

# Prep session

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## Introduction

**This document will assist you in setting up fictitious information for use with your customers. The prep session document includes two Teams meetings:**

1. First, a shared email thread will be created for use in Copilot in Outlook demos.
2. Second, a Teams meeting will be set up, which can be used in Copilot in Teams demos.

It is highly recommended that someone on the team acts as the **facilitator**. The facilitator should read this entire guide before the prep session so they can guide and assist all the other participants. For detailed instructions on how to set up this prep session for maximum success, see the [Facilitator prep guide](#) section at the end of this document. **IMPORTANT considerations:**

- We highly encourage you to set up these fictitious meetings using your [Individual Demo Tenant](#). We do not recommend using your MSIT account given you can accidentally expose confidential information, which could result in a privacy incident.
- You can invite any number of extra people to this session (following Teams limits). They do not have to participate in the email or meeting, but consider the following so attendees can leverage the content from the demos:
  - To be able to leverage the demo, they need to be part of the **hosting tenant**—meaning the tenant out of which you sent the invite. Copilot in Teams will not work if attendees are participating externally.
  - They need to be invited **before** the session is recorded. If you forward the meeting to someone **after** the session has been recorded (retroactively), they will **not** have access to the transcript and will not be able to use Copilot in Teams.
  - Extra attendees should **not decline** the meeting, or else they will not have access to the Meeting Recap.

## Scheduling

For the prep session, the facilitator should schedule two back-to-back meetings. Invite everyone who needs to demonstrate Microsoft Copilot with customers. See the [Facilitator's prep guide](#) for more details.

The full prep session is estimated to take 30-45 minutes.

## Number of participants

The prep session works best if you have **at least 4** participants. If you have **fewer** than **4** participants, you can have one person fill the roles of multiple participants.

# Prep setup session script

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Follow these steps to set up the demo prep session.

## Meeting 1: Creating the shared email thread

This section will help you create a fictitious email thread that's safe for customers to view while demonstrating Copilot in Outlook. Follow the instructions in this section to create an email thread that you can use for demo purposes.

### Session Setup

Before you begin, decide who will play each role in the email thread. There are four required personas. The rest are optional:

- **Person 1:** <Person 1>
- **Person 2:** <Person 2>
- **Person 3:** <Person 3>
- **Person 4:** <Person 4>
- **Person 5:** <Person 5> (optional)
- **Person 6:** <Person 6> (optional)
- **Person 7:** <Person 7> (optional)
- <Additional attendees> (optional)

If you have more than four people, assign numbers to each person up to any maximum.

**Facilitator:** If time allows, replace the <Person X> placeholders in this script with the attendee names and share this script with the participants.

**Person 1** (usually the facilitator), will begin by sending an email to all participants. Have each person respond to the thread when their turn comes.

Roles and actions	Email Body
<p>&lt;Person 1&gt;, compose a new email message:</p> <ul style="list-style-type: none"> <li>• <b>To:</b> All session attendees</li> <li>• <b>Subject:</b> Copilot Design System blog</li> </ul>	<p>Hi Team,</p> <p>The Microsoft Design System Blog is ready for your final review &amp; sign-off. We've added the sections on Microsoft Responsible AI principles and put more emphasis on the fact our Copilot UX ensures the human is always in control, per the feedback you sent yesterday.</p> <p>Looking forward to your feedback!</p> <p><b>(your name)</b></p>
<Person 2>, reply all with this response:	Thanks! <Person 3>, will you have a chance to look at this today? Once I get the thumbs up from you, I can send it over to Jason to be sure it's ready to post on the day of the event.
<Person 3>, reply all with this response:	Yes, I will look at it later today. Thanks for taking care of this!
<Person 4>, reply all with this response:	This draft looks great! Thanks for the quick updates on it!
<Person 2>, reply all with this response:	Thanks for all the feedback and input on the doc so far. The meeting was super helpful in getting clear about the key points to land. I updated the draft based on that conversation and think it's ready for the next round of review. Take a look when you can and ping me if you have any additional comments or feedback.
<Person 5> (optional), reply all with this response:	I think we should be sure to mention the customer stories we have just published. They will make a great addition!
<Person 6> (optional), reply all with this response:	I've shown it to the engineering team as well, and they are happy with it. Great work!

Roles and actions	Email Body
<Person 7> (optional), reply all with this response:	No feedback to add. Let me know when it's published and I will add it to the next field update.
<Person 1>, reply all with this response:	<p>Hi everyone,</p> <p>I got some additional feedback from the folks in marketing and think we need to get together to make sure we're all on the same page with how we're positioning the design system.</p> <p>They want to make sure we're really highlighting the Microsoft RAI principles and think we should elaborate more on how our copilot experiences are designed to make sure the user is always in control.</p> <p>I'll get a meeting set up for us to talk about the changes as soon as possible.</p> <p>Thank you!</p>
<Person 4>, reply all with this response:	Thanks for getting us with this first draft I'll give it a read today and get you feedback as soon as possible.
<Person 2>, reply all with this response:	<p>Hey all,</p> <p>I've finished the first draft of our Copilot Design System blog for the announcement. I'd like to get your eyes on it. I left comments in the doc about where I specifically need input and decisions about the messaging.</p> <p>I'd also appreciate input on the overall content, structure, and clarity for the blog.</p> <p>I know everyone is busy with the event related work, but if you can get me this first round of feedback by EOD tomorrow, then I can get a new draft ready for review by Friday.</p>
<p><b>Prepare for the Teams meeting</b></p> <p>Before you sign off, make sure everyone is ready for the second meeting in the prep, as this next meeting will be recorded and used for the demo.</p>	

## Meeting 2: Creating the shared Teams meeting

This session will help you create a fictitious Teams meeting recording that you can use to safely demonstrate Copilot in Teams. This meeting discusses the release date for an imaginary product called Project Avalon.

**Facilitator:** If time allows, replace the **<Person X>** place holders in this script with the attendee names and share this script with the participants. Also, do a global search and replace for **<next month>** and replace it with the name of a month after this meeting will be held.

In this meeting, each participant will take on one of the following roles:

- Role 1—Integrated Marketing Lead (facilitator): **<person 1>**
- Role 2—Product Manager: **<person 2>**
- Role 3—Product Marketing Lead: **<person 3>**
- Role 4—Strategy and Roadmap: **<person 4>**
- Role 5—Press and Media Relations: **<person 5>** (optional)
- Role 6—Production lead – Event Setup: **<person 6>** (optional)
- Other attendees: Additional attendees can be added as needed (optional)

**If you have fewer than 6 people**, some people will need to take on two roles. Don't double-up the first four roles unless you have too.

**If you have more than 6 people**, additional attendees should speak up when **other attendees** show up in the script.

### Facilitator setup steps

1. **Assign meeting roles.** You can do this when the meeting starts, or as part of a previous meeting, or by email before the event begins.
2. **Start the meeting. DO NOT START RECORDING YET.**
3. **Confirm roles.** Make sure everyone knows which role they are playing.
4. **Start recording.** When everyone is ready, start recording and transcription.

Speaker role	Speaker script
<b>Facilitator setup steps</b> <ol style="list-style-type: none"><li>1. <b>Assign meeting roles.</b> You can do this when the meeting starts, or as part of a previous meeting, or by email before the event begins.</li><li>2. <b>Start the meeting. DO NOT START RECORDING YET.</b></li><li>3. <b>Confirm roles.</b> Make sure everyone knows which role they are playing.</li></ol>	

Speaker role	Speaker script
4. <b>Start recording.</b> When everyone is ready, start recording and transcription.	
<p>&lt;person 1&gt; Integrated Marketing Lead</p>	<p><b>TURN ON RECORDING</b></p> <p>Hi team, I'm starting recording now.</p> <p>It's good to see you're all very excited to kick off the meeting. Before we go into the agenda for today, let's do a brief introduction with name and role. I'm &lt;person 1&gt;, the integrated marketing lead.</p>
<p>&lt;person 2&gt; Product Manager</p>	<p>Hello folks. I'm (your name), and I am the product manager and lead the engineering work stream.</p>
<p>&lt;person 3&gt; Product Marketing Lead</p>	<p>And I am (your name), I am the product marketing lead for Avalon.</p>
<p>&lt;person 4&gt; Strategy and Road Map</p>	<p>I'm (your name), and I'm responsible for strategy and road map, working closely with (Product Manager's name).</p>
<p>&lt;person 5&gt; (optional) Press and Media Relations</p>	<p>I'm (your name), and I manage press and media relations.</p>
<p>&lt;person 6&gt; (optional) Production Lead – Event setup</p>	<p>I'm (your name), the events production lead to make sure that the event goes smoothly.</p>
<p>&lt;person 1&gt; Integrated Marketing Lead</p>	<p>Let's started. The two most important decisions we need to make today are one, to discuss the launch timing for Project Avalon and two, to discuss and propose which executives should be our spokesperson at the launch event.</p> <p>So, we have a busy agenda. We'll start with &lt;Person 2&gt;, who will provide a product readiness update. &lt;Person 3&gt; will share the marketing asset development update. &lt;Person 4&gt; will cover strategy and road map. I will share the latest marketing launch plan.</p>
<p>&lt;person 2&gt;</p>	<p>I'll start with the product management side. We're just a few weeks away from the launch of Project Avalon, but I have some concerns about our readiness because we didn't start our end user preview testing on time</p>

Speaker role	Speaker script
<b>Product Manager</b>	as scheduled. This early end user data is so important, and I think we should consider delaying the launch by one month to ensure the product is properly tested before we release it.
<person 3> <b>Product Marketing Lead</b>	Delayed the launch? Are you kidding me? We've been working on this project for over a year and we're finally ready to go. We cannot possibly delay now. There's just so much at stake.
<person 1> <b>Integrated Marketing Lead</b>	I agree with you. We've already started our content marketing strategy and we're planning on publishing a teaser video next week. Delaying the launch will throw everything off that we've been working on.
<person 4> <b>Strategy and Road Map</b>	I understand your concerns and you're right about some of the activities that are already in motion. However, the success of our 24-month road map is extremely connected to the success of Project Avalon. If it stumbles right out of the gate due to poor user experience, we will spend the rest of the year in damage control trying to salvage our reputations with customers.
<person 5> (optional) <b>Press and Media Relations</b>	I agree we may not get a second chance. The press is not very forgiving, and the media can be relentless. But with all that being said, we have already sent out invites to a press event, so we would need to keep that in mind as any changes will have implications for our plans.
<person 3> <b>Product Marketing Lead</b>	Look, it's clear we're in a tough spot. We have existing commitments for a press event. Also, we have to manage customer demand expectations. But I tend to agree that the downside of a failed launch is far greater than a small delay launch.
<person 1> <b>Integrated Marketing Lead</b>	Maybe we could speed up the beta testing by two weeks?
<person 2> <b>Product Manager</b>	I'm happy to take that action item on. We can add extra resources and end-user incentives for the testers to help speed things up.
<person 5> (optional) <b>Press and Media Relations</b>	If that's the case, I propose we keep the press event on the 6 <sup>th</sup> of <next month> as planned, so that we don't risk generating any negative news cycles. The press will start reading into why an event was delayed, and we don't want to raise any concerns.
<person 1>	That sounds sensible. What do the rest of you think?

Speaker role	Speaker script
<b>Integrated Marketing Lead</b>	
<person 3> <b>Product Marketing Lead</b>	Yeah, I think that makes sense. A two-week launch delay seems like a good compromise.
<person 1> <b>Integrated Marketing Lead</b>	Great. That's decided. And we'll keep the press event as scheduled.
<person 3> <b>Product Marketing Lead</b>	And will you be informing the leadership team about these developments? Most significantly, we need to make sure that <b>Amy</b> and <b>Paul</b> are informed so they can work out a clear communication plan.
<person 1> <b>Integrated Marketing Lead</b>	Good catch. Yes, I'll take that action and we'll get it done by the end of day. Next up is marketing asset review and readiness.
<person 3> <b>Product Marketing Lead</b>	That's me! Could we show the next slide, please? Perfect. So, let's discuss the schedule. Specifically, we need to determine what date to have the updated public launch event and which executives should be our spokesperson.
<person 5> (optional) <b>Press and Media Relations</b>	I learned this week that our biggest competitor will launch their new product on the 22 <sup>nd</sup> of <next month> at an event in New York. We absolutely have to get our announcement out ahead of their event.
<person 2> <b>Product Manager</b>	That makes sense. From a testing perspective, we're scheduled to finish product testing and certification on the 15th. We have high confidence in this date.
<person 6> (optional) <b>Production Lead – Event setup</b>	The event setup will be completed on <next month> 18 <sup>th</sup> , so technically we can start rehearsals the next day on the 19 <sup>th</sup> .
<person 1> <b>Integrated Marketing Lead</b>	We need to also figure out whether Amy, who is our CEO or Paul, our CMO will be able to attend the event as our executive speaker. The tricky thing is, is that they would need to attend both the rehearsal and the launch event.



Speaker role	Speaker script
<person 4> Strategy and Road Map	I got confirmation from the office of the CEO that Amy will be traveling to Tokyo until <next month> 19 <sup>th</sup> and will be back in the office on the 20 <sup>th</sup> . And to make things tricky, she has to attend an all-day board meeting on the 21 <sup>st</sup> . I also worry that she could be jet lagged from travel on <next month> 20 <sup>th</sup> .
<person 3> Product Marketing Lead	And I learned that Paul will be on vacation for three days starting the 15 <sup>th</sup> of <next month>. And then he travels to Europe a few days later on the <b>21<sup>st</sup></b> for a week on customer visits so he could potentially do <next month> the 19 <sup>th</sup> and 20 <sup>th</sup> .
<person 6> (optional) Production Lead – Event setup	As a reminder, we need to have a full day for rehearsals with our executive speaker before we can have the launch event.
<person 3> Product Marketing Lead	OK, I'll take the action to map this out after the meeting on the whiteboard and decide what options we have for the timing of the public announcement event.
<person 6> (optional) Production Lead – Event setup	That sounds good. Let me know by the end of the week so I can start working out all the event logistics.
<person 5> (optional) Press and Media Relations	I have an update on Press and Media Relations. We have received acceptances from most of the press and I'm working with an agency with the execution. In short, <b>Amy</b> is going to kick things off, then pass over to the product management side do a product demo, walk through to do a product demo, and walk through the pitch. Then we'll open it up to Q&A before they get hands on with the product during the happy hour.
<person 3> Product Marketing Lead	I can do a product demo and walk through after the executive keynote.
<person 4> Strategy and Road Map	I'm really excited to see this product finally get into the hands of the press. I'm glad we were able to work this out and compromise on a two-week delay.
<person 1> Integrated Marketing Lead	Are there any open questions before we wrap up?

Speaker role	Speaker script
<person 3> Product Marketing Lead	My only question is whether we should proactively arrange a lessons learned postmortem meeting to ensure we learn from this experience. I'm happy to volunteer for setting that up.
<person 1> Integrated Marketing Lead	Great point, thanks! I'll mark you down for taking that action and let's get that on the calendar for a week after the event.
<person 3> Product Marketing Lead	Sounds good. No other questions for me.
<person 1> Integrated Marketing Lead	That's great. Well, we're out of time. So, thanks, everyone for this week's participation. Let's talk again in a couple of days. Once we followed up on the action items.
<person 3> Product Marketing Lead	Thanks everyone.
Everyone	Thanks, bye.

## Facilitator's prep guide

Follow these instructions to prepare the prep session:

1. **Pre-meeting:** Let the team know about this event and why it's important to attend. This prep session sets your team up for success when demonstrating Microsoft Copilot with a shared email thread and teams meeting that can be used to safely show Copilot.
2. **Assign roles:** For best results, it's recommended that you have a full list of participants before you set up the meetings. Each participant will have two roles to play—one for the shared email thread, and one for the shared Teams meeting. Once you have your list of participants, add them to the **Participant name** column on both of the following tables.

If you have fewer than the recommended number of participants, some people will need to be assigned to multiple roles. Optional roles do not need to be filled.

- a. **Shared email thread roles:** These roles will be used in the first meeting.

Role	Participant name
Person 1	<Person 1>
Person 2	<Person 2>
Person 3	<Person 3>
Person 4	<Person 4>
Person 5 (optional)	<Person 5> <i>Optional</i>
Person 6 (optional)	<Person 6> <i>Optional</i>
Person 7 (optional)	<Person 7> <i>Optional</i>
Additional participants	<Person 8> <i>Optional, as needed</i>

- b. **Teams meeting roles:** These roles will be used in the second meeting.

Role	Participant name
1. Integrated Marketing Lead	<Person 1>

2. Product Manager	<Person 2>
3. Product Marketing Lead	<Person 3>
4. Strategy and Roadmap	<Person 4>
5. Press and Media Relations	<Person 5>
6. Production lead – Event Setup	<Person 6>
7. Other attendees: as needed	<i>Optional, as needed</i>

3. **Share materials with the team:** Once you have assigned roles, share this script document with the attendees before the meeting. It is highly recommended that you do a global find-and-replace for the placeholders <Person X> with each person's name, so they will know when to act in the script.
4. **Schedule the meetings:** Schedule two back-to-back meetings with the entire team. Each meeting should be 15-minutes long. **Remember** that to be able to leverage the demo, invited participants need to be part of the **hosting tenant**—meaning the tenant out of which you sent the invite. Copilot in Teams will not work for external attendees.
  - a. **Meeting 1**
    - i. **Title:** Copilot demo prep session
    - ii. **Length:** 15 minutes
    - iii. **Attendees:** Everyone who might be giving Copilot demos
  - b. **Meeting 2**
    - i. **Title:** Project Avalon Launch Meeting
    - ii. **Length:** 30 minutes
    - iii. **Attendees:** Everyone who might be giving Copilot demos
5. **Conduct the prep session:** On the day of the prep session, review this guide and then conduct the meetings!
6. **Post-meeting:** We recommend removing the expiration date for the recording of meeting #2.