

MEET **Intermediate** 20 MIN · UPDATED 2026-09-30

Draft a pre-call client briefing.

Consolidate recent emails, chats, proposals and support tickets into a one-page brief before a client call.

MICROSOFT 365

Teams

Outlook

WORKS WITH

Copilot Cowork

Business Outcome

Account teams walk into client calls already knowing the account's recent history, instead of scrambling through six tabs beforehand.

Workflow Steps

Step 1: Point Cowork at the client

Copilot Cowork

Give Copilot Cowork the client or account name and the upcoming call's date, and let it pull recent Outlook emails, Teams chats, any open proposals, and support ticket history for that account.

PROMPT

Build a one-page pre-call brief for our call with Northwind Traders tomorrow. Pull the last month of email and Teams activity, the status of any open proposal, and any unresolved support tickets. Flag anything that looks like it needs an answer on the call.

Step 2: Review the flagged open items

Copilot Cowork

Check the items Cowork flagged as needing an answer — confirm each is genuinely unresolved and not something already closed out in a channel the agent didn't have access to.

Step 3: Cross-check the proposal status

CRM

Open the CRM opportunity record directly and compare its stage and last-updated date against what the brief says — a status change logged straight into the CRM (not announced over email) is exactly the kind of update an email-and-chat-based brief can miss entirely.

Step 4: Trim to one page and bring it to the call

Teams

Cut the brief down to what you'll actually reference live — recent history, open items, and the proposal status — and keep it open during the call.

✓ Check the work

- Confirm every open item listed is still actually open, not resolved in a channel the agent missed.
- Verify the proposal status against its source system, not just the email thread about it.
- Check that no unrelated account's activity leaked into this client's brief.

Expected Outcome

A one-page client brief covering recent interactions, open items and proposal status, ready before the call starts.

Want help rolling this out across your team? **Go to Liminals.Tech** ■