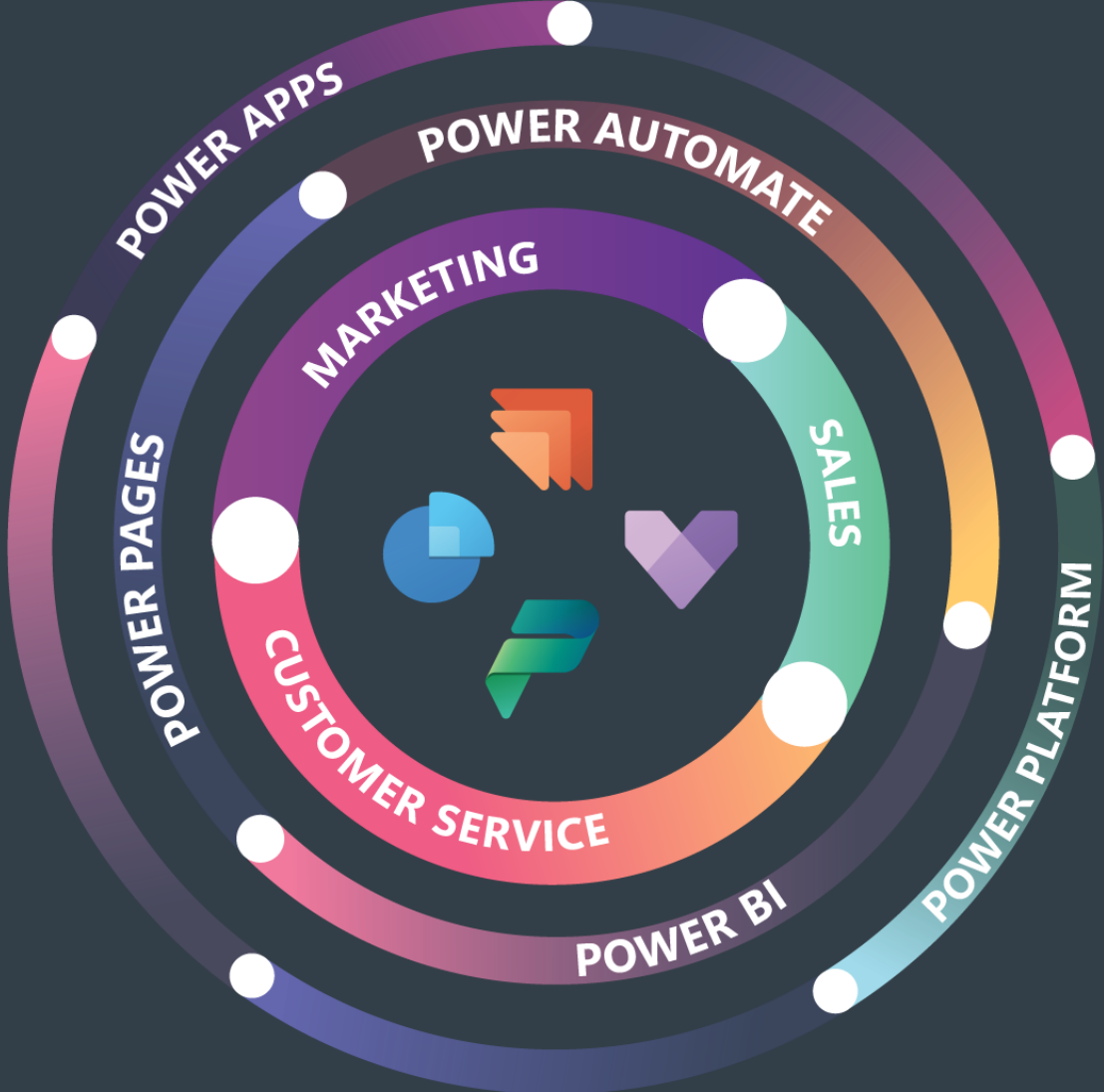


CRM connect

Sales Engagement & Excellence





Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Hi!

Jon Evans

Tecman – Dynamics 365 CRM Consultant

Jordan Dunn

Tecman – Dynamics 365 CRM Consultant

What we'll cover

1. Looking Back to what's already here
2. CRM 2024 to better our System!
3. Co-Pilot 2024 & Demo
4. Email Engagement
5. Conversation Intelligence

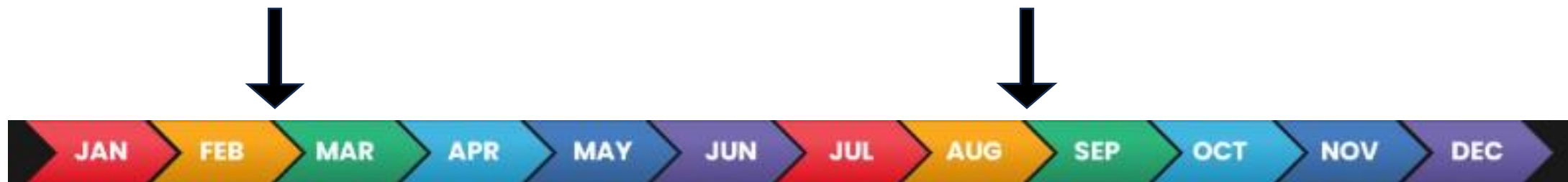




Looking Back to what's already here

What do we mean by Releases waves, Features and updates?

- What is a wave?
- Okay, Okay.. Feature?
- That sounds great, so when are these?
- And what if it breaks?
- Wait Bugs?



So what's included in these Release Waves?

- Follow up on emails using recommended actions
- Stay on top of your deals with AI-generated opportunity summaries
- Stay on top of your lead with AI-generated lead summary
- Gear up for meetings with AI-generated preparation notes
- Stay updated with contextual news within Copilot chat
- Elevate your sales pitch using Copilot email assistance
- Summarize lengthy emails using Sales Copilot
- Get basic relationship insights out of the box
- Manage opportunities more effectively using the new pipeline view
- Enhanced pipeline management with distraction-free and customizable side panel
- Personalize opportunity pipeline view with your default metrics and side panel form
- Configure forecasts for multiple business units
- Improve forecast accuracy with yearly and weekly forecasts

So what's included in these Release Waves?

- Work efficiently with enhanced Sales accelerator worklist items
- Prioritize engagement for any sales entity by working in focus mode
- Simplify address entry with smart autocomplete using Bing Maps
- Improve process efficiency using sequence insights
- Utilize A B testing in sequences
- Engage with your Customers using SMS conversation
- Connect your own provider to send text message from Dynamics 365 Sales
- Use focused view for custom entities
- Assign sequences to any seller from sales team
- Work in Focus mode with Advanced filtering and view management capabilities
- Visualize key stakeholders and take action with the smart organization chart
- Provide intelligent suggestions to improve seller effectiveness
- Get improved user experience with new and enhanced opportunity form

So what's included in these Release Waves?

- Elevate your sales pitch using Copilot email assistance
- Use Copilot to get answers from your sales documents
- Maximize sales success with AI-suggested past successful deals
- Improve productivity by using Copilot in Dynamics 365
- Know your account better with AI-generated account summary
- Summarize lengthy emails using Copilot in Dynamics 365 Sales
- Boost your sales with product content recommendations
- Plan and perform assigned tasks with preview of sequence steps
- Improve customer engagement with sequence preview
- Guide sellers to work simultaneously using multiple sequences
- Notify sellers and sales managers after assignment rule execution
- Assign leads, opportunities to sellers based on individual capacity
- Experience the new look with a refreshed styling
- Analyze opportunities better by grouping them and aggregating their values
- Customize lead qualification process for a seamless experience
- Optimize lead entity work with focused view as default



CRM 2024 to better our System!

Co-Pilot

- How long AI has been around for?
- You are not just restricted to CRM!
- Let it do the little things

Email Engagement

- Better information on your email
- Where have you seen this before?

Conversation Intelligence

- Make the link between teams and CRM
- Speeds up data entry!



Co-Pilot



DEMO

How to get started



Email Engagement



Conversation Intelligence

Thank you.

CRM
connect

THURSDAY 25 APRIL 2024

