



Day in the life of an account executive



Microsoft Dynamics 365

Let's see how an AI-powered CRM eliminates inefficiencies throughout his day:



9:00 AM



David sees he has a new email from a prospect. He asks the system to generate a response using data collected from previous meetings, the prospect's activities, and third-party applications, like LinkedIn Sales Navigator.

9:30 AM



11:00 AM

Later that day, David has a meeting with a prospect interested in buying Contoso Coffee. He uses the system to prepare a summary of the opportunity, including prospect details, past meeting notes, and emails. After reviewing the summary, he realizes there is a chance to increase the opportunity size and wants to connect with his manager, Sara, who works from home, to discuss how to approach today's conversation.



11:30 AM

Before meeting with Sara, David takes some time to do prospect using personalized, AI-generated content based on prospect activity and concerns.



12:30 PM

Using collaboration tools connected to the CRM, David creates a deal room with Sara using a pre-built template that includes all the opportunity details. He then has a virtual meeting with her to develop a strategy for the call.



2:00 PM

David presents what he discussed with Sara to the prospect. He can better focus on the meeting as the system records the meeting and writes a transcription highlighting competitor mentions and action items instead of manually taking notes.



2:45 PM

During the call, the prospect asks a question David doesn't know how to answer. The system generates a suggested answer, tips, and related information to address the prospect's concerns.



3:00 PM

After the meeting ends, the system gives David an analysis of the call. The information includes a customer sentiment analysis and KPIs like talk-to-listen ratio, talking speed, and switches in the conversation.



3:30 PM

David shares the meeting recap and analysis with Sara using the same deal room he created earlier to update her on how the opportunity progressed.



4:30 PM

A new lead replies from David's prospecting session earlier in the day. The system automatically adds details to the CRM and the company's communication systems.



Ready to make this a reality for your sales team?

Check out this guided demo to see how we can deploy Microsoft Dynamics 365 Sales powered by Copilot to see how!

Contact us now:

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As businesses look to their sales team to scale company growth, they must provide them with AI-powered solutions that connect with existing systems, eliminate tedious tasks, and empower them with the tools they need to succeed.

David is a Account Executive at Contoso Coffee. He manages a large pipeline of customers, so he needs to stay on-task to get through his to-do list and maintain strong customer relationships.

30%

spend <30% of their time on non-sales activities¹

1. "How Much Time Do Your Salespeople Spend Selling?," The Center for Sales Strategy, 2021