



## Microsoft business-class email

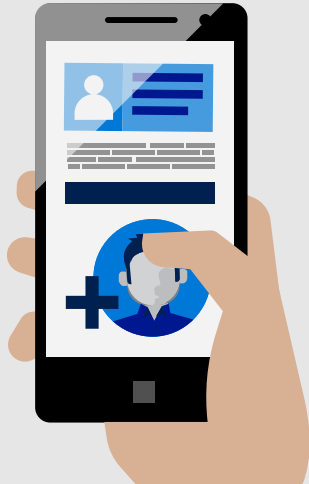
# Day in the life - Financial services

Meet Joy, partner at VanArsdel, Ltd., a boutique financial services firm. She uses professional cloud email to give her the flexibility she needs to manage her business on the go while protecting confidential client data.

### 6:15 AM

#### Score a new client

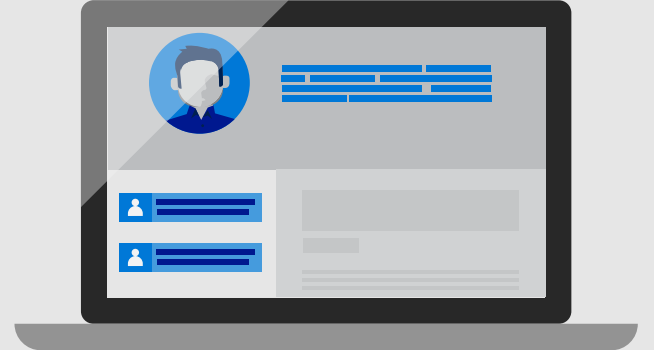
Checking email from her phone before getting out of bed, Joy sees that a client has referred someone to VanArsdel, Ltd.!



### 7:30 AM

#### Manage prospects

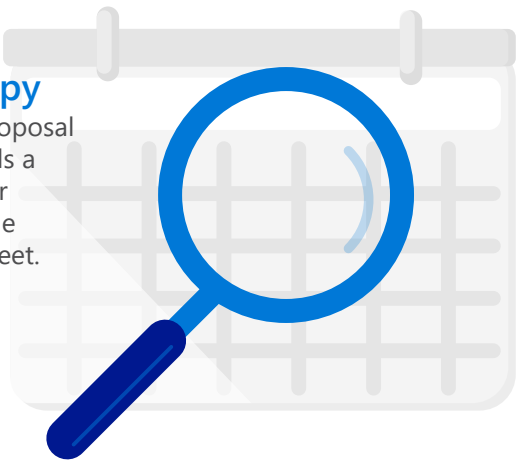
Fully caffeinated, Joy researches the new prospect. She emails her notes with high-importance to Cesar who will add the details in his [Salesforce Lightning for Outlook](#) add-in.



### 8:00 AM

#### Keep clients happy

With Cesar starting a proposal for the referral, Joy sends a [FindTime](#) request via her calendar to see when she and the prospect can meet.



### 9:00 AM

#### Keep secrets safe

Prepping for a lunch meeting, Joy reviews a client's portfolio. She sends updates to her team via an email marked confidential.



### 9:45 AM

#### Make last-minute changes

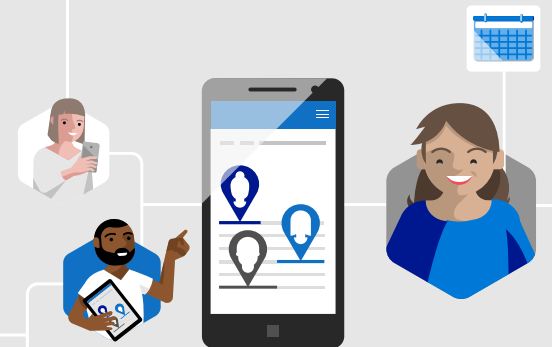
After hearing the painters are not yet done painting the main conference room, Joy moves the staff meeting to a new location using Room Finder.



### 11:50 AM

#### Tag for task management

Checking email before lunch, Joy sees she's been @tagged to provide feedback on potential stock holdings. Joy sets a task reminder to research and follow up tomorrow.



### 1:30 PM

#### Seal the deal

Alert! The proposal is in Joy's inbox. She sends it to the prospect via an attachment on a calendar invite for the next day.



### 3:00 PM

#### Follow up fast

Joy shares her calendar with Wade so he can set up an optimal time for a team training on a new insurance product.



### 8:00 PM

#### Skim the headlines

Back at home, Joy puts her feet up and skims industry news. She sees an article she wants her team to read, and forwards the link with a delivery delay<sup>1</sup> to the next morning.



1. Feature only available in Outlook client.