PREPARE

Prepare for a customer conversation

Your call starts in 20 minutes. Can you walk in knowing what matters?

You've got a customer call coming up and no time to dig through everything. Use Copilot to pull together the context, open items and questions worth asking.

1 Try it your way

Use a real conversation if you can. See what you naturally ask Copilot.

Try in Copilot →

2 Need a cue?

Start with the outcome you need:

Context | Open items | Questions

3 Still stuck? Reveal a sample prompt

Have a go first — the sample prompt is on the next page when you want it.

Reveal sample prompt ↓

4 Did you get something useful?

- [ ] I understand the context
- [ ] Open items and risks are clear
- [ ] I have useful questions to ask
- [ ] I know where the gaps are

5 Take it one step further

Ask Copilot: “What are the most important topics to focus on in this call, and why?”

Your notes — what worked, what you'd change

Need a little help?

Watch a quick video
(3 mins)

See a worked example

Take the learning path on ASN

Top tips

- ✓ Use your own work if you can.
- ✓ Be specific about the output you need.
- ✓ Iterate — your first prompt doesn't have to be perfect.
- ✓ Check the result — would you actually use it?

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Sample prompt

Prepare for a customer conversation

> Help me prepare for my call with Adventure Works. Summarise our recent emails, meetings and files with them into customer context, open items and risks, questions to explore, and information I still need.

Select the text above and copy it into Copilot.

Why this works

- It names the customer, so Copilot searches the right conversations.
- It asks for gaps — what you don't know is as useful as what you do.
- It ends with questions, so you walk in ready to listen, not just talk.

Try it in Copilot →

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PREPARE

Worked example

Illustrative example — names and details are fictional

The situation

You have a renewal call with Adventure Works in 20 minutes. You've been on leave for two weeks and a colleague covered the account.

What Copilot returned

Copilot

Here's a briefing for your call with Adventure Works.

CONTEXT

- Renewal due 31 December; they've asked about a two-year term.
- They expanded to 150 users in June.

OPEN ITEMS AND RISKS

- A support ticket on reporting has been open 11 days.
- Their new CFO hasn't been introduced to the account team.

QUESTIONS TO ASK

- What would make a two-year commitment easier?
- Who else should be involved in the renewal decision?

What to check

- ✓ Freshness: is anything here out of date after your two weeks away?
- ✓ Risks: would you raise the open ticket before they do?
- ✓ Gaps: Copilot can only use what it can see — ask your colleague what's missing.

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