

CASE STUDY · AI FOR INDUSTRIAL SALES & OPERATIONS

10+ hours a week back to every salesperson — *an AI rollout* for a mid-size industrial manufacturer.

A Microsoft Copilot and Claude AI deployment for a mid-size industrial manufacturer with a multi-site sales network — 60% faster quote generation, 10+ hours saved per salesperson per week, payback within 3 to 6 months.

CLIENT	SECTOR	STACK	DEPLOYMENT
Mid-size industrial manufacturer · anonymised	Industrial manufacturing & multi-site distribution	Microsoft Copilot · Claude AI · M365	4–6 week pilot · 6-month full rollout
10+ <i>h</i> TIME SAVED Per salesperson per week — email, quotes, reporting.	60% FASTER QUOTES From hours to minutes — pricing, templates, personalisation.	+30% MORE QUOTES Same team, higher capacity = more deals in the pipeline.	3–6 <i>mo.</i> PAYBACK At 10 users · ~€2,500 net monthly savings.

THE CHALLENGE

The client is a **mid-size industrial manufacturer** running a multi-site sales and distribution network on Microsoft 365 — Outlook, Excel, Word, PowerPoint, OneDrive/SharePoint — supporting a high-volume B2B sales motion under an ISO-certified operating regime. Growth was hitting a ceiling in the manual workload of the sales team:

- **Multi-site coordination** — divergent versions of quotes, price lists, templates and contracts across sales locations.
- **High volume of quotes** — repeated manual pricing and personalisation for every customer enquiry.
- **Inconsistent communication** across the group — different tones, terminology and branding between sister entities.
- **Manual data work** — reports, branch-performance analyses and materials planning done by hand in Excel.
- Slow customer responses — emails written from scratch, hunting for the right phrasing in EN/DE.

How can AI make the sales team more efficient — and deliver measurable returns without disrupting existing processes or the M365 environment?

THE SOLUTION

RAIM Consulting Group designed a combination of two complementary AI tools, deployed into the client's existing M365 environment. The operating principle:

Copilot for daily work. Claude for deep analysis. The human decides.

- 01 COPILOT IN OUTLOOK & TEAMS**
Suggested replies, long-thread summarisation, professional emails in multiple languages, automatic meeting notes and action items.
- 02 COPILOT IN EXCEL & POWERPOINT**
Cross-branch performance analysis, materials-consumption forecasts, automatic pricing from historical quotes, customer-facing decks generated from order parameters.
- 03 CLAUDE AI — DOCUMENT ANALYSIS**
Contract and offer comparison, key-data extraction, contract-risk flagging, analysis of up to **200,000 words at once** in an EU data centre (Frankfurt).
- 04 SHAREPOINT AS A KNOWLEDGE BASE**
Unified quote and contract templates for every sales location, a central product catalogue, sharing across sister entities in the group.

DEPLOYMENT MAP · 9 KEY AREAS

PRIORITY · TOOL · BENEFIT

Where AI lands first — and what it delivers.

#	AREA	AI TOOL	PRIORITY	BENEFIT
01	Email communication	Copilot (Outlook) + Claude	HIGH	8+ hours/week saved per salesperson
02	Pricing quotes	Copilot (Excel + Word)	HIGH	60% faster generation, automatic personalisation
03	Data analysis & reports	Copilot (Excel) + Claude	HIGH	Automated performance reports across the branch network
04	Meetings & minutes	Teams Copilot	HIGH	100% action-item capture, owners assigned
05	Customer presentations	Copilot (PowerPoint)	HIGH	Professional proposals in minutes from Excel data
06	Translation EN/DE/local	Copilot + Claude	MEDIUM	Instant translation preserving technical terms
07	Customer service	Claude + templates	MEDIUM	2× faster replies on frequent enquiries
08	Marketing & web	Claude + Copilot	MEDIUM	Agency-grade content in-house, faster campaigns
09	Employee training	Claude + internal database	LOWER	Personalised learning, quizzes, knowledge tests

BUSINESS CASE

MONTHLY RUN-RATE · EUR

SCENARIO	COPILOT LICENCES	CLAUDE LICENCES	TOTAL COST	TIME SAVINGS	NET BENEFIT	PAYBACK
Pilot · 10 users	~€1,000	~€500	~€1,500	~€4,000	~€2,500	3–6 MO.
Full rollout · 50 users	~€5,000	~€2,400	~€7,400	~€20,000	~€12,600	< 6 MO.

TIME SAVED 10+ h / week Per salesperson — email, documents, pricing.	QUOTE GENERATION 60 % faster From hours to minutes — templates + auto-personalisation.	CAPACITY +30 % quotes Same team, same time — more opportunities in pipeline.	SECURITY EU data M365 EU Boundary · Claude via AWS Frankfurt, zero retention.
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IMPLEMENTATION PLAN · 4 PHASES

MONTH 1

Preparation

ANALYSIS · USE CASES · COMPLIANCE

MONTH 2–3

Pilot

3–5 USERS · TRAINING · MEASUREMENT

MONTH 4–5

Rollout

COMPANY-WIDE · ADVANCED USE CASES

MONTH 6+

Optimisation

ROI MEASUREMENT · FURTHER AUTOMATION

No custom infrastructure. No vendor lock-in. No disruption to the M365 environment. Deployed into the client's existing Microsoft 365 tenancy, using EU data centres, audit log and role-based access. Compliance with the *EU AI Act* (Art. 4 — AI literacy; Art. 50 — customer disclosure) and GDPR is handled in Phase 1.

ABOUT RAIM CONSULTING GROUP

RAIM Consulting Group is a Prague-based AI and digital transformation advisory. We combine strategy, engineering and adoption in single engagements — turning AI capability into measured business outcomes. We specialise in Microsoft Copilot and Anthropic Claude implementations for European industrial, public-sector and Fortune 500 clients.

HOW TO GET STARTED

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