The AI Advantage:

Driving sales performance
with next-generation tools

This content is for

Sales leaders seeking practical insights about harnessing next-generation AI to improve seller productivity, team performance, and customer experiences.
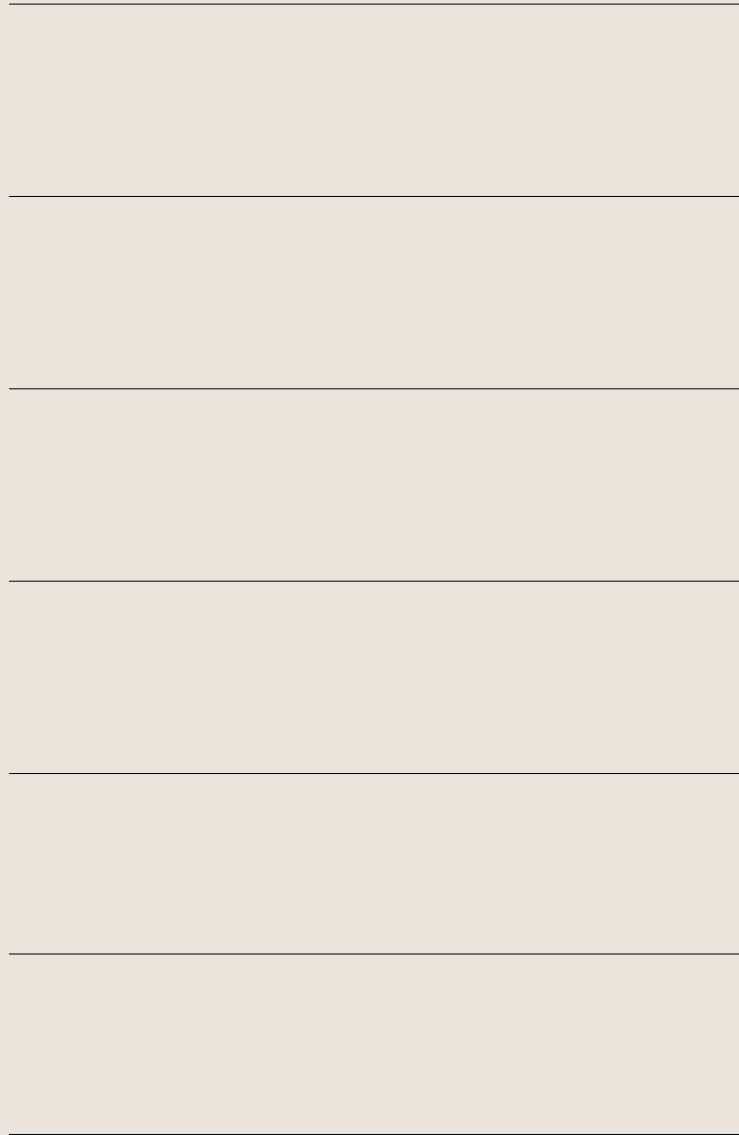
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How next-generation AI enables next-level sales success

Businesses expect sales teams to increase
efficiency and create more personalized
customer connections.

Without the right tools, these goals clash.
As sellers load up on leads, they spend
more time writing emails and juggling
data—and less time engaging with
promising prospects. Leaders lack the data
to turn closed deals into repeatable best
practices, making training less effective
than it should be.

What's missing is a way to make sense of
data and turn it to their advantage. That's
why next-generation AI has the potential to
transform performance.

68%
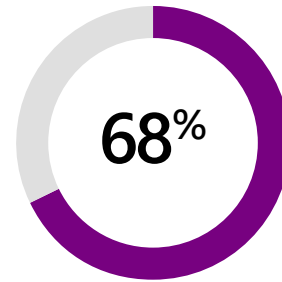
**68% of people say they don't have
enough uninterrupted focus time
during the workday.[1]**

It can empower sellers to instantly surface
the most critical data, generate new and
original content, and automate CRM tasks.
It also enables leaders to discover which
sales efforts work and why—and gives
them insights to inform strategic decisions.

AI is poised to create a new way of working by helping sellers...

Cut the drudgery: Focus on building
relationships by automating and simplifying
tasks with AI-generated emails, meeting
summaries, data collection, and data entry.

Connect the data: Answer customer
questions immediately with easy access to
the right information in the flow of work.

Crush the sale: Keep the momentum
rolling with AI-powered recommendations
and reminders.

Continuously improve: Learn what works
from real-time analysis of conversations
and interactions for better coaching and
performance.

Next-generation AI has already demonstrated that it can dramatically improve the workplace experience. In a recent survey, 89 percent of workers with access to automation and AI-powered tools feel more fulfilled because they can spend time on work that truly matters.[2]

Start your journey right

Making the most of AI requires more than just turning on the tools. It's essential to choose the right capabilities, train people to use them, and ensure data privacy and security. In this e-book, we'll help you make the most of this emerging game-changer with insights about:

- **How** to choose next-generation AI tools for sellers
- **Where** AI can make the most significant impact
- **Training** sales teams for AI adoption
- **Ensuring** responsible use of AI

"This new generation of AI will remove the drudgery of work and unleash creativity. There's an enormous opportunity for AI-powered tools to help alleviate digital debt, build AI aptitude, and empower employees."

Satya Nadella,

Chairman and CEO, Microsoft[3]

Choosing the right AI-powered sales solution for your team

The number of general-purpose and sales-specific AI tools available on the market has grown significantly, providing many options. The best way to choose the right one for your business is to match critical use cases and pain points with the capabilities of a given platform.

What do people want?

Luckily, there's data on this question. Asked to imagine work in 2030, people said they'd place the most value on changes that saved them time, enabling them to produce high-quality work and learn new skills faster.[4] More specifically, 85 percent want digital tools that help them be more agile, automate daily tasks, and make information more accessible.[5]

Therefore, AI for sales should:

Be quick and easy to learn and adopt. Employees feel their time is scarce and valuable—there's a limit to how much effort they will invest in learning a new tool if the old way seems "good enough."

Make a noticeable impact. The best AI experiences feel immediately transformative to employees. They can make something that was painful and annoying easy, even fun.

Free employees to be more creative and invested. People don't want to save time so they can do more busywork. They want to use their skills and knowledge in meaningful ways. AI should help them focus and engage so they can do their best work.

Keep humans in the driver's seat. AI should feel like a copilot, not a robot overlord. Keeping people at the center is essential to adoption, results, and ethical usage. Humans should always have the final say about any content or action the tools generate.

Tips for making the right decision

Your journey to empowering your sales team with AI is unique. Knowing what it can do and how it matches your team's needs can help you choose the right tools.

- **Learn about the tech.** You don't have to be a data scientist to use next-generation AI. But understanding how it works and what's behind a given solution can help you know the vendor's approach and how seriously they take developing these tools.

- **Ask the team.** Find the top pain points in the typical workday through conversations or surveys.

- **Try it out for yourself.** Look for a free trial or guided demo to see how the tools work.

- **Get opinions from top sellers and leaders.** Put a team together to pilot AI-based tools in real-world situations.

The importance of integration

The usefulness of next-generation AI depends on the data it can access and the number of ways employees can interact with it. Solutions that work with existing technology and data at your organization give you a head start on driving adoption and ROI.

Here are two crucial questions to ask.

Does it integrate with existing experiences?

Many vendors offer standalone AI tools. However, driving adoption and value is easier when next-generation AI integrates into the typical workday. It makes sense to look for tools that are part of a full-featured platform or interoperate with your existing technology investments.
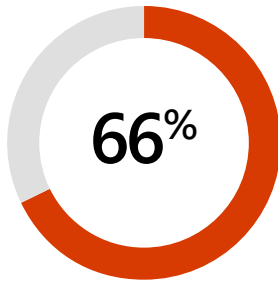
Does it integrate with your existing data?

When employees use AI that works with your company's data, especially CRM, they can more easily create personalized content and gain actionable insights. AI systems connected to a unified data platform help people break through silos and gain a 360-degree customer view.

Improving seller focus and productivity

66%

**Sellers spend up to 66% of their day
dealing with email.[6]**

Sellers face many demands on their time—
not all of them equally productive for
closing deals. With AI, they can get routine
tasks done in less time. How does it work in
the real world? Let's take a look.

Creating customer emails

Current process:

The seller drafts emails from
scratch or based on a template,
personalizing them for
each customer by manually
inputting relevant information.

AI-enabled process:

The seller uses natural-language
prompts to rapidly generate
personalized email content
that automatically incorporates
details based on CRM and past
interactions. The seller can then
refine the message further as
needed.

Considerations for adoption:

- **Ensure the AI-generated
  emails align with brand
  voice and guidelines.**

- **Maintain a balance
  between automation and
  personalization.**

- **Monitor for any potential
  biases or incorrect
  information in the
  content.**

Recapping sales meetings

Current process:

Sellers take notes during meetings and then manually write meeting summaries, often after hours.

AI-enabled process:

The seller uses AI tools to automatically transcribe and summarize meetings, extracting key points and follow-up actions.

Considerations for adoption:

- **Evaluate the accuracy and reliability of AI transcription services.**
- **Ensure sensitive information is handled securely.**
- **Provide training to sales teams on effectively using recaps.**

Identifying and prioritizing opportunities

Current process:

Sales teams rely on manual research, data analysis, and subjective judgment to identify and prioritize potential business opportunities.

AI-enabled process:

AI algorithms analyze vast amounts of data, including market trends, customer behavior, and historical data, to identify and rank high-potential opportunities.

Considerations for adoption:

- **Validate the AI algorithms' effectiveness in identifying relevant opportunities.**
- **Integrate AI insights with human expertise.**
- **Establish clear criteria for opportunity prioritization.**

Coaching and performance improvement

Current process:

Managers provide feedback to team members based on their observations and subjective assessments.

AI-enabled process:

Managers use AI-powered tools to identify successful strategies based on detailed analysis of calls, KPIs, and other data. They can provide personalized coaching recommendations based on data-driven insights.

Considerations for adoption:

- **Ensure the tools align with the organization's coaching methodologies.**
- **Address privacy concerns related to performance data.**
- **Strike a balance between automated feedback and human guidance.**

Personalizing customer engagements

Customers increasingly expect personalized interactions, fast answers to questions, and a seamless cross-channel experience. Sellers using next-generation AI have the advantage. They can quickly incorporate relevant data into their interactions and gain valuable insights when and where needed.

64%
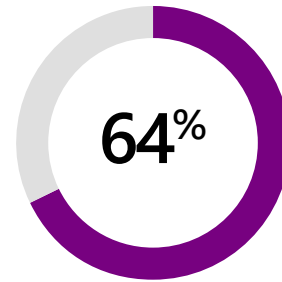
64% of consumers wish companies would respond faster to meet their changing needs.[7]

In the battle for customer loyalty, here are three ways that teams can use AI to make customers feel heard.

Staying informed: Sellers can get summaries of the latest interactions, news, and relevant information specific to a given customer without searching multiple sources. AI analyzes past interactions and numerous data sources to provide comprehensive, real-time insights on demand. A seller can go into a meeting with a clear picture of the client's recent activities, needs, and expectations, enhancing the conversation and the overall relationship.

Sharing relevant content: Sellers can further elevate customer engagement using AI-driven content recommendations. The tool analyzes a customer's past interactions, preferences, and behavior and predicts the most engaging content. Whether a blog post, a new product update, or a personalized offer, the right content at the right time can significantly enhance customer engagement.

Following up: Prioritizing follow-up actions can be challenging in a fast-paced sales environment. Using AI, sellers can get key points, competitor mentions, and follow-up actions from emails and calls to promptly address issues and opportunities. This enhanced attention to detail can improve customer perceptions without increasing demands on busy sellers.

Training sales teams for AI adoption

While the best AI tools are easy to adopt, training ensures a smooth transition. It minimizes resistance and misunderstandings that could hinder successful integration. It also opens their eyes to the breadth of ways they can take advantage of these new capabilities, leading to better results and greater ROI.

Start with a high-level understanding of how AI works

Begin with the basics. When people understand what AI is—and what it isn't—they can use it more effectively. Here are a few high-level talking points.

- People interact with AI using natural language, which makes using it easy—you don't need special training or knowledge.

- It's good at handling lots of information. It can take vast amounts of data and make sense of it. This might mean understanding customer habits or spotting patterns in sales data.

- AI can also create content based on what it has "learned" from data and human input. It can help write emails or create pitches based on what it's been taught.

- Finally, AI is here to help you, not replace you. It works best when humans are involved, adding their knowledge, perspective, and judgment that machines can't duplicate. Also, as sellers guide the AI, it gets better at helping them over time.

Share specific best practices and skills

When training sellers to use generative AI, these are among the most important specific skills they should learn.

1. **Crafting prompts:** To use generative AI, users input prompts. Prompts are text-based questions or requests the AI responds to, usually written in natural language. Different prompts generate different outputs. As a first step, sellers should focus on crafting clear, specific, detailed prompts and experimenting with different approaches. Some generative AI tools provide specific kinds of output, such as a first draft of an email. Others are more open-ended and can perform various tasks, such as summarizing text, generating content ideas, and even writing articles.

2. **Being creative and iterative:** AI is a tool that encourages experimentation. If the AI doesn't produce the desired output on the first try, tweaking the prompt or approach might yield better results. One way to think of this skill is "co-reasoning"—ideating alongside AI by engaging with it and shaping the outcomes over multiple question-and-answer interactions.

3. **Double-checking content:** While AI is powerful, it's important to remember it's a machine and can make mistakes. This helps avoid potential miscommunication or errors. Having a human – or humans – in the loop ensures the content aligns with the brand and is helpful for the intended audience.

The mindset shift

Learning to use AI is not only about acquiring new skills or getting familiar with new tools. It's about a fundamental shift in mindset regarding where to allocate time and focus.

In one survey, leaders said they believe analytical judgment, flexibility, and emotional intelligence will be essential skills for employees in an AI-powered future.[8] These skills are vital because they help sellers make sense of AI-generated insights and adapt to new AI-driven processes while still connecting with customers on a human level.

It's important to understand that AI is here to help you, not replace you. It allows sellers to shift their focus from mundane, repetitive tasks to higher-value activities. This shift will enable them to concentrate more on interacting with customers, building relationships, and closing sales.

Successful use of AI treats the technology as a copilot rather than a self-contained solution. For instance, rather than sending an AI-generated email without reading it, it's far more effective to use it to speed up the crafting of a personalized response. The tool can generate the bulk of the content, but the salesperson is the one who makes it truly personal and practical.
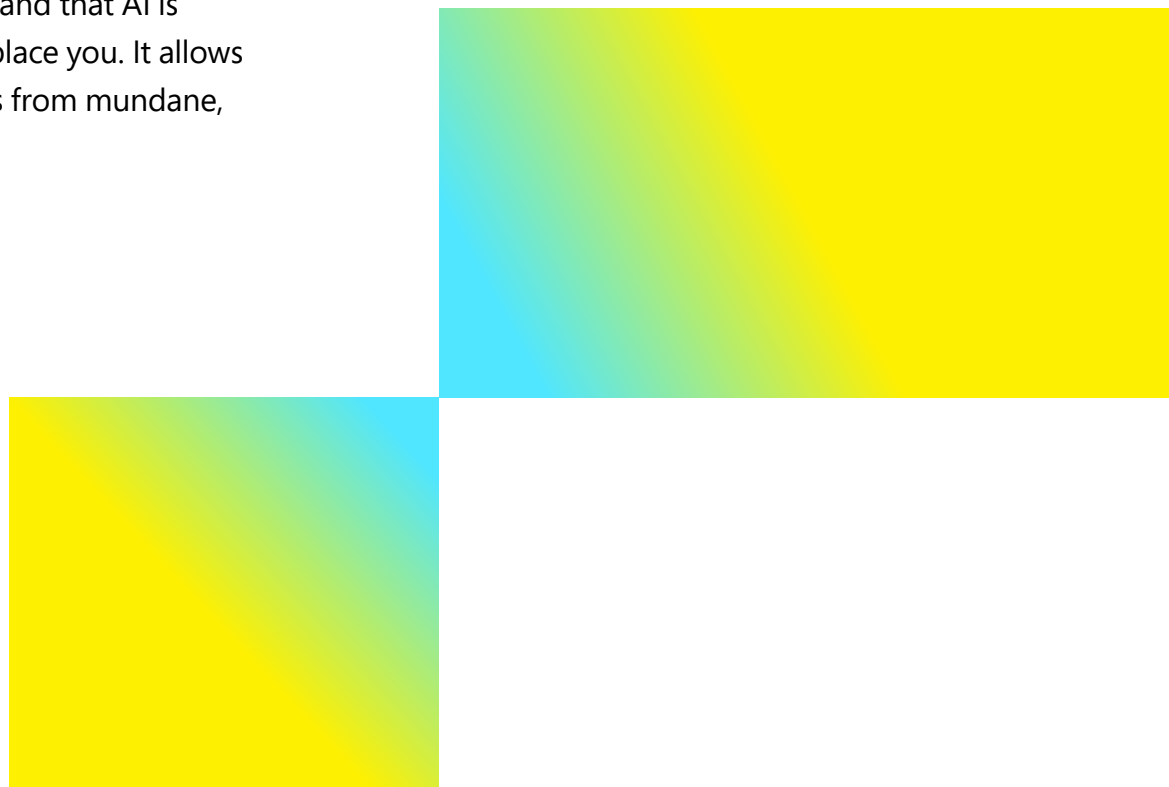
Ensuring responsible use of AI

AI relies on data, so it is critical to ensure the technology is designed to be trustworthy and highly secure. You'll likely be trusting a vendor to meet these criteria, so your choice of partner matters.

When evaluating an AI solution, ask questions about security, privacy, and ethical principles, and be confident that the vendor meets your standards.

1. **Fairness:** The system should avoid bias and treat all individuals and groups equitably. It should not favor certain groups over others or discriminate based on characteristics such as race, gender, age, or socioeconomic status.

2. **Reliability and safety:** The AI should be dependable and operate safely under all conditions. It should consistently perform as expected and have safeguards to prevent or mitigate harm.

3. **Privacy and security:** They should protect user data and respect privacy. This includes secure data storage, encryption, and compliance with relevant data protection laws.

4. **Inclusiveness:** AI should be designed to be accessible and valuable to as many people as possible, regardless of their abilities or background. It should not exclude or marginalize any groups.

5. **Transparency:** How the system works and makes decisions should be clear. Users should be able to understand and, where necessary, challenge the system's outputs.

6. **Accountability:** There should be mechanisms to hold the creators and operators accountable for their performance and impacts.

When you work with a company that follows these principles, you can be more confident using their solutions to enhance business performance and the sales team experience.

Dive in

Next-generation AI can help sellers personalize the customer experience, be more productive, and enhance performance based on data. Putting people at the center supports greater creativity, engagement, and satisfaction.

Microsoft Sales Copilot is a role-based AI copilot designed for sellers and sales teams to help them automate everyday tasks and unlock creativity. They empower sellers to deliver personalized customer experiences efficiently, focus on the most valuable opportunities and tasks, and identify best practices to close more deals. Sales Copilot is experienced in Microsoft Dynamics 365 Sales and Microsoft 365 apps like Microsoft Teams and Outlook, and also connects to other CRMs like Salesforce.

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[1] Work Trend Index | Will AI Fix Work?, Microsoft, 2023
[2] Four Ways Leaders Can Empower People for How Work Gets Done, Microsoft, 2023
[3] Work Trend Index | Will AI Fix Work?, Microsoft, 2023
[4] Work Trend Index | Will AI Fix Work?, Microsoft, 2023
[5] Four Ways Leaders Can Empower People for How Work Gets Done, Microsoft, 2023
[6] Microsoft boosts Viva Sales with new GPT seller experience - Microsoft Dynamics 365 Blog, Microsoft, 2023
[7] A Life-Centric Approach to Business, Accenture, 2022
[8] Work Trend Index | Will AI Fix Work?, Microsoft, 2023

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