

# Microsoft Copilot for Sales

## Course Overview

The Microsoft Copilot for Sales course is aimed primarily at sales professionals seeking to improve their efficiency and effectiveness through the use of tools based on artificial intelligence.

## Pre-requisites

To participate in this course, the following prerequisites are recommended:

- Basic understanding of sales processes and strategies.
- Familiarity with Microsoft 365 applications such as Outlook, Teams, and Excel.
- Access to Microsoft Copilot and related Microsoft 365 tools (via subscription or organization access).
- Basic computer proficiency and internet navigation skills.
- Willingness to dedicate the time necessary for lectures, practical exercises, and assessments.

## Course Objectives

- Understand the concept of customer management and its benefits for sales.
- Learn to use Microsoft Copilot for Sales to manage opportunities and the sales funnel.
- Apply customer lifecycle stages using Microsoft Copilot for Sales.
- Identify best practices for improving customer relationships and increasing sales.
- Automate and optimize tasks like tracking, scheduling, and reporting.
- Customize action plans and email sequences per customer segment.
- Evaluate performance through dashboards and reports.

## Course Content

### Module 1: What is Microsoft 365 Copilot?

- - Microsoft 365 Copilot overview: The copilot system
- - Employee aptitude and the AI work paradigm
- - The advantages of AI for every job
- - Prompts and natural language
- - Where does Copilot apply?

### Module 2: Implementation of Microsoft Copilot for Sales

- - Installing Microsoft Copilot (by administrator)
- - Installing the Copilot for Sales add-in for Outlook
- - Using Microsoft Sales Copilot with Teams
- - Install Copilot for Sales

### **Module 3: How to Use AI to Boost Sales in Organizations**

- - Using AI to improve sales communication
- - Generating AI-enhanced sales meetings
- - How to use CRM data with AI
- - Use of collaboration spaces
- - Customizing Microsoft Copilot

### **Module 4: Microsoft Copilot for Sales in Outlook**

- - Main utilities
- - Connect a contact to the CRM
- - Create a contact in the CRM from Copilot for Sales
- - Activity management from the CRM
- - Using Copilot to create messages
- - View and register an email summary to the CRM
- - View a summary of opportunities

### **Module 5: Microsoft Copilot for Sales in Teams**

- - Creating a meeting in Teams in a Sales environment
- - Using the Microsoft Copilot App for Sales during a meeting
- - Generate a sales meeting summary
- - Creating tasks from a sales summary
- - Share a CRM record in a Teams conversation
- - Viewing and updating records
- - Collaboration spaces in Copilot for Sales

### **Module 6: Use of Responsible AI in the Field of Sales**

- - Aspects to take into account when generating content
- - How to manage email summaries
- - How to manage meeting tracking with Copilot for Sales
- - How to manage opportunities

### **Module 7: The Customer Management Process with Microsoft Copilot for Sales**

- - The life cycle of customer management will be analyzed using Microsoft Copilot for Sales