

Day in the life

Sales representative



April is a sales representative at Contoso Foods responsible for growing the Midwest district's customer base and closing deals to grow revenue and retaining highly satisfied customers in the Midwest district.

7:45 AM

April starts her day planning her sales strategy on ways to exceed her quota for the quarter. She reviews Teams and notices a feed from the Dynamics CRM connector about a Fabrikam lead.



8:30 AM

She starts researching Fabrikam using the Power BI dashboard tab. She uses WhoBot to find Derek, an expert on Fabrikam.



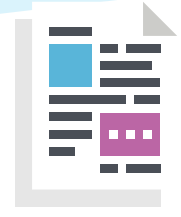
9:30 AM

April reaches out to Derick via private chat on Teams and asks for his help with an introduction. Derick agrees and includes her in a Teams meeting with the director at Fabrikam.



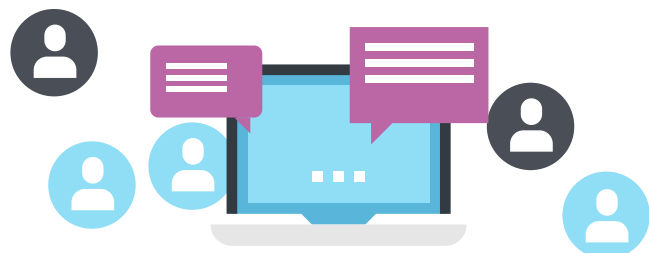
11:30 AM

April and Derick join their meeting on Teams. With the director's permission, they record the meeting and documents his vision in the notes section of the meeting.



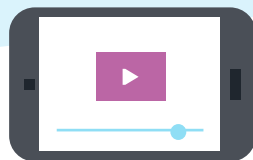
2:00 PM

April is excited about this opportunity to grow sales in the Midwest district with Fabrikam. She creates a new team in Teams and includes Derick, along with other SMEs to help put together their proposal.



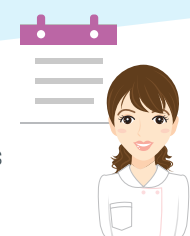
3:30 PM

April has a meeting with her team and posts a link to the meeting recording and her notes. She then creates a new OneNote tab in their channel.



4:30 PM

April also creates a new Planner tab and assigns several tasks with owners and due dates. She @mentions her team asking them to review the tasks and share their feedback.



5:00 PM

Excited with prospect of new opportunity to close a deal, she navigates to the Dynamics tab and updates her lead to opportunity stage.

