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

**Customer Success & Relationship Management**

Copilot in PowerPoint:

* Create a presentation highlighting customer success stories. Use visuals to showcase outcomes and testimonials. Summarize key drivers of satisfaction and loyalty.
* Design slides outlining customer relationship management strategies. Include charts and infographics showing engagement metrics. Highlight areas of improvement and next steps.
* Present an overview of support ticket resolution rates. Use graphs to depict trends and benchmarks. Summarize lessons learned and future actions.
* Generate a summary of customer feedback and satisfaction surveys. Illustrate results with infographics and comment highlights. Emphasize insights for action planning.
* Develop a dashboard tracking key customer success KPIs. Use visual indicators for retention, churn, and upsell rates. Summarize recommendations for ongoing improvement.

Copilot Analyst:

* Analyze customer retention and churn rates. Identify patterns and root causes for changes. Recommend targeted interventions to improve loyalty.
* Evaluate effectiveness of engagement strategies. Compare usage and satisfaction across customer segments. Advise on enhancements for higher impact.
* Review feedback from support interactions. Quantify resolution times and satisfaction scores. Suggest process improvements for better outcomes.
* Assess upsell and cross-sell opportunities based on customer data. Interpret trends and conversion rates. Recommend strategies for increased revenue.
* Examine customer success team performance metrics. Analyze task completion rates and feedback. Propose actions to strengthen results.

Copilot Researcher:

* Research best practices in customer success management. Summarize approaches from leading organizations. Highlight recommendations for our teams.
* Explore trends in digital relationship management. Compile data on tools and strategies used. Suggest suitable options for our customers.
* Review literature on customer feedback and engagement. Synthesize key findings and lessons learned. Recommend actionable methods for our programs.
* Investigate case studies on improving customer loyalty. Gather insights on strategies and barriers overcome. Relate findings to our context.
* Collect information on measuring customer success impact. Summarize effective assessment frameworks. Advise on adoption for ongoing evaluation.

**Sales & Sales Enablement**

Copilot in PowerPoint:

* Create a presentation summarizing recent sales performance. Use visuals to highlight conversion rates, top products, and trends. Summarize strategies that drove success.
* Design slides outlining sales enablement programs. Include flowcharts and metrics to show usage and impact. Highlight feedback from sales teams and customers.
* Present an overview of pipeline development and forecast accuracy. Use graphs to show trends and projections. Summarize barriers encountered and solutions applied.
* Generate slides on cross-functional collaboration in sales. Use visuals to showcase team roles and joint outcomes. Summarize lessons learned and future plans.
* Develop a dashboard tracking key sales KPIs. Use visual indicators for quotas, attainment, and growth rates. Highlight recommendations for future improvements.

Copilot Analyst:

* Analyze sales conversion rates across channels and products. Identify top performers and areas for improvement. Recommend strategies to boost results.
* Evaluate effectiveness of sales enablement tools and training. Compare adoption rates and impact on performance. Advise on enhancements for greater value.
* Review pipeline progression and forecast accuracy. Assess variance and causes for deviation. Suggest processes to refine forecasting.
* Assess collaboration outcomes between sales and other teams. Benchmark results against solo efforts. Recommend practices for stronger cross-functional alignment.
* Examine feedback from sales representatives and customers. Quantify satisfaction and recurring issues. Propose solutions for improved engagement.

Copilot Researcher:

* Research best practices in sales enablement and training. Summarize models from leading organizations. Highlight recommendations for our teams.
* Explore trends in digital sales strategies and automation. Compile data on adoption rates and impact. Suggest actionable options for our context.
* Review literature on pipeline management and forecasting. Synthesize key findings and case studies. Recommend methods to improve accuracy.
* Investigate collaboration approaches between sales and other departments. Gather insights on barriers and solutions. Relate findings to our organization.
* Collect information on measuring sales impact and effectiveness. Summarize assessment frameworks and results. Advise on implementation for ongoing review.

**Portfolio Management**

Copilot in PowerPoint:

* Create a presentation outlining portfolio composition and performance. Use visuals to depict asset allocation, returns, and risk levels. Summarize strategic goals and outcomes.
* Design slides showcasing key investment milestones. Include timelines and charts to illustrate progress. Highlight lessons learned and future opportunities.
* Present an overview of diversification strategies used. Use infographics to show risk mitigation and performance. Summarize rationale and results achieved.
* Generate a summary of portfolio rebalancing activities. Illustrate frequency, impact, and decision criteria. Highlight outcomes and recommendations.
* Develop a dashboard tracking portfolio KPIs. Use visual indicators for returns, volatility, and asset growth. Summarize next steps for optimization.

Copilot Analyst:

* Analyze portfolio performance against benchmarks. Identify drivers of outperformance or underperformance. Recommend adjustments for improved returns.
* Evaluate diversification levels and risk exposure. Compare current allocations to strategic targets. Advise on changes for better risk management.
* Review rebalancing frequency and criteria. Assess impact on returns and volatility. Suggest alternative strategies.
* Assess asset growth trends over time. Quantify factors influencing expansion or contraction. Recommend actions to support growth objectives.
* Examine external market influences on portfolio outcomes. Analyze data for correlations and risks. Propose adjustments to mitigate adverse effects.

Copilot Researcher:

* Research best practices in portfolio management and optimization. Summarize methodologies and case studies. Highlight recommendations for our approach.
* Explore trends in alternative asset allocation. Compile adoption rates and benefits reported. Suggest strategies for portfolio diversification.
* Review literature on risk management in investment portfolios. Synthesize findings and practical applications. Recommend enhancements for our processes.
* Investigate emerging technologies in portfolio analytics. Gather data on usage and outcomes achieved. Advise on adoption for improved insights.
* Collect information on measuring portfolio performance and success. Summarize assessment methods and key metrics. Recommend implementation for ongoing review.