

AUTOMATE **Advanced** 45 MIN · UPDATED 2026-09-30

Recommend a closing strategy from negotiation data.

Build a Copilot Studio agent that reviews a deal's interaction history and suggests the most likely path to close.

MICROSOFT 365

Outlook

Excel

WORKS WITH

Copilot Studio

Business Outcome

More deals closed by giving reps a data-informed read on what's actually stalling a negotiation, instead of guessing.

Workflow Steps

Step 1: Consolidate the deal's interaction history

Outlook

Gather the full email thread, any meeting notes or transcripts, and the CRM's stage-change log for this specific deal into one place the agent can read – a gap, like an important call that never got logged, is invisible to the agent and can lead it to misdiagnose what's actually stalling things.

Step 2: Have the agent identify the actual sticking point

Copilot Studio

Ask it to diagnose what's stalling the deal (price, a missing stakeholder, an unresolved technical concern) based on the interaction history, rather than jumping straight to a generic closing tactic.

PROMPT

Review this deal's email and meeting history over the past 6 weeks. What appears to be the main obstacle to closing — price, stakeholder buy-in, or something else? Recommend one specific next step and explain what evidence in the history supports it.

Step 3: Have the rep validate the diagnosis before acting

Excel

The rep reviews the agent's read on the sticking point against their own sense of the deal — the agent may be missing context from a call that wasn't logged or transcribed.

Step 4: Track whether the recommended move actually worked

Excel

Log the outcome of the recommended next step so you can see over time whether this agent's read on stalled deals is actually reliable for your sales motion.

✓ Check the work

- Confirm the cited evidence (a specific email, a meeting note) actually supports the diagnosis, and wasn't taken out of context.
- Check that the interaction history is complete — a gap (an unlogged call) can lead the agent to misdiagnose the real obstacle.
- Track recommendation-to-close-rate over a quarter before trusting this for your highest-value deals.



Expected Outcome

A specific, evidence-based recommendation for the next step most likely to move a stalled deal toward close.

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