

CREATE **Intermediate** 30 MIN · UPDATED 2026-10-01

Build a customized pitch with Copilot for Sales.

Personalize a sales pitch to a specific account's context instead of presenting the same generic deck to every prospect.

MICROSOFT 365

PowerPoint

WORKS WITH

Copilot

Business Outcome

Pitches that speak to each account's specific situation instead of a one-size-fits-all deck, improving close rates.

Workflow Steps

Step 1: Gather what you actually know about this account

PowerPoint

Check Copilot for Sales' account summary alongside your own notes from prior calls, and write down three specifics: their industry, a challenge they've actually mentioned (not one you're assuming based on their industry), and anything they've said directly matters to them.

Research limited to "they're in manufacturing" produces a pitch that still reads as generic.

Step 2: Ask Copilot to customize the pitch from your standard deck

Copilot

Start from your standard pitch template and have Copilot adapt the examples, language, and emphasis to this specific account's context.

PROMPT

Using our standard pitch deck and what we know about [account] – their industry, the challenges they've mentioned, and what matters to them – customize the examples and emphasis to speak directly to their situation.

Step 3: Verify every account-specific claim is accurate

PowerPoint

Before presenting, confirm any specific detail about the account referenced in the deck is actually correct and current – a wrong detail undermines the personalization's credibility.

Step 4: Have the account owner do a final review

PowerPoint

The rep who owns the relationship should catch anything that reads as generic or misses something they know firsthand.

✓ Check the work

- Every account-specific detail in the deck has been verified as accurate.
- The deck references something specific to this account, not boilerplate dressed up as personalization.
- The account owner reviewed it before it was presented.

Expected Outcome

A customized pitch deck referencing the specific account's industry, challenges, and prior conversations.



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