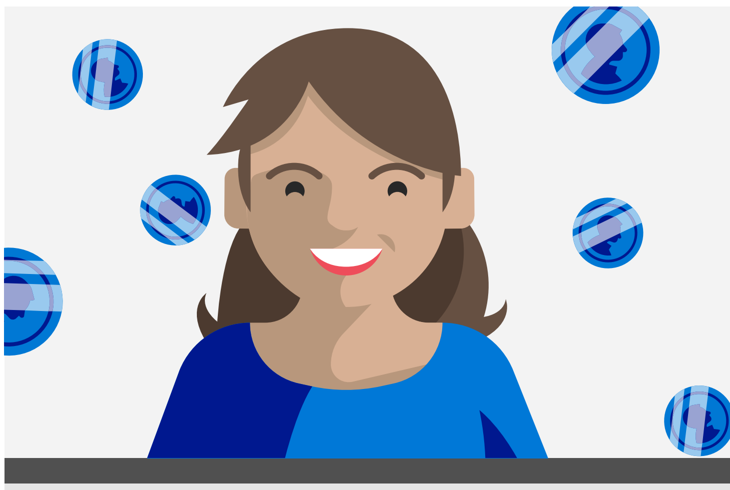


Microsoft business-class email

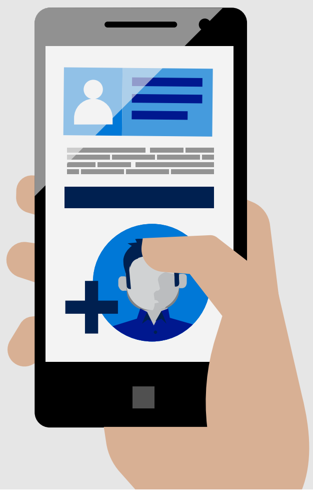
Day in the life - Financial services

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

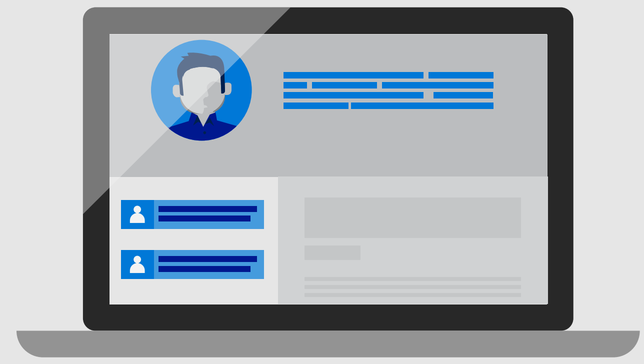
Checking email from her phone before getting out of bed, Joy sees that a client has referred someone to VanArsdel, Ltd.!



7:30 AM

Manage prospects

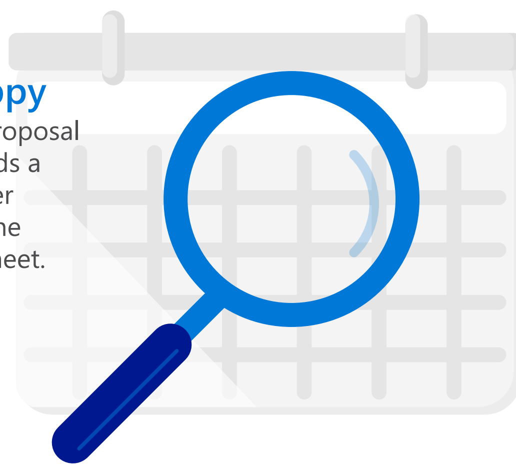
Fully caffeinated, Joy researches the new prospect. She emails her notes with high-importance to Cesar who will add the details in his Salesforce Lightning for Outlook add-in.



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

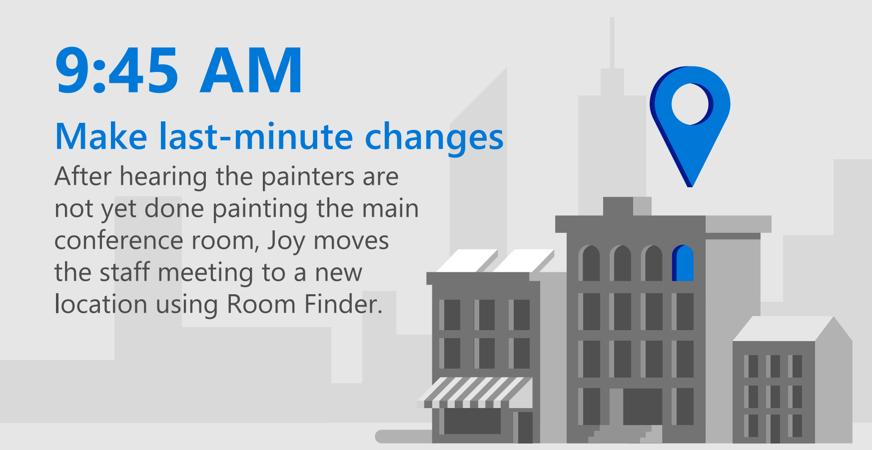
Keep secrets safe

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

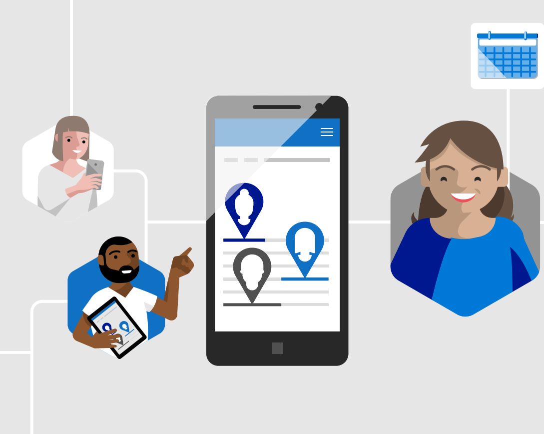
After hearing the painters are not yet done painting the main conference room, Joy moves the staff meeting to a new location using Room Finder.



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[1] to the next morning.

1. Feature only available in Outlook client.

Contact us today to realize the benefits of business-class email.

Korcomptenz

Microsoft