

Helping SMEs save time, cut admin and work smarter with AI.

Sales Enquiry Automation

The Problem (Manual):

Many customer enquiries are still managed manually through shared inboxes, individual emails and spreadsheets. This often leads to:

- Enquiries being missed or overlooked
- Manual forwarding between departments
- Inconsistent customer experience
- Limited visibility of enquiry volumes and activity
- Slow response times to customers
- No clear ownership of enquiries
- Sales opportunities falling through the cracks
- Time wasted on administration rather than selling

The Solution (Automation):



Outlook



Power Automate



SharePoint

A Microsoft 365 powered Customer Enquiry Management System that automatically:

- > Captures enquiries from a shared mailbox
- > Generates a unique enquiry reference
- > Sends an immediate customer acknowledgement
- > Notifies the assigned team member automatically
- > Creates a central enquiry record
- > Categorises enquiries by product area:
 - Furniture
 - Print
 - Technology
 - Office Supplies
- > Assigns enquiries to the appropriate salesperson
- > Creates a searchable audit trail for every enquiry

STEP 1

Enquiry received
in shared mailbox

STEP 2

Record &
reference created

STEP 3

Categorised & assigned

STEP 4

Customer acknowledged,
salesperson notified

Key Benefits:

- ✓ **Faster Response Times**
Customers receive an acknowledgement immediately and enquiries are routed without delay.
- ✓ **Reduced Administration**
Eliminates manual logging, forwarding and triage of enquiries.
- ✓ **Improved Customer Experience**
Customers receive a professional, consistent response every time.
- ✓ **Scalable Process**
Handles increasing enquiry volumes without increasing administration effort.
- ✓ **No Missed Opportunities**
Every enquiry is captured, tracked and assigned automatically.
- ✓ **Increased Accountability**
Every enquiry has a clear owner and status.
- ✓ **Better Visibility**
Management can see enquiry volumes, categories and ownership in one place.

Typical results:

Faster customer response times

Reduced manual processing

Better sales team productivity

Improved visibility of sales opportunities

Increased consistency across the business

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