

# AI-Powered Sales

Maximizing Revenue Growth with  
Unified Sales Data and AI Insights



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## 1 Introduction

# The future of sales is AI

Wide-ranging challenges—including information overload, complex customer journeys, and increasing competition—are changing what it takes to drive sales.

Amid this complexity, **64%** of people say they don't have enough time to do their jobs—and 2 in 3 leaders say that's hurting their ability to innovate.<sup>1</sup>

### Enter artificial intelligence (AI):

A transformative force that is reshaping how businesses operate.

**The key** is connecting unified sales data and AI-powered insights. **The result?** Sales leaders can tap into higher levels of efficiency, personalization, and revenue growth.

### This e-book is designed for leaders—

including Chief Revenue Officers (CROs), Chief Sales Officers (CSOs), sales decision-makers, and others—who are looking to elevate their sales strategies and gain a competitive edge.

#### What you'll learn:

- How AI integrates with unified sales data to deliver results
- Practical tips for adopting AI tools and maximizing their impact
- Real-world examples of how AI drives revenue growth and improves customer relationships

<sup>1</sup> "Work Trend Index: Will AI Fix Work?" Microsoft, 2023

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# Why AI in sales matters

Sales teams today face significant new hurdles:

- **Disconnected data silos** obscure customer needs and strategic possibilities.
- **Inefficient processes** waste time on low-value tasks.
- **Limited customer insights** hamper personalization and relationship-building efforts.
- **Inaccurate forecasting** results in missed opportunities.
- **Inconsistent customer experiences** erode trust.

Here's where AI comes in. It allows sales teams to save time, work smarter, and focus on driving revenue. How?

## Unifying and analyzing data—at scale

AI helps break down silos and consolidate data into a single, unified view. This allows for faster data-driven decisions, which can improve ROI.

## Improving decision-making

AI-powered predictive analytics can be used to analyze historical data, market trends, and customer behavior. This gives sales teams more accurate forecasts, which leads to more effective resource allocation.

## Automating repetitive tasks

Automation reduces the burden of data entry, scheduling, and other tasks, so that sellers can reclaim valuable time.

## Enhancing customer engagement

AI can help personalize recommendations, offers, and content to fuel higher customer satisfaction and retention.

**95%** of organizations are currently using AI for sales and business development, or plan to be by 2026.<sup>2</sup>

**10.3x ROI** for leaders using generative AI.<sup>2</sup>

<sup>2</sup> "The Business Opportunity of AI," International Data Corporation (IDC) and Microsoft, August 2024



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# Unleash the power of unified sales data

Siloed and fragmented data: It's holding sales teams back by hindering efficiency and hiding opportunities. The key is **connection**.

Unified sales data brings relevant information into one ecosystem that serves as a "single source of truth." This prevents teams from missing out on key insights and opportunities—and losing out on revenue in the long run.

## Why unified sales data matters

### 1. Accuracy and consistency

Reduce errors and ensure that everyone works from the same accurate, up-to-date information.

### 2. Efficiency

Streamline access to information, saving time and effort.

### 3. Compliance

Simplify governance and mitigate risks related to data privacy regulations.

## Start now: How to unify data

**1. Conduct data audits:** Review data sources (such as CRM systems, marketing platforms, customer service logs, and external databases) to understand what the organization currently has and identify gaps.

**2. Invest in integration tools:** Look for tools and platforms that centralize all data while also connecting seamlessly with existing systems.

**3. Encourage cross-departmental collaboration:** Align sales, marketing, and customer service teams with shared goals and processes.

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# Using AI insights for sales success

With unified data and an understanding of why AI matters, organizations can build new pathways to revenue and growth. Teams can get more from their leads through predictive models and prioritization. They can give more to their customers with help from sentiment analysis, content targeting, and other data-driven customization. And they can do more to drive revenue and productivity thanks to AI-powered automation. Here, we break down key ways that AI can help sales organizations with common issues—and what that looks like in practice.



## Get more: Lead management and prioritization

Capturing, tracking, and nurturing potential customers until they are ready to make a purchase is the backbone of sales success. AI can make lead management a data-driven, highly efficient process so that no opportunity slips through the cracks.

### How AI helps:

#### Scoring leads

**What it means:** Predictive models analyze historical and real-time data to better assess the likelihood of conversion.

**In action:** An AI system determines that a lead who opened three emails and downloaded a white paper has a high chance of converting.

**Business benefit:** Achieve greater productivity as sales reps target efforts to high-value leads.

#### Identifying hidden opportunities

**What it means:** AI detects patterns and opportunities that humans sometimes miss.

**In action:** AI flags news that a dormant account has recently hired a new decision-maker so sales reps can proactively reengage.

**Business benefit:** No chance for growth is missed, leading to increased revenue.

#### Personalizing outreach

**What it means:** AI can generate tailored messaging that resonates with individual leads.

**In action:** Instead of a generic email blast, AI is used to craft personalized messages that address specific challenges faced by each lead.

**Business benefit:** Personalized messaging helps build closer customer relationships.

### Case Study: Investec

## Less admin, more client time

To better handle its high volume of leads, global bank and wealth manager Investec adopted AI tools to streamline CRM updates, automate meeting recaps, and personalize client emails.



We're making approximately **200 hours** of savings a year across the bank."

**Daniel Speirits**

Sales and Marketing Product Manager, Investec

[Read the full story →](#)

## Give more: Customer journeys and engagement

Customer journeys represent the complete lifecycle of a buyer's interaction with a brand. AI simplifies the process of managing them.

### How AI helps:



#### Sentiment analysis

**What it means:** AI detects emotions in emails, calls, or social media mentions.

**In action:** If a prospect expresses frustration during a support call, AI can alert the sales team to follow up with a solution or offer.

**Business benefit:** Actionable insights and attention to detail lead to improved customer satisfaction.



#### Content targeting

**What it means:** AI recommends resources aligned with customer interests.

**In action:** If a lead has shown interest in sustainability, AI might suggest sending them a white paper on the company's eco-friendly practices.

**Business benefit:** Personalization and proactive engagement lead to more revenue opportunities.



#### Streamlined communication

**What it means:** AI automates follow-ups and reminders for timely responses.

**In action:** After a discovery call, AI can summarize the discussion and suggest sending a proposal within 48 hours.


**Business benefit:** With greater efficiency, sales reps and customers get what they need, faster.



### Case Study: HYPE

## Fueling a better customer journey

By unifying data and adopting AI tools, Italian neobank HYPE could reconnect with leads who abandoned onboarding, deliver tailored in-app experiences, and send proactive fraud alerts.



As a result, the company improved customer engagement and achieved a **90% first call resolution rate**.

[Read the full story](#) →



## Do more: Automation

Research shows that sales professionals spend more than 66% of their day on administrative work,<sup>3</sup> leaving fewer hours for strategic selling. AI-powered automation saves time, allowing teams to concentrate on building relationships and driving revenue.

### How AI helps:



#### Automating data entry

**What it means:** Capture and update information in real time, eliminating errors.

**In action:** After a sales call, an AI tool automatically logs details such as meeting participants and action items into the CRM.

**Business benefit:** Gain high-level productivity as reps move on to strategic selling and relationship-building.



#### Generating meeting summaries

**What it means:** Transcribe and summarize meetings to highlight key takeaways and next steps.

**In action:** After a virtual meeting, AI creates a concise summary that includes customer pain points and next steps.

**Business benefit:** Global teams benefit from clear, accessible communication.



#### Dynamic pricing and promotions

**What it means:** Analyze trends and behavior to adjust pricing strategies automatically.

**In action:** An e-commerce platform uses AI to adjust real-time pricing based on demand fluctuations or competitor activity.


**Business benefit:** With adaptive ROI, the effort gains value over time.

<sup>3</sup> "Sales Teams Need a Transformation, Microsoft is Ready to Deliver," The Futurum Group

### Case Study: Glencore Technology

#### Automate for success

Mining tech company Glencore Technology used AI-powered automation to streamline data handling across applications, reduce unnecessary meetings, and unlock more useful sales insights.



These changes **increased workflow efficiencies by 50%** and reduced manual efforts by 25%.

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# Introducing autonomous agents

Autonomous agents are advanced AI systems capable of perceiving their environment, processing information, and taking actions to achieve specific goals. Think of autonomous agents as virtual sales agents, teammates that never sleep.

These agents use machine learning (ML), natural language processing (NLP), and decision-making algorithms to achieve specific goals. Unlike traditional software, which requires explicit instructions for every action, autonomous agents learn from interactions and improve over time.



## Key Capabilities



### Task automation

**What it means:** Agents handle data entry, order processing, and scheduling.

**In action:** When a customer places an order, the autonomous agent automatically verifies payment, updates inventory records, and sends a confirmation email.

**Business benefit:** Sellers are freed to focus on strategic activities for more efficiency.



### Real-time adaptive insights

**What it means:** Agents provide in-the-moment recommendations to the sales team.

**In action:** An autonomous agent analyzes a customer's tone and comments during a call. It alerts the rep to key products or discounts that they may need.

**Business benefit:** Human and AI agents work in tandem to deliver data-driven support.



### 24/7 support

**What it means:** Agents operate at any time, without downtime.

**In action:** A virtual sales rep handles customer inquiries outside of standard hours.

**Business benefit:** No delays in service and easier resolution of routine issues mean an enhanced customer experience.



### Continuous learning

**What it means:** Agents adapt behavior based on past interactions, for ongoing improvements.

**In action:** Over time, an autonomous agent learns what factors lead to successful conversions and adapts the way it qualifies leads.

**Business benefit:** Investments in AI tools improve over time, with an eye to long-term results.



## Case Study: Cemex

### A helping hand

Global building materials company Cemex adopted an AI-powered autonomous agent called Technical Xpert, which helped human agents access detailed product information and offer tailored solutions.



Time is the most valuable thing ...  
[T]he agility with which we can solve  
problems allows us to have additional  
time with the customer face-to-face."

#### **Cemex salesperson Cristhian Alday**

on the benefits of Technical Xpert, which  
cut some tasks from hours to seconds.

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# Building an AI-ready sales organization

For AI to be a truly effective tool for any sales operation, leaders need to be strategic about how they adopt and implement it.

## 1. Align AI with goals

- What outcomes are most critical to success?
- What is the organization's main priority: increasing revenue, improving productivity, or something else?
- What is the expected ROI of implementing AI?

## 2. Choose the right solutions

- **Organizational needs:** Assess the current tech stack, data infrastructure, and specific pain points.
- **Integration and scalability:** Look for platforms that integrate seamlessly with existing systems and can scale as needs evolve.
- **Usability:** Simplicity and user-friendliness are key.
- **Support systems:** Prioritize tools with proven ROI and seek vendors who provide robust support.

## 3. Empower the team

- **Training programs:** Ensure teams understand how to use new tools through foundational sessions, role-specific training, and workshops.
- **Change management:** Address concerns by communicating AI's benefits, hosting Q&A sessions, and involving employees in the implementation process.
- **Addressing ethics:** Build trust by establishing clear guidelines covering data privacy, bias mitigation, and accountability.

## 4. Decide how to measure success

Tie metrics directly to goals. For example:

- Is the team closing more deals due to better lead prioritization?
- Have customer satisfaction scores improved through personalized interactions?
- Is the team spending less time on admin tasks and more on selling?



## Case Study: PA Consulting

### Built on trust

The British company PA Consulting emphasized training and support to create an “Augmented Workforce” in which AI enhances employee skills and improves the work experience.

The company estimates it can **redirect 45,000 hours annually from routine tasks** to higher-value work that aligns with business priorities.

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# How Microsoft Dynamics 365 can help

Microsoft Dynamics 365 is a set of intelligent business applications that helps connect teams, processes, and data across an entire organization to improve customer experiences and operational agility. Within the suite, Dynamics 365 Sales empowers sales teams to connect with customers effectively and achieve their goals with greater efficiency.

## Key features:

- **Lead and opportunity management:** Prioritize high-value leads using predictive scoring and AI-enhanced analysis.
- **Automation tools:** Reduce manual tasks like data entry, email drafting, and meeting summaries.
- **Real-time insights:** Analyze customer sentiment, competitor mentions, and conversation performance during calls.
- **Personalization:** Deliver tailored customer experiences based on unified data and AI recommendations.

## The Dynamics 365 difference:

- **Seamlessly integrate across the Microsoft ecosystem:** Connect with tools that organizations already work with, including Outlook, Teams, and SharePoint. No switching apps or disjointed communication.
- **Get access to advanced AI models powered by Azure:** Our leading cloud platform offers state-of-the-art machine learning models and generative AI tools, including those developed in partnership with OpenAI.
- **Use unique insights for sales:** Dynamics 365 Sales uniquely integrates with LinkedIn Sales Navigator for social selling insights and relationship analytics.
- **Activate business intelligence with Power BI:** Natively integrated, Power BI allows teams to visualize complex data, combine external data sources, and get real-time insights that update dynamically.
- **Scale to meet changing needs:** Multi-language support, localization, and global data centers ensure that Dynamics 365 can serve businesses anywhere in the world and scale quickly.

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# A new vision for AI-powered sales

The future of sales is increasingly data driven, hyper personalized, and automation focused, with AI playing a crucial role in optimizing customer interactions and decision-making. It's the tool sales teams need to gain a competitive advantage.

By adopting AI strategically and empowering the whole team, organizations can move not just to adapt but to lead in this new era.

## Transform your sales strategy with Microsoft Dynamics 365

Are you ready to take your sales strategy to the next level? Learn more about how Microsoft Dynamics 365 can help your organization thrive in an AI-powered world.



**Grow your revenue  
with advanced AI**



**Start your free trial of  
Dynamics 365 Sales**

