

Example Prompts

Here are a few example use cases and prompts which a user might want to create a recurrent prompt for.

- **Weekly Check-ins:** “Summarize all of my open deals from last week”
 - Send update to Slack and manager’s email
- **Win/Loss:** “Give me a breakdown of all of my closed won and closed lost deals from last month.”
 - Send update to email and personal slack

Daily

- **Pipeline Management:** Give me a snapshot of my open deals: amount, close date, stage, and critical next steps. Flag any changes or risks since yesterday.
 - Daily at 8am
 - Slack and potentially Email (potentially include manager)
- **Meeting Prep:** List today’s scheduled meetings with associated deals and deal stage. Include a summary of last interaction, open next steps, and recommended prep notes.
 - Daily at 8am
 - Slack and Email
- **Meeting Summary:** Summarize today’s meetings and outcomes as well as any time sensitive next steps and follow ups I need to do.
 - Daily at 4pm
 - Slack and Email
- **Next Step Nudges:** List any open deals without a clear or logged next step in the past 7 days, sorted by stage and amount descending, and suggest an action.
 - Daily at 4pm
 - Slack

Weekly

- **Competitor Mentions:** Summarize any meetings this week where competitors were mentioned and what was said.
 - Weekly on Fridays at 4pm
 - Slack competitive intel channel
- **Weekly Pipeline Digest:** Summarize changes in my pipeline from the past week: new opportunities, stage moves, slipped close dates, won/lost. Highlight critical tasks, top risks, and key learnings.
 - Weekly on Mondays at 8am
 - Slack (perhaps sales channel) and Email (potentially include manager)

- **[Managers] Weekly Pipeline Review:** Summarize my team's top 10 deals by amount, provide current stage, forecast category, qualification gaps, and a suggested coaching question."
 - Weekly on Mondays at 8am
 - Slack and Email

Monthly

- **Win / Loss Analysis:** Analyze last month's closed won and closed lost deals. Give top reasons for each as well as competitor impact and identify any ongoing risks.
 - Monthly on the 1st at 8am
 - Slack (perhaps sales channel)
- **Competitive Trends Analysis:** Across all sales and customer meetings last month, analyze competitor mentions: frequency, objections raised, feature gaps, and impact on win rate.
 - Monthly on the 1st at 8am
 - Slack competitive intel channel