Sales use case | Respond to a customer compliant

Improve close rate Number of opportunities Increase revenue per sale Potential benefits 1. Summarize customer emails 2. Research product info 3. Meet with product team Combine recent customer communications across Ask Copilot to gather product information and Ask Copilot to suggest questions to ask the create a summary of if this issue has been seen product team based on the customer request and emails, chats, and documents with deal information from CRM systems to create a customer brief in Word. before and how it might be addressed. potential solutions. **Copilot for Sales Copilot in Teams** Copilot Copilot can help boost creativity by suggesting Rapidly get up to speed to on the concern **Gathering product information** from multiple raised across all of the communications you sources and asking Copilot to prepare a summary solutions from its vast knowledge base. can save time and increase accuracy. have received. 5. Create email with response 6. Meet with the customer 4. Draft proposed response Have Copilot turn the meeting notes and action Have Copilot create an email summarizing the Use Copilot to turn the information you have presentation and highlighting how the issues will be items into an email for all participants. collected into a great presentation including resolved. images and tables. **Copilot in Teams Copilot in Outlook Copilot in PowerPoint** Document and socialize the action items to keep Avoid listening to meeting recordings and Create a draft presentation directly from the spend that time improving the proposal. the sales process moving forward towards a meeting recap. successful close.