Sales use case | Make a pitch

Potential benefits [Improve close rate] [Increase customer retention] [Increase revenue per sale]

1. Refine discovery session

Work with the sales team to refine the customer discovery session goals and components using Copilot in Loop.

Copilot in Loop

Collaborate as a team using Copilot as a key contributor of creative ideas.

2. Research the company

Discover information on the customer using Microsoft Copilot to summarize their Annual Report for goals, risks, and financial information.

Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

3. Find the asks in your emails

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.

Copilot

Save time searching for information in chats and emails and get a more complete picture than you may have if you quickly scanned the threads.

6. Create the proposal

Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.

Copilot in Word

Document and socialize the action items to keep the sales process moving forward towards a successful close.

5. Summarize the meeting

After the meeting is over review the meeting recap for a summary of key points and action items.

Copilot in Teams

Avoid listening to meeting recordings and spend that time improving the proposal.

4. Update the sales presentation

Refine a sales presentation with a new slide using customer details from the email summary and visuals relevant to their industry.

Copilot in PowerPoint

Quickly personalize pitch presentations with talking points and data specific to your customer.