

A day in the life of an Account Manager



Cassandra is a sales lead at Contoso

8:00 AM

Cassandra needs to prepare for her big pitch to Contoso so she summarizes the emails and chats from her main client.



Copilot

Summarize all the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 AM

Cassandra commands Copilot to create a message to confirm the meeting.



Copilot in Outlook

Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 AM

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot to create some amazing charts to showcase the value of the offer.



Copilot in Excel

Show all data insights.

4:00 PM

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and commands Copilot to summarize the conversation to quickly catch up.



Copilot in Teams

Summarize this chat and make sure to include the key points and who made them.

2:00 PM

It's time for the pitch. Cassandra can focus on her presentation knowing Copilot is taking notes. She commands Copilot to list the questions asked so she can be sure everything gets answered during the call.



Copilot in Teams

What questions were asked during the meeting that have not been answered?

11:00 AM

Cassandra puts the final touches on the pitch presentation by adding a slide based on the summary of the annual report she had Copilot draft.



Copilot in PowerPoint

Add a slide based on [copy in annual report summary].