

A Day in the Life of a Client Executive

Benefits



Faster Decision Making



Enhanced Client Relationships



Time Saved On Manual Tasks

8:30 AM

Early Warning Signs

A notification from Copilot about a client close to renewal who hasn't engaged, mentioning a competitor.

Action: Copilot summarizes all recent interactions.



Copilot for Sales
within Dynamics 365 Sales

Example Prompt:

Summarize recent client interactions and flag mentions of competitors or concerns.

9:00 AM

Competitor and Value Analysis

Onela uses Copilot to analyze pricing and compare the value proposition of her company vs. a competitor.

Action: Copilot pulls relevant data, highlighting key differentiators.



Copilot for Sales
within Dynamics 365 Sales

Example Prompt:

Summarize client interactions and highlight key talking points, including competitor analysis.

12:30 PM

Preparing for the Call

Onela consolidates all information using Copilot—past client interactions, value comparison and competitor data—allowing her to prep for the meeting.

Action: Copilot summarizes key points, highlights opportunity probability scores and suggests focus areas.



Copilot for Sales
within Dynamics 365 Sales

Example Prompt:

Summarize client interactions and highlight key talking points.

2:00 PM

The Critical Call

Onela connects directly with the client through Microsoft Teams, embedded within Dynamics Sales. The client raises concerns about pricing and competitor offerings.

Action: Copilot provides real-time insights, suggesting responses to client concerns.



Microsoft Teams
+Copilot for Sales (within Dynamics 365 Sales)

Example Prompt:

What are our product's key advantages over the competitor? Suggest responses to the client's pricing concerns.

3:30 PM

Follow-Up and Next Steps

After a successful call, Onela asks Copilot to draft a follow-up email.

Action: Copilot generates a follow-up, including a pricing comparison, and updates the CRM with meeting details and next steps.



Copilot for Sales
within Dynamics 365 Sales

Example Prompt:

Summarize the call, draft a follow-up email and automatically updates the CRM with next steps.

Experience the power of AI in Sales with Microsoft 365 Copilot.

Transform your sales process with Authority Partners.

Onela
is a Client Executive
at Authority Partners

