

# Microsoft Viva Sales

Microsoft Viva Sales is a sales enablement application that integrates customer relationship management (CRM) systems of record and the Microsoft 365 platform including Outlook and Teams. Launched in October, Viva Sales is the first role-based experience focused on a specific job role (customer-facing employees such as sales people) in the Viva Employee Experience (EX) platform set of applications.

- Viva Sales is integrated with Microsoft Dynamics CRM and Salesforce to help users surface customer-related data directly within Outlook or Teams.
- Meeting conversation intelligence enables sales people and managers to capture, search, and analyze the recordings of sales calls and messages to analyze best practices, understand customer sentiment, and generate action items using artificial intelligence (AI).
- Shared Teams-based deal rooms enable teams and customers to collaborate on deals.

Capabilities scheduled for 2023 release include Outlook people card integration, the ability to access and update CRM records within Teams, and ChatGPT-generated e-mail content.



## FROM THE SUMMIT

The Viva suite of EX applications is extending beyond HR to address the needs of employees such as sales people that live in Microsoft Outlook and Teams, enabling them to easily surface CRM data within the stream of collaboration and take advantage of AI to have more meaningful collaboration with prospects.



## DEEP DIVE

Viva Sales was the first Viva application for a specific job role. Microsoft has continued to add new capabilities and is now on a monthly release cycle. Although Microsoft has hinted at other role-based Viva application to come, it has not yet released plans for other Viva apps. ChatGPT-generated content capabilities are currently in preview.



## LONG VIEW

Microsoft owns the desktop and collaboration for many sellers, and Viva Sales represents the disintermediation of CRM data from the CRM application. Key to its long-term viability will be its ability to appeal to Salesforce customers, and to sell Viva Sales without cannibalizing Dynamics CRM opportunities.



**MONEY:** Viva Sales is available as part of Dynamics CRM at no cost for existing customers. Those using Salesforce will pay an additional license fee to add Viva Sales to their desktop.



**MARKET:** Microsoft's biggest challenge for Viva Sales may be connecting with buyers. Microsoft's historical buyer has been IT, and Viva has made some inroads into HR, but Viva Sales targets line-of-business sales leaders, where Microsoft has less influence.



**PEOPLE:** VIVA Sales is targeted at reducing the friction between productivity applications and CRM, increasing sales productivity by surfacing CRM intelligence directly in the stream of collaboration where they spend most of their time.



**TECH:** The preview of ChatGPT-generated sales content in Viva Sales will be the first practical use of generative AI for many users, raising visibility for both the potential and risks of generative AI.