

Power Automate + Microsoft Copilot – CRM Discipline & Lead Classification (POC)

Client Overview

The client, a growing B2B company, faced ongoing challenges with sales process visibility and CRM adoption. Their sales team managed most communication through email but failed to maintain proper CRM hygiene – resulting in missed insights, scattered lead data, and poor follow-up tracking.

Client Pain Points

The organization struggled with key CRM discipline issues that impacted sales performance and management visibility:

- Sales representatives were **not entering new leads** into the CRM.
- **Lead nurturing communication** (follow-ups, calls, or meeting notes) was often **not recorded**.
- **Lead statuses** were rarely updated, leading to outdated or inaccurate data.
- Management had **no real-time visibility** into the sales pipeline or conversion stages.
- When a salesperson **left the organization**, the new lead owner found it **difficult to track prior communications** and continue the engagement.

These challenges caused gaps in accountability, reduced forecasting accuracy, and led to lost business opportunities.



Image
Coming Soon...

Challenge

The sales and management teams were spending **excessive time manually screening emails** to identify genuine business inquiries from promotional, internal, or irrelevant messages.

Because this process relied heavily on manual effort, most leads were not captured into the CRM in a timely or consistent manner.

The organization needed a solution that could:

- **Automatically identify** new business inquiries from emails.
- **Classify and extract** essential lead information for CRM entry.
- **Eliminate manual dependency** and bring discipline into the sales process.
- **Ensure continuity** of lead communication history, even when team members changed.

Solution

Megh Technologies designed and implemented an **AI-powered workflow** using **Microsoft Power Automate** and **Microsoft Copilot Generative Actions** to intelligently classify incoming business emails and streamline CRM data capture.

How It Works

- The workflow is triggered **automatically when a new email arrives** in Office 365 Outlook.
- Integrated with **Microsoft Copilot Generative Actions** to analyze the email subject and body in real time.
- Uses a **custom-designed AI prompt** to:
 - Detect genuine business inquiries.
 - Filter out job applications, resumes, promotional, and irrelevant emails.
 - Extract key data points like **Company Name**, **Sender Name**, and **Inquiry Summary**.
 - Generate a **Confidence Score** for reliability.
- The output is structured in **JSON format** for seamless integration.
- Emails marked as **“Business Inquiry”** are automatically logged in **SharePoint**, creating a foundation for **CRM synchronization**.

This intelligent automation ensures that every potential lead entering through email is **captured, structured, and ready for CRM integration** – without requiring manual effort from the sales team.

Results & Impact

The implementation brought measurable improvements to sales efficiency, management visibility, and CRM discipline:

- **100% hands-free classification** of incoming business emails.
- **Automatic CRM readiness** – every genuine lead now enters the pipeline instantly.
- **Improved accountability** – all sales communication is centrally tracked.
- **Real-time visibility** for management into the sales funnel and inquiry trends.
- **Eliminated knowledge loss** during employee transitions.
- **Significant time savings** for the sales and management teams, allowing them to focus on nurturing opportunities rather than data entry.

Conclusion

This AI-driven Power Automate workflow successfully brought **structure, visibility, and discipline** to the client’s sales process.

By combining **Microsoft Copilot’s generative intelligence** with **Power Automate’s workflow capabilities**, Megh Technologies helped the client achieve a fully automated, error-free, and CRM-ready lead management system.

The solution not only streamlined email classification but also strengthened CRM adoption – ensuring that **no business opportunity is ever missed again**.

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