

# Sales Manager

SALES · O\*NET 11-2022.00 · SALES MANAGERS

MORE TIME IN FRONT OF CUSTOMERS, LESS BURIED IN CRM AND REPORTING.

## 1 YOUR ROLE TODAY

Sales managers set targets, coach the team and steer the pipeline. The relationships and the deals stay human. The pipeline reporting, call prep and follow-up drafting are where AI clears the desk.

### WHAT THE JOB INVOLVES

- Set sales targets and plan how to hit them.
- Lead, coach and develop the sales team.
- Monitor pipeline, forecasts and performance.
- Resolve customer issues and approve terms.
- Analyse market and sales data to guide strategy.
- Report results to senior leadership.

### SKILLS THAT MATTER MOST

- Persuasion
- Coordination
- Active listening
- Management of personnel
- Negotiation
- Critical thinking

O\*NET job zone: Job Zone 4 — considerable preparation.

## 2 THE FOUR COPILOT TOOLS

<b>COPILOT CHAT</b>	Free, secure chat. Works from the open web and anything you paste or upload. No access to your internal files unless you give it.
<b>M365 COPILOT</b>	Sits inside Word, Excel, PowerPoint, Outlook and Teams. Works on your own emails, files and meetings (only what you already have permission to see).
<b>COPILOT COWORK</b>	You hand over a longer job and it works through the steps, showing progress so you can steer. Good for multi-stage work that used to eat an afternoon.
<b>COPILOT AGENTS</b>	A custom helper you (or IT) set up once to handle a specific, repeatable job — answering a common question, triaging a queue, drafting from a template.

## 3 AI OPPORTUNITY MAP

Where the four tools fit the real work — with a practical example for each.

TASK	BEST TOOL	PRACTICAL EXAMPLE
Prepare for a customer or prospect meeting	<b>COPILOT CHAT</b>	Brief yourself on the company and its likely priorities from public sources.
Summarise pipeline and forecast for the week	<b>M365 COPILOT</b>	Ask Copilot in Excel to summarise pipeline movement and flag at-risk deals.
Draft follow-ups and proposals	<b>M365 COPILOT</b>	Draft the follow-up email or proposal in Outlook/Word from your call notes.
Recap a sales call and capture actions	<b>M365 COPILOT</b>	Use Copilot in Teams to summarise the call and list next steps.
Keep the CRM current	<b>COPILOT AGENTS</b>	An agent that drafts CRM updates from meeting notes for the rep to confirm.
Pull an account review together	<b>COPILOT COWORK</b>	Delegate a full account review: history, open deals, risks and a suggested plan.

## 4 SKILLS TO BUILD

The AI-literacy habits this role needs.

- Briefing AI with the customer context so prep is actually useful.
- Editing drafts so they sound like you, not a template.
- Checking facts before they reach a customer.
- Coaching the team to use AI for prep, not as a crutch in the room.

## 5 GETTING STARTED — 3 QUICK WINS THIS WEEK

- ✓ Brief yourself in Copilot Chat before your next prospect call.
- ✓ Summarise this week's pipeline movement in Copilot for Excel.
- ✓ Draft your next three follow-ups from call notes, then personalise.

## 6 GETTING AHEAD — YOUR 90-DAY PLAN

**Days 1–30 · Get started** Use Chat for call prep and M365 Copilot for follow-ups and pipeline summaries every week.

**Days 31–60 · Build the habit** Hand account reviews to Cowork. Coach two reps to prep with Copilot before calls.

**Days 61–90 · Get ahead** Stand up a CRM-update agent. Track time moved from admin to selling.

## 7 WHERE TO LEARN NEXT

Four short intro courses, in order. Start at the top.

- 01** Start with Copilot Chat  
The no-risk way in. Ask, draft, summarise, compare. One hour.
- 02** Work inside M365 Copilot  
Use it in the apps you already live in: Outlook, Word, Excel, Teams.

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**03** Delegate with Copilot Cowork  
Hand over the multi-step jobs. Learn to brief, check and steer.

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**04** Build a Copilot Agent  
Turn your most repeated task into a helper that runs itself.

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Sources — Occupation overview: O\*NET 30.2, occupation 11-2022.00 ([onetonline.org/link/summary/11-2022.00](https://onetonline.org/link/summary/11-2022.00)) and the ESCO occupational profile ([esco.ec.europa.eu](https://esco.ec.europa.eu)). Copilot tool descriptions: Microsoft 365 Copilot and Copilot Cowork product documentation, Microsoft, May 2026. AI mapping and pathways: Craig Stanley Studio. Verify figures and policy against your own systems before acting.

