

# We enabled sales finance teams to focus on customers and strategy, not busywork.

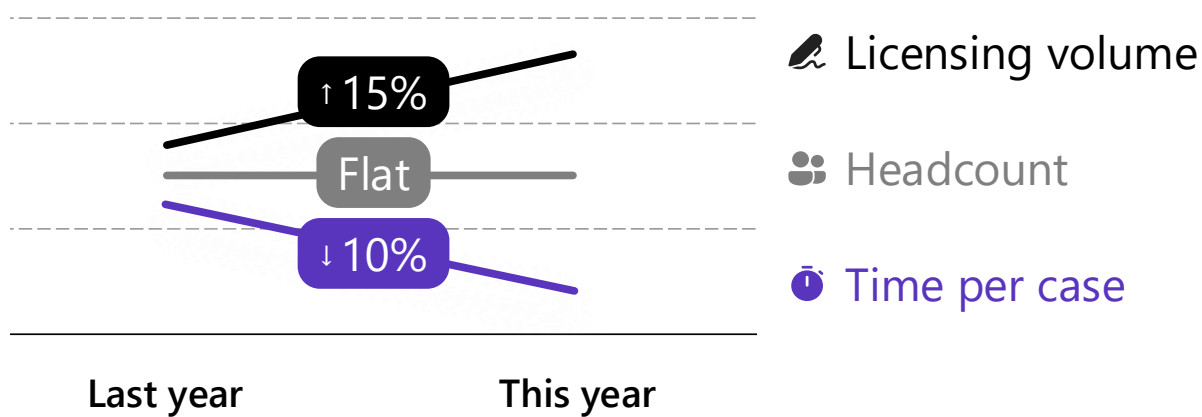
## Sales Enablement

Microsoft's Sales Enablement team manages the company's most complex, high-impact opportunities across regions and solution areas. Historically, fragmented systems and manual coordination slowed decision-making and led to inconsistent approvals.

We redesigned the process so scale drives speed and consistency – not added effort. AI is now embedded directly into review and approval workflows, surfacing contract history, strategy, policy guidance, investment requirements, and approval criteria at the point of decision.

The result: 15% more sales opportunity volume managed with flat headcount, 10% faster turnaround times, and support for over 2,500 cases per month – with faster approvals, stronger consistency, and better visibility for leaders.

### Sales opportunity improvements driven by AI




## Agents and automation in sales enablement

Our internal Finance and Finance IT teams have leveraged Microsoft tools to build custom AI solutions within the Microsoft ecosystem, tailored to our underlying systems and data. These solutions enable Sales teams to convert manual, expertise-driven steps into standardized, scalable processes.



### Terms and Conditions AI Agent

To facilitate a sale, contract negotiations require manual searches and ad hoc expertise input to resolve T&C questions, introducing variability in terms and slowing customer engagement. A centralized **Terms and Conditions AI Agent** now delivers structured guidance, fallback language, and reusable insights – eliminating 15K hours annually while increasing speed and confidence in negotiations.

Main development tool:  Agent Builder in M365 Copilot	Learn more: <a href="https://aka.ms/TermsAndConditionsAIAgent">aka.ms/TermsAndConditionsAIAgent</a>
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### Investment & Statement of Work Agents

In strategic investment cases, decisions require interpreting complex End Customer Investment Funds (ECIF) and Azure Credit Offer (ACO) rules across siloed sources as well as validating costs, funding alignment, and policy compliance through expertise-heavy processes that delay approvals and drive rework. The **Investment Agent** now centralizes policy guidance to enable faster, more accurate eligibility and funding decisions, and the **Statement of Work Agent** analyzes documents to surface risks, validates funding eligibility, and standardizes insights. In combination, these two agents save 3K hours annually while improving rigor and scalability.

Main development tool:  Copilot Studio	Learn more: <a href="https://aka.ms/InvestmentsAgent">aka.ms/InvestmentsAgent</a>
 Agent Builder in M365 Copilot	<a href="https://aka.ms/StatementOfWorkAgent">aka.ms/StatementOfWorkAgent</a>

### Customer Opportunity Agent

Further, our **Customer Opportunity Agent** accelerates sales negotiation by turning a proposed set of commercial terms into quantified, revenue-based guidance in minutes. A single assumption change regarding volume, price, or product mix previously took five hours to model impact in Excel. With five negotiation iterations per customer, reviewers spent 25 hours per customer opportunity. The agent, built in Copilot Studio by a finance professional without an IT background, ingests current versus proposed inputs, calculates revenue growth and margin impact, flags KPI threshold results, and routes approvals accordingly – cutting time to customer opportunity insights from 25 hours to three minutes.

Main development tool:  Copilot Studio	Learn more: <a href="https://aka.ms/CustomerOpportunityAgent">aka.ms/CustomerOpportunityAgent</a>
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## Agents and automation in sales enablement

### Contract Intelligence Agent

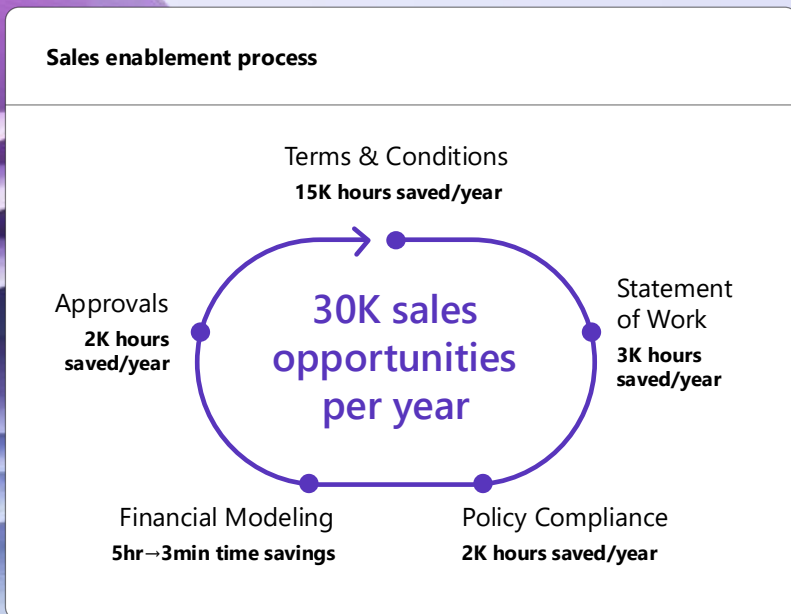
In the next step of the sales execution process, time-critical decisions in Professional Services compliance reviews depended on fragmented guidance and manual escalation. Now, they are streamlined through our **Contract Intelligence Agent**'s role-based, policy-aligned recommendations, saving 2K hours annually and improving sales outcome quality while reducing risk.

Main development tool: Copilot Studio	Learn more: <a href="https://aka.ms/ContractIntelligenceAgent">aka.ms/ContractIntelligenceAgent</a>
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### Sales Enablement Assistant

To execute on final sales steps, sales opportunity managers historically had to manually draft sales and finance leadership approval emails, summarize complex case notes, and context-switch across systems, slowing execution and creating inconsistency. The **Sales Enablement Assistant**, built using no-code Copilot agent tools, automates these tasks by generating approval communications and case summaries, saving one hour per case and enabling consistent execution across opportunities. Today, 35 managers actively use the assistant, saving 2K hours annually on top of savings from the above agents, allowing them to focus more on negotiation strategy, risk assessment and decision-making.

Main development tool: Agent Builder in M365 Copilot	Learn more: <a href="https://aka.ms/SalesEnablementAssistant">aka.ms/SalesEnablementAssistant</a>
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In combination, these capabilities shift the team from manual opportunity-by-opportunity review to scalable, insight-driven risk prevention, and finance professionals are able to focus on applying consistent judgment, surfacing systemic risks earlier, and supporting confident sales execution at global scale.