

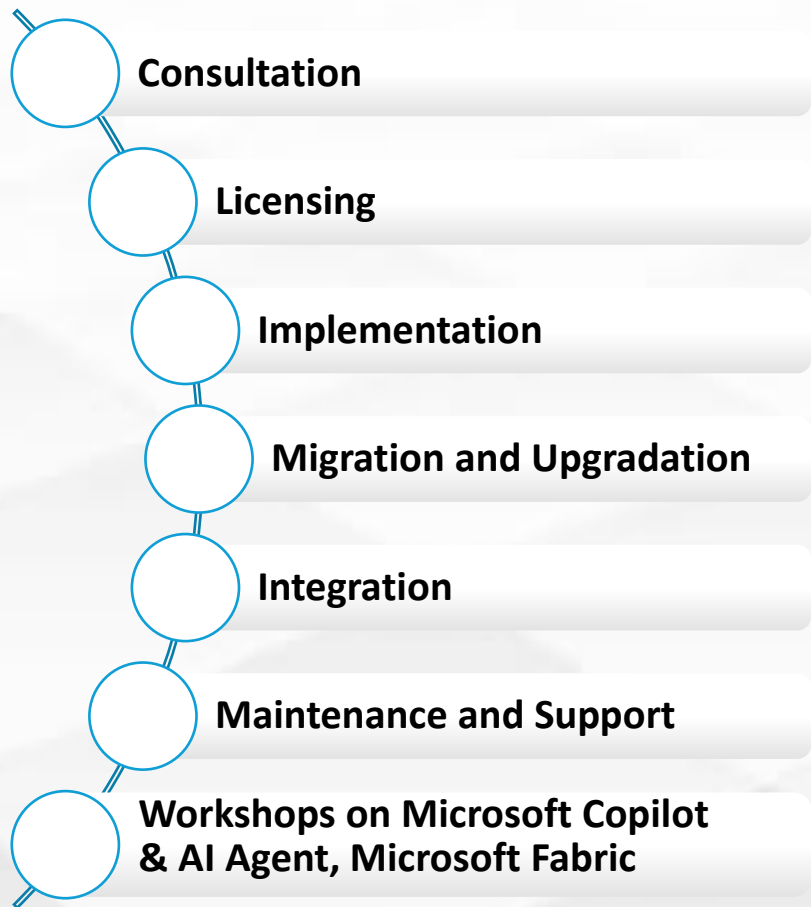


Microsoft
Solutions Partner

**Microsoft Training
Service Partner (TSP)**

Innovate | Integrate | Automate – Global Presence with Local Reach

Microsoft Solutions & Services



SMB – Mid-Market – Large Enterprise
&
All Business Verticals



Co-Pilot with AI Technology

Modern Workplace



Microsoft 365

Enterprise Application



Microsoft Dynamics 365

Data & AI

Microsoft Fabric



Low code Technology Solutions



Power Apps



Power Automate



Power BI



Copilot Studio

Microsoft Power Platform

Azure



Infrastructure
& Platform Services

Microsoft TSP
[Training Service Partner]

Training Services



Workshop / Corporate
Training across
Microsoft Solutions

Adoption and best practices with Microsoft Dynamics 365

Implementation & Adoption Success Kit

- **Persona and scenarios library:** Understand common use cases by typical sales roles.
- **Enablement guide:** Product overview, steps to enable, and best practices.
- **Train the trainer:** Explore prompt walk-throughs to provide a jump-start to your sales team.
- **Resource Guide:** See resources by key adoption stages.
- **Top 10 to learn one-pager:** Master foundational skills at-a-glance.

Find it at <https://adoption.microsoft.com/en-us/copilot-for-sales/success-kit/>

Top 10 things for sellers to do in copilot

Foundational skills for new users



1

Save customer emails and meetings easily

Show consistent customer engagement by capturing emails and meetings in CRM automatically.



2

Capture a new customer contact or a lead from email

Create new contacts or leads directly from your Outlook inbox so that you can keep track of your stakeholders.



3

View opportunity summary in Outlook

View opportunity summary, and relevant insights (Budget, Authority, Need, Timing) in Outlook



4

Create or edit an opportunity from Outlook

Create new accounts and opportunities without switching to your CRM.



5

Get ready for customer meetings with a summary card

Prepare for a customer meeting thoroughly and quickly with an AI generated summary leveraging data in CRM and M365.



6

Follow up with an email after a customer meeting

Follow up on next steps and action items immediately after a meeting with AI generated draft.



7

Update CRM after customer meetings

Capture CRM tasks directly from AI generated summary when recording a Teams meeting



8

Summarize an email thread and include sales data from CRM

Get quickly caught up to a long, complex email thread.



9

Draft an email reply with sales information

Generate customer replies using sales prompts, data, and insights. Personalize email by adjusting tone and length.



10

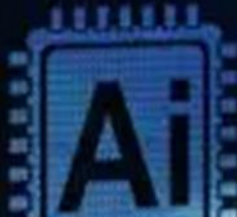
Share CRM data in Outlook and Teams

Share sales data from CRM such as contacts, accounts, opportunities without switching application.

Onboard & engage: Best practices

- 1 Use the **Microsoft adoption website** for free online resources, including training and engagement content, as a jumping-off point.
- 2 Create a **dedicated project team** including sales and IT.
- 3 **Develop your adoption plan.** Steps include: design and deploy training via a centralized SharePoint, identify engagement communities (Center of Excellence/Champion Platform), train champions and support staff, and **drive awareness with employee communications and champions.**
- 4 Build out a **user experience strategy** and secure **executive sponsorship.** Establish **user cohorts**, including execs and **champions (key for enabling peer-to-peer adoption and hosting office hours).**
- 5 Focus on **the human element of change**, explaining the “why” and the “how” to accelerate adoption.

DIGITAL TRANSFORMATION



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