

Sales use case | Improve customer meetings

Potential benefits

Improve close rate

Increase customer retention

Increase revenue per sale

1. Prepare for a meeting

Summarize recent customer communications across emails, chats, and documents with Copilot Studio's connection to your CRM. Then create a customer meeting brief using Copilot for Sales.



Copilot Studio
Copilot for Sales

Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify cross sell opportunities.

2. Create a presentation

Use Copilot to generate a presentation for the meeting using branded templates. Copilot can suggest important topics, customer requests, and organize slides into a logical flow.



Copilot in PowerPoint

Using higher quality presentations makes it easier to convey a clear message and can reduce the time to close the deal.

3. Stay focused during the call

Since Copilot is listening in there is no need to take notes and keep track of action items. Stay focused on the call and have a better discussion.



Copilot in Teams

Having a better discussion during the call can help to raise and resolve issues quicker, leading to increased customer satisfaction and potentially reduce the time to close the deal.

6. Send a follow up email

Have Copilot turn the meeting notes and action items into an email for all participants.



Copilot in Outlook

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. Update the opportunity details in the CRM system.



Copilot in Teams
Copilot for Sales

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

4. Ask Copilot to suggest next steps

During the meeting you can ask Copilot for suggestions on questions to ask or next steps to discuss to keep the conversation on track.



Copilot in Teams

Keep the conversation flowing onto meaningful topics can help to cover the agenda quicker and reduce meeting times.