efforts.

When applied to unified data, next-gen AI and analytics can significantly enhance sales performance. These tools offer real-time customer insights, enhance seller productivity, and promote collaboration.

In this e-book, we'll explain how to address critical challenges using copilots and other intelligent solutions in Microsoft Dynamics 365 Sales and Microsoft Dynamics 365 Customer Insights. You'll discover how to help your team reach new heights, boosting revenue and productivity.

A woman with dark hair and glasses, wearing a dark green jumpsuit, stands in a factory or industrial setting. She is holding a tablet computer and looking upwards and to the right. The background is slightly blurred, showing industrial equipment and structures.

“

At Leatherman, we are thrilled about the potential of generative AI and Microsoft Copilots to advance our business. We are beginning to realize the benefits of improved productivity, streamlined processes, and personalized customer experiences. This technology will undoubtedly propel us towards greater innovation and success.”

Liz Lee
IT Director, Leatherman Tool Group¹

¹[Microsoft Sales Copilot, Dynamics 365 Customer Insights, and cloud migration reshape the future of business - Microsoft Dynamics 365 Blog,](#) July 18, 2023

1

Empower sellers with 360-degree customer insights

When sellers deeply understand customers, they can personalize the buying journey effectively. Guidance enriched by AI helps sellers engage customers at the right time in the right way.

Take action

- Give sellers critical details: Provide quick access to up-to-date customer details, meetings, emails, and relationship history.
- Maximize revenue potential: Identify high-value customers using predictive insights and allocate resources wisely.
- Know the best action: Offer prioritized recommendations for engagement activities and timely notifications.

2

Increase the accuracy of revenue forecasts using AI and analytics

Accurate sales forecasting is a strategic advantage. It helps you monitor performance, allocate resources, identify risks, and improve seller performance. AI-powered predictive forecasting boosts accuracy by analyzing past data and the sales pipeline to predict future revenue.

Take action

- **Expand your data universe:** Expand your data sources to enhance AI forecasting and break down organizational silos.
- **Take more control of revenue:** Focus on critical areas of the sales funnel and track trends.
- **Keep sales on track:** Keep sales on target with custom push notifications for deal risks and bottlenecks.

3

Improve seller focus and productivity

Automation and AI can free up 20 percent of a sales team's capacity, enabling them to focus on customers and closing deals.² Eliminating repetitive tasks gives them more time to build relationships as trusted consultants.

Take action

- **Reduce mundane tasks:** Improve seller focus and productivity with AI-powered opportunity scoring, automated data capture, and task assistance. For example, generative AI can rapidly generate contextual emails using CRM data.
- **Stay in the flow of work:** Collaborate on deals and update customer records in the flow of work with automatic data syncing.
- **Ensure sellers are always prepared:** Give them AI tools that summarize notes and emails, providing valuable context for productive conversations.

²"[How top performers outpace peers in sales productivity | McKinsey](#)," July 6, 2023



With Dynamics 365's rich ecosystem, we were able to help the sales teams focus on core selling. The sales teams have a 360-degree personalized view of key data points like market intel, client contacts, client communication history, win trends, and the ability to manage strategic account planning effectively on a single platform."

[Read the story >](#)

Saikrishna Kaparthy
Associate Group Manager, Sales
Effectiveness and Enablement, Infosys



4

Deliver real-time coaching using intelligent automation

Coaching increases seller performance—especially when it’s based on the latest data drawn from real customer interactions, analyzed using AI. Connecting seller interactions and behaviors to sales success enables you to provide objective feedback that boosts seller confidence and drives revenue.

Take action

- **Identify coaching opportunities:** Get insights into your top performers and KPIs to discover how others can learn from their success.
- **Synthesize customer sentiment:** Get in-the-moment insight about customer emotion, competitor mentions, sentiment, and priorities in calls to enable guided selling via conversation intelligence.
- **Share the right coaching at the right time:** Provide timely, opportune coaching by understanding who needs help and where they can improve.

5

Maximize collaboration and cross-organizational impact with connected solutions

As organizations shift to digital-first selling, breaking down barriers between sales and marketing is more important than ever. Integrating data and enabling collaboration supports a holistic view of the customer, creates a better buying and selling experience, and helps drive ROI.

Take action

- **Deliver connected customer journeys.** Combine data with real-time journey orchestration and next-generation AI and tailor interactions precisely to customer needs.
- **Engage customers in real time:** Design, predict, and deliver content through the right channels in the moment of interaction for unique customer journeys.
- **Gain holistic insights into customer needs:** Unify and enrich marketing, sales, and service data to form a clear picture of your customers—and foresee future opportunities in real time with AI.



Opportunity summary in Microsoft Sales Copilot is a huge and important leap in our direction to save more time for our sales personnel. With this capability in the hands of our sellers, they can spend more time equipping organizations with best-in-class security solutions to help make our world a safer place.”

[Learn how Securitas uses Dynamics 365 >](#)

Philip Eklund
Vice President of Client Engagement
Platform, Securitas³

³“Microsoft Sales Copilot, Dynamics 365 Customer Insights, and cloud migration reshape the future of business - Microsoft Dynamics 365 Blog,” July 18, 2023

Microsoft brings the power of AI to sellers everywhere

Help your sellers focus on ROI and strengthen customer relationships with AI assistance from Copilot in Dynamics 365 Sales, the next-generation AI offering for sellers. Use Copilot to:

- Write email replies.
- Draft meeting summaries.
- Update customer records.
- Pull relevant information from SharePoint, Outlook, and Microsoft Teams.

Copilot complements advanced capabilities built into Dynamics 365 Sales, an intelligent, full-funnel sales and marketing solution that unifies siloed data to support AI insights, seamless collaboration, and intuitive productivity tools.

Enhance customer understanding and personalize journeys with Microsoft Dynamics 365

Dynamics 365 Customer Insights and Dynamics 365 Sales work together to give sellers the most relevant information about customer activities and preferences. This integration makes it easier to identify high-value leads and craft personalized sales strategies that close more deals.

With actionable customer insights at their fingertips, sellers can provide added value and build stronger relationships, all within a streamlined workflow that supports data-driven decisions when they matter most.

[Learn more about Dynamics 365 Sales](#)

[Learn more about Dynamics 365 Customer Insights](#)

