

CREATE **Advanced** 45 MIN · UPDATED 2026-10-01

Draft a product launch plan from CRM data

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Pull CRM and market data together into a launch plan draft instead of assembling it manually from separate reports.

MICROSOFT 365

Word

WORKS WITH

Copilot

Business Outcome

A launch plan draft ready for review within a day instead of the week it typically takes to assemble from scratch.

Workflow Steps

Step 1: Define the launch's scope and timeline

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Settle the launch date, target segment, and key message before pulling data — grounding a plan in the wrong scope wastes the research pass.

Step 2: Have Copilot pull and analyze the relevant CRM data

Copilot

Reference the specific saved CRM views or exported reports that already filter to this launch's target segment — pointing Copilot at the whole CRM instead invites it to pull in accounts and context from unrelated segments that happen to share a keyword.

Step 3: Ask for a structured plan, not prose

Copilot

Request specific sections — positioning, target account list, content needs, timeline — so the draft is directly usable by the team executing it.

PROMPT

Using this CRM data for our target segment, draft a launch plan covering: positioning statement, the top 20 target accounts and why, content needed per channel, and a week-by-week timeline to launch day.

Step 4: Validate the target account list against sales

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Have a sales rep sanity-check the account list before it's finalized — CRM data can be stale or miss context a rep has from direct relationships.

✓ Check the work

- The target account list has been validated by someone with direct account knowledge.
- Every data point in the plan traces back to the CRM, not an assumption.
- The timeline accounts for realistic content production time, not launch-date wishful thinking.

Expected Outcome

A structured launch plan covering positioning, target accounts, and timeline, grounded in actual CRM data.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■