

## **Achieving sales** success with **Microsoft Dynamics 365** Sales & AI:

Key considerations you need to know





#### Cut the drudgery

Generate email content including data from CRM and past interactions

Summarize meetings instantly

Simplify tasks like updating customer records while in the flow of work

### Connect the data

Answer customer questions immediately

**Build connections** with summaries of the latest interactions

Get relevant CRM data during meetings



# the sale

rolling with reminders and recommendations

Keep the momentum

leads with autogenerated opportunity reports Receive next-

Focus on high-quality

best action recommendations



## Continuously improve

Learn from real-time analysis of conversations and interactions

Quickly search content using natural language

Identify best practices and practical techniques



89 percent of workers with access to automation and Al-powered tools feel more fulfilled because they can spend time on work that truly matters1





spent selling 68% is spent on non-



revenue-generating activities<sup>2</sup>



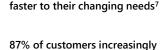
- Automate daily tasks<sup>5</sup>

critical challenges.

Make information more<sup>6</sup>

# Meet customer needs in real-time

64%



64% of customers with

companies would respond

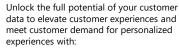


2.

decision journey8

expect relevant, personalized

information based on their



iournevs

Real-time insights

Contextual and relevant customer

#### Next-generation Al is easy to use, but training can take results to the next level. Here are three things to focus on.

3 top skills to train

Crafting prompts: Many Al features respond to user input. Clear, specific, and detailed prompts deliver better results.

Iteration: Unlike traditional computer programs,

where there is only one way to do things, Al responds to subtle changes in your approach. Trying something in several different ways can

lead to a better outcome. **Double-checking content**: Al is very powerful, but it can make mistakes. Sellers 3. should always review content for errors and ensure it's appropriate.

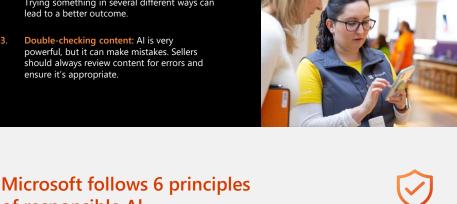


60%

owners expect AI to

drive sales growth9

60% of business



of responsible Al

#### When you're looking to empower your sales team with Al capabilities, it's important to choose solutions that meet high standards of ethics and responsibility. Microsoft uses six principles to guide development and use of Al-enabled tools.





84%

5. Transparency 6. Accountability

84% of executives believe

that audit of Al models

will be required within

the next 1-4 years10

1. Fairness

2. Reliability and safety

Get practical guidance for

Light Reply is a Microsoft partner with the expertise to guide your business in unlocking the benefits of an Al-powered CRM. Read our new e-book, "The future is here: unlock the power of Al for your sales team," to discover how Al helps sellers and sales leaders transform how they work.

empowering your sales team with Dynamics 365 Sales

Contact Light.us@reply.com to learn more.

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2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan Can AI Really Help You Sell?, Harvard Business Review, 2022 Work Trend Index | Will AI Fix Work?, Microsoft, 2023 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan 2023 Microsoft Business Trends Survey of 4,500 business decision makers (BDMs) in the United States, the United Kingdom, and Japan The human paradox. From customer centricity to life centricity, "Accreture, 2022 "Want to pull ahead of the pack? Ramp up data-driven capabilities," Deloitte, 2022 How Businesses Are Using Artificial Intelligence In 2023 – Forbes Advisor 2023 KPMG US AI Risk Survey Report, KPMG, 2023