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- Lead statuses were rarely updated, leading to outdated or inaccurate data.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.

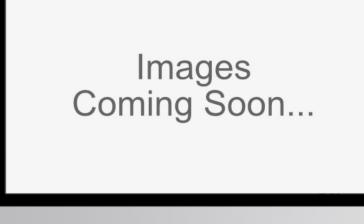


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Challenge

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.

Technology Stack

- Microsoft Power Automate
- GPT 5 Reasoning LLM / Microsoft **Copilot Generative Actions**
- Office 365 Outlook Connector
- JSON Schema Parsing SharePoint Integration
- 100% Cloud-Based Workflow (no local deployment required)

Solution

Megh Technologies designed and implemented an Al-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 Al 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.

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

Results & Impact

- 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

opportunity is ever missed again.

process.

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This Al-driven Power Automate workflow successfully brought **structure**, **visibility**, **and discipline** to the client's sales

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**

By combining Microsoft Copilot's generative intelligence with Power Automate's workflow capabilities, Megh