

Day in the life of an account executive



As businesses look to their sales team to scale company growth, they must provide them with Al-powered solutions that connect with existing systems, eliminate tedious tasks, and empower them with the tools they need to succeed.

Contoso Coffee owns offices in countries across North and South America, Europe, and Asia with over 10,000 employees.

David is a Account Executive at Contosc Coffee. He manages a large pipeline of customers, so he needs to stay on-task to get through his to-do list and maintain strong customer relationships.

of their time on

spend <30%

Let's see how an Alpowered CRM eliminates inefficiencies throughout his day:



David signs into the CRM and has the system generate a list of tasks, including email responses and meeting summaries based on the opportunity.



prepare a summary of the opportunity, including prospect details, past meeting notes, and emails. After reviewing the summary, he realizes there is a chance to increase the opportunity size and wants to connect with his manager, Sara, who works from home, to discuss how to approach today's conversation.

Later that day, David has a meeting with a prospect interested in buying Contoso Coffee. He uses the system to



David sees he has a new email from a prospect. He asks the system to generate a response using data collected from previous meetings, the prospect's activities, and third-party applications, like LinkedIn Sales Navigator.

with Sara using a pre-built template that includes all the opportunity details. He then has a virtual meeting with her to develop a strategy for the call.

Using collaboration tools

David creates a deal room

connected to the CRM,



Before meeting with Sara,

David takes some time to

personalized, Al-generated

content based on prospect

activity and concerns.

do prospect using



David presents what he discussed with Sara to the prospect. He can better focus on the meeting as the system records the meeting and writes a transcription highlighting competitor mentions and action items instead of manually taking notes.

During the call, the prospect asks a question David doesn't know how to answer. The system generates a suggested answer, tips, and related information to address the prospect's concerns.







3:00 PM

After the meeting ends, the system gives David an analysis of the call. The information includes a customer sentiment analysis and KPIs like talk-tolisten ratio, talking speed, and switches in the conversation.



4:30 PM

David shares the meeting

Sara using the same deal

room he created earlier to

update her on how the

opportunity progressed.

recap and analysis with

A new lead replies from David's prospecting session earlier in the day. The system automatically adds details to the CRM and the company's communication systems.



Ready to make this a reality for your sales team?

Check out this guided demo to see how DAC Systems can deploy Microsoft Dynamics 365 Sales powered by Copilot to see how!

Contact us now:

info@dac.co.za | 0860 000 DAC (322)

. "How Much Time Do Your Salespeople Spend Selling?", The Center for Sales Strategy, 2021