

Meet Lakshmi. She is a sales representative.

A day in the life of a sales representative

As a sales representative, Lakshmi is responsible for reaching out to customer leads. From prospecting and lead generation, to conducting industry research, and creating sales presentations, her workday encompasses lots of moving parts.

By outsourcing some of her routine tasks to AI tools, Lakshmi gets more time to focus on building pipelines and closing deals. Here's how.



8:00 AM

Workday begins at home

Lakshmi is already greeted by a pile of over 50 emails. She asks Copilot to display only emails from potential prospects. Copilot filters the results, highlighting an email from a new lead named Ken. Lakshmi asks Copilot to respond immediately to schedule a meeting with Ken for 3PM later today.



9:00 AM

Start of workday

Lakshmi receives an email from Ken, who has agreed to the meeting. She instructs Copilot to set up a Microsoft Teams meeting and send an invitation link to Ken.

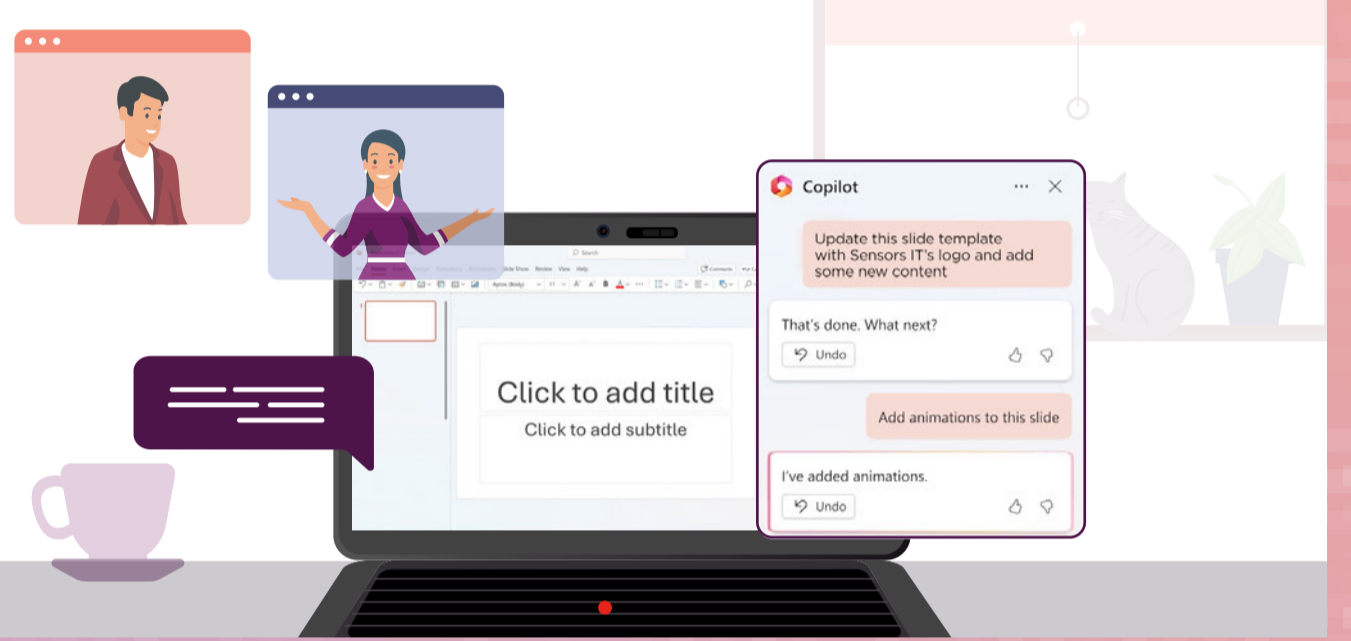


10:00 AM

Prepares for meeting

Lakshmi asks Copilot in Teams to recap customer pitch tips from the enterprise sales spotlight meeting last week.

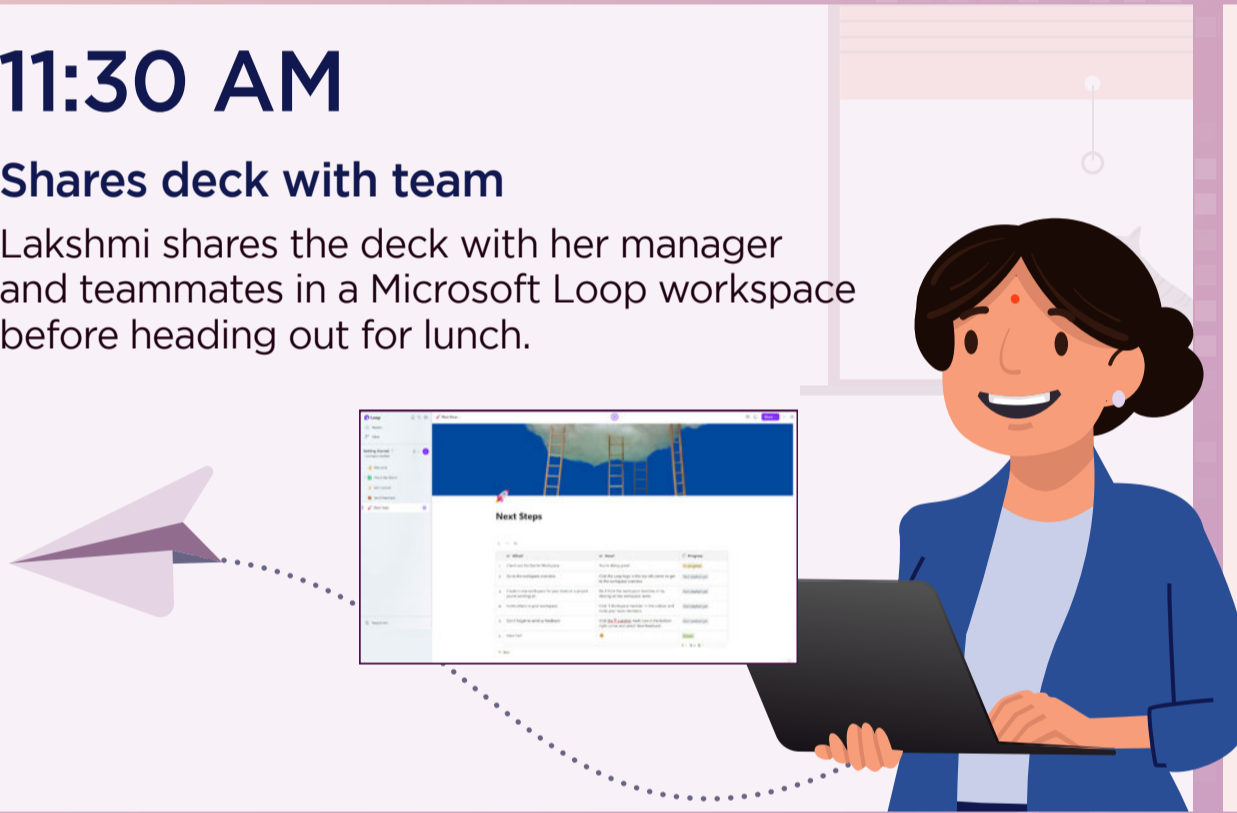
For the pitch deck, Lakshmi asks Copilot in PowerPoint to update a pitch deck template with Sensors IT's name and logo and add relevant content.



11:30 AM

Shares deck with team

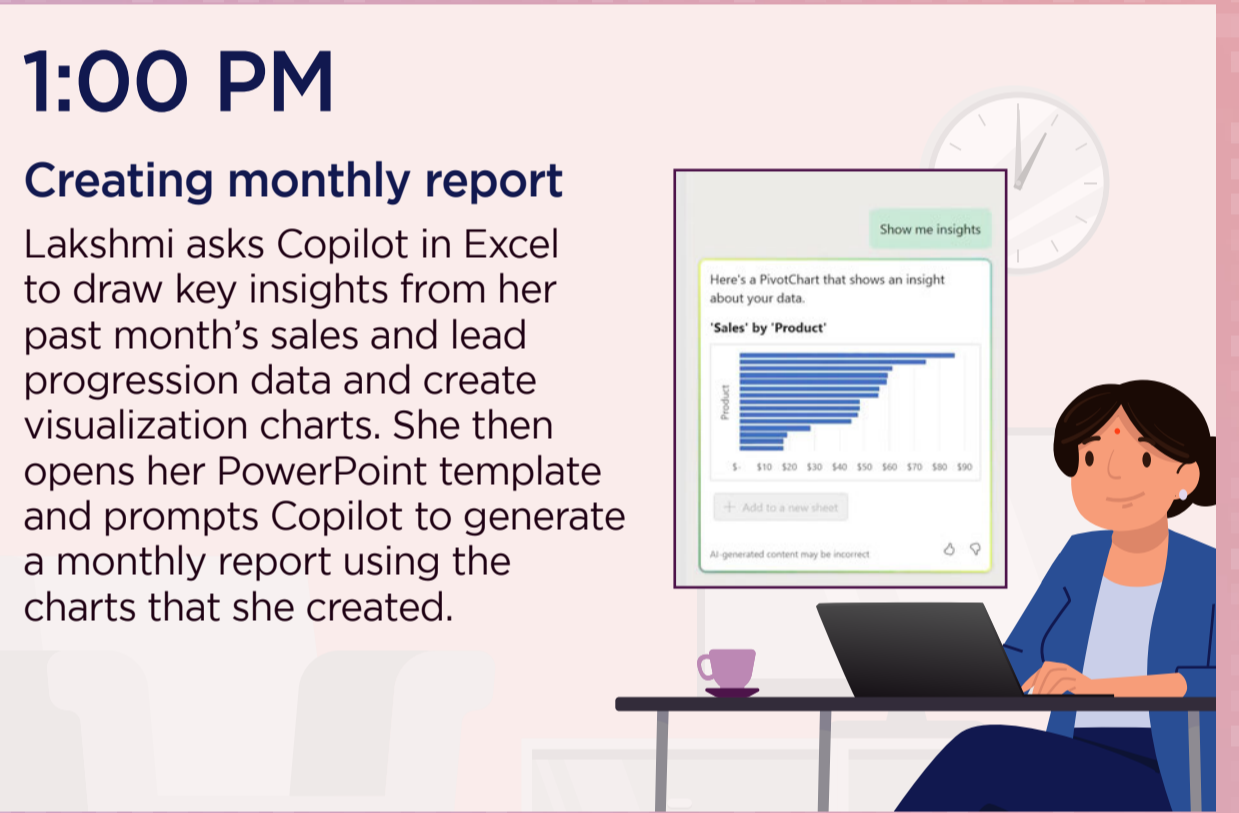
Lakshmi shares the deck with her manager and teammates in a Microsoft Loop workspace before heading out for lunch.



1:00 PM

Creating monthly report

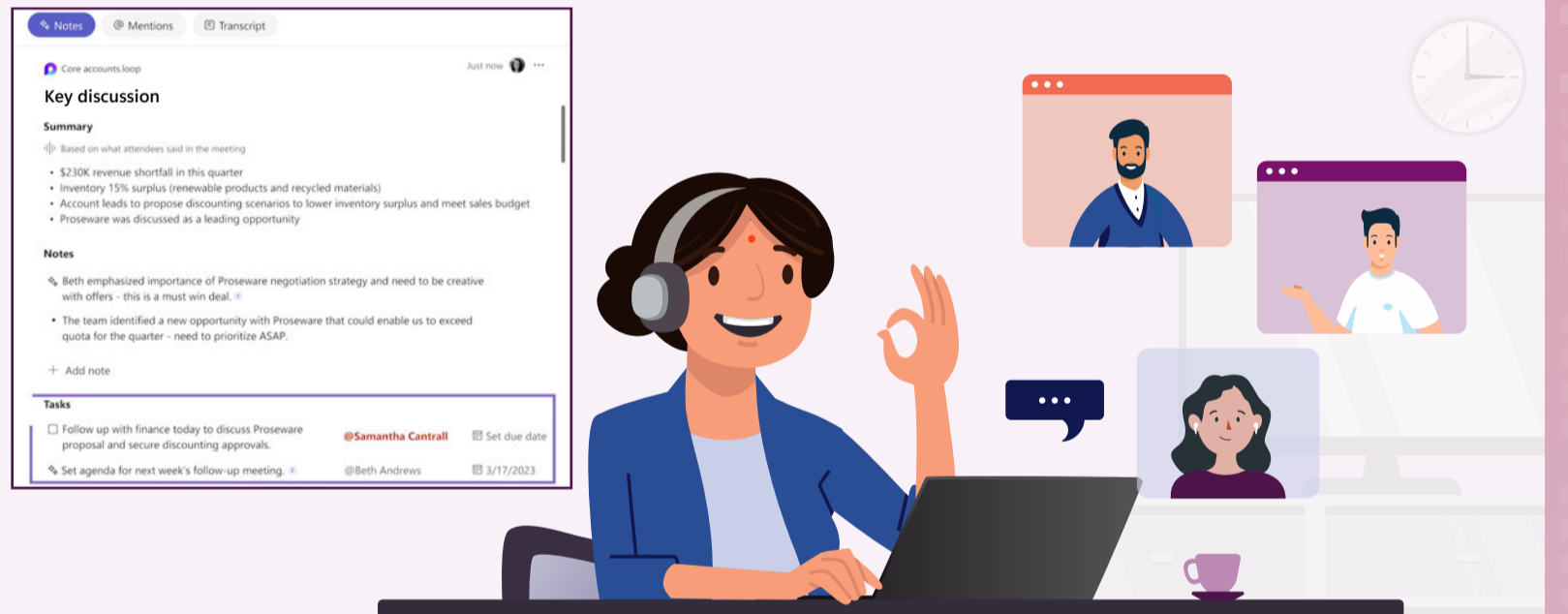
Lakshmi asks Copilot in Excel to draw key insights from her past month's sales and lead progression data and create visualization charts. She then opens her PowerPoint template and prompts Copilot to generate a monthly report using the charts that she created.



3:00 PM

Meeting with Ken

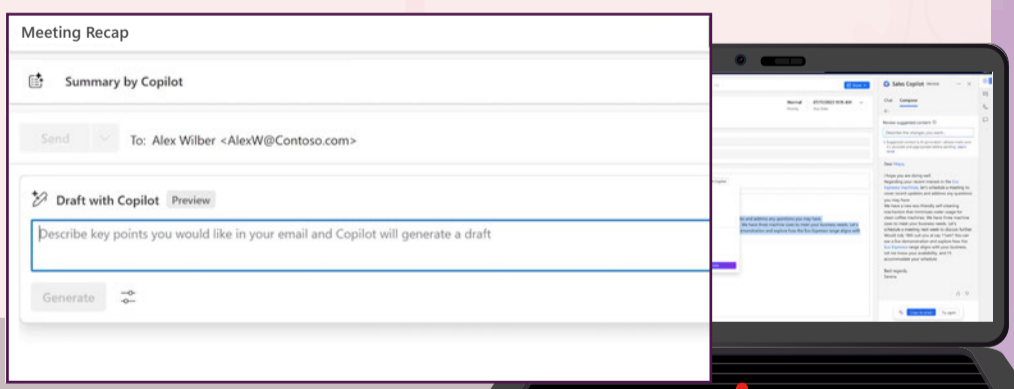
Lakshmi hosts the meeting with her colleagues in Teams. Copilot in Teams summarizes key discussion points and offers tips along the way for Lakshmi to reply to Ken's queries. A meeting summary with action items is automatically generated when the call ends.



4:00 PM

Follow up actions on meeting

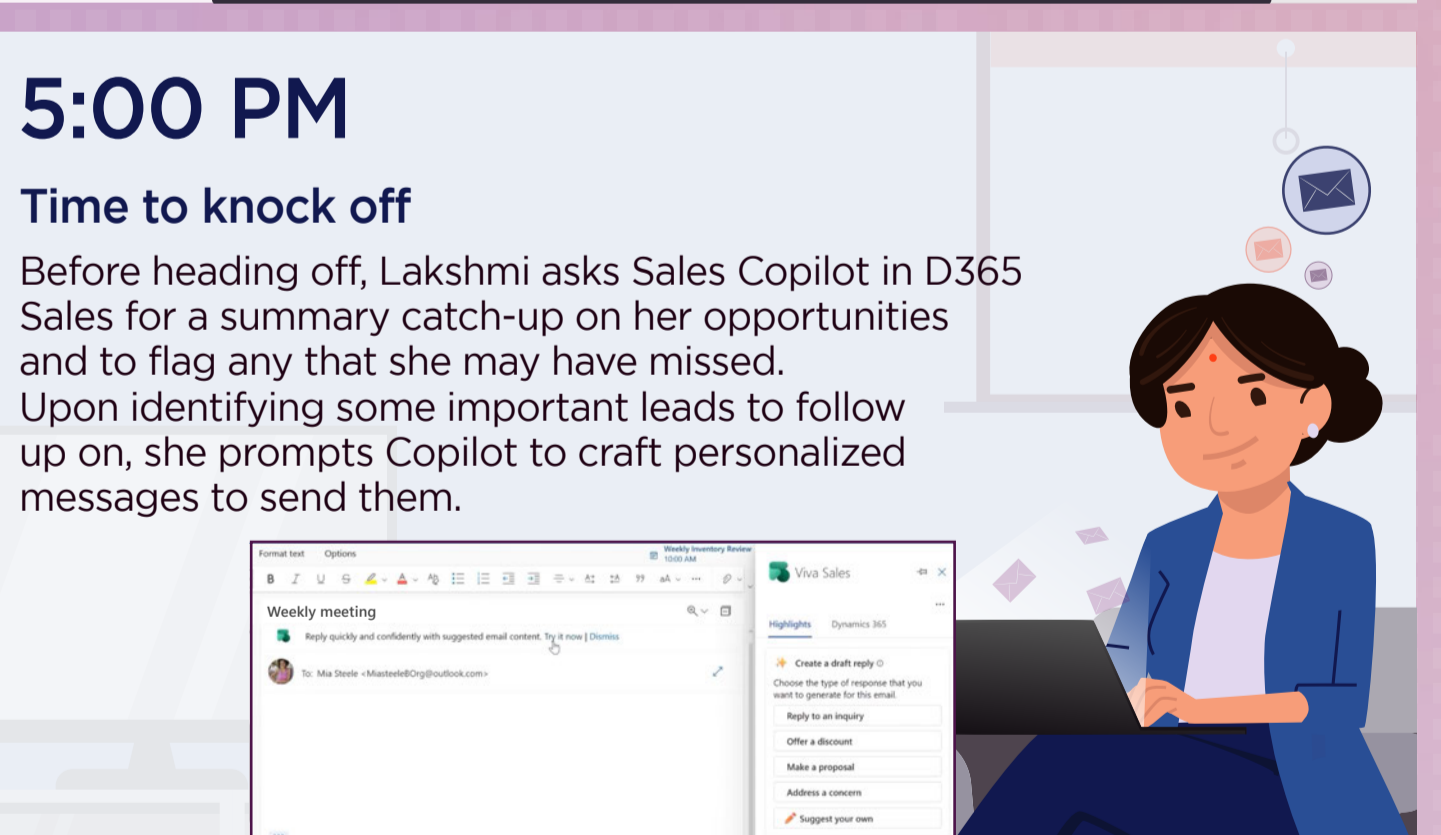
After the meeting ends, Lakshmi asks Sales Copilot in Outlook to write an email recapping the call with action items and follow-up dates, based on CRM and meeting data.



5:00 PM

Time to knock off

Before heading off, Lakshmi asks Sales Copilot in D365 Sales for a summary catch-up on her opportunities and to flag any that she may have missed. Upon identifying some important leads to follow up on, she prompts Copilot to craft personalized messages to send them.



90
minutes a week
average time saved
by early users of Copilot
for Sales¹



Find out how Lakshmi maximized employee experience in the hybrid workplace with Copilot for Microsoft 365 from Lenovo

[Learn more >](#)

¹What can Copilot's earliest users teach us about Generative AI at work?