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Do what matters

Summarize key discussion points

Generate answers using your business language

Activating Copilot

Microsoft Copilot for customer engagement

Sales and Service FAQs

Simplifying the complex

With Microsoft launching Copliot everywhere, we know from our conversations with clients that confusion is rife. What are the different Copliot, who are they for, what do they do, and what's available right now – these are just some of the questions we're regularly hearing from clients.

In this set of FAQs, we aim to provide clear information about Microsoft Copilot for Sales and Microsoft Copilot for Service, showing you how they can enable your organization to improve customer experiences, satisfaction and ultimately, growth.

How do Copilot for Sales and Copilot for Service differ?

While the clue's in the name, many struggle to understand how and where these Copliot can be used and where they fit.

Copilot for Sales is specifically crafted for the needs of sales teams. It focuses on streamlining the sales process by automating and personalizing tasks, generating summaries and reports, and assisting in meeting preparation. This tool is designed to seamlessly integrate with CRM systems, enabling sellers to optimize their workflows and customer interactions directly within Microsoft 365 applications like Outlook and Teams, or from within their existing CRM systems.

In contrast,

Copilot for Service is developed with customer service teams in mind. It aids customer service agents by offering personalized guidance that surfaces an organization's established knowledge base and leverages the AI capabilities of Copilot. Copilot for Service is geared towards improving the relevance and timeliness of support provided to customers by equipping agents with the right information at the right time, accessible through familiar tools like Dynamics 365, Outlook, and Teams.

In essence,

while both applications aim to empower professionals with AI-driven support, Copilot for Sales is tailored to enhance the sales cycle and activities of sales representatives to close business opportunities, whereas Copilot for Service is focused on elevating the performance of customer service agents through better information management and guidance to provide exceptional customer service experiences.

Copilot for
Service

What is Copilot for Service?

Copilot for Service is a cutting-edge generative AI solution powered by Azure OpenAI and tailored to enhance the capabilities of customer service teams. It leverages the trusted knowledge within an organization, combined with the advanced features of the Copilot product suite, to deliver personalized support to service agents.

How does Copilot for Service assist customer service agents?

By integrating with an organization's existing knowledge repositories, Copilot for Service analyzes and synthesizes vast amounts of data to provide agents with relevant and timely guidance. This helps agents to efficiently resolve customer inquiries and improve the overall service experience.

Where can agents access Copilot for Service?

Agents can easily access Copilot for Service within their daily workflow through Microsoft 365 applications such as Outlook and Teams or through Dynamics 365. This ensures a seamless experience and allows agents to assist customers without leaving their primary workspaces, confident that records will be updated in CRM systems without needing to switch between applications.

How will agents use Copilot for Service?

Agents can use Copilot for Service in a multitude of ways:

Automating Tasks: Copilot helps in automating repetitive and time-consuming tasks, freeing up agents to focus on more complex customer needs and solve customer issues.

Handling Cases: Agents can use Copilot to manage cases more efficiently. Copilot can suggest actions, provide information, and assist with navigating the case management process in Dynamics 365.

Resolving Issues Quickly: By offering real-time guidance and suggestions, Copilot enables agents to find solutions and resolve customer issues at a faster pace using your trusted enterprise data and internal repositories.

Responding to Inquiries: Agents can use Copilot features to respond to customer questions promptly, as well as draft emails and chat responses that are coherent and tailored to the customer's needs.

Summarizing Interactions: Copilot for Service can summarize cases and conversations, giving agents and leaders a concise overview that helps them stay on top of the situation.

Copilot for
Sales

What is Copilot for Sales

Copilot for Sales is an innovative AI-powered application designed to enhance the sales experience by integrating with Microsoft 365, Microsoft Teams, and Microsoft Dynamics 365. The goal of Copilot for Sales is to increase efficiency, productivity and relevance, reduce workloads, and save valuable time for sales professionals that can be better spent with customers.

How does Copilot for Sales helps sellers?

Copilot for Sales assists sellers by automating and personalizing routine tasks, generating insightful summaries and reports, and helping to prepare for upcoming meetings.It streamlines the sales process, allowing sellers to focus on building relationships and closing deals.

Can Copilot for Sales be integrated with other CRM systems?

Yes, Copilot for Sales is designed for seamless integration with popular CRM systems such as Dynamics 365 Sales or Salesforce. This ensures that you can maintain your existing workflows while benefiting from the added efficiency of Copilot for Sales.

Where can Copilot for Sales be accessed?

Copilot for Sales is accessible within your familiar Microsoft 365 applications, including Outlook and Teams, or directly from within Dynamics 365. This integration allows for a smooth user experience without the need to switch between different platforms and spend valuable time updating records.

How will salespeople use Copilot for Sales?

Salespeople can leverage Copilot for Sales to enhance their productivity and customer engagement in several ways:

Automating Tasks: Copilot for Sales streamlines the sales process by automating the creation of summaries and reports. It pulls key information on status, progress, and significant changes directly from the CRM, all within Microsoft 365 apps. This automation saves time and allows salespeople to focus on more strategic activities.

Personalizing Customer Interactions: By utilizing data from the CRM and Microsoft 365 Graph, Copilot for Sales enables salespeople to craft contextual emails tailored to specific products, customers, and opportunities, based on insights that are often hard to uncover. This level of personalization can significantly improve customer relationships and increase the chances of closing deals.

Streamlining Workflow: Copilot for Sales provides a comprehensive overview of customer accounts, including essential information such as account details, notes from previous interactions, any issues or concerns raised, and recent updates. This information is readily available in Outlook, Microsoft Teams, or Dynamics 365 Sales, ensuring salespeople have everything they need at their fingertips.

Real-time Call Insights: During Microsoft Teams meetings, Copilot for Sales can offer real-time insights when competitors or brand mentions occur, helping salespeople to react promptly and effectively. Additionally, it automatically generates meeting recaps and suggested next steps, which can be saved directly to the CRM. This feature ensures that salespeople can maintain a high level of responsiveness and follow-up efficiently with leads and customers.

What's available right now in my region?

To be honest, that depends. Across sales and service, some features are available in some regions, some are in preview, and some are generally available. These details are changing regularly. We know what new functionality is due to be released when, and in which regions – we'd be happy to share this information with you in the context of solving your challenges and we regularly help clients to participate in previews.

Our experts can give you the latest updates in real time. There have been dozens of Copilot announced and we can help you navigate through these uncharted waters.

Can Avanade tailor Copilot to meet my organization's specific needs?

Extend Copilot with Custom Data: Avanade can help you enhance the capabilities of Copilot by integrating it with custom data sources that can be found within your organization or outside data services. This means that the core features upon which Copilot is built can be leveraged to create bespoke solutions that fit neatly into your current or planned applications. This integration ensures that Copilot aligns with your business processes and workflows.

Build Your Own Copilot: For organizations with unique and complex needs, Avanade can support the development of custom Copilot solutions. This approach involves a significant development effort but offers the advantage of spanning multiple data stores, services, and apps, both within and outside your Microsoft tenant. The result is a highly customized version of Copilot that is perfectly suited to your business's specific demands.

Augment Copilot with Skills and Plugins: Avanade can augment Copilot with additional skills through plugins managed with Microsoft Copilot Studtio. This means adding new functionalities or enhancing existing ones to better serve your business objectives and improve user experiences.

Ready to get started?

Bringing award-winning Microsoft expertise, proven accelerators and delivery methods, we bring your customer experience vision to life through AI powered Copliot.

Our privileged access to the development of Microsoft's Copilot solutions and early adoption has enabled us to explore the power of generative AI for superior customer engagement across sales and service. Our range of services are designed to accelerate value and solve real-world challenges.

18x winner
of the Microsoft Global SI Partner of the Year.

Leader
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Winner
- Microsoft 2023 Customer Experience Partner of the Year
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Learn more about Copilot for Sales and Service by **registering your interest here.**

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Do what matters

Imagine what you will do with AI

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