**Practice Prompts – Go To Market: Sales & Customer Success**

**Customer Success & Relationship Management**

Copilot in Word:

* Write a customer onboarding guide. Include account setup steps, key contacts, and escalation paths. Make the language welcoming and straightforward.
* Draft an end-of-quarter customer success report. Summarize engagement activities, key wins, and areas for improvement. Organize the data for executive review.
* Create a renewal communication template. Address upcoming expiration, renewal benefits, and next steps. Use a positive and proactive tone.
* Summarize feedback from recent customer health checks. Highlight positive trends, warning signs, and recommended follow-ups. Structure the summary for internal teams.
* Develop a playbook for managing high-touch accounts. Detail engagement strategies, escalation procedures, and KPI tracking methods. Format the playbook for quick use by CSMs.

Copilot in Excel:

* Track customer engagement activities and outcomes. Input activities by account, date, and type. Use conditional formatting to highlight inactive accounts.
* Build a renewal pipeline dashboard. List accounts up for renewal, renewal stage, and probability of closing. Visualize pipeline value by stage.
* Create a Pivot Table to analyze support ticket trends by account and issue category. Identify accounts needing proactive outreach. Present findings in a management report.
* Use VLOOKUP to match account IDs to health scores from a separate data sheet. Reference the Health Scores tab and flag missing scores as “Review.”
* Design a dashboard to monitor NPS scores and customer satisfaction over time. Visualize trends by segment and highlight accounts with declining scores.

**Sales & Sales Enablement**

Copilot in Word:

* Write a battlecard for a new competitor. Summarize strengths, weaknesses, and counter-messaging strategies. Make the format quick to scan for busy sales reps.
* Draft a quarterly sales performance summary. Include total sales, win rates, and pipeline highlights. Suggest action items for underperforming segments.
* Create a template for sales call debrief notes. Provide sections for prospect needs, objections, and next steps. Use a concise and structured layout.
* Develop a quick reference guide for product features and benefits. Organize information by product line for easy lookup. Make the guide visually engaging for reps.
* Summarize feedback from the latest sales enablement training session. Capture participant ratings, learning outcomes, and areas for improvement. Present the summary for leadership review.

Copilot in Excel:

* Track sales opportunities by stage and expected value. Input opportunity details, close dates, and probability. Visualize the pipeline using funnel charts.
* Build a sales leaderboard for the team. Input sales figures by rep and rank performance monthly and quarterly. Highlight top performers in green.
* Create a Pivot Table to analyze win rates by product and region. Compare results to targets and display trends with charts. Focus on high and low-performing segments.
* Use VLOOKUP to match product codes to commission rates in the commission table. Reference the Commission Rates tab and populate missing rates as “Review Needed.”
* Design a dashboard to monitor sales enablement activity completion. Track training, certifications, and resource usage by team member. Highlight overdue items for follow-up.

**Portfolio Management**

Copilot in Word:

* Draft a portfolio summary for quarterly review. List key investments, current status, and returns to date. Format the summary for board presentation.
* Write an investment policy statement. Define objectives, risk tolerance, and asset allocation guidelines. Ensure clarity and alignment with organizational goals.
* Create a report on portfolio diversification strategies. Analyze current holdings, identify gaps, and recommend changes. Use charts and tables to support key points.
* Develop a template for tracking portfolio rebalancing activities. Include sections for action dates, rationale, and outcomes. Make it straightforward for regular updates.
* Summarize the results of a recent portfolio risk assessment. Highlight high-risk assets, mitigation plans, and suggested asset shifts. Organize the information for executive review.

Copilot in Excel:

* Track investment holdings by asset class, value, and return. List holdings and calculate total and average returns. Use conditional formatting to flag assets underperforming benchmarks.
* Build a rebalancing schedule tracking target versus actual allocations. Input changes and highlight deviations from targets. Summarize rebalancing actions by quarter.
* Create a Pivot Table to analyze portfolio performance by sector and geography. Summarize returns, risks, and diversification levels. Present findings in an executive dashboard.
* Use VLOOKUP to match investment IDs to manager assignments. Reference the Manager Assignment tab and flag unassigned investments as “Assign.”
* Design a dashboard to visualize portfolio risk distribution. Use pie and bar charts to show risk categories and trends over time.