

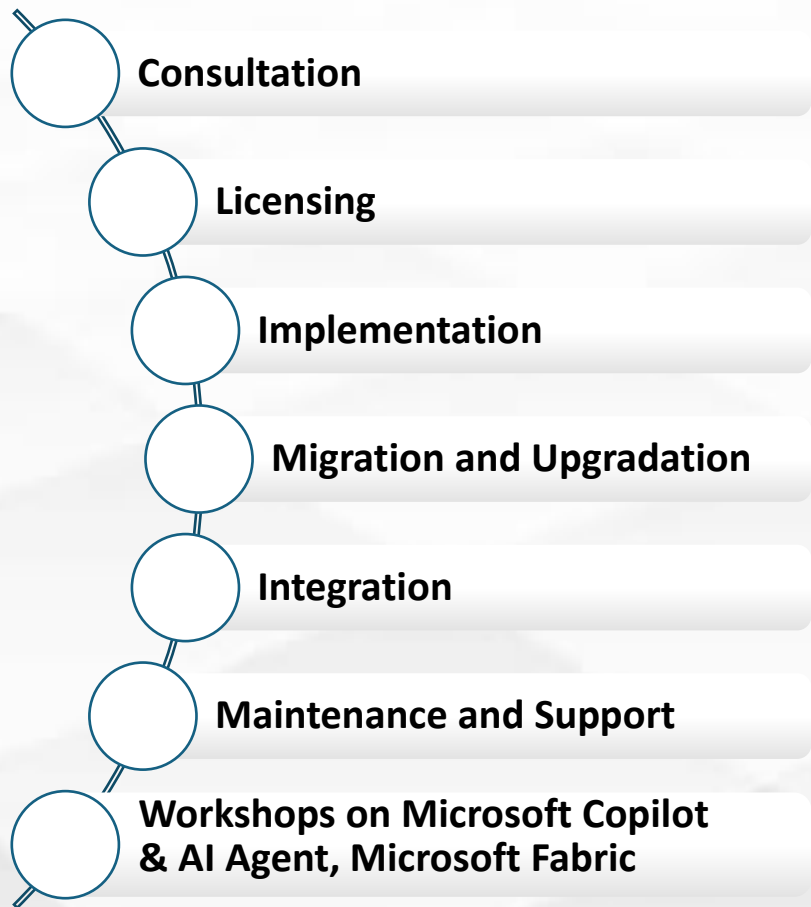


**Microsoft**  
Solutions Partner

**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

# The Frontier Firm

AI Leadership | One Unified Platform | Enterprise Security & Compliance

## Sales Agents

Sales Chat  
Sales Agent  
Sales Research  
Sales Qualification  
Opportunity Scoring

## Customer Service Agents

Case Resolution  
Sentiment Analysis  
Knowledge Management

## Marketing Agents

Campaign optimization  
Segmentation

## Integration & Infrastructure Agents

Data Unification  
Model Context Protocol (MCP)  
Workflow Automation

## Tasks and Process Agents

Invoice Process Automation  
RFP Template Generation  
Remote Transition support  
Claims Manager  
Renewals  
Dormant Accounts Activation

## Multi Agents and A2A Agents

Legal and Compliance Manager  
HR Manager  
Customer Service Concierge Agent  
Travel and claims Agent  
Analytics Agents

## 1st Party D365 Agents

## Custom Agents

Inhouse Customizations and Tailoring

## Productivity & collaboration

 Microsoft 365

 Word  
 PowerPoint  
 Excel  
 Outlook  
 Teams

## Business data & processes

 Microsoft Dynamics 365

 Sales  
 Customer Insights  
 Customer Service  
 Supply Chain  
 Finance  
 Field Service

## Low-code solutions

 Microsoft Power Platform

 Power Apps  
 Power BI  
 Power Pages  
 Copilot Studio  
 Power Automate

Agent Marketplace



Microsoft Graph

Microsoft Dataverse

Azure OpenAI Service

Global cloud infrastructure & services

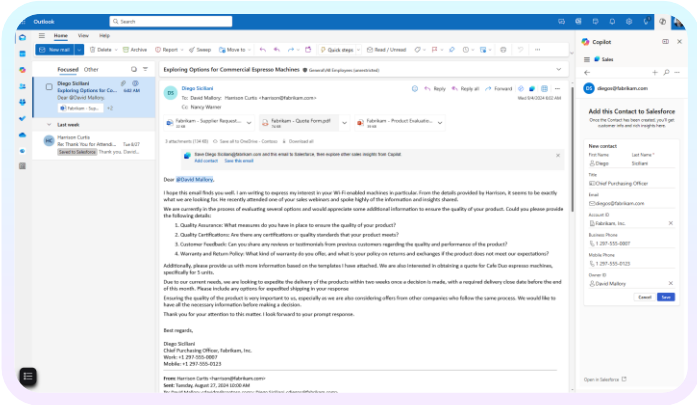
Identity, security, management & compliance

Productivity-first sales

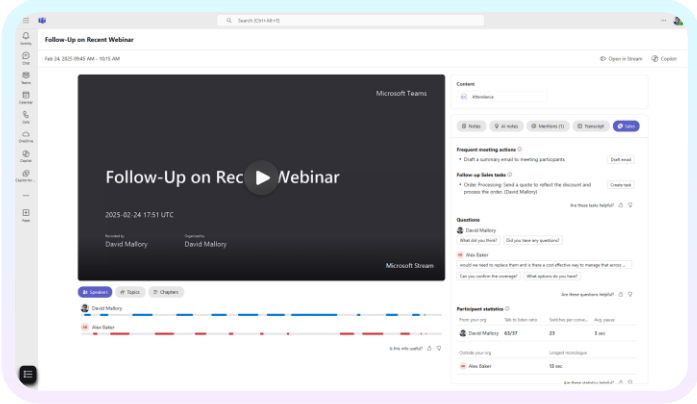
# Your everyday tools - CRM only when you need it



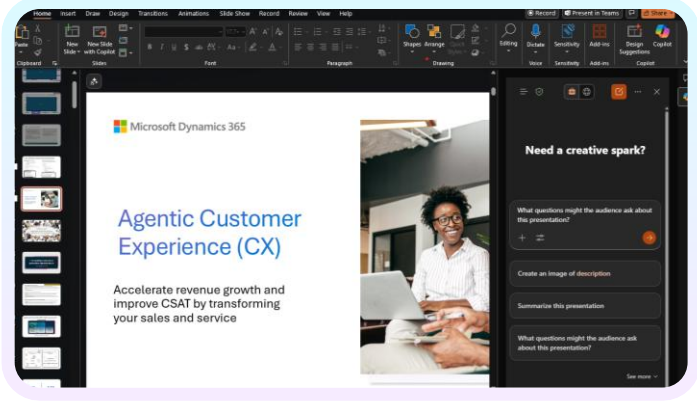
8:00AM



11:00AM



3:30PM



Catchup, track deals, and send customer follow-ups



Collaborate, engage prospects, and close deals



Generate compelling presentations, tailor content for customers, and get ready for tomorrow



# Sales Copilot– Enabling system of engagement



**Intelligent CRM** that harnesses the power of next-generation AI to help you adapt to continuous change, simplifies sales processes, and improves customer interactions

## GPT 5 integration

Supports AI based contextual email response, Opportunity Summary

### Seller tasks in familiar M365 apps

Create contacts, Track activity, View deal info, teams channel/deal room etc.

### Unify customer context

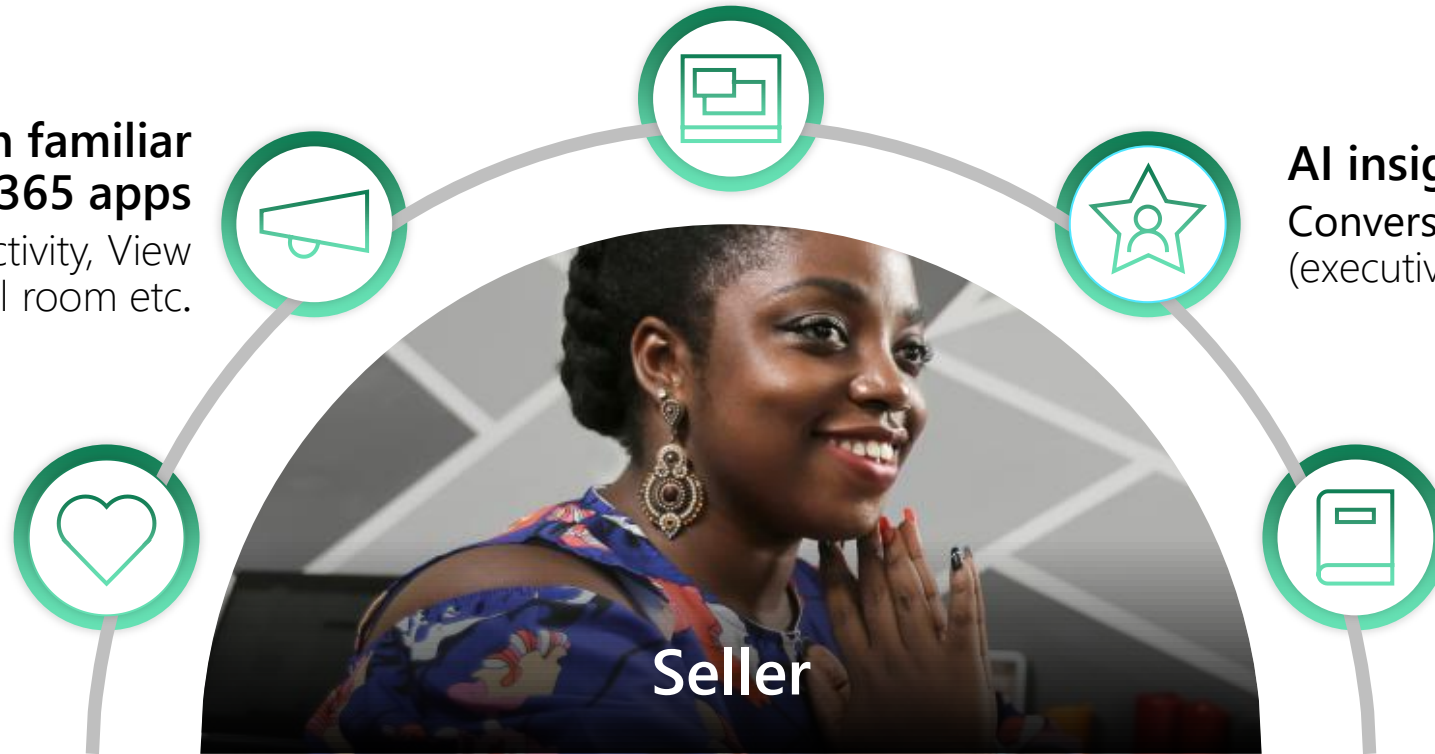
Teams, Outlook, CRM

### AI insights in the flow of work

Conversational intelligence (executive summary)

### Automate logging & tracking

With D365 CRM



**Seller**

# Role Based Copilot Agents

Process-specific value optimized for specific personas and embedded in M365



Microsoft 365  
**Copilot for Sales**

Bring sales insights and  
next-generation AI into the  
flow of work



Microsoft 365  
**Copilot for Service**

Enhance customer  
experiences and boost service  
visibility & productivity



Microsoft 365  
**Copilot for Finance** *(preview)*

Optimize processes and  
accelerate time to insight  
for financial analysis



Microsoft  
**Copilot for Microsoft 365**

**Copilot for Microsoft 365** is included within Copilot role-based extension products. If you purchase Copilot for Sales, Service or Finance you get Copilot for Microsoft 365 **Included** within the license.



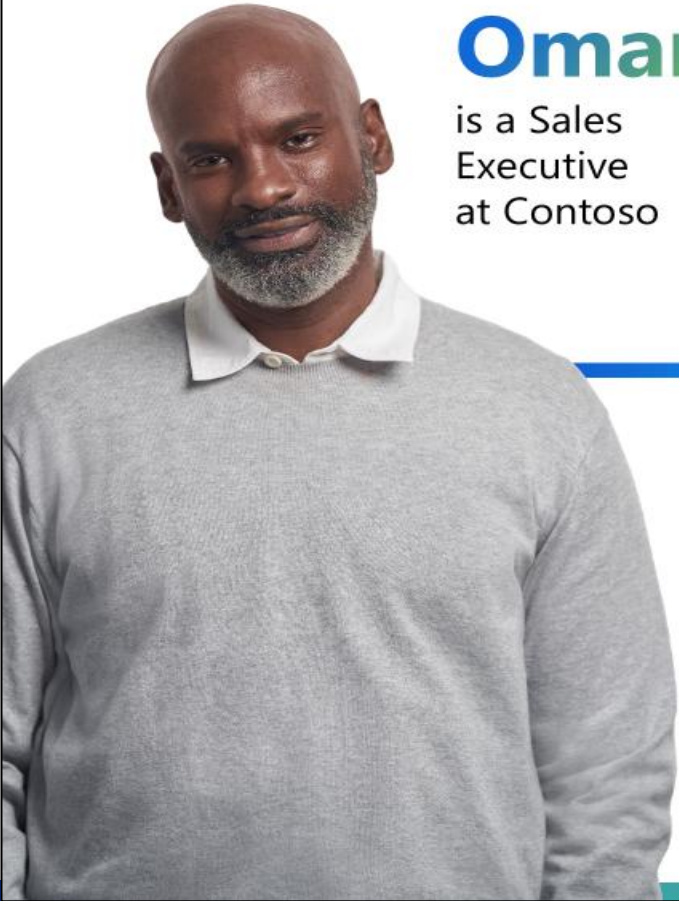
**Shared Copilot Infrastructure**

# Day in the Life with Copilot for Sales



## A day in the life of a Sales Executive

Steer corporate sales strategy, oversee major accounts, and ensure alignment with broader business objectives.



**Omar**

is a Sales Executive at Contoso

8:00 am

Omar starts his day by reviewing his calendar and messages. On a typical day, he gets 300 emails and 200 Teams messages. Being able to use Copilot is game changing – he can prioritize responses by asking “Do I have any urgent asks?”

11:00 am

Omar has a short working block to prepare for an upcoming strategic planning session. As he scrolls through his calendars, Omar sees he has two upcoming meetings with customers and uses Copilot for Sales in Outlook to quickly get up to speed on account and opportunity details.

2:00 pm

After his meeting, Omar calls a sales director on his team to share key takeaways from this strategic customer identifying new sales opportunities to grow revenue. Copilot for Sales takes notes and recaps the meeting.

10:00 am

He then reviews sales data and key performance issues using Copilot to highlight important insights and heads into the monthly business review.

12:00 pm

As he gears up for an important meeting with a new customer, Omar reviews a detailed meeting prep document his team prepared using Copilot for Sales in Word. So, even though he’s relatively new in his role, he’s well prepared.

4:30 pm

Feeling a sense of accomplishment, Omar ends his day on a lighter note, using Copilot’s image generation capabilities to create a fun image to share in the leadership Teams chat with an inspiring “We’ve got this!” message.



# Day in the Life with Copilot for Sales



## A day in the life of a Field Seller

Drive sales by engaging directly with customers, pursuing leads, nurturing relationships, and closing deals through personalized interactions.



**Beth**  
(using Salesforce)  
is a Sales Rep  
at Contoso

8:00 am

Beth wakes up to a strategic customer escalating on pricing and technical issues related to a current deal with strong competitive pressure. **She views customer account and opportunity summary information in Salesforce.**

11:00 am

Beth **asks Copilot for Sales to create an email update for her manager and broader account team**, summarizing the customer escalation and next steps on resolution. Salesforce is updated with key items.

2:00 pm

Beth jumps into a customer call with minimal prep due to the earlier escalation. **Using Copilot for Sales, she receives real-time tips during the call, later capturing CRM tasks from the recap.** After, she sends a meeting summary and saves it to her CRM.

10:00 am

Beth asks **Copilot to summarize all the emails and Teams chats in the past month from this customer**, highlighting the primary asks and open items.

1:00 pm

After **starting a Teams deal room to keep folks engaged on this deal** under risk, Beth receives the OK to provide the customer with an additional discount. As they work through the issue, **Copilot for Sales suggests a new opportunity close date.**

4:00 pm

Monitoring the Teams deal room chat, Beth feels good about progress on the customer escalation. **She uses the extra time Copilot for Sales has freed up to catch up on the latest AI training course.**

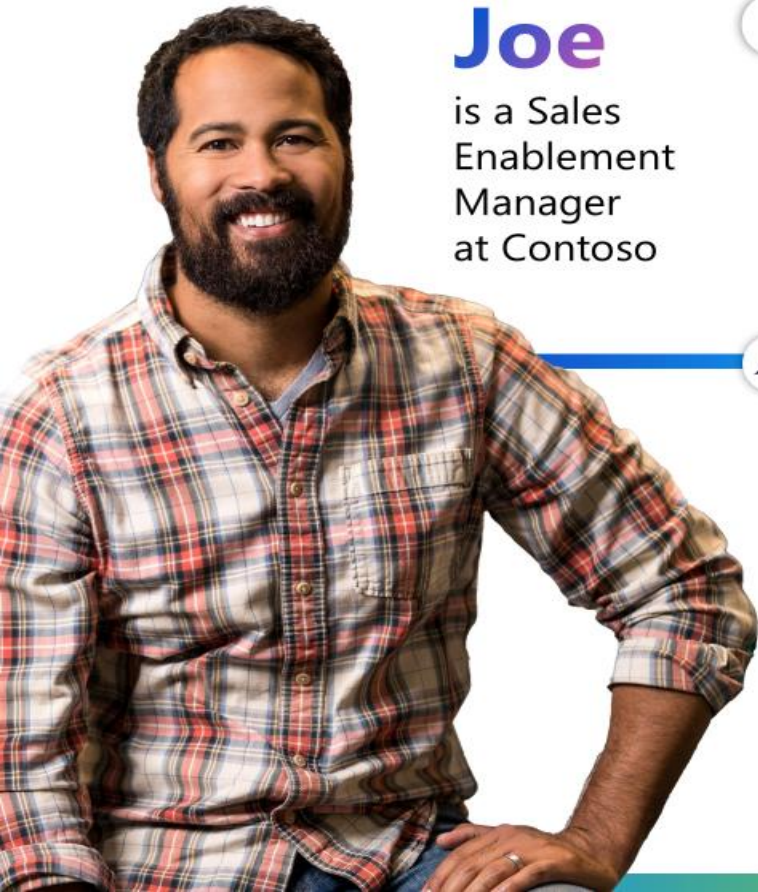


# Day in the Life with Copilot for Sales



## A day in the life of a Sales Enablement Manager

Elevate organizational sales performance by tailoring strategies and tools to meet diverse needs and enhance overall effectiveness.



**Joe**  
is a Sales  
Enablement  
Manager  
at Contoso

8:00 am

As a champion user and enablement leader, Joe kicks off the day **reviewing usage stats in the Copilot for Sales dashboard\*** to get detailed understanding of Copilot uptake and collect insights for sales executives.

11:00 am

He checks out the **Microsoft adoption website to learn about new capabilities** so he can optimize their sales team's internal target scenarios and elevate sales performance.

2:00 pm

Gamification can be a powerful tool in driving Copilot for Sales adoption, so Joe sends his weekly **"team challenge" reminder asking people to submit their best sales prompts** for a shared library. He'll then recognize those with the most or best submissions.

10:00 am

He develops new training materials for an upcoming product launch, using Copilot's assistance to review existing training content and tailors it to be sure it supports the right sales strategies and addresses customer needs.

1:00 pm

During Office Hours, Joe **coaches new hires on using Copilot for Sales**, walking them through the Top 10 skills to try and then role-playing use of those skills in customer conversations.

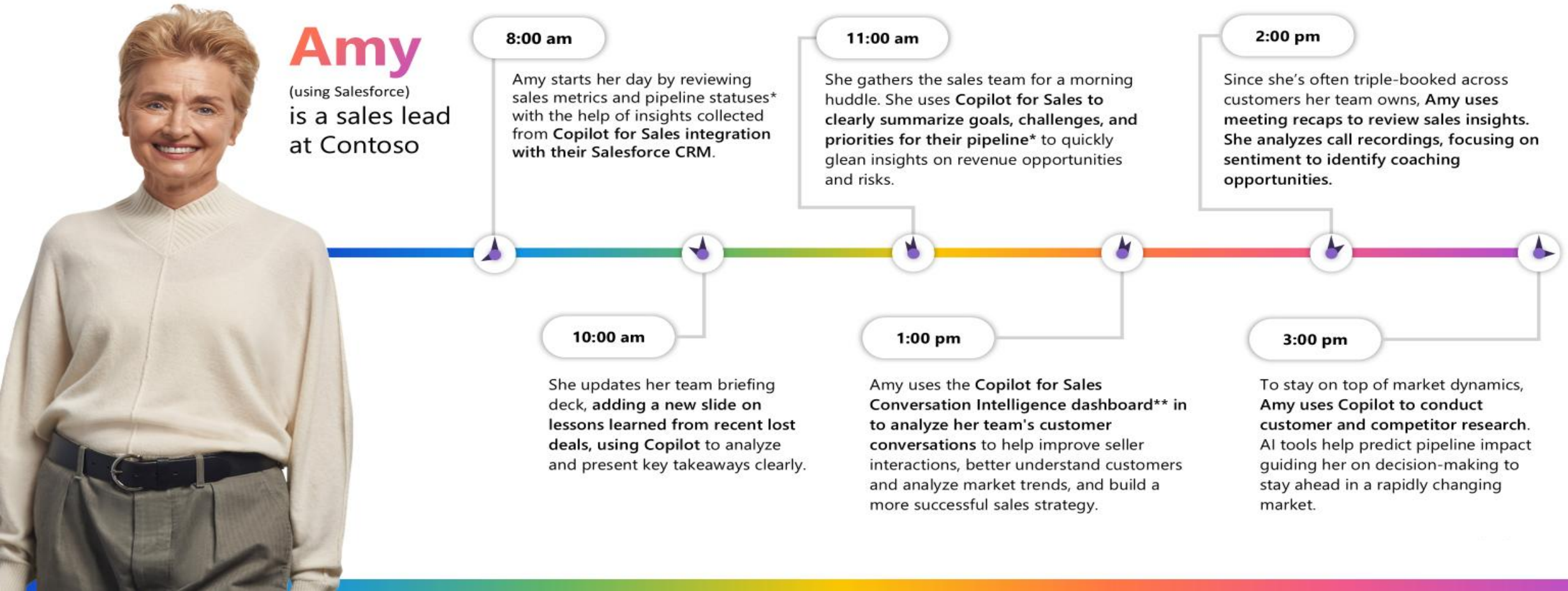
3:00 pm

As part of planning for his monthly sales readiness session, Joe uses Copilot to **draft event agendas, coordinate logistics based on team availability, and generate engaging content** to ensure the event's success.

# Day in the Life with Copilot for Sales

## A day in the life of a Sales Leader

Achieve sales targets and optimize team performance, ensuring strategic alignment and customer satisfaction.



# Microsoft Differentiators



## Driving CRM Adoption through user preferred Interface

- Supports Mobiles / Tablets, Web Browser, Outlook, Teams etc. User can work with their chosen interface.

## Ease of extensibility – Power of Power Platform

- Extensibility with fast TTM in an agile low-code/no-code way using PowerApps Power Automate Power BI and Common Data Service. **Enable Innovation & citizen development** for all employees

## Comprehensive compliance to Indian Regulations

- Compliance built in across solution with our RBI, METI and IRDA compliant platform, **Indian Data Centers**, and **data security at transit and rest**.

## IP and Customer Data Protection

- IP for AI models build on Dynamics; No pooling of Data for Customer Insights

## NLP and AI for Indian Customers

- AI technology tailored to fit, with comprehensive NLP, Speech-text, translation and 14+ Indian Languages supported.

## Best Practices – BFSI Vertical

- BFSI specific solution templates expertise already deployed across 50+ customers to accelerate deployment and improve adoption.

## Our investment in your success

- Direct Engineering connect to support successful deployment and drive innovation.



# DIGITAL TRANSFORMATION



## Connect With Us.

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