



Microsoft
Copilot Studio



Microsoft 365
Copilot



Microsoft
Dynamics 365

USE CASE GUIDE

Microsoft sales agents



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Why the future starts now

Discover how AI assistants can reduce everyday burdens and enhance opportunity.

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Your next step into the future

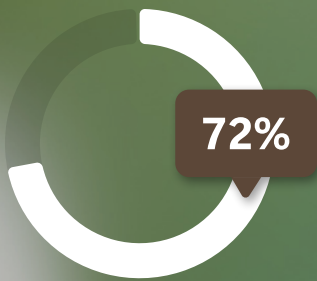
Ready to integrate AI into your sales organization? Learn how to get started.

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Common use cases across sales roles

Not sure which agents are right for you? Here are some common AI use cases from across the sales spectrum.

WHY THE FUTURE STARTS NOW



of a rep's time is spent on administrative tasks¹

Sales teams across Microsoft have integrated agentic sales into their workflow.

Early results include:

15.1%

Increase in sales lead/opportunity conversion²

9.4%

Higher revenue per seller³

Sales has entered a new digital-first, data-fueled era that is driving expectations higher than ever. Yet, sales teams are struggling to convert a plethora of new tools and data into success stories. Sales leaders are juggling fragmented tools and data to make strategic decisions. Sales operations teams are overwhelmed with manual reporting and process maintenance. And for some, quota attainment is flatlining. Enter **Agentic Sales**.

Microsoft sales agents are enterprise-grade, generative AI assistants designed to alleviate administrative burdens for sales teams. These secure, always-on tools are embedded in apps sales teams use every day, including Dynamics 365, Microsoft Teams, and Outlook. These plug-and-play assistive agents work in partnership with sellers, taking on time consuming tasks such as conducting lead research, generating personalized outreach emails, and collecting key information for sales reps.

For more specific needs, organizations can build custom sales focused agents using tools such as Copilot Studio. These agents can be trained on your sales playbooks, product data, and industry-specific sources for tailored support and deeper automation.

The challenges sales teams face today are real—but so is the opportunity. Read on to learn how AI agents can empower your sales teams to move **faster, smarter, and more effectively**.

USE CASES AND AGENTS

Sales leaders and executives



Drive strategy and results

Sample roles: Vice President of Sales; Chief Revenue Officer (CRO); Chief Sales Officer (CSO)

AI is a strategic lever for driving revenue growth, improving forecasting and annual planning cycles, and empowering your team to win smarter. With today's sales cycles longer and more complex than ever, AI gives you a real-time pulse on the business, proactively highlights risks and opportunities, and automates the insight-gathering you used to spend hours on. Imagine spending less time chasing spreadsheets and more time coaching reps and shaping strategy. Agentic AI makes that possible now.

USE CASE 01

Reporting and communications

Report and communicate strategic team updates with agent-assisted insights. Agents can be used to automate time-consuming tasks including preparing quarterly executive updates and other comms, reviewing contracts and purchase orders, and converting performance data into presentation-ready slides.

- Generate quarterly updates
- Review contracts and purchase orders
- Draft reports and comms

Recommended custom agent concept

- Weekly sales performance reporting agent built with [Copilot Studio](#)

Tip: A "custom agent concept" refers to a type of agent you can create using Microsoft Copilot Studio.

USE CASE 02 Forecasting

Forecast your team's opportunities based on a complete view of your data. Agents can generate forecast scenarios based on 360-view of the accounts, opportunities, and contacts, creating accessible analytics for use in reports. They can also analyze current CRM trends and historical data to predict future performance.

- Auto-generate forecast scenarios
- Predict performance based on data
- Generate accessible analytics

Recommended Microsoft agents

- [Microsoft Sales Research Agent](#)
- [Microsoft Sales Agent in M365 Copilot](#)

USE CASE 03 Sales planning

Plan your sales team strategy based on up-to-date insights with the assistance of AI. Agents can benchmark teams performance based on segments or territories and identify friction or gaps in the pipeline, providing valuable insight into where to focus future efforts. You can also use agents to validate assumptions.

- Benchmark performance
- Identify friction/gaps in pipeline
- Validate assumptions

Recommended Microsoft agent

- [Microsoft Sales Research Agent](#)

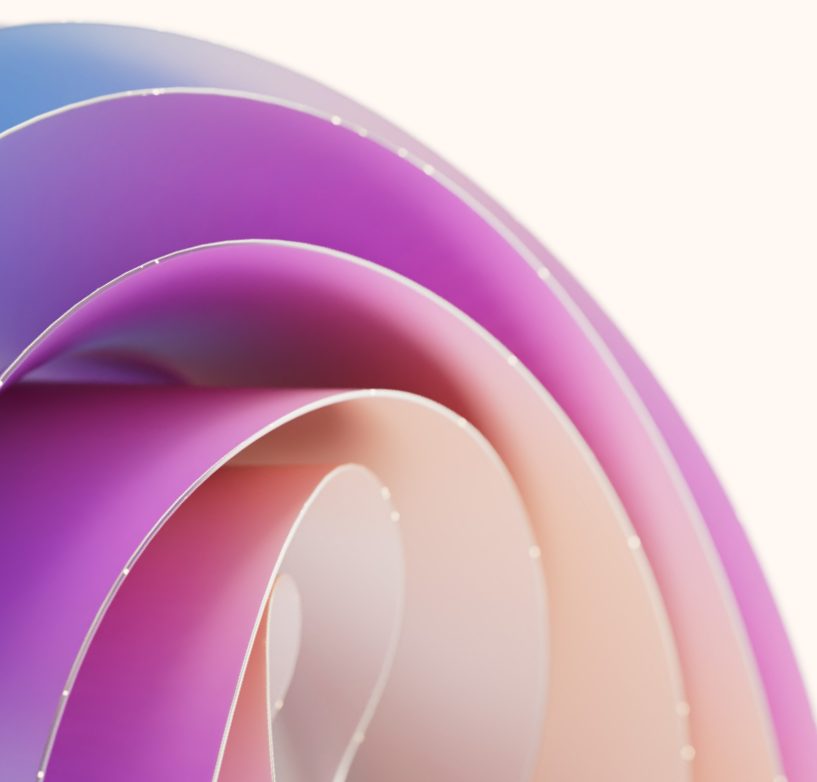
USE CASE 04 Sales health monitoring

Monitor the health of your pipeline, team, and business faster and more effectively with AI. Agents can quickly and efficiently summarize the pipeline by segment, region, or rep, highlighting at-risk deals while there's still time to save them.

- Summarize pipeline
- Highlight at-risk deals

Recommended Microsoft agents

- [Microsoft Sales Research Agent](#)
- [Microsoft Sales Agent in M365 Copilot](#)



USE CASES AND AGENTS

Sales reps and account managers



Close more, administer less

Sample roles: Account executive; Sales representative; Account manager

Let's be honest, you didn't get into sales to update CRM records or dig through inboxes to check on the status of a proposal. With AI, you can finally spend less time on admin tasks and more time selling. Whether it's prepping for your next call, writing that perfect follow-up, or surfacing deal insights in seconds, AI acts like your personal sales assistant, always ready to help.

USE CASE 01

Lead research and outreach

Accelerate lead research and automate outreach with help from AI. Agents can assist with gathering and synthesizing data from multiple resources, creating a more complete view of the lead. They can also be used to automate key sales nurture tasks including writing personalized emails to leads, generating reminders for next steps, and flagging critical follow-up dates. Agents can assist with generating proposals tailored to the individual lead.

- Synthesize data from multiple resources
- Compose/send personalized emails to leads
- Generate reminders for next steps
- Flag important dates
- Generate tailored proposals

Recommended Microsoft agent

- [Microsoft Sales Qualification Agent](#)

USE CASE 02

Lead qualification

Work your sales leads more effectively and reduce lead qualification cycles with AI. Agents can be used to automate the data verification process, scoring leads based on fit and intent and flagging factors that may disqualify them as leads.

- Automate data verification
- Score leads based on fit and intent
- Flag disqualifying factors

Recommended Microsoft agent

- [Microsoft Sales Qualification Agent](#)
- [Sales Development Agent](#)

USE CASE 03

Meeting preparation

Better prepare for meetings and customer calls with the power of AI. Agents can create pre-call summaries of key prospect data pulled from both internal and external resources including CRM, LinkedIn, and emails. They can also summarize essential information, including product data, that may prove valuable during the meeting.

- Summarize key prospect data
- Summarize info to share during the call

Recommended Microsoft agents

- [Microsoft Sales Voice Chat Agent](#)
- [Sales Agent in M365 Copilot](#)

USE CASE 04

CRM updates

Update your CRM contacts, accounts, and opportunities faster and more accurately with AI. Agents can assist with:

- Reducing manual data input through automation
- Auto-logging meeting notes, next steps, and customer interactions
- Auto-filling contacts and company data from external data resources

Recommended Microsoft agents

- [Microsoft Sales Qualification Agent](#)
- [Sales Agent for M365 Copilot](#)

USE CASE 05

Price quoting

Quote pricing for your opportunities faster and with greater accuracy using AI. Agents can recommend optimal pricing, ensuring compliance with all pricing rules. They can then produce personalized quote documentation. Other key tasks such as updating CRMs and forecasts can also be automated using AI.

- Recommend optimal pricing
- Produce personalized quotes
- Update CRMs and forecasts

Recommended custom agent concept

- Custom price quoting agent built with [Copilot Studio](#)

USE CASE 06

Training and onboarding

Onboard, train, and improve your sales skills with AI. Agents can guide reps through core sales processes, reducing reliance on manual training materials and helping new hires become productive faster. Agents can also answer policy and deal desk questions in context, enabling them to get answers quickly.

- Guide reps through sales processes
- Reduces dependence on manual training materials
- Provides self-service solution for deal desk questions

Recommended Microsoft agent

- [Sales Agent in M365 Copilot](#)

Recommended custom agent concept

- Custom-built sales rep onboarding agent built with [Copilot Studio](#)

USE CASE 07

Competitive intelligence and research

Research competitors on your opportunities with help from AI. Agents can identify competing products and core differentiations, providing insights and talking points for conversations. They can also do broader research across the market landscape, ensuring you're up to date on trends.

- Identify competing products and differentiators
- Conduct market research
- Provide insights/talking points

Recommended Microsoft agent

- [Microsoft Sales Research Agent](#)
- [Sales Agent in M365 Copilot](#)

Recommended custom agent concept

- [Custom market landscape research agent](#) built with [Copilot Studio](#)

USE CASE 08

Upsell/cross-sell suggestions

Strategize upsell and cross-sell opportunities based on comprehensive views of your accounts with AI. Agents can monitor and analyze a customer's historical data, identifying patterns of interest. They can also recommend add-ons based on the individual customer's behavior and purchase history.

- Monitor and analyze customer data
- Recommend add-ons based on customer data

Recommended Microsoft agent

- [Microsoft Sales Qualification Agent](#)
- [Sales Agent in M365 Copilot](#)

Recommended custom agent concept

- Personalized, custom communications agent built with [Copilot Studio](#)

USE CASE 09

Opportunity identification

Identify opportunities within your territory smarter with the help of AI. Agents can qualify leads and identify those that should be prioritized. They can also suggest additional market opportunities based on customer data.

- Qualify leads
- Identify priority leads
- Suggest market opportunities

Recommended Microsoft agents

- [Microsoft Sales Qualification Agent](#)
- [Sales Development Agent](#)

Recommended custom agent concepts

- [Respond to RFP custom agent](#) built with [Copilot Studio](#)
- [Lead prediction custom agent](#) built with [Copilot Studio](#)

USE CASE 10

Territory management

Prepare and manage your territory faster and more efficiently with AI. Agents can analyze territory coverage and gaps, surfacing regional trends and buying signals of interest. They can also track and report on territory health.

- Analyze territory coverage and gaps
- Surface regional trends and buying signals
- Track and report on territory health

Recommended custom agent concept

- Custom territory analysis and planning agent built with [Copilot Studio](#)

USE CASE 11

Deal closing

Reduce the hands-on time required to close deals within your accounts using AI. Agents can summarize lead engagement and intent signals and recommend next-best actions based on the deal stage, lead behavior, and historical patterns. They can also flag risk signals in real time, enabling you to take action before it's too late. Agents can also prepare and send follow-up communications automatically, ensuring timely outreach.

- Summarize lead engagement and intent signals
- Recommend next-best actions based on deal stage, lead behavior, and historical patterns
- Flag risk signals in real time
- Prepare follow-up comms automatically

Recommended Microsoft agents

- [Sales Close Agent](#)

Recommended custom agent concept

- [Custom sales conversion training agent](#) built with [Copilot Studio](#)

USE CASES AND AGENTS

Sales operations and administrators



Optimize the engine

Sample roles: Sales operations analyst; CRM administrator; CRM Program Manager; Revenue Operations Systems Analyst

AI is a multiplier for sales productivity and operational efficiency. For Sales Ops and IT, that means cleaner data, faster reporting, smarter enablement, and fewer fire drills. And with enterprise-grade AI like Microsoft Copilot, it's all delivered in a way that's secure, scalable, and aligned with your existing systems. Whether you're driving adoption or deploying custom copilots, AI helps you reduce overhead and unlock strategic value, without compromising on governance.

USE CASE 01

Sales reporting

Report on sales team performance with data gathering and analytical assistance from AI. Agents can retrieve and share deal trends, pipeline status, and segment without asking an analyst for help. They can also gather data for ad-hoc reporting and surface key insights for leadership reports.

- Retrieve and share deal trends
- Pull data for ad-hoc reports
- Surface key insights for reports

Recommended Microsoft agent

- [Microsoft Sales Research Agent](#)
- [Sales Agent in M365 Copilot](#)

USE CASE 02

Training content

Create material and train your sales team faster with help from AI. Agents can help reduce onboarding time by identifying potential training topics and generating focused, targeted training materials.

- Identify potential training topics
- Generate training materials

Recommended Microsoft agent

- [Sales Agent in M365 Copilot](#)

USE CASE 03

Annual planning

Build a strategic plan for your sales team based on a complete view based on a comprehensive set of data with help from AI. Agents can use internal and external resources to find and fill in missing company details such as industry, size, and geography, enabling more accurate territory and quota planning. They can also provide additional information ranging from deal and account histories to broader industry and market trends, providing additional insight into the big picture.

- Fill in company data gaps
- Summarize deal and account histories
- Identify industry and market trends

Recommended Microsoft agent

- [Microsoft Sales Research Agent](#)
- [Sales Agent in M365 Copilot](#)

Your next step into the future

AI in sales is a present-day imperative. From leadership visibility to rep productivity to ops and IT efficiency, AI agents are already delivering value. The companies that start now will build the muscle memory, insights, and momentum to stay ahead. Whether you begin with pre-built tools or invest in custom copilots, the key is to get started today.



Learn more about building custom agents



Common use cases across sales roles

Use case	Sales leaders	Salespeople	Sales ops and IT	Microsoft pre-built agent(s)	DIY custom agent concept(s)
Prospecting	Identify opportunities	Qualify prospects	Track opportunities	Microsoft Sales Qualification Agent Sales Development Agent	Respond to RFP agent Lead prediction agent
CRM	Review summaries, insights	Auto-log notes and updates	Data hygiene and integrity	Microsoft Sales Qualification Agent Sales Agent in M365 Copilot	
Customer comms and personalization	QBRs, board updates	Draft follow-ups, outreach	Support content delivery	Microsoft Sales Qualification Agent Sales Agent in M365 Copilot Sales Development Agent	Personalized communications agent
Forecasting and insight	Forecast intelligence	Deal trends and deal health	Enable self-serve analytics	Microsoft Sales Research Agent Sales Agent in M365 Copilot	Weekly sales performance reporting agent
Productivity automation	Dashboard creation	Meeting prep, email writing	Automate reporting	Microsoft Sales Voice Chat Agent Microsoft Sales Research Agent Sales Agent in M365 Copilot	
Coaching and enablement	Identify skills gaps	Receive tips and resources	Generate training and FAQs	Sales Agent in M365 Copilot	Sales rep onboarding agent Sales conversation training agent

References

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2. Internal Microsoft sales team data based on Time Period - Jan to Nov 7 2025 Total customers outreach by the Agent - 61,734
3. Internal Microsoft sales team data based on 30 SME&C sellers from pilot of Sales Agent. "AI is already changing work—Microsoft included," Microsoft, 2024