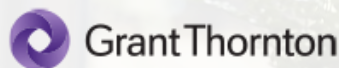


# Sales Insights Add-in for Dynamics 365 Sales

"With the assistant, relationship analytics, predictive lead and opportunity scoring, and other AI-powered tools, we can focus on those opportunities where we have the highest likelihood of winning and strike while the iron is hot."

**Nichole Jordan**  
National Managing Partner

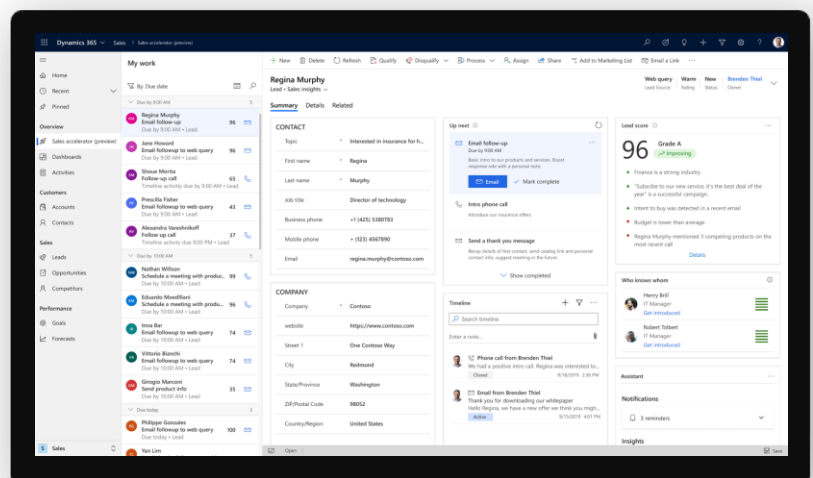


## Pivot to digital selling

In today's socially distant environment, every seller is a remote seller, facing new challenges in identifying ready buyers, engaging customers, and sustaining day-to-day productivity. The Sales Insights Add-in helps organizations jump-start digital selling with prebuilt intelligence, equipping sales teams with adaptive guidance to serve customers now and into the future.

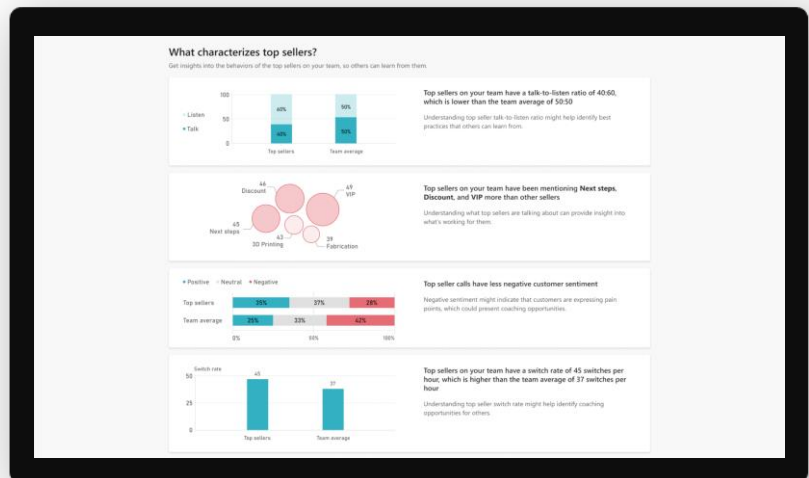
## Friction-free selling

Sales accelerator helps velocity sellers move fast and stand out from the competition with a single digital workspace that has everything sellers need to stay focused and productive. Get an AI-prioritized list of customers, with clear and achievable sales activities. Use integrated multi-channel tools such as soft phone dialer and email templates to shorten sales cycles.



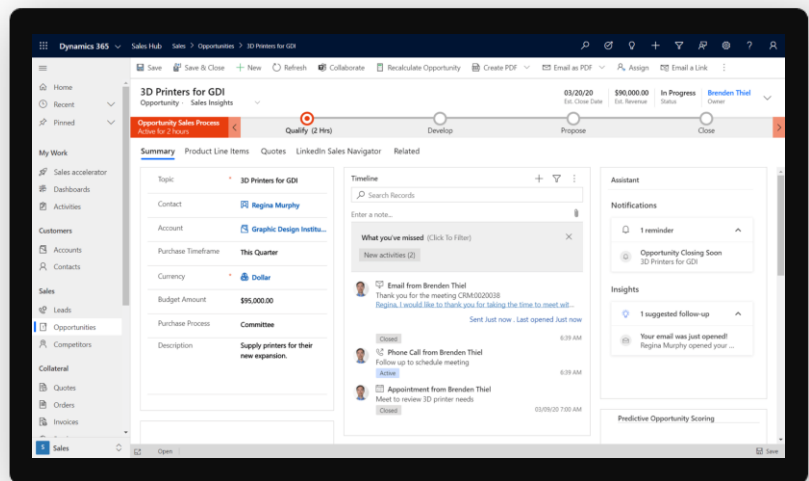
## Make every conversation count

With more sales interactions happening virtually, sellers need digital-first solutions that provide signals on whether their call conversations are landing. Conversation intelligence automatically transcribes and analyzes customer emotion, sentiment, conversation content, and speaking style, so sellers can build rapport remotely.



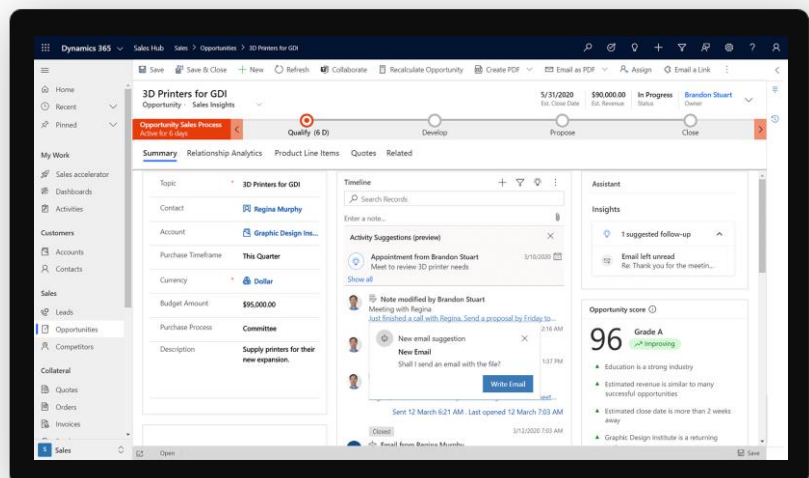
## Communicate at the right moment

Sellers can be more responsive with intelligent email tracking. Find out when and how customers interact with emails – know when they open your email, click a link, open an attachment, or send a reply.



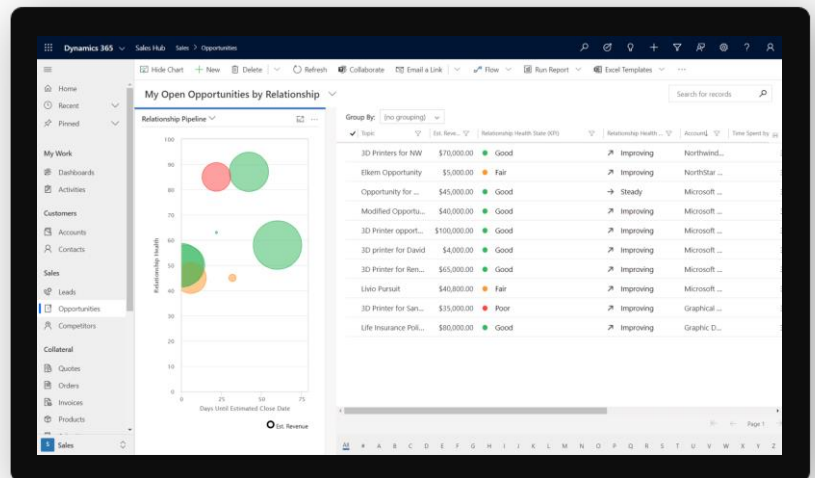
## Free up time

Minimize data entry with suggested customer activity records. Auto capture customer emails and meetings based on Outlook data. Get contextual, real-time suggestions for creating new emails, meetings, contacts, and tasks as sellers enter notes.



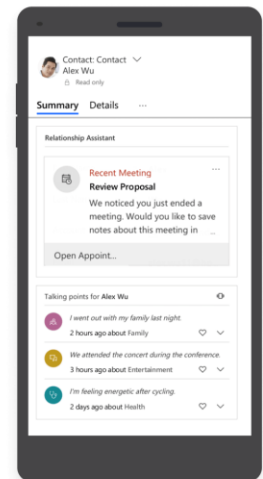
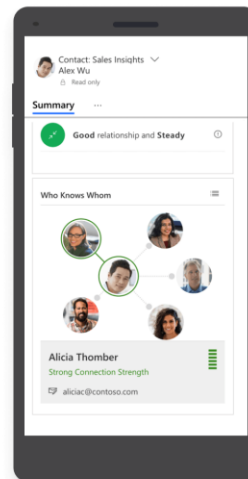
## Monitor relationships

For sales that have longer cycles, keep track of relationship health and mitigate risks based on comprehensive interaction signals across Dynamics 365, Microsoft 365, and LinkedIn.



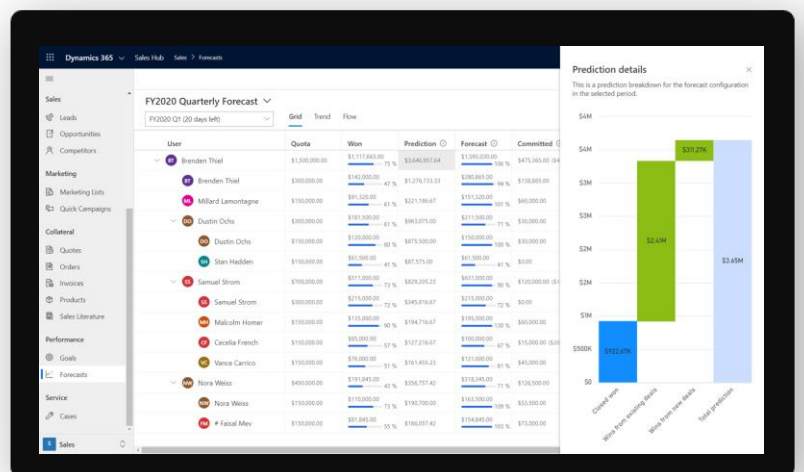
## Strengthen relationships

Secure warm introductions from colleagues who already have active relationships with prospects based on Microsoft Exchange data. Move relationships forward with personalized talking points and next best action assistant cards that are easy to customize.



## Adapt to change

Keep up with a rapidly changing environment using agile forecasting tools that result in more accurate forecasts. Predictive forecasting supplements seller-generated forecasts and intuitively tracks and analyzes changes in the pipeline using snapshots and deal flow visualization.



For more information, visit: <https://dynamics.microsoft.com/en-us/sales/overview/>

# Sales plan comparison

	Dynamics 365 Sales Professional	Dynamics 365 Sales Enterprise	Dynamics 365 Sales Premium	Microsoft Relationship Sales
Dynamics 365 Sales				
Sales execution				
Lead and opportunity management	●	●	●	●
Marketing lists and quick campaigns	●	●	●	●
Products, price lists, and product bundles	●	●	●	●
Quotes, orders, and invoices	●	●	●	●
CPQ and data enrichment solution discovery	●	●	●	●
Live org charts	●	●	●	●
Cases (for Sales)	●	●	●	●
Business card scanner <sup>1</sup>	○	●	●	●
Products, relationships, and hierarchies		●	●	●
Forecasting		●	●	●
Assistant (standard cards)		●	●	●
Email intelligence (email engagement & auto-capture)		●	●	●
Sales playbooks		●	●	●
Competitors, sales goals, and territory management		●	●	●
Partner relationship management		●	●	●
Knowledge management		●	●	●
Microsoft 365 integration				
Outlook	●	●	●	●
Exchange	●	●	●	●
Excel	●	●	●	●
Teams	●	●	●	●
OneDrive or SharePoint	●	●	●	●
OneNote	●	●	●	●
Reporting and analysis				
Export to Excel, advanced analytics with separate Power BI license	●	●	●	●
Real-time sales reports and dashboards	●	●	●	●
Portals <sup>2</sup>	○	○	○	○
Customization and extensibility <sup>3</sup>				

Application customizations	Limited	●	●	●
Custom applications <sup>4</sup> (Microsoft Power Apps)		●	●	●
Workflow automation <sup>5</sup> (Microsoft Power Automate)		●	●	●
LinkedIn Sales Navigator				
Embedded Sales Navigator in Dynamics 365 Sales				●
Activity sync from Sales Navigator				●
Accounts, leads, and contacts saved to Sales Navigator				●
Smart Links				●
Sales Insights Add-in <sup>6</sup>				
Contextual insights				
Predictive forecasting		○	●	○
Pipeline intelligence		○	●	○
Predictive scoring		○	●	○
Relationship analytics		○	●	○
Connection insights (who knows whom & talking points)		○	●	○
Notes analysis		○	●	○
Assistant customization and premium cards		○	●	○
Conversation intelligence				
Call transcription		○	●	○
Keyword, sentiment, and emotion analysis		○	●	○
Competitive products and brand analysis		○	●	○
Pipeline analysis		○	●	○
Seller behavior and top seller analysis		○	●	○
Coaching tools		○	●	○
Personalized seller dashboards		○	●	○

● Included

○ Add-in

<sup>1</sup>Business card scanner available to Sales Professional customers only if they purchase an AI Builder license.

<sup>2</sup>Available as an add-in. For more information, see [Power Apps portals](#).

<sup>3</sup>For more information about customization, see the [Dynamics 365 Licensing Guide](#).

<sup>4</sup>Applies to custom applications within the same environment as the Dynamics 365 application.

<sup>5</sup>Applies to flows that map to the context of the Dynamics 365 application.

<sup>6</sup>Available as part of Dynamics 365 Sales Premium or as an add-in to Dynamics 365 Sales Enterprise and Microsoft Relationship Sales. Must be deployed in the same geo as the Dynamics 365 instance.