

KPI – Close rate

Copilot Workshop

Request information on the Copilot for Microsoft 365 online Workshop



Closing a deal often requires bringing many elements together from an entire team to ensure that both the customer and seller are satisfied.

How Microsoft Copilot can help improve the close rate

Improve quality of customer-facing materials

- Improve sales and marketing and content
- Create more compelling proposals and RFP responses
- Make emails and chats more impactful

Create a proposal

- Research market conditions
- Compare sales across regions or other variables

Improve targeting

- Analyze current product mix and cross sell success

Improve customer meetings

- Prepare for the meeting
- Focus during the meeting
- Generate follow up communications

Roles

Improving close rates can require input from:

Account Manager

Product teams

Technical Sales

Product Marketing

Training staff

Finance

Microsoft AI solutions

Copilot for Microsoft 365

Copilot in Dynamics 365 Sales

Copilot for Sales

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