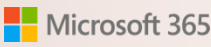


A day in the life of a sales professional



Sales representatives spend an average of 440 hours annually trying to find the right content to share with their prospects and customers.¹ Enable your sellers to focus on closing more deals by providing them with agents in **Copilot Chat and Microsoft 365 Copilot**. See how Node4 can train your team on using Copilot agents to handle administrative tasks and build stronger customer relationships.





Cassie is the lead seller for a regional food services company. The business relies on Cassie hitting her monthly sales targets to maintain operations and support sustainable business growth. To stay focused on meeting with potential customers and finding ways to close deals, she uses agents in Copilot to streamline manual, time-consuming tasks and provide deeper insights on her customers to tailor offers and close more deals.

8:00 AM

Cassie needs to prepare for a big pitch with a customer this afternoon, so she uses Copilot to summarize emails and chats about the account. An agent in Copilot Chat for Sales provides a summary of the opportunity for more context.



Summarize the emails and Microsoft Teams chats in the past month from this account highlighting the primary asks and open items.



9:00 AM

As she prepares, Cassie receives the latest financial figures from her business planning lead. **She uses Copilot in Microsoft Excel to create charts that highlight the value of the offer that she can include in her presentation.**



Using the data in this file, create visually appealing charts that highlight the value of the offer to the customer.



9:30 AM

Cassie has a meeting with her manager to discuss their strategy for the pitch call. While she meets with her manager, **she asks Copilot to create a slide using the charts she created earlier so she can focus on prepping her pitch.**



Add a slide using the graphs in the financial analysis document attached.



2:00 PM

It's time for the pitch. **Cassie stays focused on the customer's concerns and questions by using an agent in Teams to capture meeting notes, outstanding questions to follow up on, and next steps.**



Generate a summary of today's call. Highlight any questions that were asked and have not been answered and the agreed upon next steps.



4:00 PM

Cassie has missed a few messages during her pitch meeting. She sees that her team has been discussing a new, limited time offer and **uses Copilot to summarize the conversation to quickly catch up.**

Summarize the Teams chat about the new limited time offer and be sure to include the key points and who made them.



Contact Node4 to learn more about how we can support your sellers in using Copilot Chat, agents, and Microsoft 365 Copilot to build their pipeline and advance more deals.

Interested in seeing more ways Microsoft 365 Copilot can assist with everyday tasks across your business? Check out the [Microsoft Copilot Scenario Library](#).

References:

1. "70+ Sales Enablement Statistics To Blow Your Mind in 2024," G2, 2024.