

Sales use case | Respond to a RFP

Potential benefits

Improve close rate

Number of opportunities

Increase revenue per sale

1. Summarize the RFP

Use Copilot to organize the information required for the RFP by generating a list of required items sorted by category.



Copilot in Word

Get started quickly by skipping over non-essential portions of the RFP.

2. Gather opportunity information

Use Copilot to summarize information from the company website and annual reports to understand financials, goals, and challenges.



Copilot

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

3. Use Copilot to research responses

Use custom RFP repository copilot built with Copilot Studio to ask for responses to the RFP questions.



Copilot Studio

Using defined content to answer customer questions ensures accuracy of the responses.

6. Create email with response

Have Copilot turn a list of bullet points into a professional email summarizing the RFP response.



Copilot in Outlook

Quickly create professional emails that are concise and more likely to be read and can lead to higher close rates.

5. Revise responses

Use Copilot to revise the document content to make it more readable. Go back to the RFP bot to get answers to additional items.



Copilot in Word

Quickly make responses more readable to improve the quality of the RFP response.

4. Meet with team to review

Discuss required changes and opportunities for cross-sell. After the meeting generate a list of suggestions for updates.



Copilot in Teams

Don't miss any updates by asking Copilot for all of the suggestions made during the meeting.