



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



Crush the sale

Keep the momentum rolling with reminders and recommendations

Focus on high-quality leads with auto-generated opportunity reports

Receive next-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 AI-powered tools feel more fulfilled because they can spend time on work that truly matters¹

What do people want from their CRM platform?

We have seen that sellers are more likely to adopt and use tools that solve their most critical challenges.

- Save time³
- Be more agile⁴
- Automate daily tasks⁵
- Make information more⁶



32% of seller time is spent selling



68% is spent on non-revenue-generating activities²

Meet customer needs in real-time



64% of customers with companies would respond faster to their changing needs⁷



87% of customers increasingly expect relevant, personalized information based on their decision journey⁸

Unlock the full potential of your customer data to elevate customer experiences and meet customer demand for personalized experiences with:

- Real-time insights
- Contextual and relevant customer journeys

3 top skills to train



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

1. **Crafting prompts:** Many AI features respond to user input. Clear, specific, and detailed prompts deliver better results.
2. **Iteration:** Unlike traditional computer programs, where there is only one way to do things, AI responds to subtle changes in your approach. Trying something in several different ways can lead to a better outcome.
3. **Double-checking content:** AI is very powerful, but it can make mistakes. Sellers should always review content for errors and ensure it's appropriate.



60% of business owners expect AI to drive sales growth⁹



Microsoft follows 6 principles of responsible AI



When you're looking to empower your sales team with AI 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 AI-enabled tools.



84% of executives believe that audit of AI models will be required within the next 1-4 years¹⁰

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|---------------------------|-------------------------|-------------------|
| 1. Fairness | 3. Privacy and security | 5. Transparency |
| 2. Reliability and safety | 4. Inclusiveness | 6. Accountability |

Get practical guidance for empowering your sales team with Dynamics 365 Sales



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

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