Maximizing CRM Potential with Artificial Intelligence

Discover how Microsoft Dynamics 365 CE and Salesforce—the two industry leading CRM platforms—offer built-in intelligence and automation using Microsoft Copilot and Salesforce Einstein

In this whitepaper we are going to explore how these AI-powered tools are reshaping the landscape of B2B and B2B businesses by addressing common pain points and driving value through their advanced capabilities.

The Increasing Importance of AI in Modern CRM Practices

In today's competitive landscape, integrating AI into CRM systems is increasingly becoming an imperative for businesses. **Next-generation AI goes beyond simple automation, playing a crucial role by:**

◇ Utilizing advanced analytics to comprehend customer preferences.

◇ Forecasting future trends to enhance alignment with customer needs.

◇ Fine-tuning marketing and sales strategies for optimal effectiveness.

◇ Recommending key actions that salespeople can take can take to close a deal quickly.

![Korcomptenz]

Challenges for Companies in the B2B and B2C

Fragmented data silos impeding seamless data management and analysis.	Tedious manual data entry processes that drain crucial resources and time.	Challenges implementing advanced analytics that hinder extraction from extensive datasets.	Technical barriers hampering strategic planning and growth initiatives.	Limited agility to leverage emerging technologies and trends in the competitive market landscape.

Microsoft Copilot: Empowering Your CRM Experience

90%

of businesses report better customer relationships with AI-powered CRM tools like Microsoft Copilot.

80%

of Copilot users note a significant improvement in customer satisfaction and retention rates.

15%

increase in sales productivity for companies using Microsoft Copilot

Meet Microsoft 365 Copilot, the AI-powered productivity tool seamlessly integrated into daily Microsoft 365 apps.

◇ Copilot assists in crafting customer email responses and creating summaries of Teams meetings through Outlook within Dynamics 365 Sales

◇ It incorporates CRM information like pricing, product details, and insights from Teams calls into email replies and proposals.

◇ Sellers can quickly draft responses to inquiries or proposals and ensure they include essential data such as pricing, promotions, and deadlines.

◇ Copilot utilizes Microsoft Graph to access insights from the Microsoft Cloud and Microsoft Dynamics 365 CRM, enhancing the relevance of generated responses.

◇ It leverages conversational intelligence to summarize essential issues and topics covered during customer calls or meetings, streamlining documentation and follow-up.

◇ Copilot aids customer service agents by providing AI suggestions to resolve customer problems, drafting personalized email responses, and offering conversational chat experiences to quickly address customer queries.

Microsoft 365

Microsoft 365 Apps

Microsoft Teams

Microsoft Loop

Microsoft Entra ID

Microsoft OneDrive

Outlook

Microsoft Whiteboard

Salesforce Einstein: Transforming Your CRM Strategy

26%

increase in lead conversion rates for businesses leveraging Salesforce Einstein
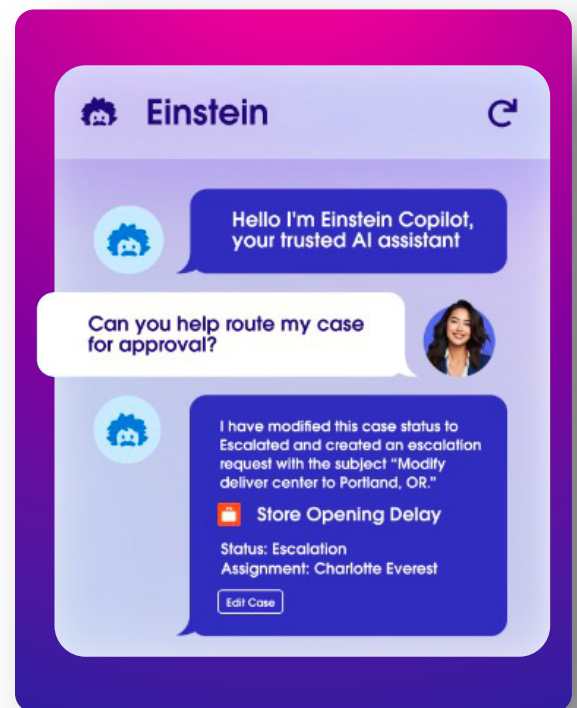
32%

reduction in time spent on administrative tasks using Einstein, allowing for more strategic initiatives

44%

increase in forecast accuracy for companies leading to better-informed decision-making.

Meet Salesforce Einstein, the AI-powered productivity tool designed to work with the world's leader in CRM software

◇ Einstein utilizes trusted business data from your Salesforce Clouds to provide context for responses

◇ Pre-programmed capabilities and automated responses are available in a library for users to prompt Einstein to perform tasks

◇ Einstein offers a consistent user experience directly embedded within Salesforce, allowing for dynamic task automation and data-driven responses

◇ Leverages private and trusted data from Salesforce customers to generate tailored responses, ensuring relevance and accuracy

◇ Users can combine multiple actions to create dynamic multi-step plans, allowing Einstein to seamlessly automate complex processes

Einstein

Hello I'm Einstein Copilot, your trusted AI assistant

Can you help route my case for approval?

I have modified this case status to Escalated and created an escalation request with the subject "Modify deliver center to Portland, OR."

📦 **Store Opening Delay**

Status: Escalation
Assignment: Charlotte Everest

Edit Case

Korcomptenz

Real-life Use Cases for Microsoft Copilot and Salesforce Einstein

Microsoft Copilot

Instant Insights: A financial analyst inputs data and gets instant market trend analysis, saving hours of manual work.

Efficiency in Excel: HR managers compile performance metrics in hours instead of days, freeing up time for strategic planning.

Smart Marketing: Marketing teams use Copilot to analyze customer feedback swiftly, spotting sentiment trends for agile strategy adjustments.

Salesforce Einstein

Customer Segmentation: Einstein categorizes customers based on demographics and behaviors, enhancing personalized communication.

Lead Prioritization: Machine Learning scores leads, guiding sales teams to focus on the most promising prospects for higher closure rates.

Predictive Marketing: Einstein recommends tailored content for marketing campaigns, optimizing audience targeting and campaign effectiveness.

Microsoft Copilot and Salesforce Einstein represent the future of CRM innovation, but both are available right now. By harnessing the power of Artificial Intelligence, these tools enable B2B and B2C businesses to overcome common challenges, drive productivity, and achieve tangible results. Embrace the future of CRM today and unlock endless possibilities for your organization's success.

How Korcomptenz Can Help?

Korcomptenz specializes in integrating and properly configuring Microsoft Copilot and Salesforce Einstein into CRM systems, boosting efficiency. With expertise in CRM implementation, we can seamlessly incorporate AI to help with predictive analytics, optimizing sales and marketing strategies, improving customer engagement, and increasing revenue. Our goal is to help you maximizing the value of your CRM investments and drive operational excellence.

Discover how we #FocusOnYou at www.korcomptenz.com

Get in touch with us:

+1 (973) 601 8770 | sales@korcomptenz.com