

V365 PREMIUM + AGENTS

Land seller intelligence—not another destination

A concise path to turn Sales Premium's guided selling, scoring, relationship intelligence, conversation insight, and forecasting into repeatable Haworth seller workflows—then extend them with first-party agents and mobile voice.

Asset boundary: These are Haworth review copies. External redistribution requires separate review.

EXECUTIVE SUMMARY

Premium is the intelligence foundation

Know where to focus

Prioritized work, predictive scoring, advanced relationship intelligence, and forecast signals help sellers and managers act earlier.

Let agents watch the work

Qualification and Opportunity Agents research, monitor, synthesize, flag risk, and recommend actions against governed CRM context.

Work from anywhere

Outlook, Teams, Copilot, Cowork, and mobile voice bring CRM context and confirmed updates into the seller's current flow.

Reduce admin. Make priorities obvious. Help sellers win.

Learn with Copilot

Help individual sellers move faster with research, meeting preparation, drafting, business plans, and follow-up.

Capture seller patterns

Identify what works across business plans, RFPs, presentations, coaching, insights, leads, and data capture.

Scale with V365

Turn proven patterns into governed, repeatable workflows connected to customer and opportunity data.

Surround the seller with Premium intelligence

SURFACE	SELLER VALUE	GOVERNANCE ROLE
Sales Premium	Prioritized work, sequences, predictive scoring, advanced relationship intelligence, conversation insight, and forecasting.	Validate data quality, model readiness, sequence policy, consent, access, and manager ownership.
Qualification and Opportunity Agents	Research leads, evaluate fit, monitor deal signals, surface risk, and recommend the next action.	Set scope, autonomy, handoff rules, capacity, quality review, and customer-contact controls.
Sales Agent for Microsoft 365 Copilot	Sales-specific research, synthesis, questions, and recommended actions.	Ground answers in permitted sources and verify before action.
Mobile voice	Dictate CRM notes, prepare for meetings, and propose supported opportunity field updates while on the go.	Review transcription and confirm the target record and proposed update before saving.
Cowork	Execute visible multistep plans across permitted Dynamics 365 and Microsoft 365 context.	Keep source permissions in force and review customer-facing output before release.

Planning boundary: Haworth's July 2026 source identifies V365 Premium for 2027. This is a customer planning direction, not a Microsoft release commitment. Capability names, availability, licensing, geography, language, consent, and configuration must be verified before rollout.

Demonstrated proof and proposed extensions

STAGE	MICROSOFT ENGAGEMENT SURFACE	AGENT CONTRIBUTION	CURRENT DISPOSITION
Lead	Dynamics 365 Sales; optional governed Power Pages intake	Research and explain lead fit.	Proposed extension
Qualify	Dynamics 365 Sales	Provide fit evidence and a qualification recommendation.	Proposed extension
Develop	Outlook, Sales Agent, Dynamics 365 Sales, Opportunity 360	Summarize context, prioritize risk, and recommend next actions.	Demonstrated with synthetic data
Propose	Dynamics 365 Sales, Cowork, Word, PowerPoint	Prepare grounded review candidates.	Demonstrated with synthetic data
Close	Dynamics 365 Sales	Assemble decision evidence and recommend an action when available.	Proposed extension
Continue	Customer Service, Field Service, selected Microsoft planning surface	Carry governed context into the next team and surface future growth evidence.	Service continuity shown; full loop proposed

CONTROL MODEL

Automation with visible decision rights

Agent-led does not mean uncontrolled. An agent may research, prioritize, summarize, and prepare work within its configured mode. Haworth can choose where a seller must review or approve outreach, lead conversion, CRM changes, commercial content, close actions, orders, service actions, and downstream opportunities.

Availability, licensing, capacity, language, region, consent, and configuration can vary. Each capability must be verified in the intended environment before it is presented as active.

OPPORTUNITY AND ASSET VIEWS

Put context at the decision point

VIEW	BEST PLACEMENT	PURPOSE
Opportunity 360	Dynamics 365 Sales opportunity, Sales Agent context, and proposal review	Keep stakeholders, risks, activities, products, pricing, and project readiness together during Develop and Propose.
Asset 360	Customer Service case, Field Service work order, and mobile service experience	Carry installed product, serial, entitlement, service history, knowledge, and expansion evidence into Continue.

NEXT PROOF

Three bounded options

Lead qualification

Validate one lead source, target-customer profile, fit explanation, engagement mode, and seller handoff.

Seller preparation

Measure preparation time, data completeness, accepted recommendations, and CRM update lag for one opportunity.

Service continuity

Trace one sold product through case, asset, entitlement, field-service work, and a reviewed expansion signal.

WORKING-SESSION CLOSE

Decision record

Selected proof

Executive sponsor role

Accountable workflow owner

Business and adoption measures

Required source information

Review date

Customer review draft. Product claims grounded in Microsoft Learn as of August 28, 2026. Synthetic demonstration data only. No production, licensing, pricing, or roadmap commitment is implied.