



AI/Copilot
STAMMTISCH

M A I 2 5

AlfaPeople

www.alfapeople.com



Agenda

- About Us
- Demo
- Q & A
- Austausch



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Senior Sales



Julian Fischer

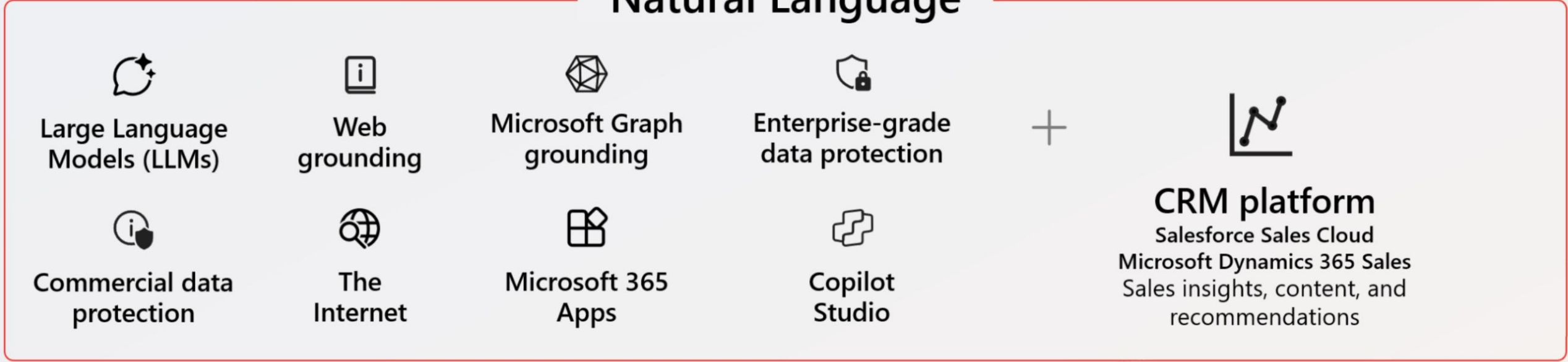
Business AI Consultant



Microsoft Copilot for Sales

Your everyday AI **assistant at work** - for sales teams

Natural Language





Microsoft Copilot for Sales

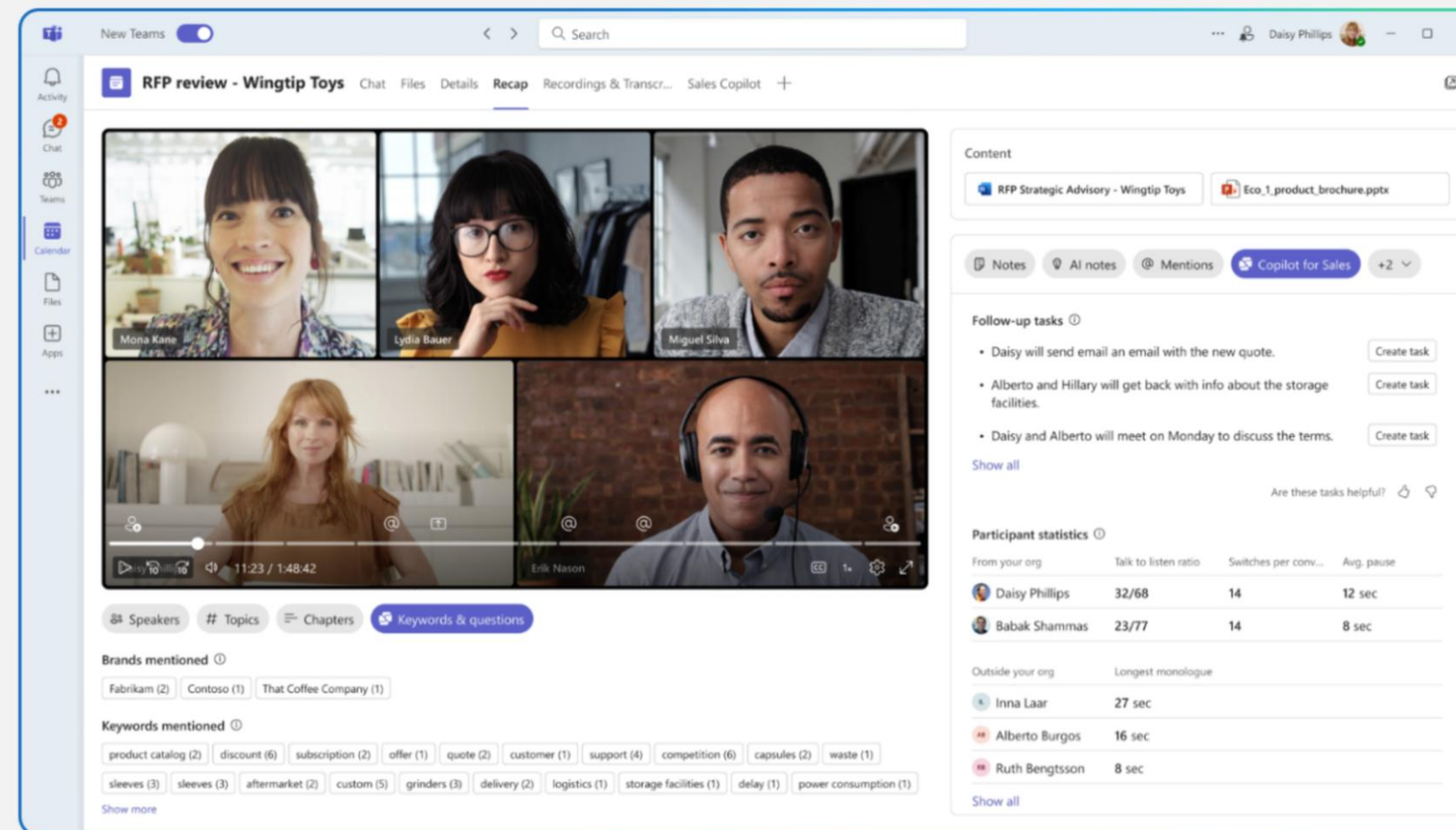
Next-generation AI assists sales teams with tedious tasks like catching up on pipeline, updating CRM data, preparing for meetings, and analyzing calls so they can focus on closing the deal.

View opportunity summary

Analyze sales conversations

Draft a proposal

Create a revenue data chart



Create CRM tasks from a meeting

Update opportunity stage

Show conversion rate

Create a pitch presentation

Copilot for Sales is experienced in Microsoft 365 and connects to your CRM system



Works with your CRM platform

The screenshot shows the Outlook interface with an email from Alberto Burgos. Two Copilot windows are overlaid, each showing a 'New contact' form. The left window is titled 'Add this contact to Salesforce' and the right window is titled 'Add this contact to Dynamics 365'. Both forms contain the following information:

- New contact**
- First name: Alberto
- Last name: Burgos
- Job title: Cafeteria manager
- Email: alberto@alpineskihouse.com
- Company: Alpine Ski House
- Phone number: 1 619 555 0127
- Mobile phone: 1 619 555 0127

Each form has 'Cancel' and 'Save' buttons at the bottom.

Connects to
Salesforce Sales
Cloud or Microsoft
Dynamics 365 Sales



A seller's day-in-the-life with Copilot for Sales

Summarize messages from customer

Microsoft Copilot

Summarize emails and Teams chats from Contoso.

✦ 📎 ▶

Pursue opportunity

Microsoft Outlook

Draft an email to Contoso with **product details from Salesforce**, proposing a meeting.

✦ 📎 ▶

Prepare for meeting

Microsoft Word

Microsoft PowerPoint

Create a **sales meeting preparation brief**. Create pitch deck for meeting using *Fabrikam meeting brief.doc*

✦ 📎 ▶

Review meeting and conduct follow-ups

Microsoft Teams

Summarize meeting with **sales-specific** keywords and actions. **Post summary to deal room.**

✦ 📎 ▶

Propose a meeting

Microsoft Outlook

View **opportunity summary from Salesforce**. Update opportunity details and **sync to Salesforce**.

✦ 📎 ▶

Prepare offer value document for customer

Microsoft Excel

Show all data insights from *FinancialForecast2024.xls*

✦ 📎 ▶

Take call with customer

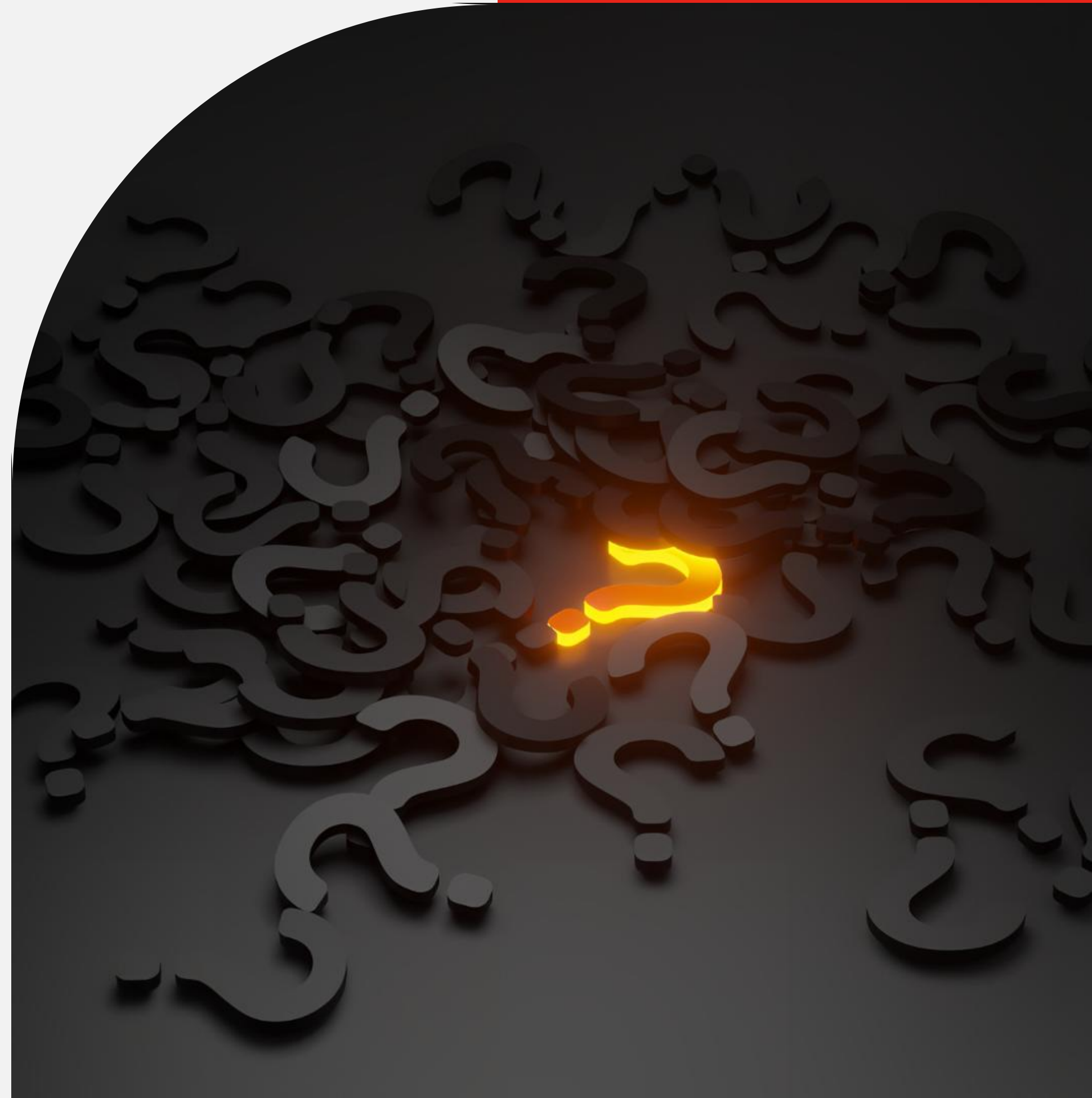
Microsoft Teams

Show **sales tips** and related information about **competitors** mentioned during call.

✦ 📎 ▶



Q & A





Was haben wir gesehen?



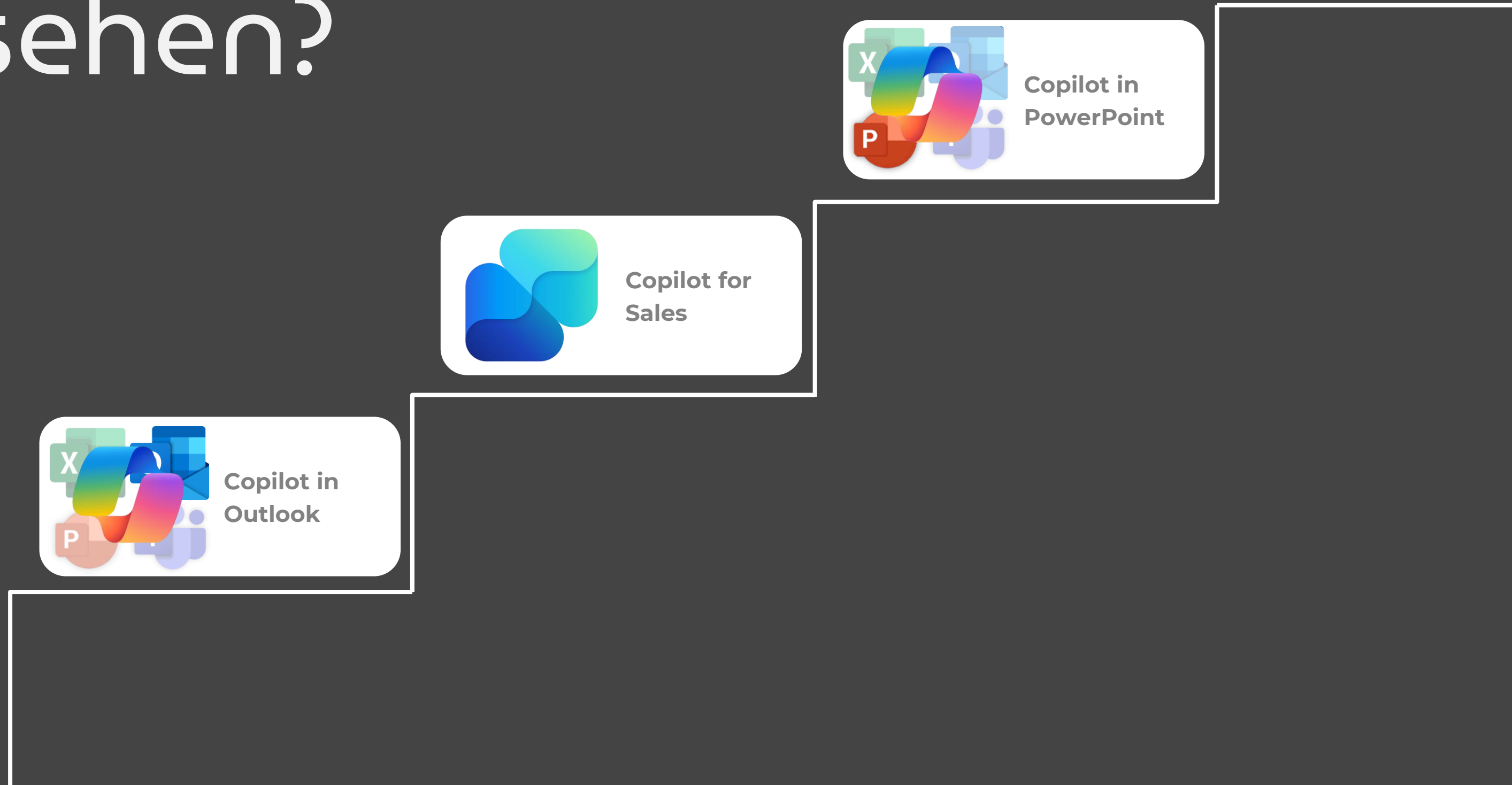
Copilot in Outlook



Copilot for Sales



Copilot in PowerPoint



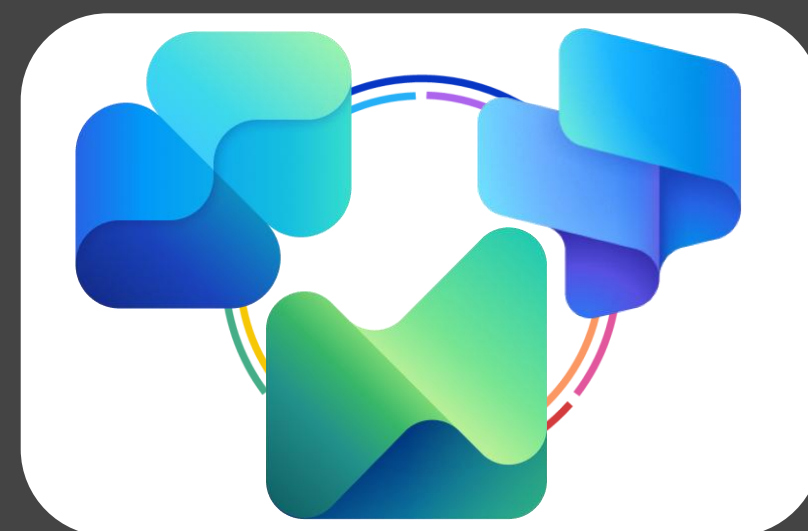


Ausblick

Themenblöcke:

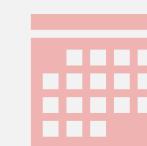


**Weitere M365
Copilot Apps**



**Rollenbasierte
Copiloten**

Jetzt schon registrieren!



05. Juni 2025

<https://alfapeople.com/ch/webinars/ai-copilot-stammtisch-juni-2025/>



Austausch





Ausblick

Themenblöcke:

Vielen Dank für Ihre Teilnahme!

Reichen Sie Fragen vorab ein für den
nächsten Termin über unser Formular:



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**Rollenbasierte
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