

CRM connect

Discover Dynamics 365 Sales
Agents helping your Sales
Reps meet their goals





Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Kelly



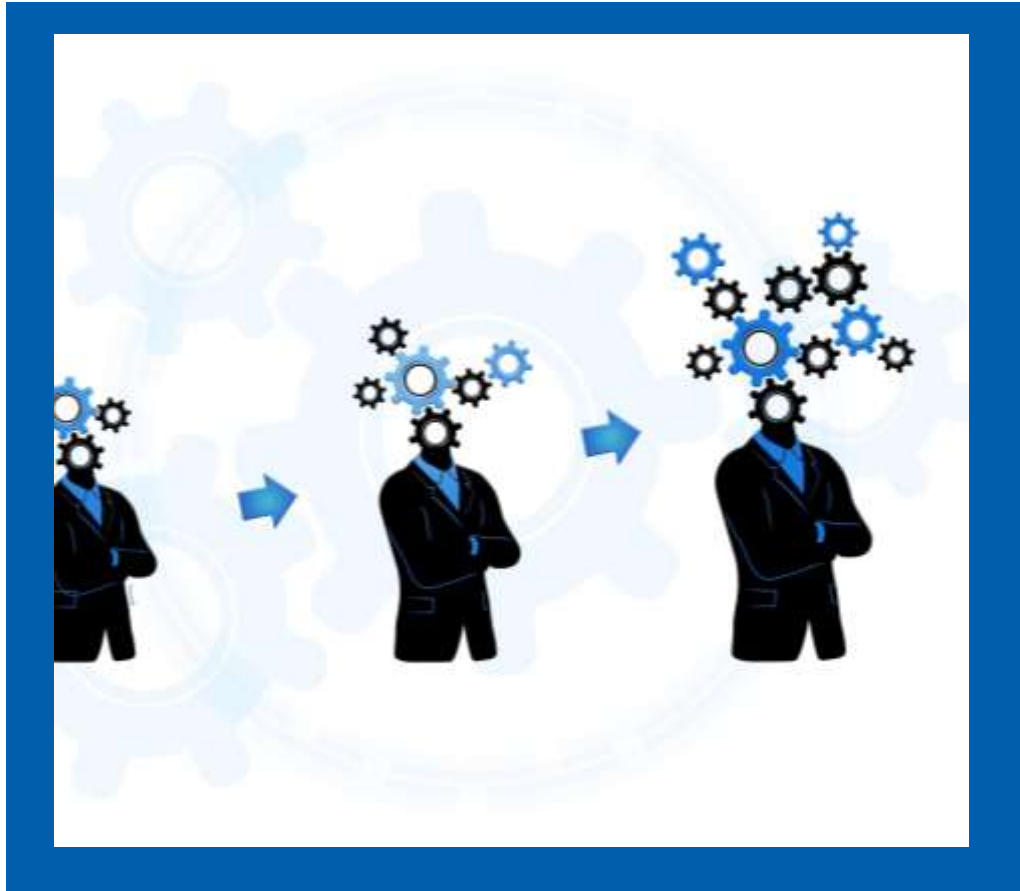
Agenda Overview

- Introduction
- Sales Co Pilot
- Research Agent
- Qualification Agent
- Communication Agent
- Goals and Forecasts
- Q&A's



Introduction

Importance of Sales Agent Functionality



Automation of Key Processes

Sales agent functionality automates routine tasks, saving time and allowing sales teams to focus on more strategic activities.

Improved Lead Management

Effective lead management provided by sales agents increases the chances of converting prospects into customers.

Enhanced Communication

Fostering better communication within the sales team leads to collaboration and improved customer interactions.

Increased Efficiency

Higher efficiency allows sales teams to spend more time closing deals rather than managing administrative tasks.

3 Aspects to the Qualification Agent functionality

Research, Qualification & Communication



Sales Co Pilot



Demo



Research Agent

Role and responsibilities



Information Collection

The Research Agent gathers vital information on leads, competitors, and market trends to support strategic decisions.

Market Trends Analysis

Analyzing market trends helps the sales team understand the competitive landscape and adapt their strategies accordingly.

Supporting Sales Decisions

The intelligence provided by the Research Agent aids the sales team in making informed decisions that drive success.

Integration with external data sources



Enhanced Research Capabilities

Integrating external data sources significantly enhances the Research Agent's capabilities, allowing for more comprehensive analysis.



Broader Information Scope

The integration of various data sources broadens the scope of available information, empowering sales agents with better insights.

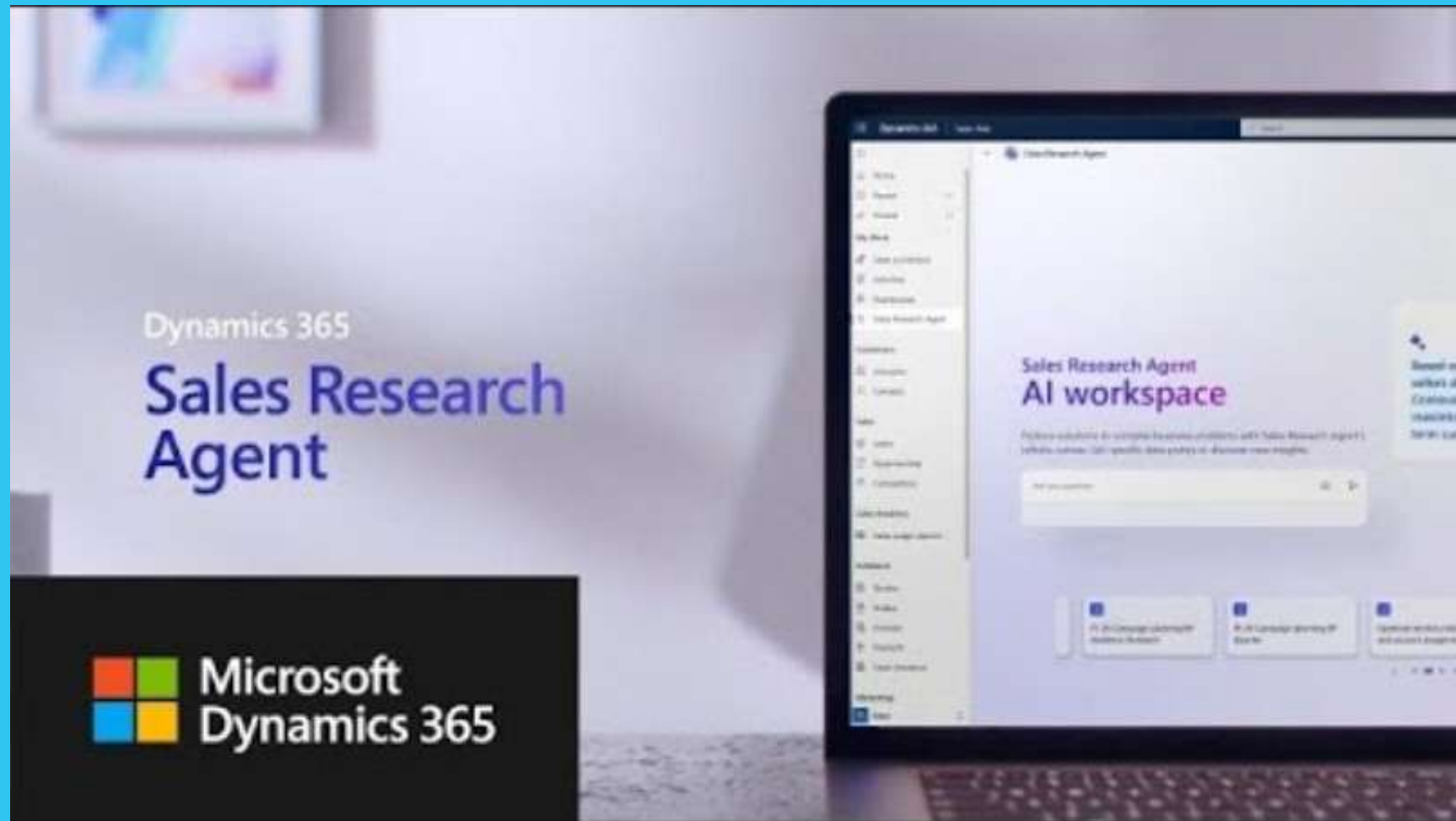


Data Source Examples

Examples of external data sources include social media platforms, market reports, and customer feedback channels.



Demo

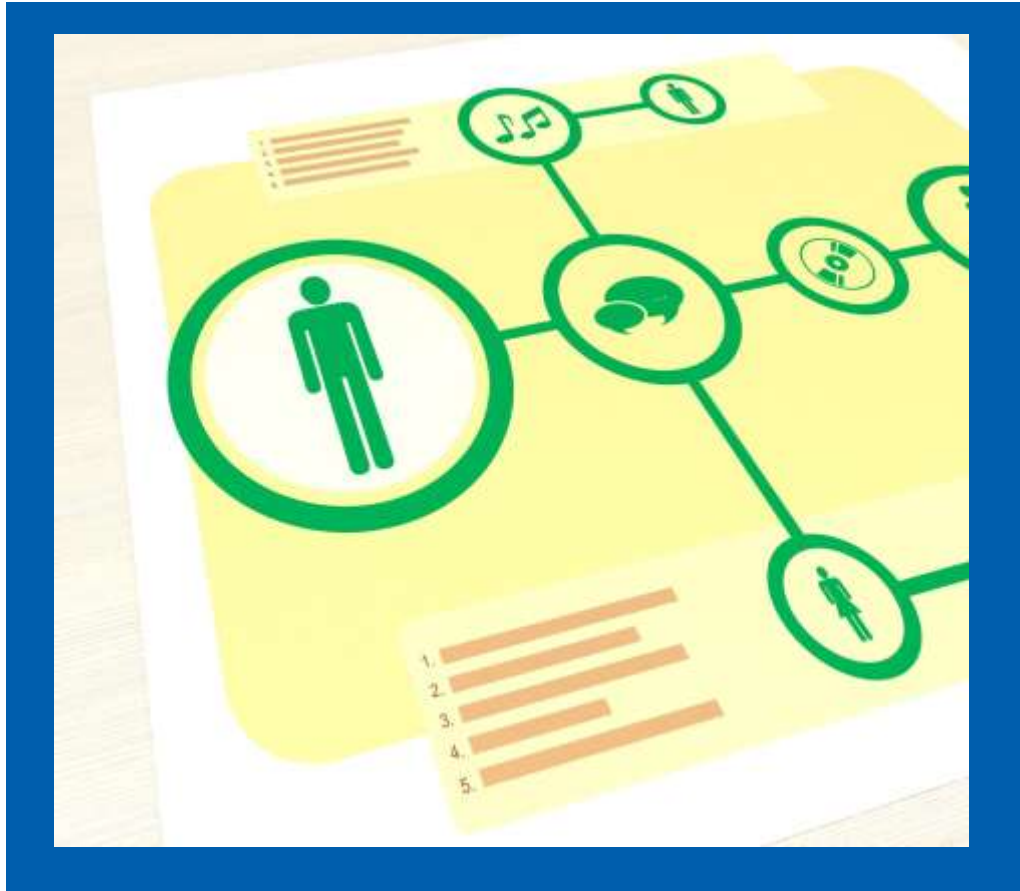


[Introducing the Sales Research Agent in Dynamics 365](#)



Qualification Agent

Lead scoring and prioritisation



Importance of Lead Scoring

Lead scoring systems help businesses identify which leads are most likely to convert, improving sales efficiency.

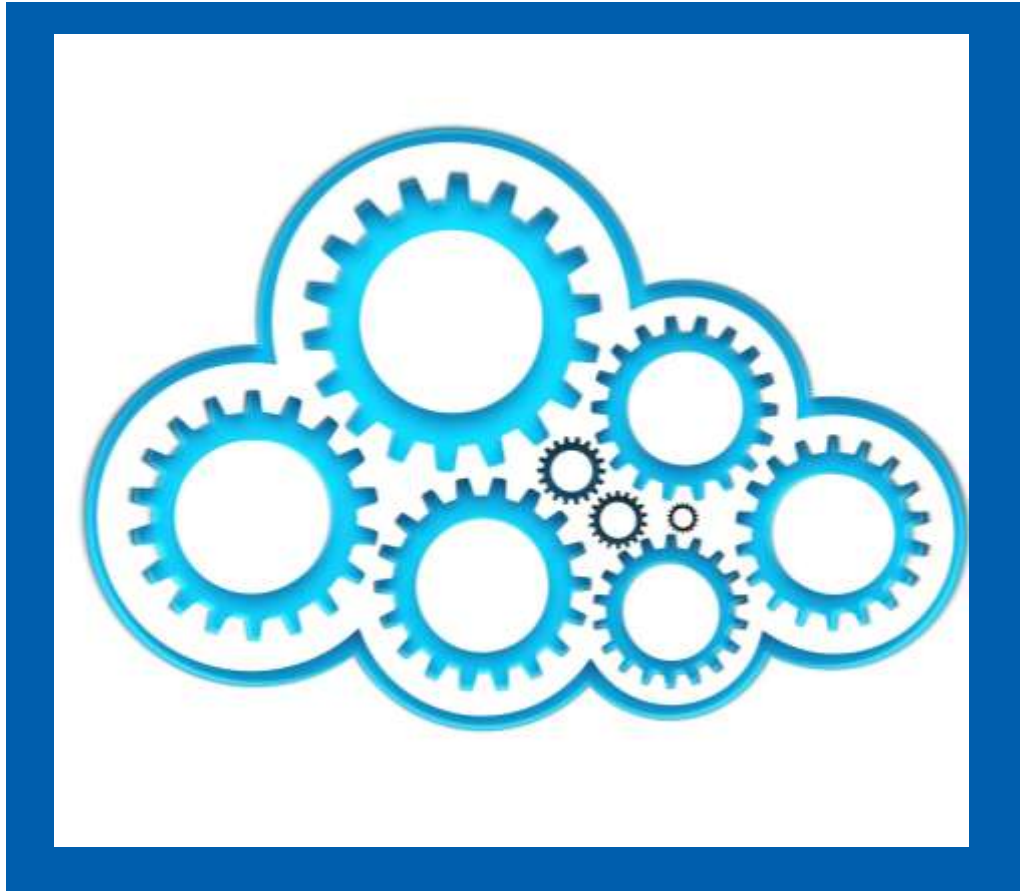
Effective Time Allocation

Prioritising leads allows sales agents to focus on high-potential prospects, maximizing their time and resources.

Maximising Conversion Rates

Utilising lead scoring techniques can significantly enhance conversion rates and overall sales performance.

Automated qualification process



Streamlined Lead Handling

Automated qualification processes simplify the management of leads, enhancing efficiency in sales operations.

Reduced Manual Effort

By automating the qualification process, organizations can minimize manual tasks, allowing teams to focus on strategic activities.

Faster Decision-Making

Speeding up the qualification process allows sales teams to make quicker decisions and respond to opportunities promptly.

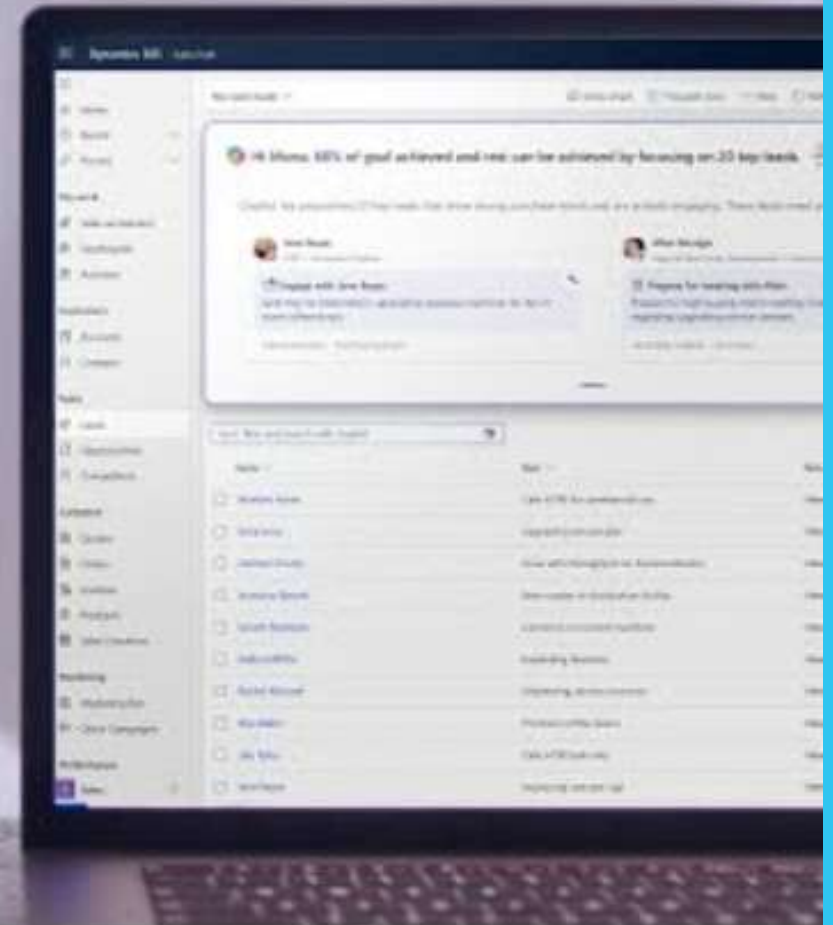


Demo



Dynamics 365 Sales Qualification Agent

 Microsoft
Dynamics 365



[Introducing the Sales Qualification Agent for Dynamics 365 Sales](#)



Communication Agent

Automated email and messaging



Efficient Outreach Management

Automated email and messaging streamline outreach efforts, improving efficiency and reducing manual workload significantly.

Scheduling Features

Scheduling features in automated messaging allow users to plan communications ahead of time for optimal engagement.

Personalisation of Communications

Personalising communications enhances engagement, making recipients feel valued and more likely to respond positively.

Personalised communication strategies



Data-Driven Insights

Utilising data analytics helps identify specific needs and preferences of leads for tailored messaging.

Tailored Messaging

Tailoring messages according to insights increases engagement and conversion rates among potential leads.

Strengthening Relationships

Personalised communication fosters stronger connections and trust between the brand and leads, driving loyalty.



Goals and Forecasts

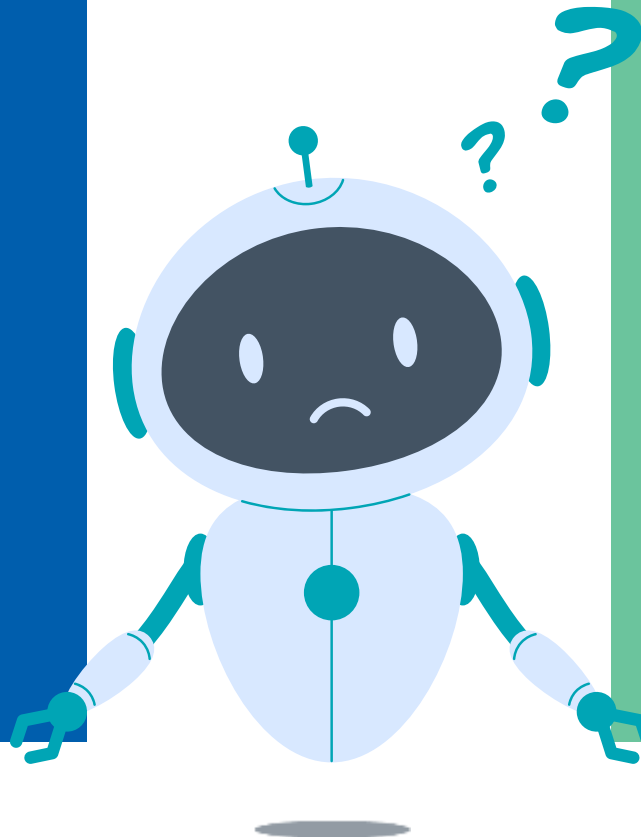
What's the difference?

Goals

- Define, Measure and track specific objectives
- Have a hierarchy so can be configured to cover entire teams as well as individuals
- Specifically about performance

Forecasts

- Used to predict future Sales based on the Pipelines
- Can highlight gaps in the Pipelines and potential for Proactive actions
- Can help drive Sales Strategy





Demo

Q&A

Thank you!



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THURSDAY 15th MAY 2025

