

RESEARCH

Intermediate

20 MIN

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Prep for a client call by consolidating CRM, email and meeting history.

Have Copilot Cowork pull recent emails, chats, proposals and support tickets into a one-page briefing before a sales call.

MICROSOFT 365

Teams

Outlook

WORKS WITH

Copilot Cowork

Business Outcome

Walking into every client call already knowing the full recent history, without spending 30 minutes digging through five systems first.

Workflow Steps

Step 1: Confirm Cowork can see the relevant client threads

Teams and Outlook

Check Cowork's connected sources include the Outlook mailbox and Teams channels where this client's conversations actually live, and that support-ticket data is reachable if it sits in a separate system.

A briefing built on a partial connection will look complete while quietly missing the one ticket that would have changed your approach.

Step 2: Ask for the pre-call briefing

Copilot Cowork

Frame it around what you need to walk in knowing, not just "summarize everything."

PROMPT

Before my call with [Client] today, pull together everything relevant from the last 60 days: recent email threads, Teams chat history, any open proposals, and any open support tickets. Summarize into a one-page briefing with anything that needs my attention flagged at the top.

Step 3: Scan for anything that changes your approach to the call

Copilot Cowork

An open support ticket or an unanswered proposal question should shape how you open the conversation – read for that before the call starts.

Step 4: Do this consistently, not just for the big accounts

Copilot Cowork

The habit is more valuable applied consistently across your book of business than perfected for a handful of top accounts.

✓ Check the work

- Confirm the briefing's "flagged" items are actually the most relevant ones, not just the most recent.
- Cross-check any number or commitment cited against the actual source thread before referencing it on the call.
- Note if anything relevant seems to be missing – a gap in Cowork's data access, not a gap in the account's history.

Expected Outcome

A one-page pre-call briefing summarizing recent emails, chats, open items, and support history for a specific client.



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