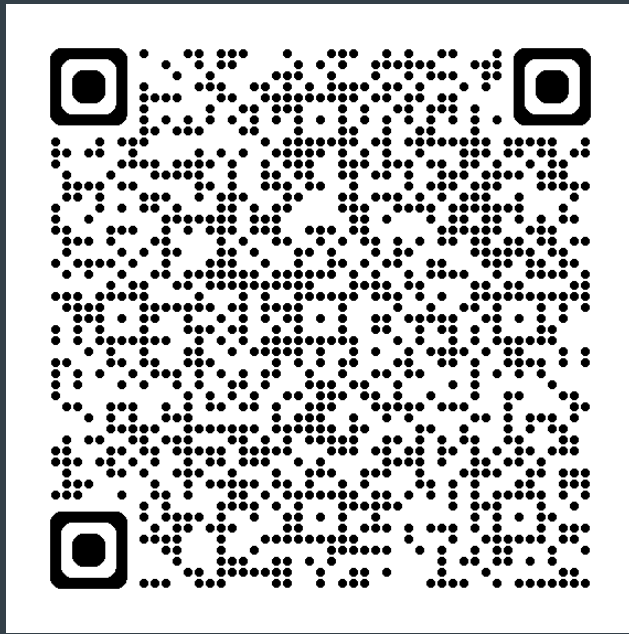


CRM connect

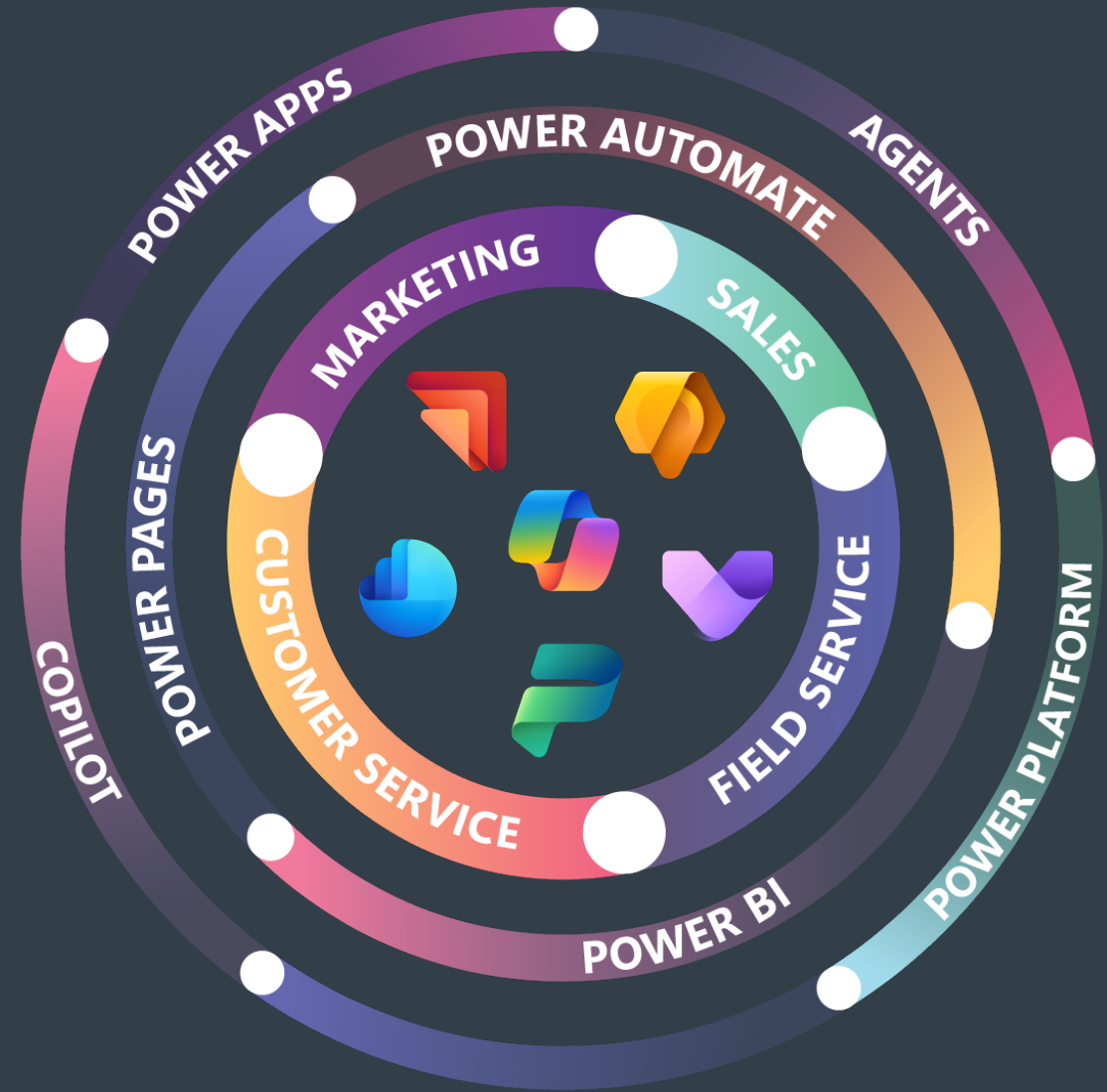
5 Sales Features and 4 AI Agents that your team can't afford to ignore



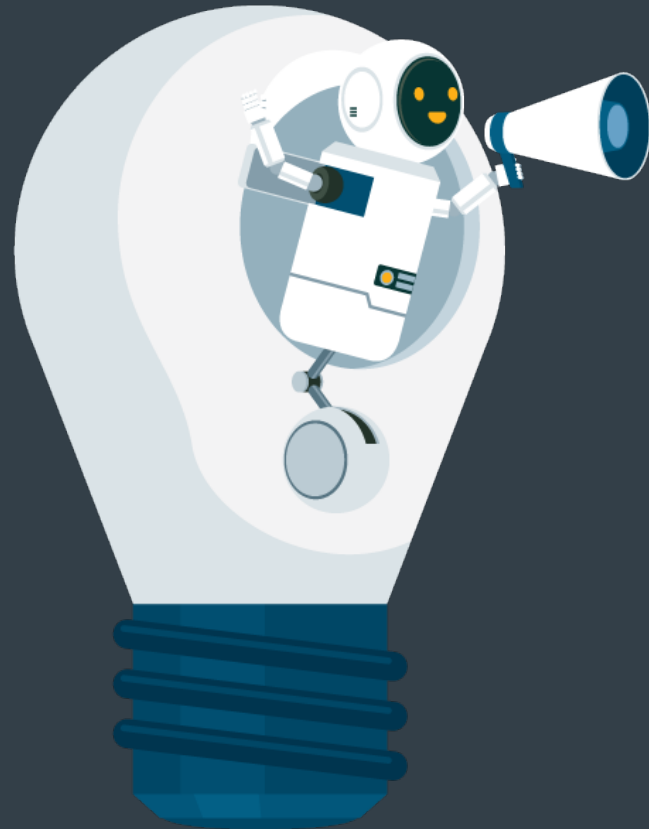
This session involves a live demo with real data required, so please scan the QR code and enter your information as accurately as possible.

By filling in this form, you consent to your data being used during the live demonstrations and understand it will be visible to other members of the audience.

This session is not recorded, and any data entered will be removed from the demo system after this session. It is possible that images may be captured whilst your data is on the screen.



(4) Sales Agents of our new world!



4 Agents of Sales and the Cost of using them.

- Agent manager and AI optimization
- **Sales Research & Engage Agent (SQA)**
- **Sales Opportunity Agent (Research)**
- **Sales Close Agent (Engage)**
- **Sales Data Enrichment Agent**
- *Costs and Considerations*

5 Features of D365 Sales you should be using



What we will cover:

- Sales Agents of the New World!
- Form Fill Assist Toolbar
- Visualise with Co-Pilot
- Natural Language Smart Grid
- Smart Paste



Agent manager and AI optimization hub



Dynamics 365 AI hub
Create, manage, and monitor AI agents to automate and scale your workflows to drive revenue. Shape how AI supports your org and helps sellers focus on closing what counts.

Agent manager
Discover and publish AI agents to automate your sales workflows.
[Create and manage agents](#)

AI optimization hub
Monitor and measure how agents are creating value and driving impact.
[See insights](#)

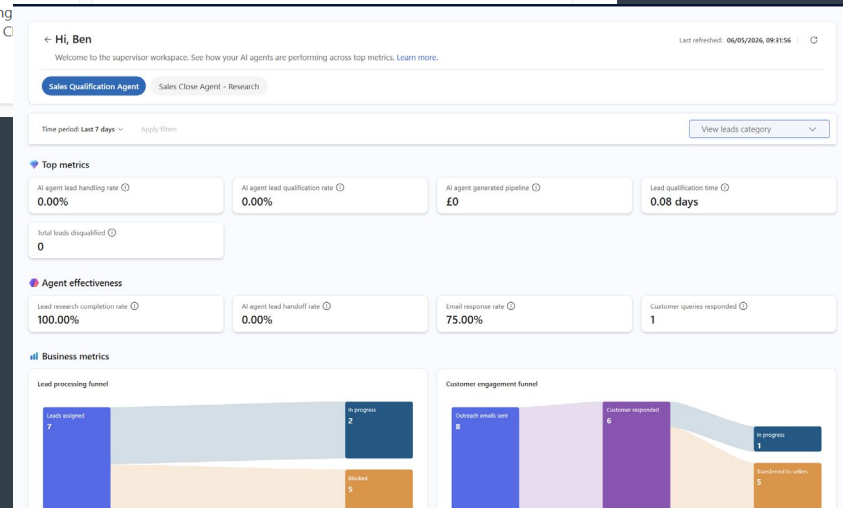
Learn how AI agents work

Sales Qualification Agent
Identifies, engages, and qualifies leads based on their buying interest and your ideal customer profile. Delivers high-impact outreach and...
[Learn more](#)

Opportunity Research Agent
Uncover deal insights and risks early in the sales cycle, flagging deals, competitive threats, and decision-maker changes from C...
[Learn more](#)

Sales Agents in D365 Sales
Sales Qualification Agent, Sales Close Agent, Sales Research Agent, Sales Development Representative, Sales Representative, Sales Leader, Lead qualification and..., Opportunity research, and autonomous sales, Sales planning and Cps.

- The place to setup and configure your agents + Insights to agent data
- Accessed through the settings pane in the Sales Hub
- Create and Configure your Agents with Agent Manager
- Inspect your Agent insights with the AI optimization Hub.
- Microsoft Marketing Videos 😊

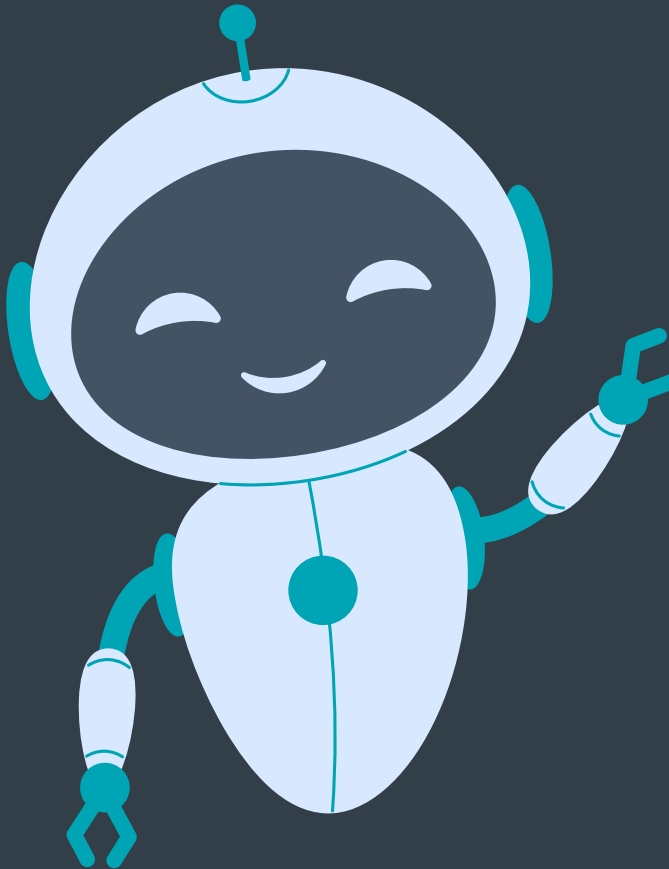




Agent manager and AI optimization Demo



(Lead) Research Agent Overview



The Research Agent provides insight — not action on filtered leads
In new Dynamics CRM solutions its already added to the site map.
Accelerates the earliest stages of the sales cycle by removing the need for
time-consuming manual research.

- Company background and industry context
- Recent news and market activity
- Key decision-makers and stakeholder information
- Competitor insights
- Relevant engagement and interaction history (timeline summary)
- Accessed either through the navigation of the Sales Hub or using the Copilot (full) summary on a lead (once the research agent step has been completed)
- Researching uses Copilot Credits

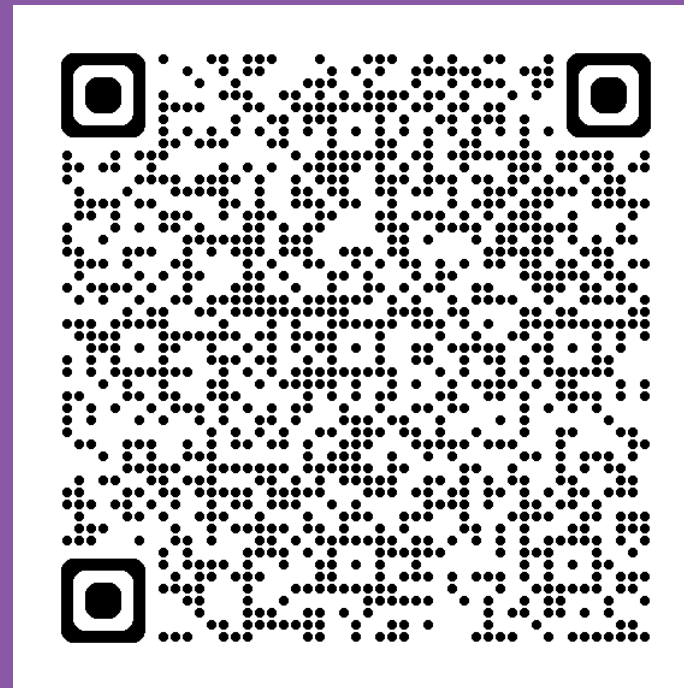


Research Agent Demo

The Research Agent equips sellers with the insight they need to make an informed first contact.



SQA Microsoft Summary



Try interacting with the Sales Qualification Agent!



Engage Agent Overview

- Processes Leads based on filtered criteria
- Autonomously produces AI populated emails and engages with the potential prospect. (Also has an option for templated responses)
- Uses information from your company website for the tone and content of the email.
- Validates the email address on the lead
- Hands off to a Human based on the requirements defined (round robin) – Notification to Human on assignment
- Can **Disqualify** a Lead
- Lead records appear in specific views
- Uses Copilot Credits

Edit Sales Qualification Agent On Apply changes Stop agent

Research and engage Last saved by Ben Humphries on May 05, 2026, 07:02 PM

Workflow

- Automation
- General
 - Agent profile
 - Company info
 - Products
- Guidance
 - Selection criteria
 - Email instructions
 - Email address validation
 - Handoff criteria
 - Assignment rules
- Knowledge
 - Research
 - Agent emails
- Simulation
 - Outreach emails

Automation level
Choose what the agent should automate and when to hand off to a seller. [Learn more](#)

Research Default

If you select this, the agent will:

- Gather lead insights
- Draft outreach emails for seller review
- Identify lead fit based on research results

Engage

If chosen with research, the agent will also:

- Send personalized emails to leads
- Follow up and respond to customer questions
- Engage until leads show interest and fit, then hand off

Prerequisites
For the agent to work, set up a mailbox, a Dataverse app user, and other required steps. [Learn more](#)

Bing search Done

Agents need Bing search to find and retrieve answers from your data sources. [Learn more](#)

[Accept terms](#) Refresh

Create app in Azure Mark as done

An Azure AD app is required to securely authenticate the agent's Dataverse Application User, enabling it to act independently via app-based access. [Learn more](#)

[Set up](#)

Create shared mailbox Mark as done

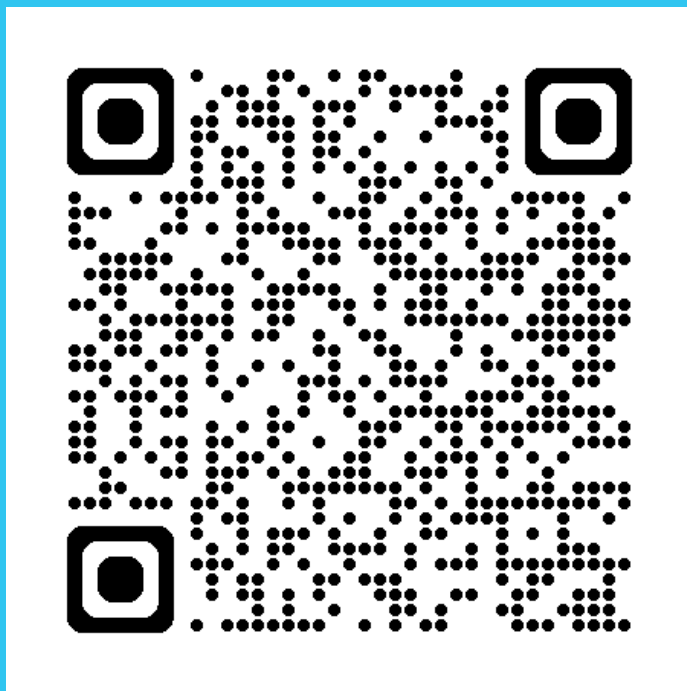
Create app user in Dataverse Mark as done

[Continue](#)

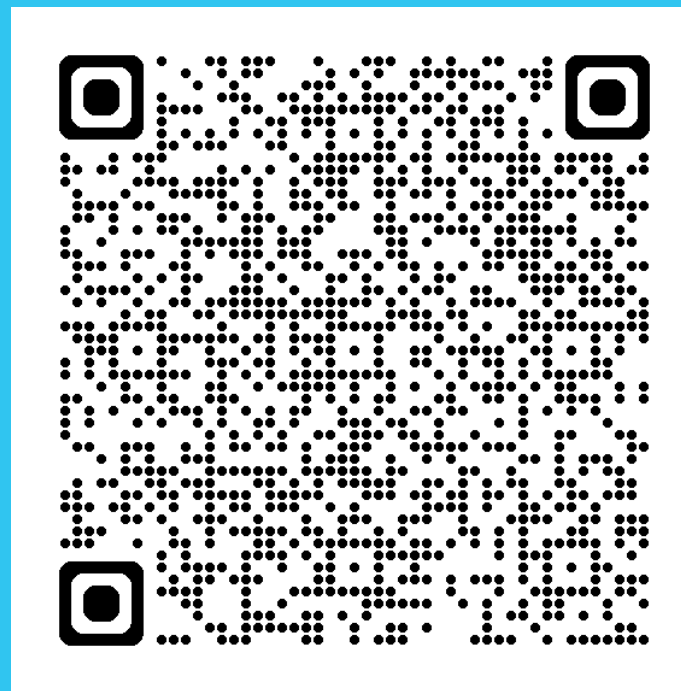


Engage Agent Demo

The Engage Agent interacts with Leads (via email) autonomously to gather prospect requirements before handing off.



SQA Microsoft Summary



Try interacting with the Sales Qualification Agent!

Opportunity Research Agent Overview



Summary

Low risk: Early-stage deal with strong financial backing and AI focus

- Deal is only **1 day old** with no recent activity but Amazon UK shows **strong growth and profitability**.
- Amazon's **£8 billion AWS investment** and AI skills training highlight urgent tech modernization needs.
- Missing **economic buyer and champion** roles create potential timeline uncertainty.

Deal value is moderate at £51,000 but aligns well with Amazon UK's strategic priorities. Explore the full insights for next steps and risk mitigation.

22nd April - Saved
Opportunity - Opportunity

Amazon UK Account | Est. close date | £51,000.00 Est. revenue | # CRM Connect Co Pilot App Registration Owner

Lead to Opportunity Sal... Active for 16 days

Qualify | Develop (3 D) | Propose | Close

Opportunity information

Topic: 22nd April

Contact: Jeff Besos

Budget amount: £50,000.00

Currency: British Pound

Purchase Timeframe: ---

Purchase Process: ---

Forecast Category: Pipeline

Company: ---

Up next

Friday Meeting
Added by you • Overdue (09:00)

Show more

Open | Mark complete

Assistant

Notifications

1 reminder

Recent meeting Friday Meeting

Timeline

Search timeline

Enter a note...

Highlights

- A meeting was scheduled via Microsoft Teams to discuss matters related to the Friday meeting.
- An inquiry was made to confirm an estimated budget of £77k and a closing date of May 13, 2026.
- Initial contact was made to discuss Alumasc's building envelope and water management

Stakeholders

JB Jeff Besos Stakeholder

Sales team

- Same Concept as the (Lead) Research Agent but supports a more granular configuration
- Researches Opportunities based on specific filters
- Define Research insights refresh rate based (Credit Consumption Consideration) – Fast moving markets
- Uses the open web for research insights (additional resources can be added)
- Define your competitors as well as insights from the open web
- Specify Opportunity Risk Criteria that suits your business
- Specify Opportunity Importance.
- Information displayed on the header of the Opportunity record and opens in to full summary



Opportunity Research Agent Demonstration

[Opportunity](#)

Sales Close Agent Overview



Same concept as the Engage Agent element (SQA) on the Lead

Autonomously Engages with the Contact on the Opportunity

Sends emails based on defined agent personality or tone of voice – emails are based on a template you define

Knowledge Sources

Agent Playbook Defines how the agent engages with customers – Configurable to match your sales approach.

Product Knowledge - upload local files, such as PDFs or other documents, for the agent to use as knowledge input

Create Sales Close Agent - Engage Preview Draft Assisted setup Save Start agent

Last saved by Ben Humphries on 07 May 2026, 10:09 pm

- Prerequisites ✓
- General
- Agent profile** ✓
- Products ✓
- Guidance
- Target customer ✓
- Email delivery ✓
- Email content ✓
- Knowledge
- Knowledge sources

Agent profile

Manage the agent's details that'll be used to engage with your customers. [Learn more](#)

Agent name *

Agent user *

Agent language

The languages you see depend on installed packs and your Power Platform Admin Center settings.

Email signature *

[Modify signature](#)

AI disclaimer

Other terms

Sales Data Enrichment Agent Overview



← Edit Data Enrichment On Apply changes Stop agent

Enrichment Last saved by Ben Humphries on 06 May 2026, 04:20 pm

Prerequisites ✓

General

Agent profile ✓

User access ✓

Record selection ✓

Agent behavior ✓

Agent behavior

Configure how Data Enrichment behaves and enriches your records. [Learn more](#)

Field scope

Choose the fields you want the agent to skip. It also skips field types it can't enrich.

Pick fields to exclude ▼

Field update behavior

Choose whether the agent should update fields automatically or wait for seller approval.

Automatically update fields

Enrichment frequency

Shows how often data enrichment runs. This field is read-only.

Daily (Default)

Data sources

Shows the sources the agent uses to process information. This field is read-only.

Email Outlook

What is the Data Enrichment Agent?

- AI-powered agent that automatically enhances Opportunity data (the SQA doesn't do this)
- Ensures records are complete, accurate, and up-to-date

Core Features

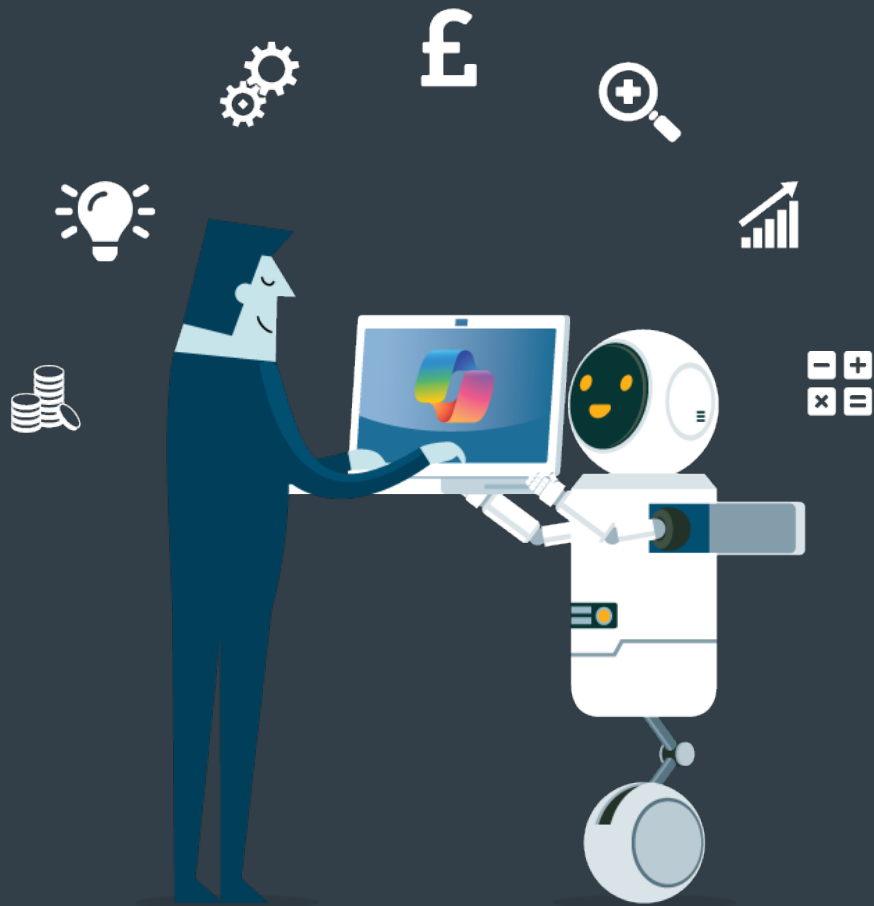
- Auto-population of Opportunity data from (Email & Outlook)
- Option to define what opportunity fields are not updated. (opposite of the CMA)
- Option to choose if the agent prompt for updates of data on the opportunity
- Data cleansing and standardisation
- Duplicate detection and merging

Sales Data Enrichment Agent Demonstration



*Opportunity Research Agent -
Microsoft Summary*

Copilot Credits - Managing your Agents and Consumption Limits.



Interactions with Agents Cost 'Copilot Credits'

Credits can be bought in Packs or on a PAYG model

- Capacity Packs: Purchased at £153.80 per pack/month. Each pack provides 25,000 Copilot Credits to the tenant-wide pool.
- Pay-as-you-go: No upfront commitment. Credits are billed at the end of the monthly cycle based on actual usage.

Copilot Credit Options



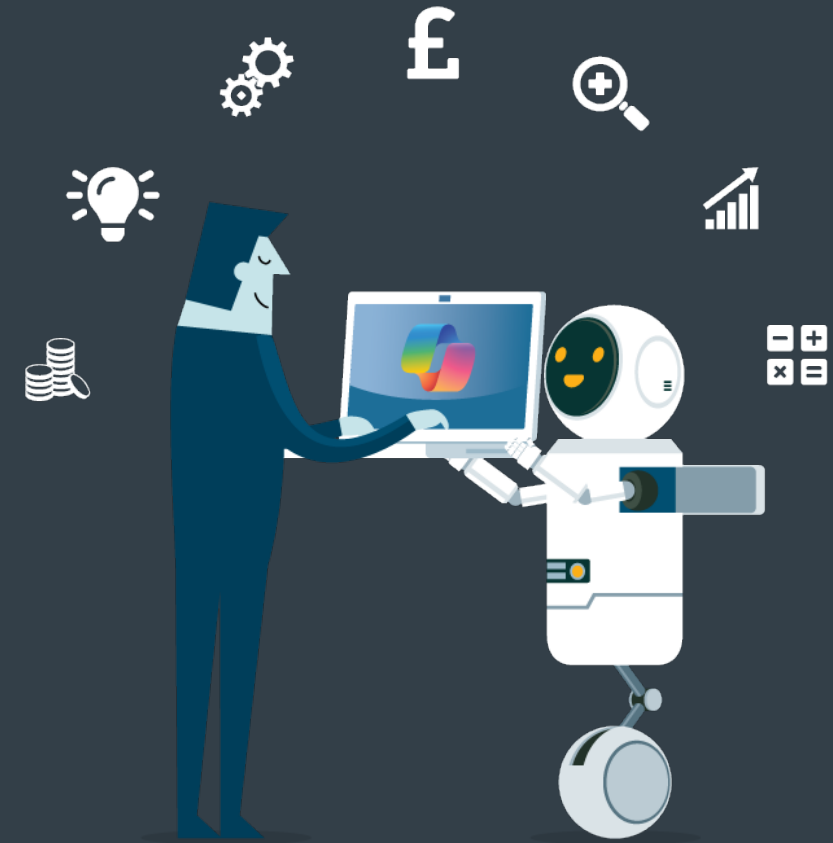
Interactions with Agents Cost 'Copilot Credits'

Pack model

- Capacity Packs: Purchased at £153.80 per pack/month. Each pack provides 25,000 Copilot Credits to the tenant-wide pool.
- Unused credits expire at the end of each month
- Recommended to also setup a PAYG subscription (for fail over)

PAYG model

- Pay-as-you-go: No upfront commitment. Credits are billed at the end of the monthly cycle based on actual usage.



Managing your Agents and Consumption Limits



- Credits can be managed at
 - Environment Level
 - Agent Level
- Warnings can be setup based on percentage consumed.
- Safe way to ensure you are not going over expected capacity on Pay as you go Model
- Consumption overview found in licencing>Copilot Studio in the PPAC.



What are the prerequisites to use the Sales Agents

- Dynamics 365 Copilot for Sales (included with Sales Enterprise & Premium)
- AI capacity (credits)
- Not support with Sales Professional Licence

- Salesperson (or higher like Sales Manager)
- Copilot / AI access enabled in role settings
- Permissions to
 - Leads
 - Opportunities
 - Activities
 - Accounts
 - Contacts

What does it actually cost and how does this compare to an employee wage?

25,000 Copilot credits =
£153.80

$£153.80 \div 25,000 = \mathbf{£0.0061}$
per credit

Lets say a lead costs roughly 50
Copilot Credits to process

$50 \text{ credits} \times \mathbf{£0.006} = \mathbf{£0.30p}$
per lead

So let say an employee on £33,000k PA \div 228
working days (average working days per year) \approx
£145 per day (before Tax and NI).

£145 \div £0.30 Copilot Cost = 480

They would need to process **480 leads per day.**

A human realistically handles: 5–15 qualified leads
per day (including admin, meetings, emails, fatigue)

At 10 leads/day \rightarrow ~40 \times more cost-effective

At 50 leads/day \rightarrow ~9 \times more cost-effective

At 100 leads/day \rightarrow ~5 \times more cost-effective

*Copilot handles volume. Enabling
your team to focuses on high-
value engagement.*



Other Sales Features Demo

Form Fill Assist Toolbar

Visualise with Co-Pilot

Natural Language Smart Grid

Smart Paste

Thank you!



CRM Connect App



CRM

connect

FOR ALL THINGS DYNAMICS 365 CRM & POWER
PLATFORM