



# Level Up CSP Microsoft 365 and Copilot

In person series

Modern Work & Business Applications

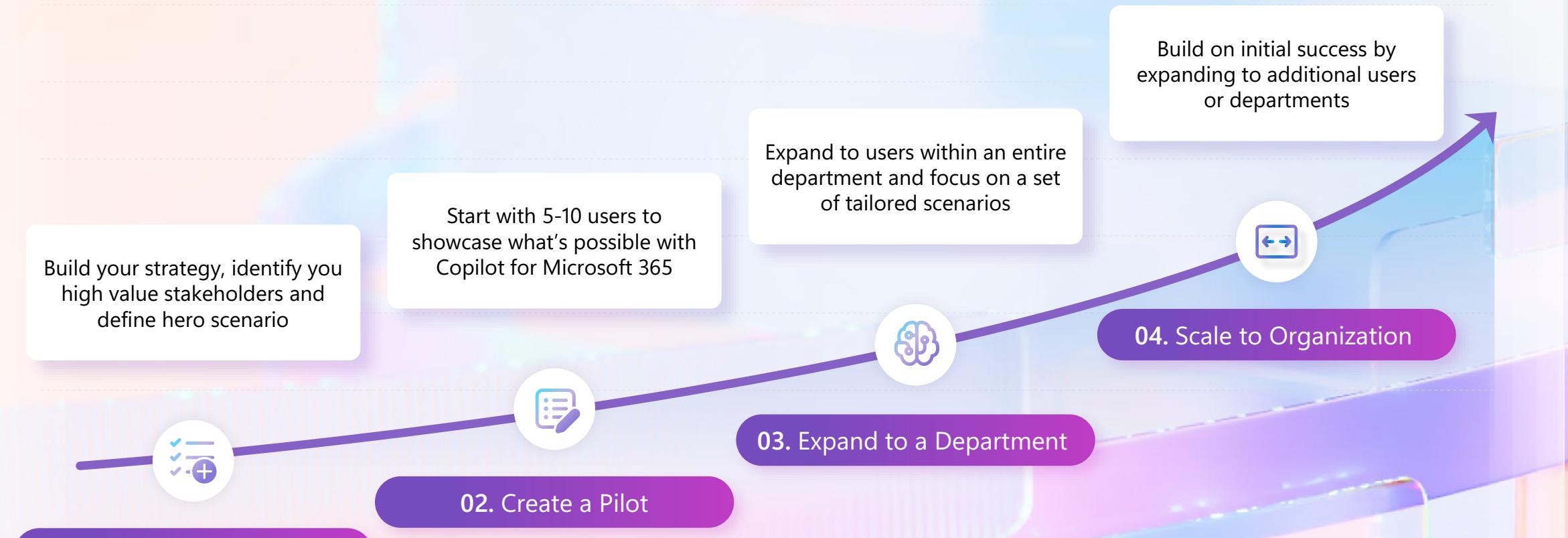




# After



# Four steps to drive Copilot success with customers



# Steps to drive Copilot success with customers



Get Ready

1

Secure LT sponsorship and identify single line of business to pilot

2

Identify success owners and detail high value personas

3

Define success criteria, KPIs, and success measurement plan

# Steps to drive Copilot success with customers



Create a  
Pilot

1

Launch a pilot for 5+ users and help them get started

2

Prepare and deploy Copilot for M365

- Discover, label, and protect data
- Migrate data to Microsoft 365
- Implement Identity and Access Management
- Configure Copilot and assign licenses

3

Drive Adoption

- Identify Copilot Champions (decision makers)
- Build and execute adoption plan
- Deliver adoption training and materials on Copilot for Microsoft 365

# Steps to drive Copilot success with customers



Expand to  
a Department

- 1 Review success measures and gather and amplify success stories
- 2 Create deployment and adoption plan jointly with customer
- 3 Rollout Copilot licenses to the rest of the department
- 4 Tailor Copilot for the specific department leveraging Copilot Studio

# Steps to drive Copilot success with customers



Scale to  
Organization

1

Build an org-wide Copilot adoption plan

2

Establish the business case and ROI with Copilot Dashboard

3

Support customer with adoption & change management services

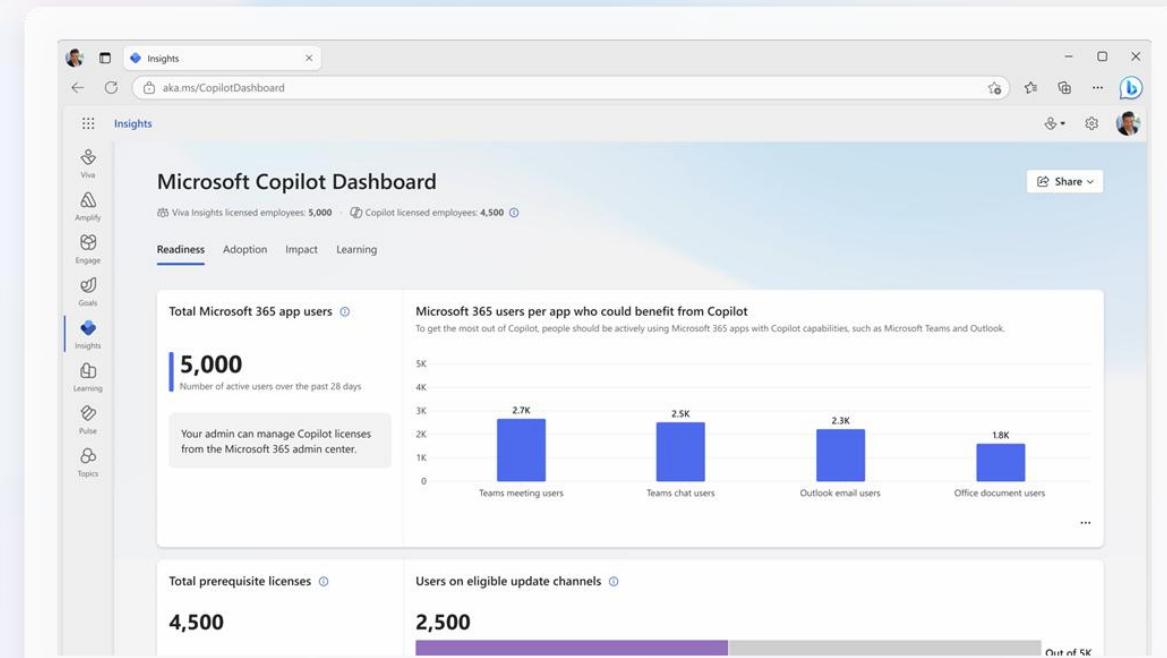
4

Pilot role-based Copilots (Copilot for Sales / Service)

# Measure the impact of your Copilot investment

With the Microsoft Copilot Dashboard powered by Viva, business decision makers and IT leaders can plan their AI readiness, drive adoption and measure the impact of their Copilot investment.

- Plan for Copilot readiness across Microsoft 365 and track by app
- Evaluate Copilot adoption across apps and by feature
- Analyze the potential impact of Copilot across meetings, email, chat, and documents
- View employee sentiment about the value and benefits of Copilot
- Learn about the latest research and findings about AI



## Viva for Measurement

- + With a Microsoft Viva license (*available as add-on*), get advanced analytics across behavioral, collaboration and sentiment data to measure how Copilot has impacted work patterns

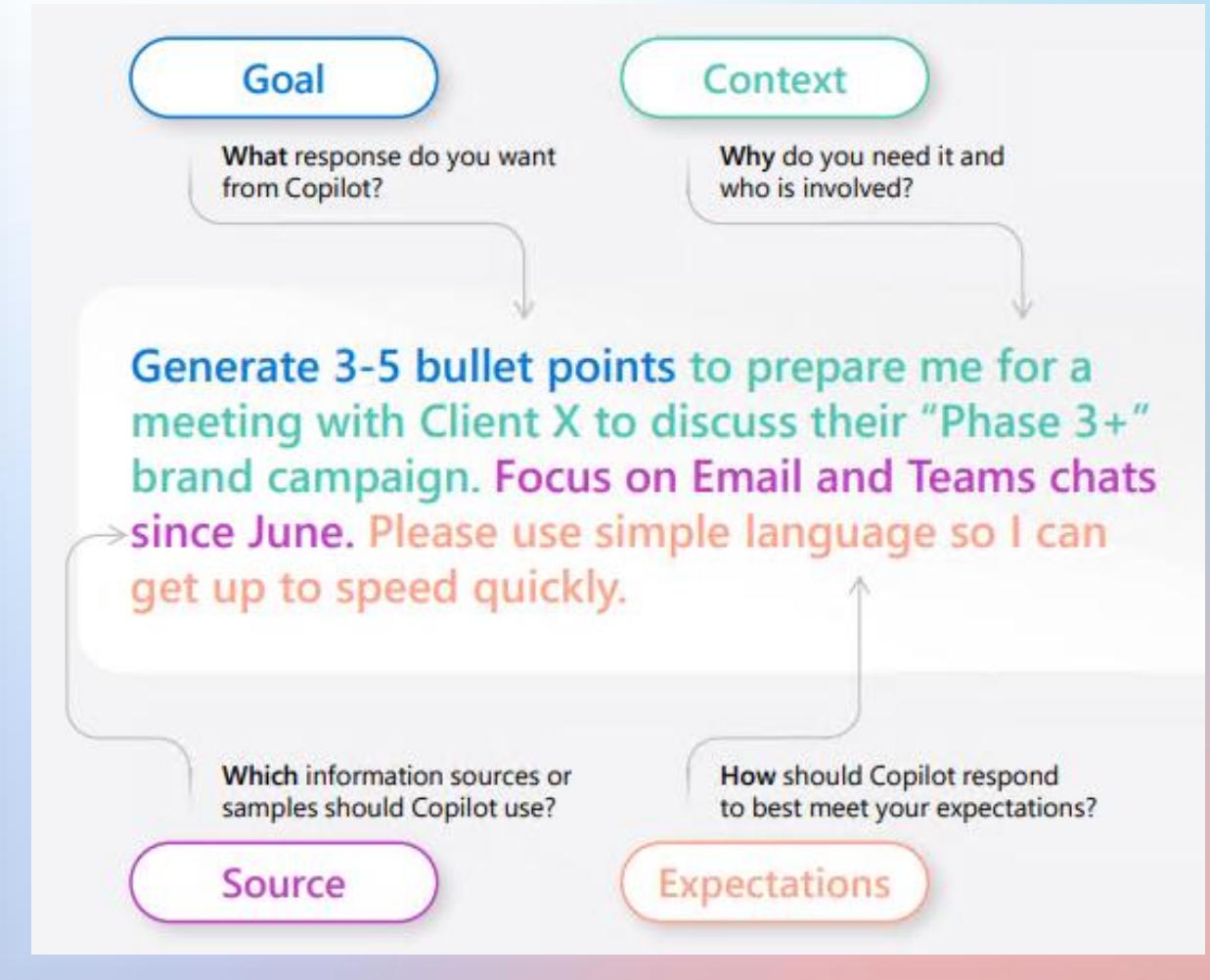


## Microsoft Copilot Dashboard

[aka.ms/CopilotDashboard](http://aka.ms/CopilotDashboard)

# Teach users how to use prompts with Copilot for Microsoft 365

Use prompts to create, summarize, edit or transform.  
It's like having a conversation with Copilot.



# Copilot Lab

- A collection of prompts that can be used to explore and experiment with Copilot
- Learn the art and science of prompt Engineering in an easy way
- Provides latest information and resources
- Evolves and adapts as AI becomes more advanced

The screenshot shows a user interface titled "More prompts to try". At the top, there are tabs for "Work" and "Personal", with "Work" being the active tab. Below the tabs are dropdown menus for "Apps" and "Categories". The main area is a grid of 16 cards, each representing a different prompt. The cards are arranged in four rows and four columns. Each card has a small icon on the left, a title, and a brief description.

Category	Prompt Title	Description
Work	Share meeting notes	Draft an email with notes and action items from <code>meeting</code>
Work	Write a status update	Write a status report to my manager based on <code>file</code> . Include any upcoming deliverables, due dates, and key decisions
Work	Catch up on messages	Summarize Teams messages from this week about...
Work	How to	How do I write a request for proposal?
Work	Help me write	Write an email to my team about our top priorities for next quarter from <code>file</code>
Work	Discover a company topic	I need to explain [concept] to a [role/target audience]. I need to include an explainer of what it is, how it works, and a
Work	Draft an FAQ	Create an FAQ based on <code>file</code>
Work	Describe something concisely	Summarize this doc into a high-level overview of the benefits of [topic]
Work	Get calendar info	When's my next meeting with <code>person</code> ?
Work	Create a quiz	Write a practice quiz about [Topic]. Include at least 20 questions, and group questions by category. Provide a detailed
Work	Create based on a topic	Create 5 hypothetical courses about [Topic]. Include a brief summary for each course and a catchy title.
Work	Prep for a meeting	I've got an upcoming meeting with <code>person</code> . Based on my recent communication and recent news items, create a...
Personal	Add images	Add a relevant image to this
Personal	Get key info	List key points from <code>file</code>
Personal	Brainstorm	Suggest 10 compelling taglines
Personal	Draft an email template	Draft a personal email I can send

➤ Find more Copilot prompts to try in [Copilot Lab](#)

# How to get started

1	Skill your people on delivering the best Copilot demo	<a href="https://aka.ms/CopilotClickThroughDemoGuide">https://aka.ms/CopilotClickThroughDemoGuide</a>
2	Build your Copilot for Microsoft 365 Pilot Offering	<a href="https://aka.ms/CSPCopilotAdoption">https://aka.ms/CSPCopilotAdoption</a>
3	Leverage the renewal opportunity to get customers AI-ready	<a href="https://aka.ms/CSPCopilot">https://aka.ms/CSPCopilot</a>
4	Start using Microsoft 365 Lighthouse to:  a. Manage your upcoming renewals and optimize growth b. Identify high propensity customers to engage with	<a href="https://lighthouse.microsoft.com">https://lighthouse.microsoft.com</a>

The background of the slide features a dynamic, abstract design composed of several overlapping, translucent bands. These bands are primarily colored in shades of blue, orange, and pink, creating a sense of depth and motion. The bands curve and overlap, with some appearing to be in sharp focus while others recede into the background.

*D*eliver impact

**Deliver Managed Services**

# Deliver impact: Managed services

Establish process for continuous service improvement

Delivering a managed service around Copilot empowers partners and customers to organize service health reviews to:

1. Periodically review health and business value of the AI transformation journey
2. Conduct periodic assessments of governance, security, and user enablement practices
3. Identify opportunities for expansion and further optimization of key Microsoft Copilot for Microsoft 365 user experiences

- Access the [admin documentation](#) for the latest technical requirements, policies and reporting
- Join [the Copilot community](#) to connect with experts and community members
- Participate in Copilot Ask Microsoft Anything [events](#)



## Managed Service components



# Shared deliverable: Service Health Review



Performance



Feedback analysis



Incident review



Success stories



Roadmap planning



Risk mitigation

A Service Health Review (SHR) is a systematic process of evaluating the current state and future needs of IT services in an organization.

The purpose of an SHR is to identify the strengths and weaknesses of IT services (in this case Copilot implementation), as well as the opportunities and threats that may affect their delivery and value.

An SHR provides recommendations for improving IT service management, governance, user enablement, and alignment with business goals.

SHRs foster a transparent and collaborative partnership between the partner and business leaders, user enablement specialists, and IT professionals.

## Recommended practices include:

- SHR Chair is the Copilot Success Owner (partner or customer)
- Conducted monthly, moving to quarterly, once onboarding cohorts are complete
- Includes service feedback and top issues from User Enablement staff
- Core focus on data-driven fact finding, scenario identification, learning, and improvement in a blame-free environment

The background of the slide features a dynamic, abstract design composed of several overlapping, translucent bands of light. These bands are primarily colored in shades of orange, pink, and purple, with some blue and white highlights. They appear to be curved and flowing across the frame, creating a sense of motion and depth.

**Deliver impact**

**Analyze usage reports**

# Deliver impact: Access usage reports

Interpret the Microsoft Copilot Dashboard data

The Copilot for Microsoft 365 usage report includes two sections: Readiness and Usage.

In the [Readiness section](#), you can review technical eligibility, license assignment, and users who are in a strong position to get value from Copilot for Microsoft 365.

In the [Usage section](#), you can view a summary of Copilot for Microsoft 365 adoption with visibility into users' last Copilot for Microsoft 365 activity.

- Interpret the Readiness section by analyzing assigned and available Copilot licenses, how many users are technically eligible, and how many are in a strong position to get value from Copilot for Microsoft 365.
- If needed, you can export the report data into an Excel .csv file by selecting the Export link. This exports the Copilot for Microsoft 365 last activity data of all users and enables your identified report readers to do simple sorting, filtering, and searching for further analysis.



# Deliver impact: Analyze usage reports

Interpret the Microsoft Copilot Dashboard data

In the Readiness tab, you assess your organization's overall readiness for Copilot rollout based on technical eligibility requirements and overall Microsoft 365 app usage.

In the Adoption tab, you track user adoption trends per Microsoft 365 app and Copilot feature.

In the Impact tab, you assess Copilot impact by layering the results of Microsoft's quantitative and qualitative research on top of your organization's Copilot and Microsoft 365 usage patterns.

The Sentiment tab provides information that helps you assess Copilot impact from users' perspective.

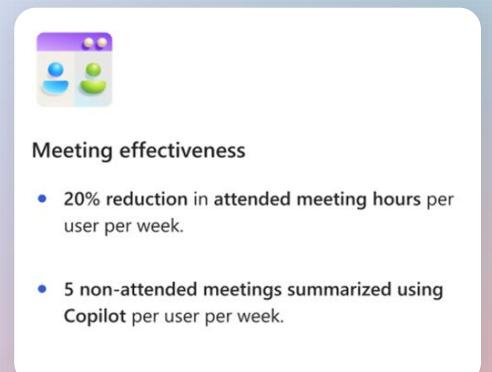
- Instruct users to [access the Copilot Dashboard in Teams or web app](#) to analyze the tabs
- Analyze Readiness, Adoption, and Impact tabs
- Follow the instructions on the Sentiment tab to deliver a survey to users
- [Upload](#) the survey results through the Microsoft 365 admin center to have them displayed in the Microsoft Copilot Dashboard
- Analyze insights on how users feel about the AI assistance they receive from Copilot



Readiness



Adoption



Impact



**Deliver impact**  
**Investigations**

# Audit: Types of events for forensic investigations



## Copilot Interactions

Helps determine scope of prompt and response messages sent



## Teams

Provides insight into Teams activities, including users, channels, connectors or apps that have been added or removed



## User Search

Provides insight into searches in Exchange Online or SharePoint Online for breach assessment

# Investigations: How Audit can help

## For your regulatory and legal obligations

- Assess scope of data breach
- Access audit logs to support length of investigation



Forensic investigations



Responding to legal requests

Audit &gt; Audit search

X

**Monday, Nov 6, 2023 12:00:00 AM to Wednesday, Nov 8, 2023 12:00:00 AM**

Export ▾

Date ↓	IP Address	User
<input type="checkbox"/> Nov 7, 2023 12:41 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:40 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:36 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:25 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:24 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:20 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:16 PM	2001:4898:80e8:37:f985:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:11 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input checked="" type="checkbox"/> Nov 7, 2023 10:20 AM	24.17.224.43	AlexW@MODERNCOMMS382604.OnMicrosoft.com

**Users**

AlexW@MODERNCOMMS382604.OnMicrosoft.com

**Activity**

Interacted with Copilot

**Item****Details****CreationTime**

2023-11-07T18:20:46

**Id**

8a2bfba6-c241-47fd-a6e5-6995b57590b0

**Operation**

CopilotInteraction

**OrganizationId**

b9ba404e-37f1-4363-bb0b-fc387ddfabe6

**RecordType**

261

**UserKey**

23f35b20-f05f-42f6-9ce8-d53c9edd3ce0

**UserType**

0

**Version**

1

**Workload**

Copilot

**Close**

Audit &gt; Audit search

Monday, Nov 6, 2023 12:00:00 AM to Wednesday, Nov 8, 2023 12:00:00 AM

Export ▾

Date ↓	IP Address	User
<input type="checkbox"/> Nov 7, 2023 12:41 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:40 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:36 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:25 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:24 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:20 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:16 PM	2001:4898:80e8:37:f985:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:11 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input checked="" type="checkbox"/> Nov 7, 2023 10:20 AM	24.17.224.43	AlexW@MODERNCOMMS382604.OnMicrosoft.com

1

## Workload

Copilot

## ClientIP

24.17.224.43

## UserId

AlexW@MODERNCOMMS382604.OnMicrosoft.com

## CopilotEventData

```
{ "AccessedResources": [ { "Id": "https://moderncomms382604.sharepoint.com/sites/0f34ff40-e6-aab6-2802e7fcf5d3", "Name": "kickoff.pptx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fcf5d3", "Type": "pptx" }, { "Id": "https://moderncomms382604.sharepoint.com/sites/0f34ff40-e6-aab6-2802e7fcf5d3", "Name": "Design update.docx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fcf5d3", "Type": "docx" }, { "Id": "https://moderncomms382604.sharepoint.com/sites/0f34ff40-e6-aab6-2802e7fcf5d3", "Name": "Next generation chip.docx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fcf5d3", "Type": "docx" } ], "AppHost": "bizchat", "Contexts": [], "MessageIds": [], "ThreadId": "19:qt0mIM5vzHCDQ1PGzya5KFTJfuhVOpYJcNbi1LDvqx81@thread" }
```

Close

- ≡
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- Search & intelligence
- Org settings
- Microsoft 365 Backup
- Integrated apps
- Viva
- Partner relationships
- Microsoft Edge
- Setup
- Reports

# Copilot

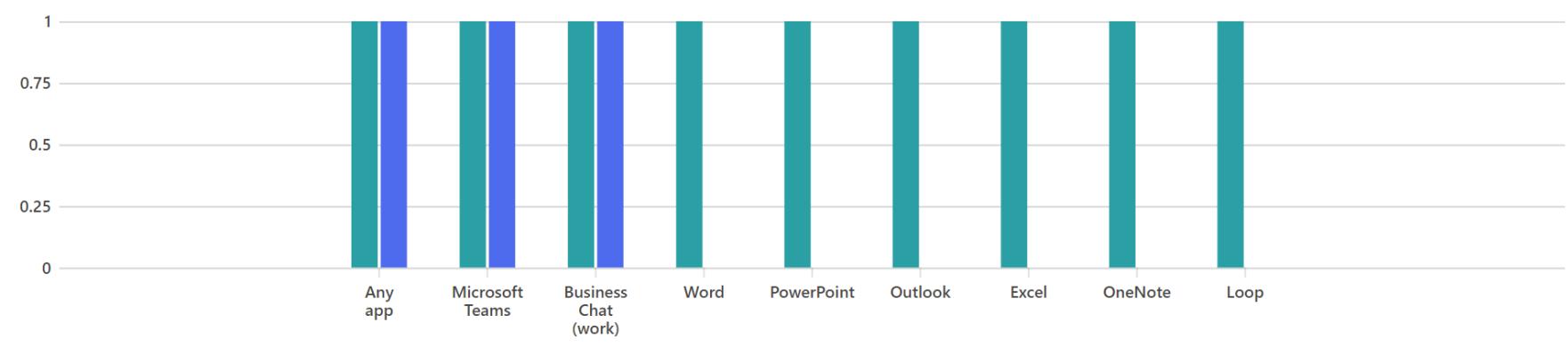
Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more.

Overview Discover Settings

## Reports

### Adoption by app

Adoption status of Microsoft 365 Copilot over the past 30 days. See metric definitions



Enabled Users    Active Users

Learn more in Usage



# Microsoft Copilot Dashboard

Readiness   Adoption   Impact   Learning

## Activate Microsoft 365 Copilot for your organisation

Any user with a prerequisite Office 365 or Microsoft 365 licence can be assigned a Copilot licence.

 Time period: 4 weeks (21 Sept – 18 Oct)

### Copilot adoption rate i



- Active Copilot users
- Copilot licensed employees

### Copilot activation steps

Total Microsoft 365 licences i



--

Total Copilot licences i



--

Copilot licences assigned i



1

Active Copilot users i



1

[Explore adoption](#)

...

# DSPM for AI



Microsoft Purview

https://purview.microsoft.com/fabrikam/en-us/

Microsoft Purview Preview

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Data assessments Preview

## Data Security Posture Management for AI

Discover and secure all AI activity in Microsoft Copilot and other AI apps. Keep your data safe and stay on track with industry regulations. Learn more about DSPM for AI

### Get started

<b>Activate Microsoft Purview Audit</b> Get insights into user interactions with Microsoft Copilot experiences.	Required	⌚ 7 Minutes
<b>Install Microsoft Purview browser extension</b> Detect risky user activity and get insights into user interactions with other AI apps.	Required	⌚ 1 Hour
<b>Onboard devices to Microsoft Purview</b> Protect sensitive data from leaking to other AI apps.	Required	⌚ 1 Hour
<b>Extend your insights for data discovery</b> Discover sensitive data in user interactions with other AI apps.	Required	⌚ 10 Minutes

### Recommendations

[View all recommendations →](#)

New AI regulations

#### Get guided assistance to AI regulations

Stay on track with newly established industry regulations for AI, such as ISO 42001 and NIST AI RMF. To ensure safe AI interactions, we've identified the key actions associated with these regulations.

[View details](#)

Interactions with sensitive data Last 30 days

**509**

[View details](#)

Data Security Investigations

#### Protect sensitive data referenced in Copilot responses

In the last 30 days, 0 unprotected files were referenced in Copilot responses. Start a data investigation or take steps to avoid potential oversharing of sensitive data.

Unlabeled files in Copilot responses Last 30 days

0

Unlabeled files

SharePoint Sites with unlabeled files

0

[View details](#)

### Reports

[View all reports →](#)

Microsoft Purview Preview

https://purview.microsoft.com/fabrikam/en-us/

Microsoft Purview Try the new Microsoft Purview

Search

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← Overview

## Reports

Microsoft Copilot experiences Enterprise AI apps Other AI apps

### Activity

Total interactions over time (Microsoft Copilot)

▲ Up 20% in the last 30 days

Date	Microsoft 365	Copilot Studio
09/01/2023	500	200
09/02/2023	1000	500
09/03/2023	1000	2000
09/04/2023	3000	2500
09/05/2023	3000	2500
09/06/2023	3500	2800

View details

Total interactions over time (enterprise AI apps)

▲ Up 14% in the last 30 days

Date	OpenAI ChatGPT Enterprise
10/01/2024	2800
10/02/2024	4000
10/03/2024	3800
10/04/2024	3800
10/05/2024	3800
10/06/2024	2000
10/07/2024	3800

View details

Total interactions over time (other AI apps)

▲ Up 14% in the last 30 days

Date	Yellow Line App	Orange Line App
10/01/2024	1800	2800
10/02/2024	3000	3800
10/03/2024	2200	3500
10/04/2024	4200	3200
10/05/2024	4500	3000
10/06/2024	4200	1800
10/07/2024	4500	2200

Total visits (other AI apps) ⓘ

▲ Up 14% in the last 30 days

Date	Visits
10/01/2024	1000
10/02/2024	1800
10/03/2024	1200
10/04/2024	1500
10/05/2024	1000
10/06/2024	1800
10/07/2024	2200

Microsoft Purview

https://purview.microsoft.com/fabrikam/en-us/

Microsoft Purview Preview

Search

Try the new Microsoft Purview

Activity explorer

Review AI activity including AI interactions (prompts and response), activity with sensitive info types, and more.

Filters: Timestamp: 10/16/2024-11/14/2024, Activity type: AI Interaction, AI app category: Microsoft Copilot Experiences, App: Any, App accessed in: Any, User: Any, User risk level: Any, Sensitive info type: Any

Resources accessed: Any, Sensitive files referenced: Any, Scope: Any, Reset all

AI Interaction

Chart time zone: UTC

Export

248 items

Activity type	User	User risk level	Timestamp (UTC)	AI app category	App	App accessed in	Sensitive info type	Resources access...	Sensitive files ref...
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:48 PM	Microsoft Copilot Experie...	Word	No	No			
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:48 PM	Microsoft Copilot Experie...	Word	No	No			
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:47 PM	Microsoft Copilot Experie...	Office	Yes	Yes			
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:46 PM	Microsoft Copilot Experie...	Office	Yes	Yes			
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:42 PM	Microsoft Copilot Experie...	Office	Yes	Yes			
AI Interaction	lisab@fabrikampurviewignite2024.o...	Nov 13, 2024 8:56 PM	Microsoft Copilot Experie...	Office	Yes	No			
AI Interaction	lisab@fabrikampurviewignite2024.o...	Nov 13, 2024 7:43 PM	Microsoft Copilot Experie...	Office	Yes	No			
AI Interaction	andrewm@fabrikampurviewignite20...	Nov 13, 2024 7:42 PM	Microsoft Copilot Experie...	Word	No	No			

Microsoft Purview

https://purview.microsoft.com/fabrikam/en-us/

Microsoft Purview Preview

Search

Try the new Microsoft Purview

Activity explorer

Review AI activity including AI interactions (prompts and response), activity with sensitive info types, and more.

Filters: Timestamp: 10/16/2024-11/14/2024, Activity type: AI Interaction, AI app category: Microsoft Copilot Experiences, App: Any, App accessed in: Any, User: Any

Resources accessed: Any, Sensitive files referenced: Any, Scope: Any, Reset all

AI Interaction

Record ID: a04bb747-25ae-47a1-8ad0-6e3d0cbe37f5  
Client IP: 2600:8800:7089:f900:69bb:c58:2694:2f12

About this user

User: Erica T

View more user details in insider risk management

App details

AI app category: Microsoft Copilot Experiences, App accessed in: Word

Interaction details

You can view prompts and responses with your Microsoft Purview Content Explorer Content Viewer role. Learn more about permissions for DSPM for AI

Prompt: Project Obsidian M&A.docx [AutoGenerated]Summarize

Sensitive info types detected: View related classification activity

Response: Project Obsidian M&A.docx [AutoGenerated]Project Obsidian is a merger between Company A and Company B to create a more competitive and innovative market entity. The merger aims to combine strengths, enhance market share, improve

Export Selected Items

Activity type	User	User risk level	Timestamp (UTC)	AI app category	App
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:48 PM	Microsoft Copilot Experie...		
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:48 PM	Microsoft Copilot Experie...		
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:47 PM	Microsoft Copilot Experie...		
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:46 PM	Microsoft Copilot Experie...		
AI Interaction	ericat@fabrikampurviewignite2024.o...	Nov 14, 2024 8:42 PM	Microsoft Copilot Experie...		
AI Interaction	lisab@fabrikampurviewignite2024.o...	Nov 13, 2024 8:56 PM	Microsoft Copilot Experie...		
AI Interaction	lisab@fabrikampurviewignite2024.o...	Nov 13, 2024 7:43 PM	Microsoft Copilot Experie...		
AI Interaction	andrewm@fabrikampurviewignite20...	Nov 13, 2024 7:42 PM	Microsoft Copilot Experie...		

11/7/2024      11/8/2024      11/11/2024  
Chart time zone: UTC

AI app category  
Microsoft Copilot Experiences  
App accessed in  
Word

## Interaction details

You can view prompts and responses with your Microsoft Purview Content Explorer Content Viewer role. [Learn more about permissions for DSPM for AI](#)

### Prompt

[Project Obsidian M&A.docx](#)  
[AutoGenerated]Summarize

Sensitive info types detected [View related classification activity](#)

### Response

[Project Obsidian M&A.docx](#)  
[AutoGenerated]Project Obsidian is a merger between Company A and Company B to create a more competitive and innovative market entity. The merger aims to combine strengths, enhance market share, improve efficiencies, and drive growth. \* \*\*\*Objectives of the Merger\*\*: The merger

Sensitive info types detected [View related classification activity](#)

Microsoft Purview

https://purview.microsoft.com/fabrikam/en-us/

Microsoft Purview Preview

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Activity explorer

Review AI activity including AI interactions (prompts and response), activity with sensitive info types, and more.

Filters: Timestamp: 10/16/2024-11/14/2024, Activity type: AI Interaction, AI app category: Microsoft Copilot Experiences, App: Any, App accessed in: Any, User: Any

Resources accessed: Any, Sensitive files referenced: Any, Scope: Any, Reset all

Activity details

Activity type: AI Interaction, Timestamp: Nov 14, 2024 8:48 PM, Sensitive info types: Microsoft Copilot Experiences

Record ID: 70ec5a71-89f3-4b83-8a2a-9781b89635bd

About this user

User: Erica T

View more user details in insider risk management

App details

AI app category: Microsoft Copilot Experiences, App accessed in: Word

Interaction details

Sensitive info types detected: ObsidianMerger\_Financial\_Data, Finance

## Activity explorer

AI Interaction

Date	AI Interaction Count
11/4/2024	~5
11/5/2024	~28
11/6/2024	~98
11/7/2024	~72
11/8/2024	~15
11/11/2024	~25

Chart time zone: UTC

Export Selected Items

Activity type	User	User risk level	Timestamp (UTC)	AI app category	App
AI Interaction	ericat@fabrikampurviewignite2024.o...	Medium	Nov 14, 2024 8:48 PM	Microsoft Copilot Experie...	Word
AI Interaction	ericat@fabrikampurviewignite2024.o...	Medium	Nov 14, 2024 8:48 PM	Microsoft Copilot Experie...	Word
AI Interaction	ericat@fabrikampurviewignite2024.o...	Medium	Nov 14, 2024 8:47 PM	Microsoft Copilot Experie...	Word
AI Interaction	ericat@fabrikampurviewignite2024.o...	Medium	Nov 14, 2024 8:46 PM	Microsoft Copilot Experie...	Word
AI Interaction	ericat@fabrikampurviewignite2024.o...	Medium	Nov 14, 2024 8:42 PM	Microsoft Copilot Experie...	Word
AI Interaction	lisab@fabrikampurviewignite2024.o...	Medium	Nov 13, 2024 8:56 PM	Microsoft Copilot Experie...	Word
AI Interaction	lisab@fabrikampurviewignite2024.o...	Medium	Nov 13, 2024 7:43 PM	Microsoft Copilot Experie...	Word
AI Interaction	andrewm@fabrikampurviewignite2024.o...	Medium	Nov 13, 2024 7:42 PM	Microsoft Copilot Experie...	Word

Demo

Audit Copilot for M365 prompts & responses

The background of the slide features a dynamic, abstract design composed of several overlapping, translucent, curved bands in shades of orange, yellow, pink, purple, and blue. These bands create a sense of depth and motion, resembling liquid or light rays. The overall aesthetic is modern and professional.

Extend & optimize

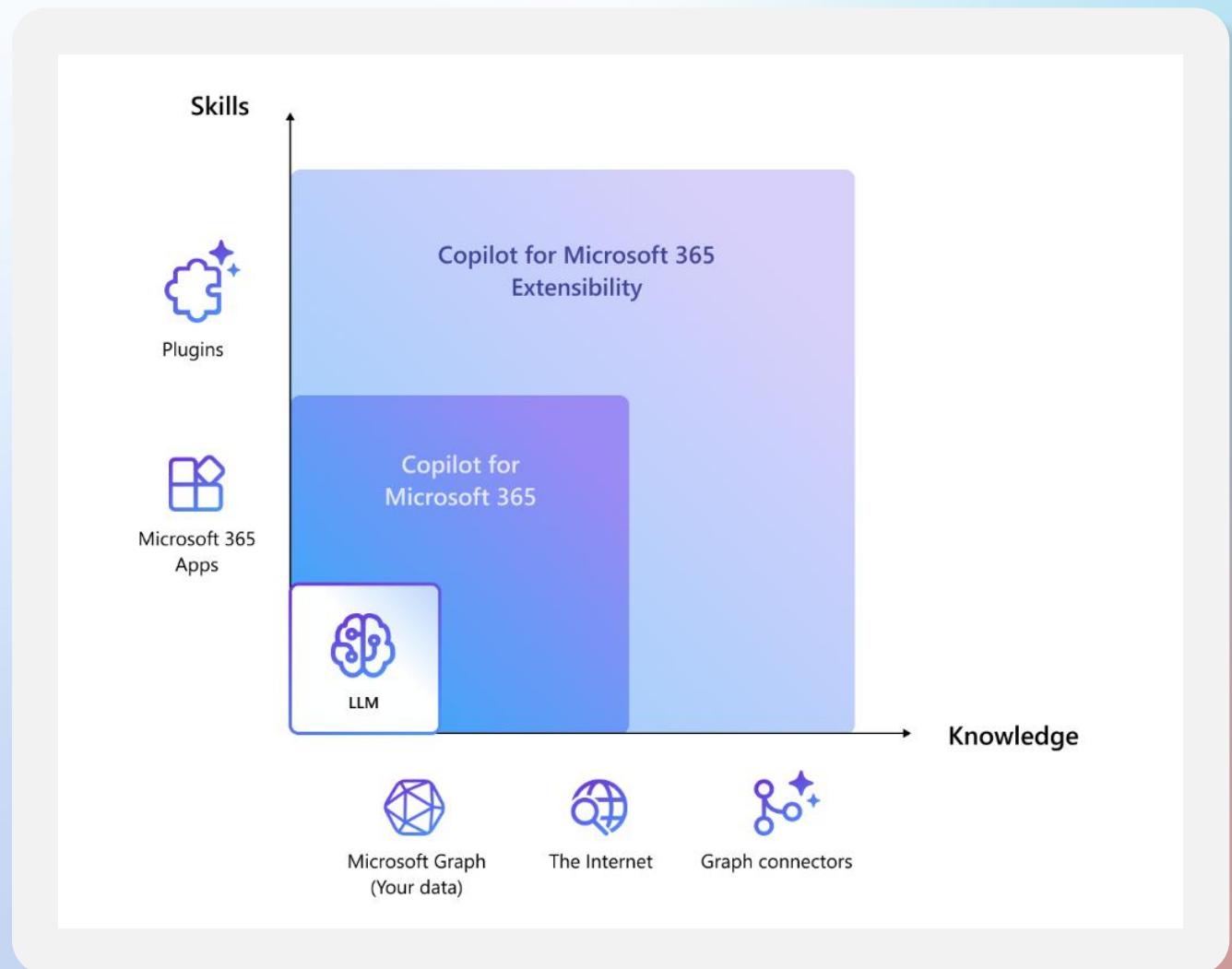
**Enable and publish plugins**

# Extend Microsoft Copilot for Microsoft 365

Enrich the data estate of your enterprise with industry-leading AI

Keep your users in the flow of their work, start to finish

Inherit world-class security, compliance, and privacy policies



# Plugin types

Use existing integrations or build new ones to extend your organization's AI-powered skills.

## Teams

### Message Extensions

Message extensions allow users to interact with a web service through buttons and forms in the Microsoft Teams, Outlook, and Microsoft 365 app clients.



## Power Platform

### Connectors

A proxy or a wrapper around an API that allows users to leverage a set of prebuilt actions and triggers to build their apps and workflows.



## Open AI

### Plugins

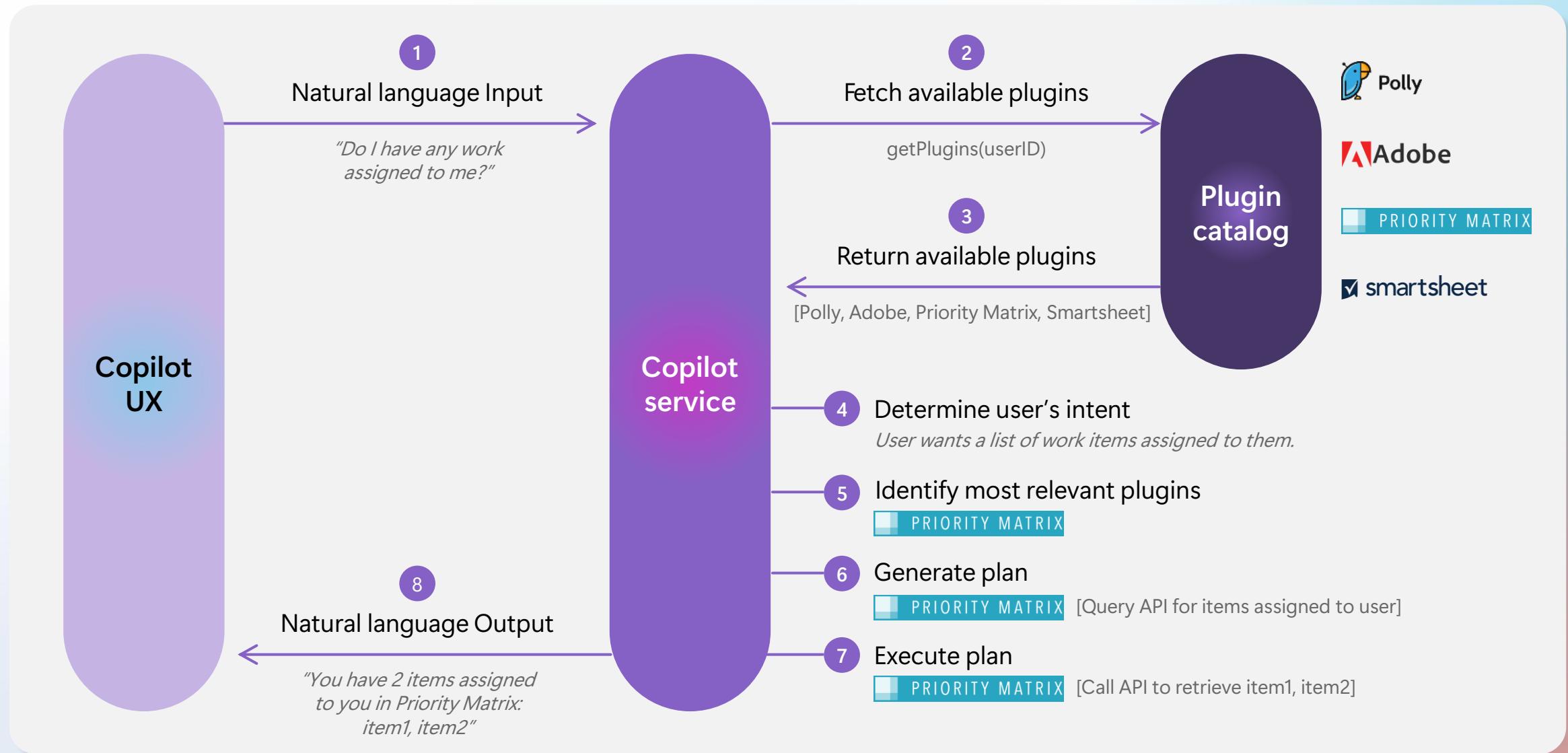
Open AI plugins connect ChatGPT to APIs, enabling it to perform actions like browsing and interacting with websites and games.



Existing Investments

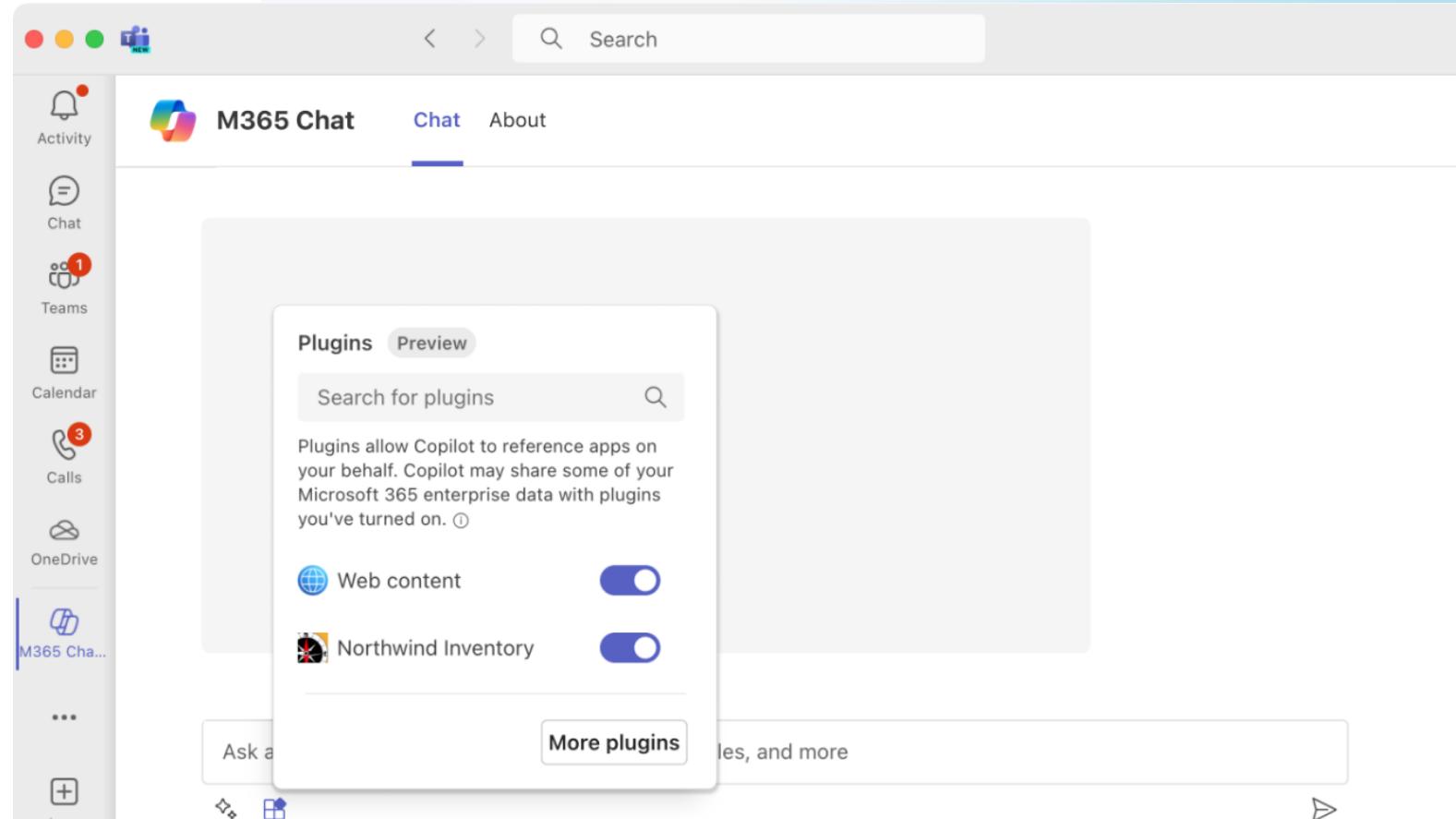
New

# Plugin flow



# Extensibility preview support

Support for plugins is in preview  
and limited to [Microsoft 365 Chat for Teams](#).



# Access citations to find summarized resources

The screenshot shows a Microsoft Copilot interface integrated into a Microsoft Teams chat window. The Teams sidebar on the left includes Activity, Chat (with 1 unread message), Teams, Calendar, Calls, Files, Contoso, and Apps. The main area displays a conversation with Copilot and several team members (Daniela, Cassandra Dunn, Aadi Kapoor, Eric Ishida, Cortex Framework, Will Little, Marie Beaudouin, Hillary Reyes, Charlotte and Babak, Reta Taylor, Joshua VanBuren, Daichi Fukuda, Kadji Bell). Copilot has provided a summary of Adatum's technical design, mentioning major updates to the database schema, implemented feedback for error handling, and proposed feature addition by Aadi. The summary includes three references:

- 1 Adatum's technical design
- 2 Group Chat with engineer team
- 3 Email with Aadi Kapoor

A "Copy" button is available to copy the summary text. A note at the bottom states "AI-generated content may be incorrect".

Hi Daniela, here are the major updates about Adatum's technical design [1](#)

- 1. Updated section 3.2:** The technical design document has been updated to optimize the database schema by introducing indexing and denormalizing certain tables. These changes are expected to significantly reduce query response times and enhance the overall efficiency of the system. [1](#)
- 2. Implemented feedback:** After receiving input from Babak, the development team addressed the identified areas of improvement in Module B. With the newly added error handling mechanisms, the system now gracefully handles potential exceptions and provides users with more informative error messages, contributing to a smoother user experience. [2](#)
- 3. Proposed feature addition by Aadi:** To enrich user interactions and foster real-time communication, the team put forth a proposal to integrate a live chat functionality within the application. Discussions regarding the technical implementation and potential impact on system performance are ongoing among the development team. [3](#)

[Copy](#)

3 references [...](#)

AI-generated content may be incorrect [Like](#) [Downvote](#)

1 Adatum's technical design [...](#)

2 Group Chat with engineer team [...](#)

3 Email with Aadi Kapoor [...](#)

Ask a work question, make a request, or type / for suggestions.

# Microsoft Graph connectors

## Make the most of your external data

by giving Copilot the ability to access and summarize your diverse datasets from different sources, enabling more comprehensive insights

## Use Copilot as a research aid

letting Copilot find, summarize, and perform Q&A natively by leveraging the dataset of your choice

## Surface the intelligence of Copilot

in Microsoft Search, ContextIQ, and more to enhance the ways your users are already searching for answers

## Three main steps to set up a Graph connector

01. Create a connection

02. Register your schema

03. Ingest your content to the Microsoft Graph

# Microsoft Graph connector pricing



## Connectors Are Free

All of the connectors by Microsoft are free. However, you need to have sufficient index quota to ingest content from those connectors.



## What is 1 item of index quota?

Each entity (or record) from the source system that you add to Microsoft Graph.

1 document in file share, 1 wiki page in Confluence or 1 ticket in Jira



## Entitlement with Copilot

Copilot for Microsoft 365 includes entitlement to 500 items of index quota per licensed user.

For a 50-user SMB, you would have entitlements to 25000 items

### Note: purchase additional index quota and SMB relevance

Additional Quota can be acquired with a minimal of USD \$1000/month for a million items.

For SMB's, you'd require special use cases to warrant this investment and therefore we recommend to first look at scenarios that can be met via license entitlement options.

Learn More: <https://learn.microsoft.com/en-us/microsoftsearch/licensing>

# Sample response from Copilot, utilizing data from Graph connector

Show me GitHub issues ready for content review



Here are some GitHub issues that are ready for content review:

- "Testing fix to breadcrumb by adding Learn at first level" is ready for content review. 1
- "Patch 3" is ready for content review. 2
- "Update subscription-post-subscriptions.md" is ready for content review. 3
- "Update presence-setpresence.md" is ready for content review. 4
- "Update subscription-post-subscriptions.md" is ready for content review. 5
- "Update docs: Update profilePhoto" is ready for content review. 6
- "Update workinghours.md" is ready for content review. 7

Is there anything else you would like to know?

Copy

7 references ▼

# Extend & optimize: Design, build, and deploy plugins

## Design and build custom plugins

To enhance the Copilot for Microsoft 365 experience and cater to specific business requirements, you can create **AI plugins**. These plugins serve as extensions, allowing you to customize Copilot for Microsoft 365 for various scenarios. Here are the different types of AI plugins you can create:

1. **Prompt Plugins:** Utilize **AI Builder** and natural language understanding to target specific workflows within your business. These plugins generate content or extract insights based on user interactions with Copilot for Microsoft 365
2. **Flow Plugins:** Leverage **Power Automate flows** to perform actions and retrieve data. They enable seamless integration with external systems
3. **Connector Plugins:** Access data from other systems using **Power Platform connectors**. Popular enterprise products like Salesforce, Zendesk, MailChimp, and GitHub can be connected
4. **OpenAI Plugins:** Establish connections to custom **OpenAI models** that you create, enhancing Copilot for Microsoft 365 capabilities

- Determine the path forward for extensibility with our [decision guide](#)
- Design a plugin based on requirements to meet a user scenario
- Determine if the plugin needs to be built or if an existing plugin in the store can be utilized to meet your needs, and if an existing or new Teams apps message extension, Power Automate Flow, Data Connector is needed
- If needed, read our [documentation on message extensions for Copilot for Microsoft 365](#)
- If needed, read our [documentation on building plugins using Microsoft business applications](#)
- Publish plugins to your tenant

## Reduce the build time for Copilot for Microsoft 365 extensibility:

- Decide if there is a need to build a new plugin or to leverage an existing plugin available in the Apps marketplace.
- Reduce the build time by determining if there is an existing Teams Message extension, Power Automate flow, and data connectors that can be leveraged for integration of Copilot for Microsoft 365 and Line of Business applications.
- Leverage Copilot Studio when possible.



# Create custom agents

The screenshot shows the Microsoft Copilot interface. On the left, there's a sidebar with icons for Home, Copilot (selected), Pages, Create, OneDrive, Apps, and Admin. The main area features the Copilot logo and several cards:

- Get calendar info**: When's my next meeting with person ?
- Prep for that meeting**: Help me prepare for meeting
- Understand the main points**: List key points from file
- Check Teams mentions**: Summarize Teams messages where I have been @mentioned this week
- Jump-start a draft**: Create an FAQ based on file
- Generate ideas**: List ideas for a fun remote team building event

At the bottom, there's a message input field: "Message Copilot" with "+ Add content", "0 / 16000", and a toolbar with @, 🖍, and >. To the right, the "Copilot" pane lists existing agents and provides options to manage them:

- Agents**: Visual Creator, Prompt Coach, Azure Technical Support, M365 Technical Support, Viva Goals, GitHub, Microsoft Licensing Assistant.
- Get agents**
- Create an agent** (this option is highlighted with a red box)

Below the agents list, the "Recent chats" section shows several recent interactions with Copilot, each with a timestamp (e.g., 1/24, 1/23) and a "See more" link.



Copilot Studio

My agents &gt; My Copilot Agent

Create

...



Describe

Configure

Try it

Jan 27, 2025, 2:55 PM

Hi, I'm here to help you build an agent.

You can start by describing what you want the agent to do.

Or, you can try one of the following templates.

**Career Coach** Microsoft

Career Coach offers personalized career advice,...

**Prompt Coach** Microsoft

Prompt Coach creates effective and AI compliant...

**Writing Coach** Microsoft

Writing Coach boosts effectiveness and supports...

Type your message

0/2000





Describe

Configure

Try it

Template: ⓘ None

## Details



Name \*

My Copilot Agent

Description \*

Describe your agent

## Instructions \*



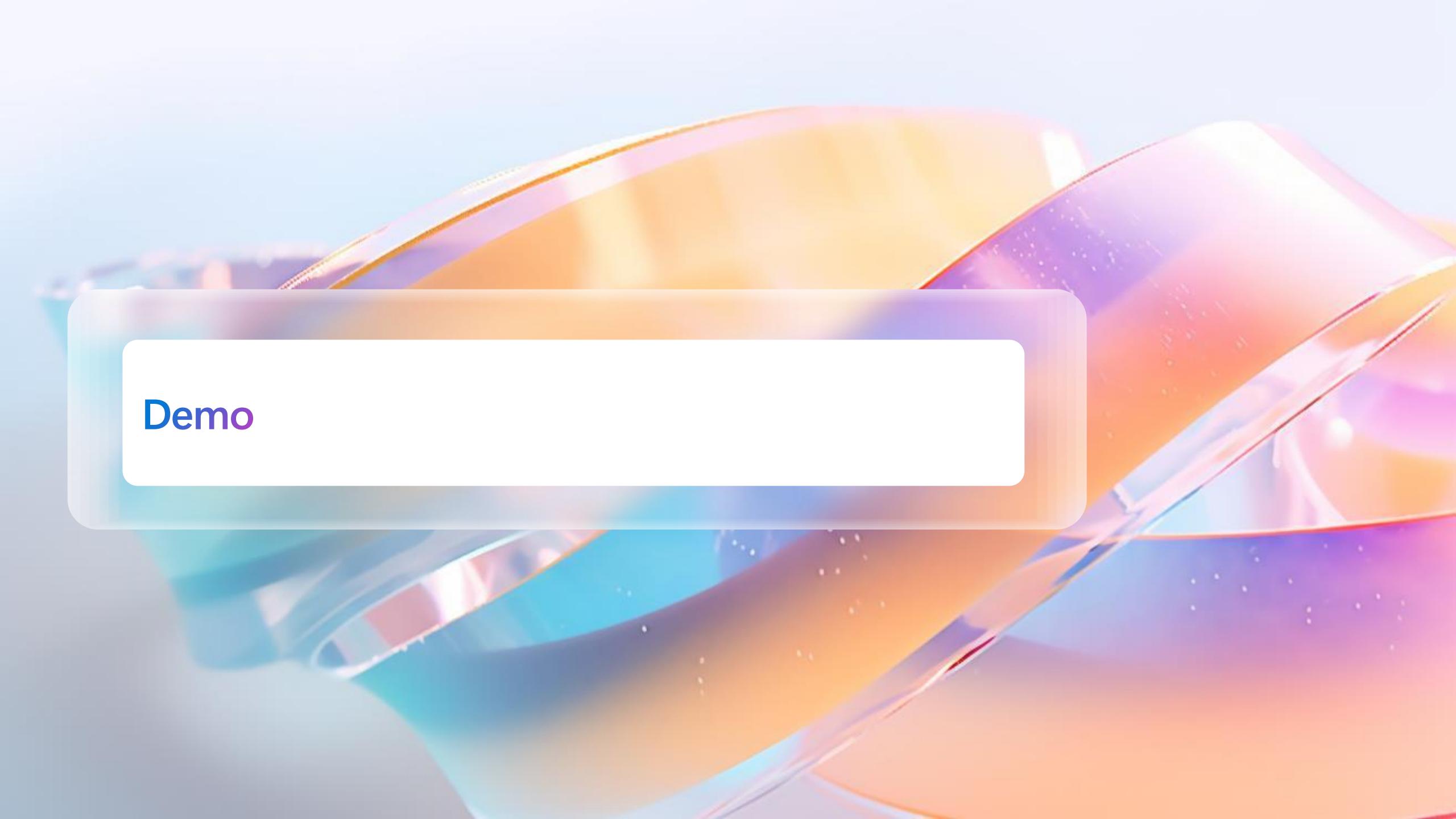
Give instructions to your agent

## Knowledge C



## SharePoint

AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, you agree to these[Terms](#) | [Privacy and cookies](#)



Demo

## Copilot Studio Overview

Public preview



# Copilot Studio

In Copilot for Microsoft 365

---

Make Copilot work for you

---

Connect Copilot  
to your data  
everywhere

Customize copilot to  
your business needs  
and processes

Control & manage  
customizations  
centrally

# Copilot Studio matched to your needs

When you **want to...**



Customize Copilot  
for Microsoft 365  
to work with data outside  
Microsoft 365



...you **need**



**Copilot Studio in  
Copilot for Microsoft 365**

Public  
Preview

Built in customization  
tool for Copilot for  
Microsoft 365

Included in your Copilot for  
Microsoft 365 subscription

When you **want to...**



Build your own Copilot



...you **need**

Generally  
Available

**Microsoft Copilot  
Studio (Standalone)**



End-to-end conversational  
low-code SaaS-based Studio for  
building custom standalone copilots

Licensed  
separately

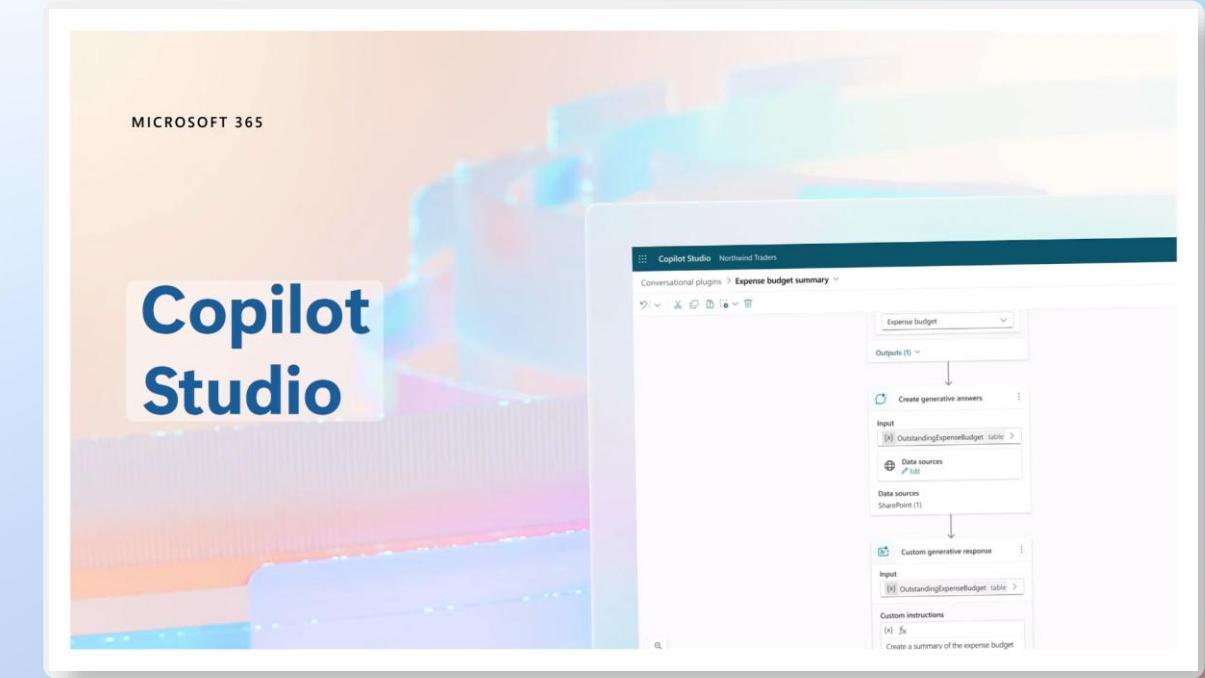
# Customize Copilot for your unique business needs

With Copilot Studio in Copilot for Microsoft 365, you can extend and customize Copilot to work the way you need.

- **Connect Copilot to your data** in CRM, ERP, finance systems and more, using 1200+ standard and premium connectors.
- **Incorporate your business processes** into Copilot
- **Configure Copilot responses** to specific questions on topics like compliance, HR policies and more.
- **Publish and manage copilot customizations** in one central place

Build your own Copilot

- + With Copilot Studio (*available standalone*), quickly and easily create your own conversational copilots for customers or employees with an intuitive low-code tool.



Copilot Studio in Copilot for Microsoft 365

# Examples of plugins you can design:

It's a platform for your needs.



## Salesforce

Accelerate the speed you want information from your core CRM applications.

Ask Copilot:

What are my **open leads**?



## Workday

Interact with your HRM systems for employee information or other.

Ask Copilot:

What's is my **current employee profile** information, address and contact information



## SAP

Interface with your ERP systems to streamline your finance or resource planning processes

Ask Copilot:

Send a list of **pending invoices** from **this week**.



1200+

# Extend with Plugins, but what are they?

Plugins are API definitions designed to **add skills** to **Microsoft Copilots**.

Reusable building blocks

Author with visual workflows to suit your needs

Publish and manage through IT

# Traditional plugin development can be challenging

Budget &  
time constraints

Infrastructure &  
resource hosting

Developer and  
technical expertise

Integration with  
business systems

Security &  
compliance risks

Maintaining  
content

# Transform plugin building with low code + AI



Build together  
in low code



Optimize  
business  
processes



Accelerate  
time to value



Unlock new  
ideas with the  
business



Reduce  
development  
costs



Monitored  
and secure  
through IT



# How to build a plugin for Copilot for Microsoft 365



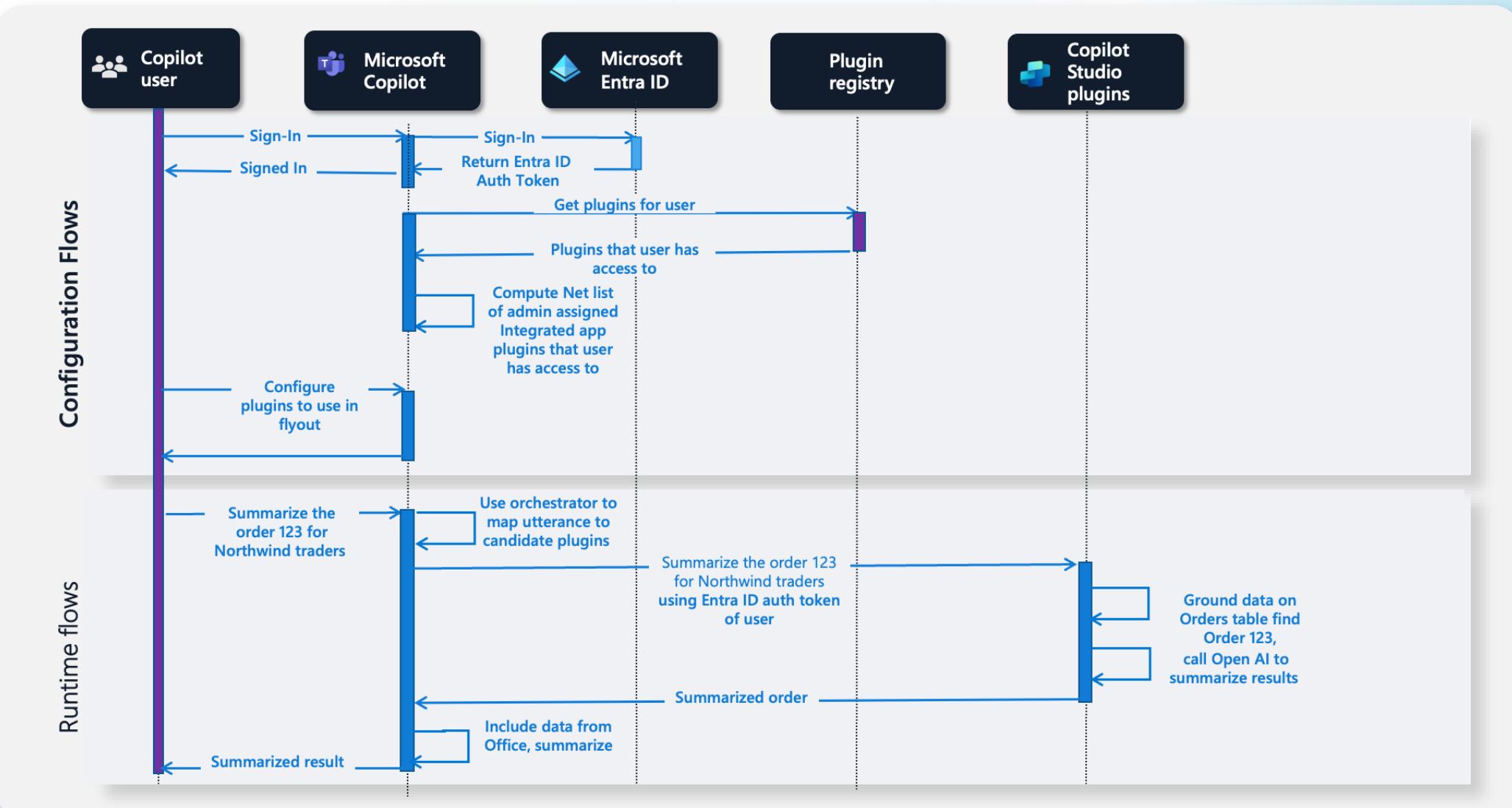
MICROSOFT 365

# Copilot Studio

The screenshot shows the Microsoft Copilot Studio interface. At the top, it says "Copilot Studio Northwind Traders" and "Conversational plugins > Expense budget summary". Below this is a toolbar with various icons. The main area is a flowchart diagram illustrating the data processing pipeline:

- Input:** "Expense budget" (dropdown menu) and "(x) OutstandingExpenseBudget table" (button).
- Outputs (1):** "Create generative answers" (button).
- Data sources:** "SharePoint (1)" (dropdown menu) and "Data sources" (button).
- Custom generative response:** "Custom generative response" (button) and "Input" field containing "(x) OutstandingExpenseBudget table".
- Custom instructions:** "Custom instructions" (button) and "fx" (button), with the instruction "Create a summary of the expense budget".

# How Copilot uses Copilot Studio plugins



**Demo**

**Extend Copilot for Microsoft 365 with Copilot Studio**

# Agents



# What is an agent?

Agents are AI assistants that can help **optimize business processes and enhance productivity** using large language models and generative AI.

**Publish to...**

## Your applications

Deploy agents to your website and other line of business applications



## Microsoft 365 Copilot

Add agents that give Copilot focused knowledge and new skills



## Power Platform

Extend Power Platform with agents that transform your low code solutions.



## Dynamics 365

Build agents that integrate and improve business processes



Dynamics 365 Sales

Dynamics 365 Finance

Dynamics 365 Customer Service



# Copilot Studio

For end users

The screenshot shows the Microsoft 365 Copilot Chat interface for building a copilot agent named "Field Service agent". The left pane displays a conversation log with the AI agent's responses to user inputs about the agent's name, purpose, and behavior. The right pane shows the "Field Service agent" configuration screen with sections for Troubleshooting, Installation support, Site preparation, Compliance and safety, Inventory management, and Documentation.

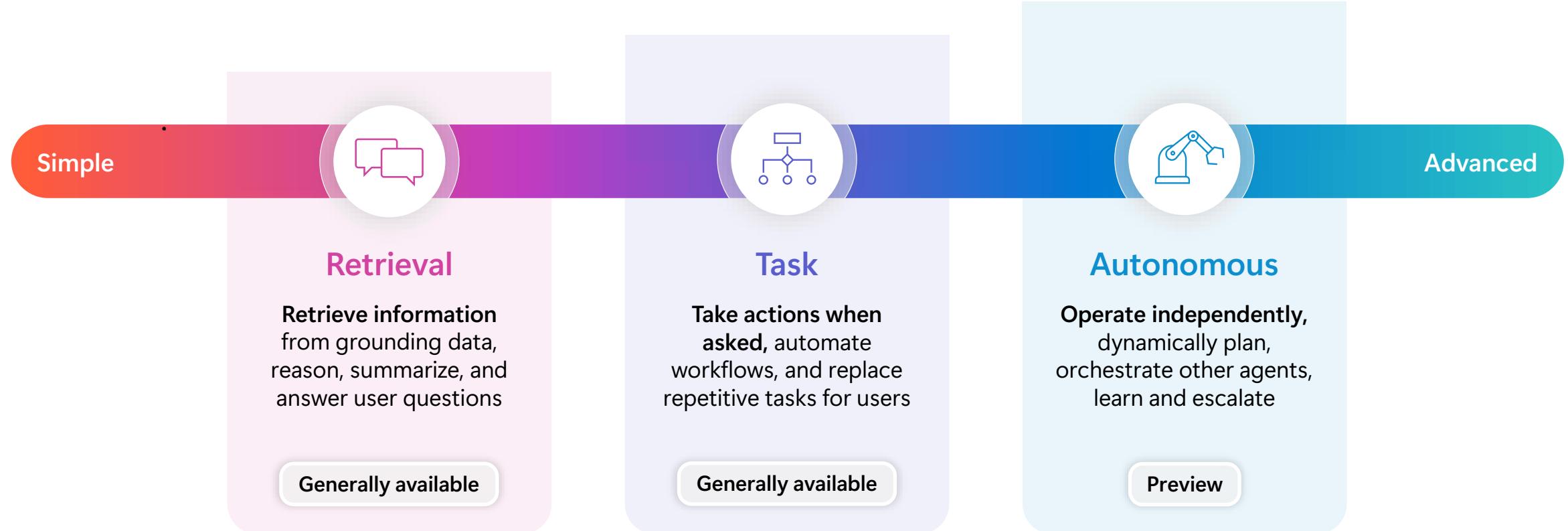
**Copilot Studio agent builder**  
in Microsoft 365 Copilot Chat and SharePoint

For IT & developers

The screenshot shows the full-featured graphical authoring environment for Copilot Studio. It displays a flowchart for a "Travel budget" copilot, starting with a "Describe what the topic does" step, followed by an "Action" step (Read SAP table), and an "Outputs (1)" step. The "Outputs (1)" step leads to a "Create generative answers" step, which takes an input from the "Action" step and uses a "Data sources" connection to generate answers. The interface includes various configuration options like "Save", "Copilot", "Comments", "Variables", "Details", and "More".

**Copilot Studio**  
Full featured graphical authoring environment

# Spectrum of Copilot agents



←..... Copilot agents vary in levels of complexity and capabilities depending on your need .....

# Explore a continuum of solutions

## IT Helpdesk agent

How do I connect to the corporate network?



## Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



## Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

## Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



## Budget Management agent

Review outstanding open PO's and begin financial planning.



## Customer Support agent

The agent has identified new support issues and triaged to other agents.



# Agents can serve both employees and customers



## Agents to enhance M365 Copilot

Serve employees with agents connecting systems and apps to Copilot and SharePoint

Included in M365 Copilot



## Custom standalone agents

Serve customers and employees with agents within 1<sup>st</sup> and 3<sup>rd</sup> party resources and apps

Copilot Studio consumption-based license

# Market opportunity

## Customer service is the 2nd most critical job

to be done for SMBs, with 40% of buyers preferring to interact via chat or phone<sup>1</sup>

## 37% of customers

will try using a digital assistant to interact with customer service on their behalf by 2025<sup>2</sup>

## \$80 billion reduction in agent labor costs

by using conversational artificial intelligence deployments within contact centers by 2026<sup>3</sup>

<sup>1</sup> <https://www.forbes.com/sites/melissahouston/2024/02/12/what-you-need-to-prioritize-when-you-are-a-small-business-owner/>

IDC, Business Value of AI Study, Aug 2023

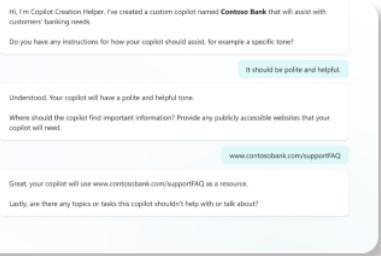
<sup>2</sup> Gartner, The Future of Customer Service: A Forward-Looking Playbook for Customer Service Leaders and Their Teams, 2022

<sup>3</sup> Gartner, Forecast Analysis: Hyperautomation Enablement Software, Worldwide, Cathy Tornbohm, Varsha Mehta, and 2 more, 6 Oct 2022

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# What's new for Copilot Studio

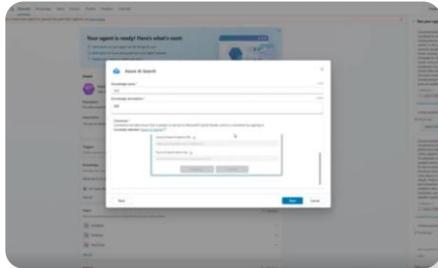
## AI & Answers Quality



### Public Preview

Improvements in Gen AI Answers quality, particularly for SharePoint and other sources

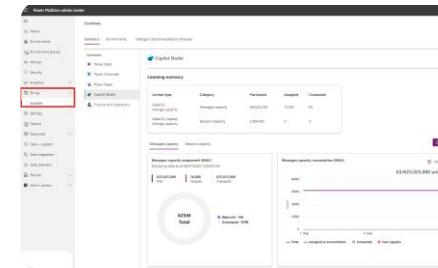
## Azure AI Integration



### Public Preview

Being able to easily leverage custom AI patterns from Azure AI Studio

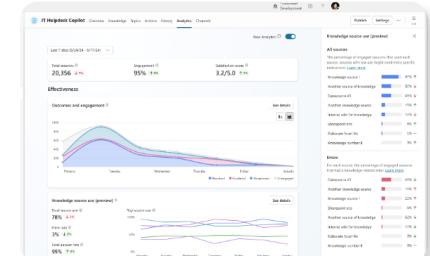
## Pay-Go Billing



### Available on Dec 1

Pay-as-you-go and simplified, consumption-based billing

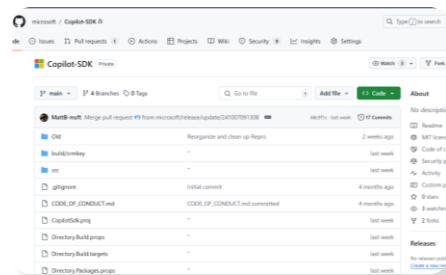
## Analytics



### Public Preview

Improved performance and insights into generative analytics

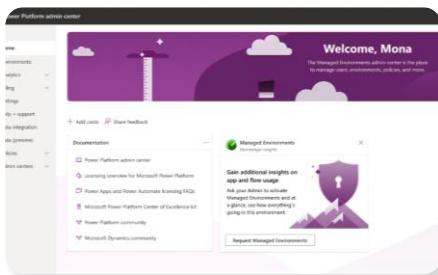
## Microsoft Agent SDK



### Public Preview

Copilot SDK to enable programmatic access to Copilot Studio

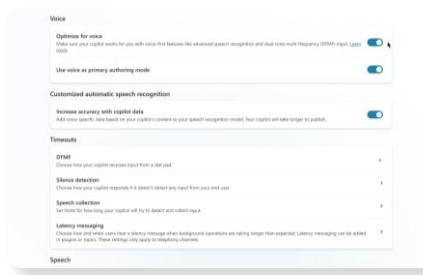
## Security & Governance



### Public Preview

Network isolation, Single tenant app registration, Environment controls for isolated development, and more.

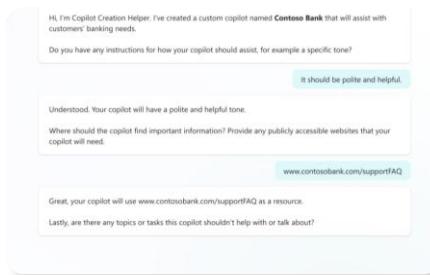
## Generative IVRs



### Generally Available

Intuitive, natural Generative Answers-powered conversations for IVRs and telephony

## Agentic Capabilities



### Public Preview

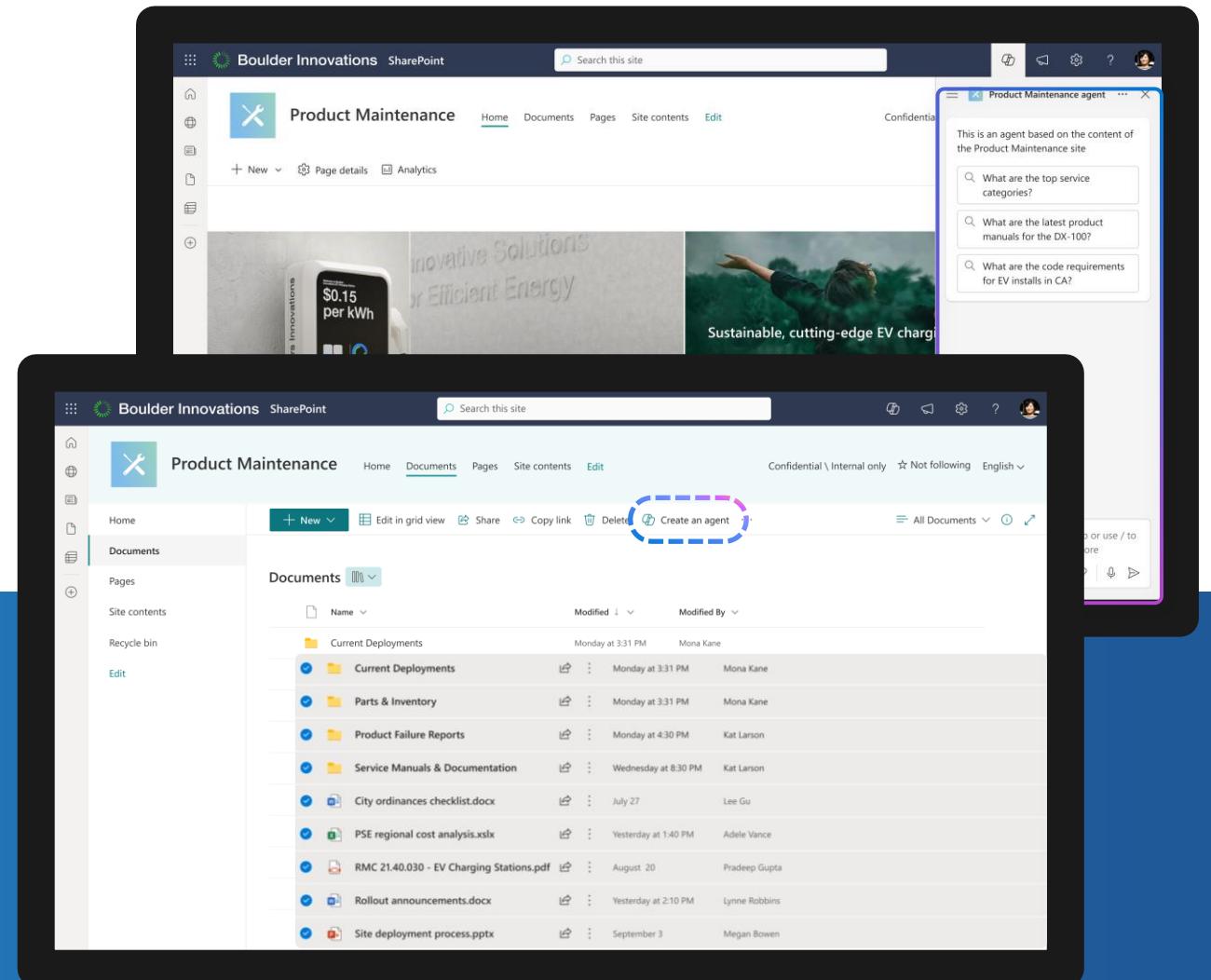
Agentic capabilities with triggers beyond chat, enabling LLM driven autonomous workflows

# Every SharePoint site now includes an agent ready to use

Agents in SharePoint scoped to specific SharePoint content for your business needs

Scoped to your SharePoint site

Tailored to your projects



# New out-of-the-box SharePoint agents announced at Ignite



# Security and governance controls you can trust



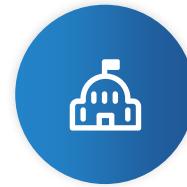
## Security

Respects existing SharePoint site and individual documents security settings and permissions

Persistent label inheritance and DLP policies

Only the site owner, site admins, or those with edit permissions on a site can create an agent for the site

Risk-based conditional access and endpoint management



## Governance & Compliance

Adheres to the same content access protocols as Microsoft 365 Copilot

Restricted Content Discovery

Restricted Access Control Policy

Display sensitivity labels in response/attribution

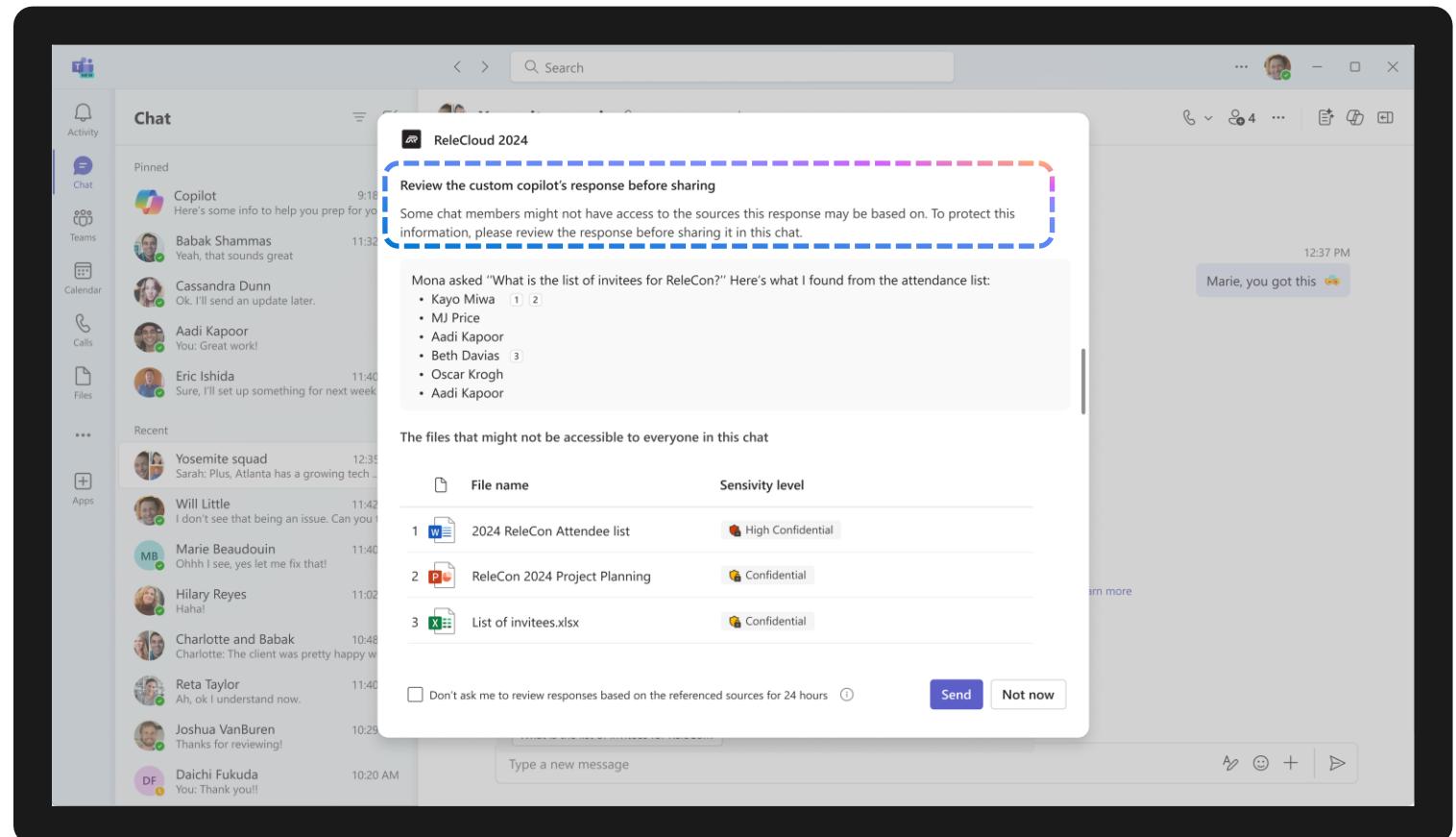
Aligns to your Microsoft 365 security, governance, compliance, and privacy policies

# Promote knowledge sharing without oversharing

Users only have access to the content they are authorized to view or edit.

The agent responds with the permissions of the requestor.

The agent will notify the requestor if some of the users in the chat do not have access to the knowledge sources in the response. The requestor can decide whether the response should be shared.



# Managed just like your existing files

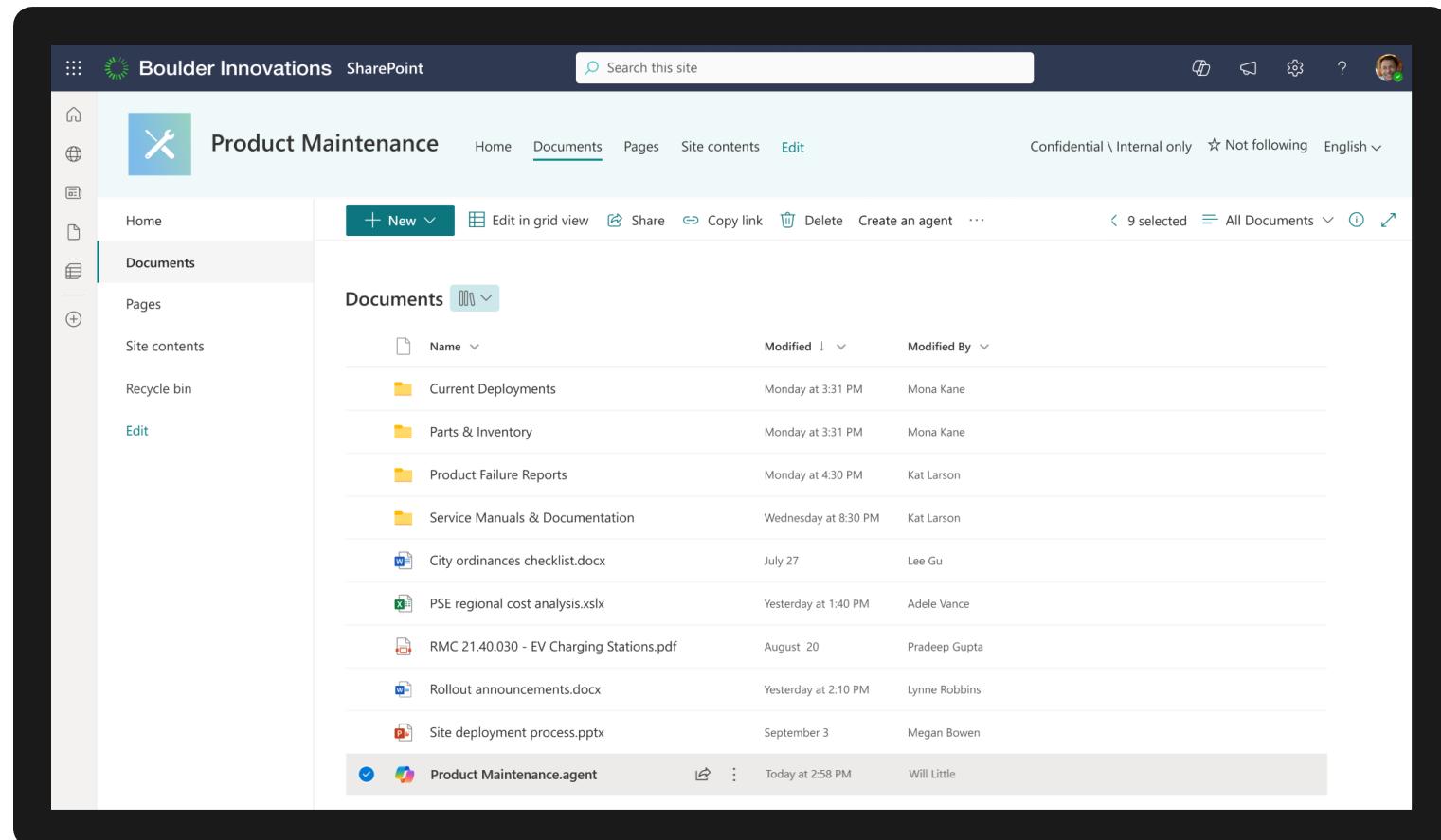
Agents in SharePoint are file-based, with a ".agent" file extension format.

Stored within your SharePoint site or document library.

Manage like files - copy, move, delete, archive.

Ready-made site agents cannot be deleted but they can be unapproved by the Site owner

Inherits existing security and sensitivity settings



[Create and edit an agent - Microsoft Support](#)

# Copilot Studio licensing options

Full feature parity across message pack and metered offering

Burn rate parity across message pack and metered offering

Leverage your existing Azure commitments (MACC)

## Message packs

- ✓ Tenant-wide message packs
- ✓ 25,000 messages/month
- ✓ \$200 per pack/month

## Pay-as-you-go

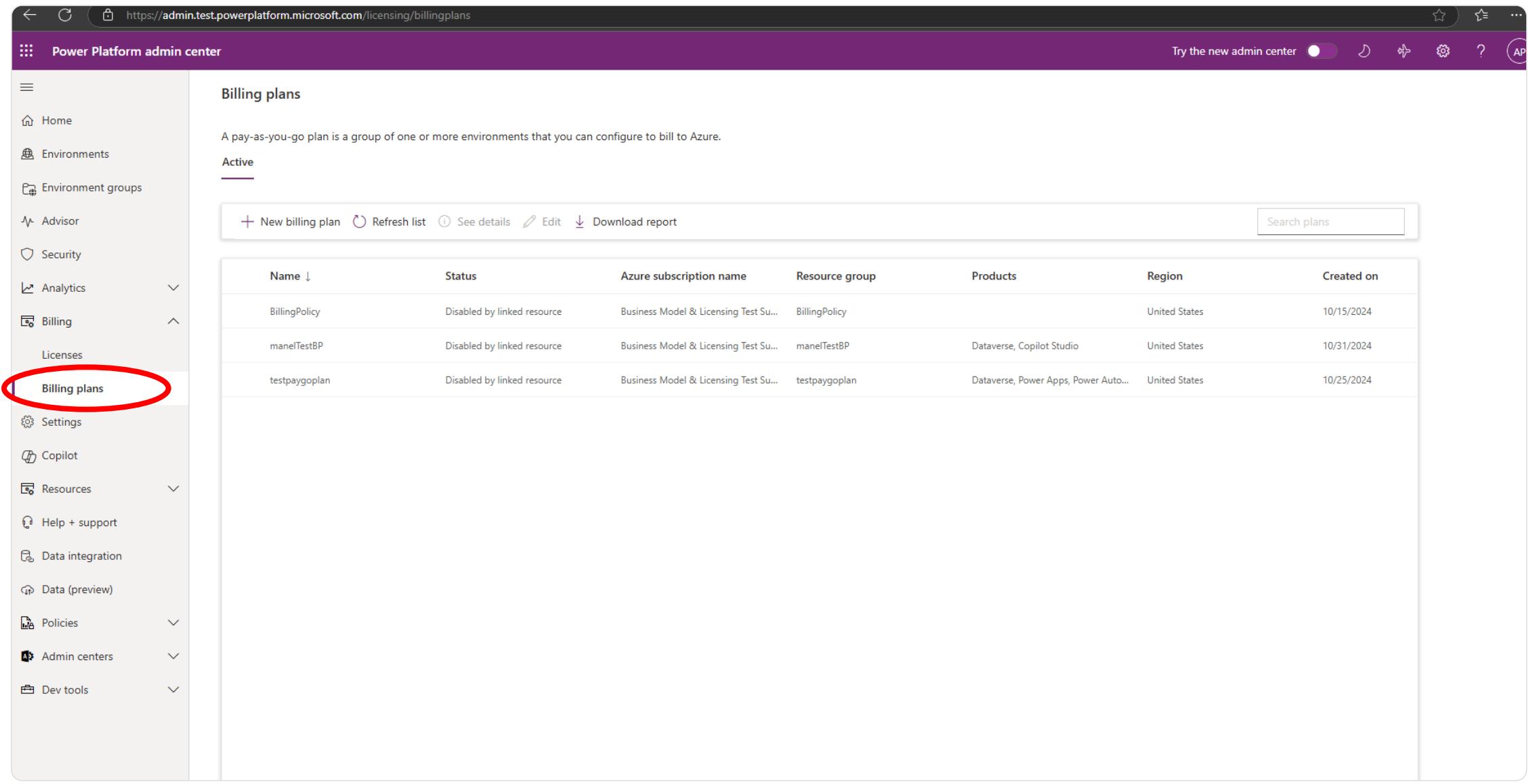
- ✓ New PAYG meter
- ✓ Can decrement MACC
- ✓ \$0.01/message

New!

Find the updated 12.2 PP Licensing Deck [HERE](#) and the PP Licensing Guide [HERE](#)

# **How to set up the consumption meter as an IT admin**

# Billing Policy Creation – 1



The screenshot shows the Power Platform admin center interface. The left sidebar is visible with various navigation options. The 'Billing plans' link is highlighted with a red circle. The main content area is titled 'Billing plans' and contains a table of existing billing plans.

A pay-as-you-go plan is a group of one or more environments that you can configure to bill to Azure.

Active

+ New billing plan   Refresh list   See details   Edit   Download report   Search plans

Name ↓	Status	Azure subscription name	Resource group	Products	Region	Created on
BillingPolicy	Disabled by linked resource	Business Model & Licensing Test Su...	BillingPolicy		United States	10/15/2024
manelTestBP	Disabled by linked resource	Business Model & Licensing Test Su...	manelTestBP	Dataverse, Copilot Studio	United States	10/31/2024
testpaygoplan	Disabled by linked resource	Business Model & Licensing Test Su...	testpaygoplan	Dataverse, Power Apps, Power Auto...	United States	10/25/2024

Power Platform admin center

Try the new admin center

Billing plans

A pay-as-you-go plan is a group of one or more environments that you can configure to bill to Azure.

Active

+ New billing plan    Refresh list    See details    Edit    Download report

Name ↓	Status	Azure subscription name	Resource group	Products	Region
BillingPolicy	Disabled by linked resource	Business Model & Licensing Test Su...	BillingPolicy		United States
manelTestBP	Disabled by linked resource	Business Model & Licensing Test Su...	manelTestBP	Dataverse, Copilot Studio	United States
testpaygoplan	Disabled by linked resource	Business Model & Licensing Test Su...	testpaygoplan	Dataverse, Power Apps, Power Auto...	United States

New billing plan

Select an option for your new billing plan.

**Azure subscription**

Creating this billing plan will turn on pay-as-you-go billing for all of the resources in the environments that you select.

**M365 Copilot chat**

Create an Azure subscription billing plan with pay-as-you-go specifically for M365 Copilot chat.

Power Platform admin center

- Home
- Environments
- Environment groups
- Advisor
- Security
- Analytics
- Billing
- Licenses
- Billing plans**
- Settings
- Copilot
- Resources
- Help + support
- Data integration
- Data (preview)
- Policies
- Admin centers
- Dev tools

Billing plans

A pay-as-you-go plan is a group of one or more environments that you can configure to bill to Azure.

Active

Name ↓	Status	Azure subscription name	Resource group	Products
BillingPolicy	Disabled by link			
manelTestBP	Disabled by link			
testpaygoplan	Disabled by linked resource	Business Model & Licensing Test Su...	testpaygoplan	Dataverse, Power Automate, Power Apps, Power BI

**Provide a name for your new billing Plan**

**Select an Azure subscription**

**Specify a resource group with that subscription**

New billing plan for M365 Copilot chat

Creating this billing plan will turn on pay-as-you-go billing for all of the resources in the environments that you select. This billing plan will charge to an Azure subscription that you select.

Note: Dataverse meters will automatically be created when creating a new billing plan. [Learn more](#)

**Name \***  
Name your plan  
Billing plan name must be alphanumeric and between 10 and 64 characters

**Azure subscription \* ⓘ**  
Select Azure subscription

**Resource group \* ⓘ**  
Select resource group

**Environment \* ⓘ**  
A new environment will be created for the M365 Copilot chat billing plan. [Learn more](#)

**Environment name**  
M365 Copilot environment

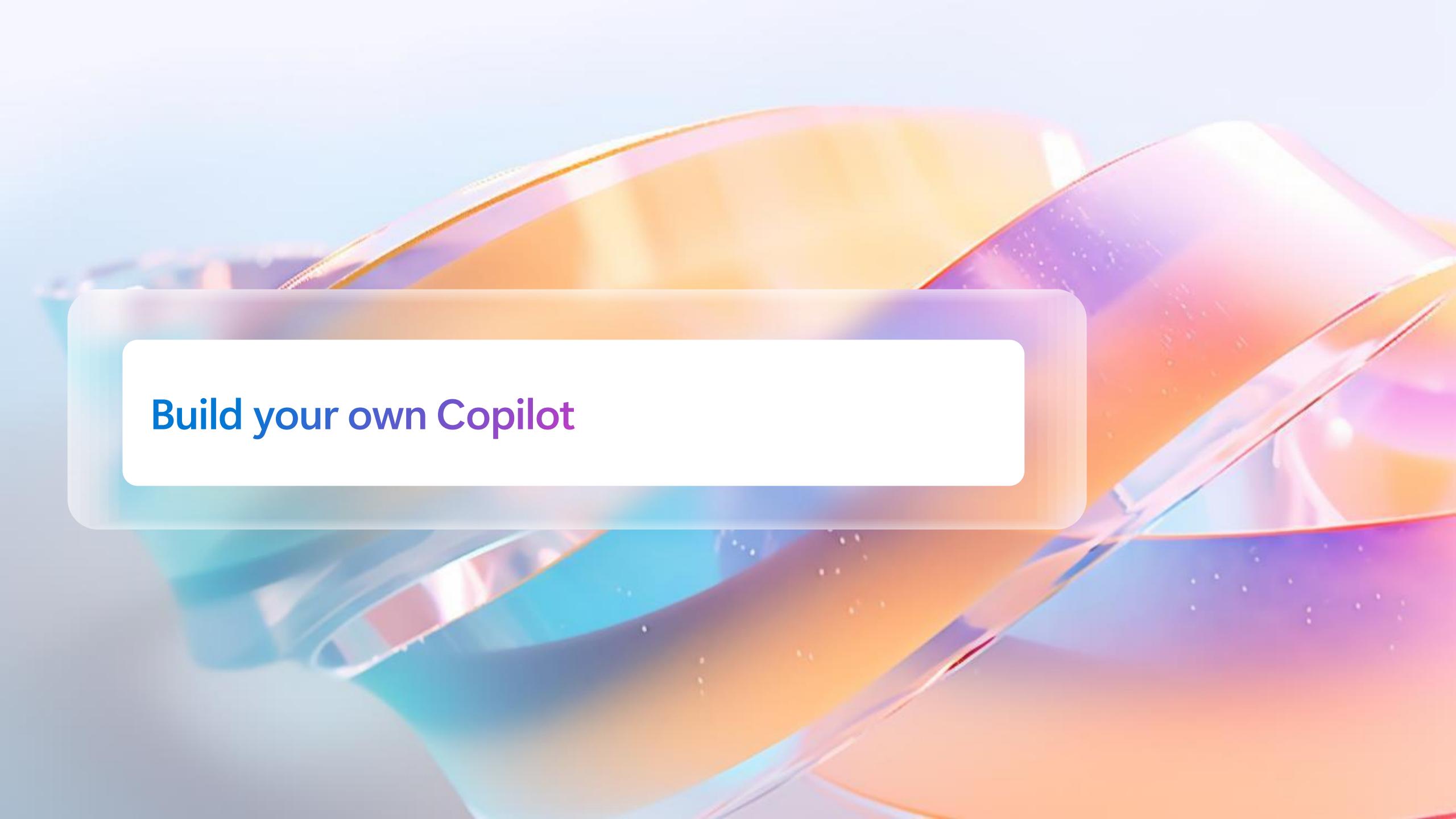
**Type**  
Production

**Region**  
United States

**Save** **Cancel**

## Group Discussion:

- » What customers do you think are the highest propensity to purchase Copilot Studio?
- » How are you planning to start going to market with agents?
- » What scenarios are you most excited about starting to sell?



**Build your own Copilot**



# Copilot Studio

Copilot Studio is an end-to-end conversational AI platform for **extending Microsoft Copilot** or **building your own copilot** experiences with generative AI and large language models.

The screenshot shows the Copilot Studio interface with the 'Northwind Trader' solution selected. The left sidebar includes options like Home, Building blocks (GPTs, Topics, Plugin actions, Prompts, Copilots), Create a copilot, Extend Microsoft Copilot (Publish, Analytics), Settings, AI integration tools, Channels, and Test your copilot. The main content area displays the 'Northwind Trader' solution with sections for 'Boost your conversations (preview)', 'Extend a Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each section includes descriptive text and a 'Go to [section]' button.



# Copilot Studio

Your copilot, your way

Customize

Build

Manage

## Customize Microsoft Copilot

Extend and customize first-party Microsoft Copilots with your own enterprise scenarios. Copilot Studio will be included with the Copilot for Microsoft 365 SKU.

## Build your own copilot

Create and publish a custom copilot for your organization using the intuitive building experience enhanced with large language models and generative AI.

The screenshot displays the Copilot Studio interface. The left sidebar contains navigation links such as Home, Building blocks (GPTs, Topics, Plugin actions, Prompts), Copilots, Extend Microsoft Copilot (Publish, Analytics), Settings, AI integration tools, Channels, and Test your copilot. The main content area features a card titled "Boost your conversations (preview)" with a sub-section "Answer unanticipated questions in real time based on content you choose." It includes a "Learn more" link, a text input field "Enter your website", and a "Use generative answers" button. Below this are three other cards: "Extend a Microsoft Copilot (preview)", "Add plugins for dynamic chaining (preview)", and "Meet people where they are". Each card has a "Go to [card name]" button at the bottom.

## Connect in the platform

Experience Microsoft conversational AI technology stacks through integrations with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models, and more.

## Manage copilot experiences

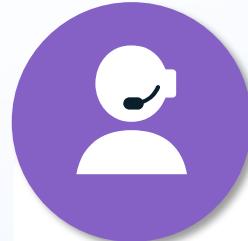
Monitor usage and gain full visibility into who is building copilots and customizing elements through built-in governance and control features.

# Momentum of conversational AI to solve business challenges

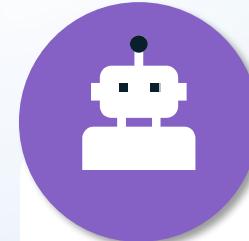
Market trends are clear, don't fall behind on this growing opportunity area



By 2025, **80%** of enterprise applications will embed a **virtual conversational assistant** to fulfill content fetching and content generation tasks.<sup>1</sup>



By 2026, **conversational artificial intelligence** deployments within contact centers will **reduce agent labor costs by \$80 billion**<sup>2</sup>



By 2025, GenAI will be embedded in **80% of Conversational AI** offerings.<sup>1</sup>

## Source:

1. 2023 Gartner® - The Impact of Generative AI on the Conversational AI Market

2. 2022 Gartner - Forecast Analysis: Hyperautomation Enablement Software, Worldwide

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# Building conversational AI has traditionally been challenging

Budget & time constraints

Infrastructure & resource hosting

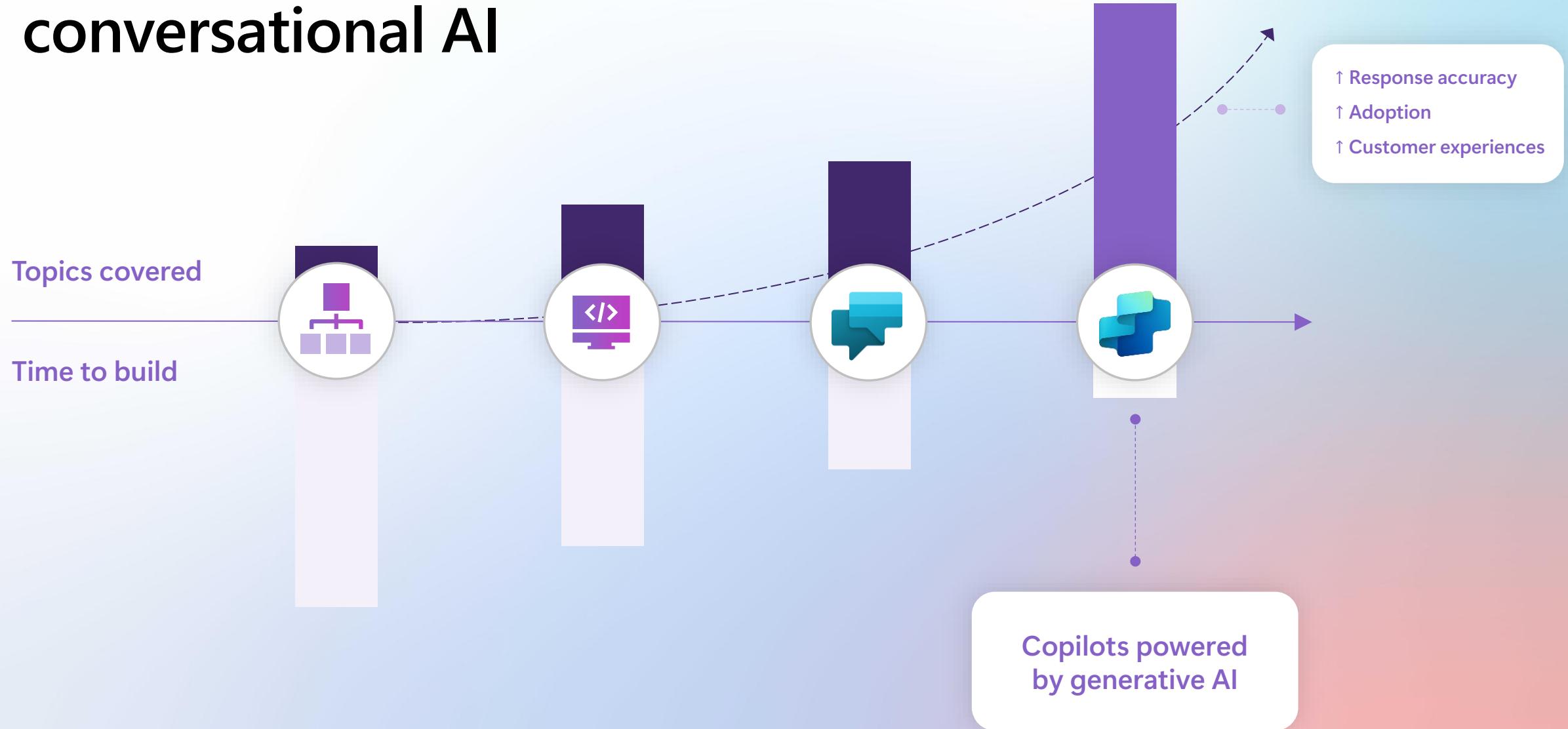
Product & technical onboarding

Integration with business systems

Security & compliance risks

Maintaining content

# Welcome to a new era of building conversational AI



# Copilot Studio is helping organizations achieve more with less

---

## Innovate and improve performance and efficiency

Innovate faster, optimize and redesign business processes and enhance customer experiences.

---

## Reduce development costs

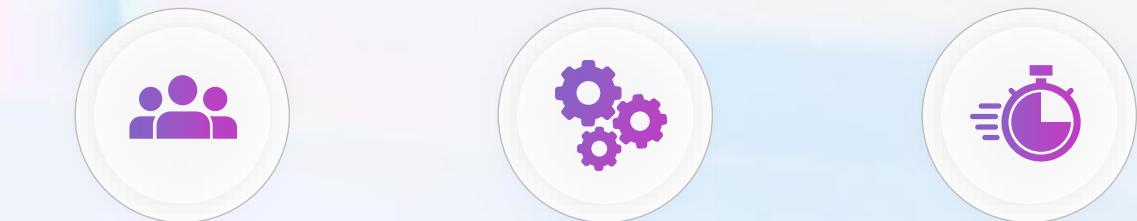
Develop faster with low code and a connected conversational AI stack and expanding the pool of available development talent.

---

## Reduce risk and maintenance costs

Minimize the risk of custom in-house conversational AI, while improving compliance and security.

# Transform your business with conversational AI



Enrich employee experiences



Bend the curve on innovation



Optimize business processes



Reinvent customer engagement



Improve efficiency & time to value

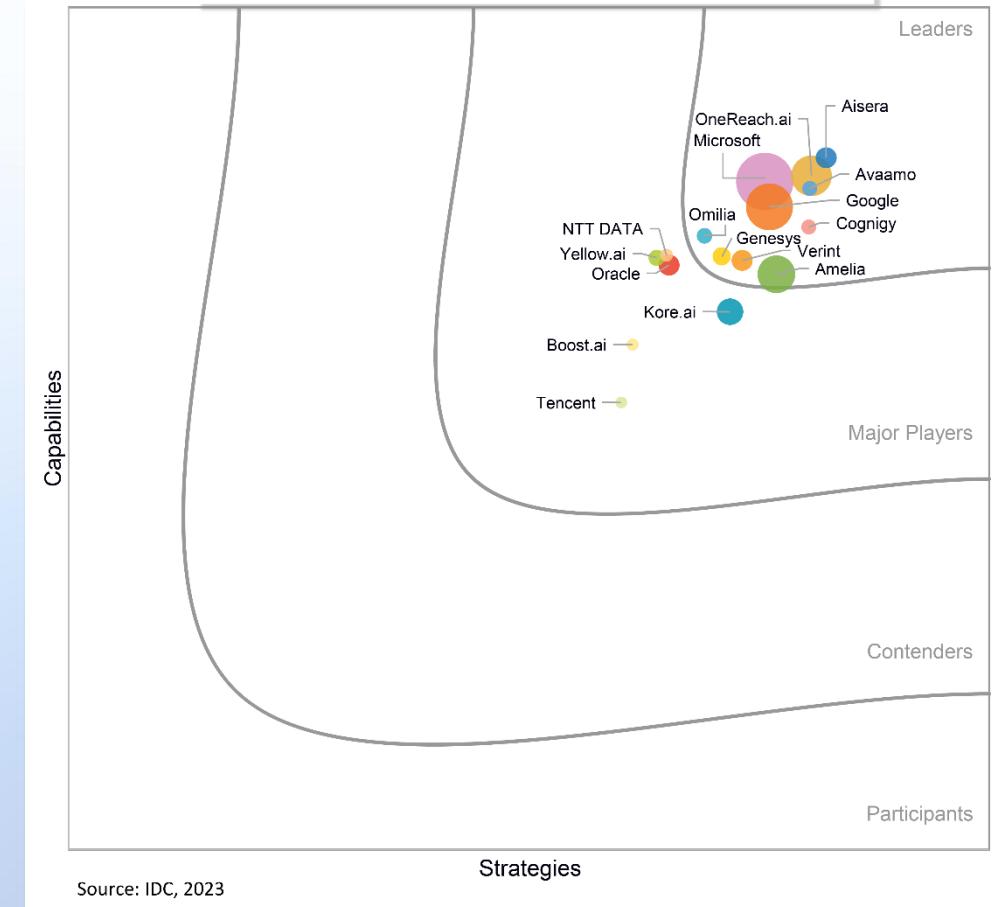


Reduce development costs & risks

# IDC MarketScape: Worldwide General Purpose Conversational AI Software 2023

Recognizes Microsoft as a leader in general-purpose conversational AI software IDC highlighted Microsoft's generative AI capabilities along with our broad set of conversational AI tools. The authors also noted that, "Customers praised Microsoft's overall engineering expertise and its industry and use case expertise in conversational AI."

Source: [IDC](#)



Source: IDC, 2023

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of ICT suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the circles. Vendor year-over-year growth rate relative to the given market is indicated by a plus, neutral or minus next to the vendor name.



# Copilot Studio

## Customize Copilot for Microsoft 365

Customize Copilot to work with your unique business processes and data sources

Configure Copilot responses to specific questions

### Build a plugin



with Copilot Studio  
(included in Copilot for Microsoft 365)

## Build your own custom copilots

Enhance customer experiences by adding a copilot to your external website or other channels

Build an internal copilot outside of Microsoft Copilot to help employees with specific functions

### Build with low code



with Copilot Studio  
(standalone)



# Customize Copilot for Microsoft 365 to...

(Preview)

## Surface your business data

Connect Copilot to your business data and apps, such as CRM, ERP, and line-of-business apps.

## Incorporate your processes

Easily customize Copilot to automate your business processes and workflows.

## Configure how Copilot responds

Control how Copilot responds to specific questions with manually created topic flows.

## Manage centrally

Secure your Copilot customizations with the right access, user controls, and analytics.

# The building process



## Customize Copilot for M365

**Discover and launch Copilot Studio**  
Included in Copilot for M365

### Build plugins

Look up enterprise data, expose generative answers, call your backend APIs, or manually create new topics for Copilot to talk about

### Publish back to Copilot for M365

Publish and enable your new plugin within the M365 Admin Center

### Begin the conversation

Interact within Copilot chat and see your data and workflows come to life without leaving the app.



# M365 Copilot extensibility through Microsoft Copilot Studio



# Examples to bring to life

## Plugin

### Sales status

Accelerate the speed you want information from your core CRM applications.

[Ask Copilot for M365](#)

What are my open leads?



## Plugin

### Employee Information

Interact with your HRM systems for employee information or other.

[Ask Copilot for M365](#)

What's is my current employee profile information



## Plugin

### Invoice Management

Interface with your ERP systems to streamline your finance or resource planning processes

[Ask Copilot for M365](#)

Send a list of pending invoices from this week.





# Create powerful custom copilots

---

## Build and test together

Users of all skill levels can create automated, connected conversational AI experiences in one comprehensive platform.

## Design personalized, responsive interactions

Engage employees or customers with rich, dynamic interactions that remember user content and context.

## Boost your conversations

Use generative AI to dynamically respond using your organization's real-time content.

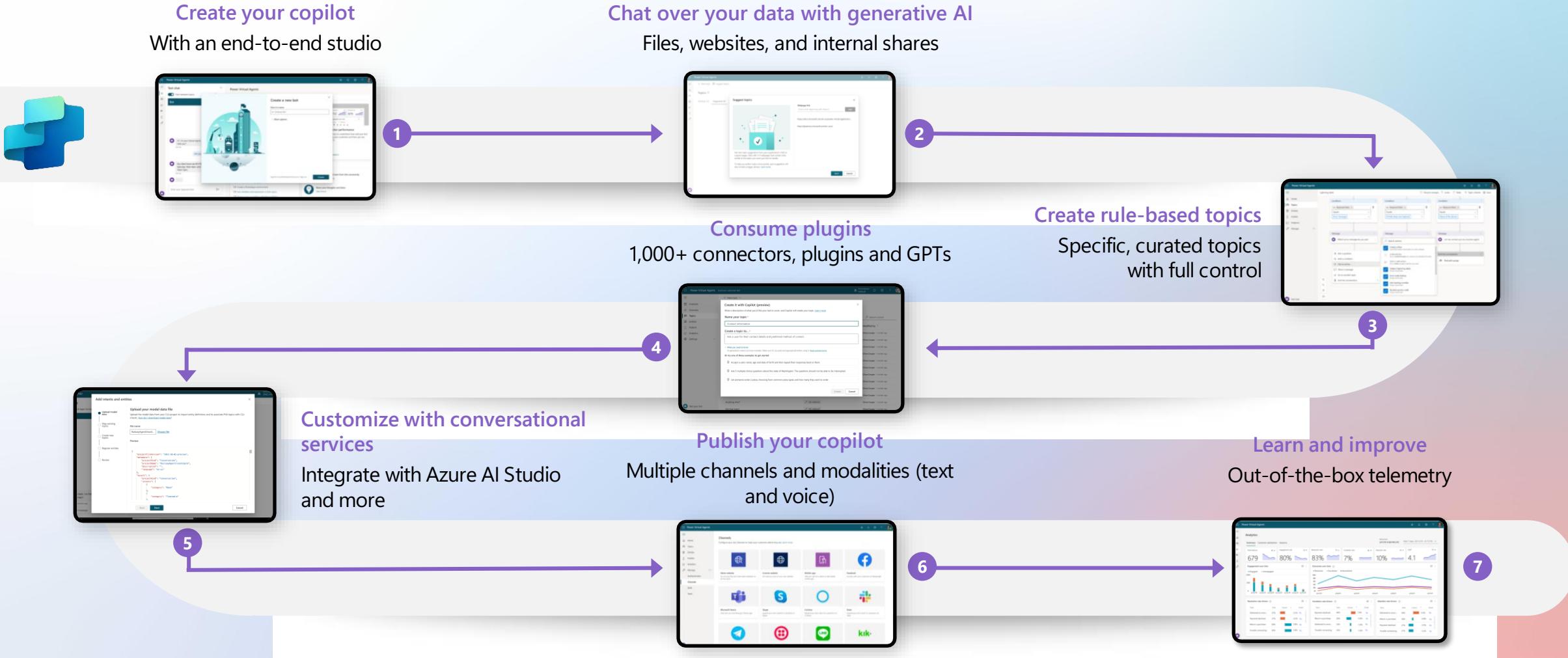
## Handle complex queries with ease

Build intricate conversations with robust variable management, logic, and responses.

## Continuous self-learning and improvement

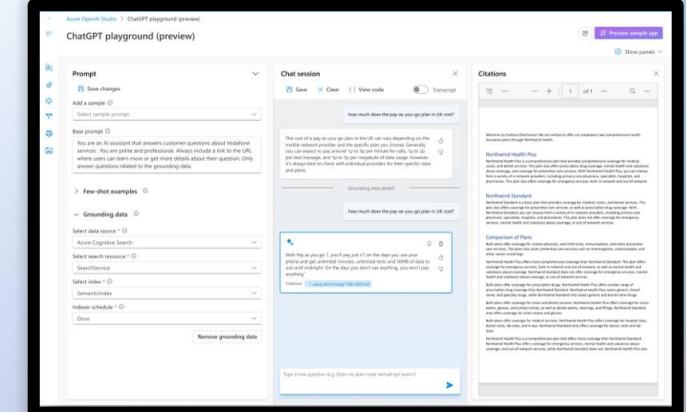
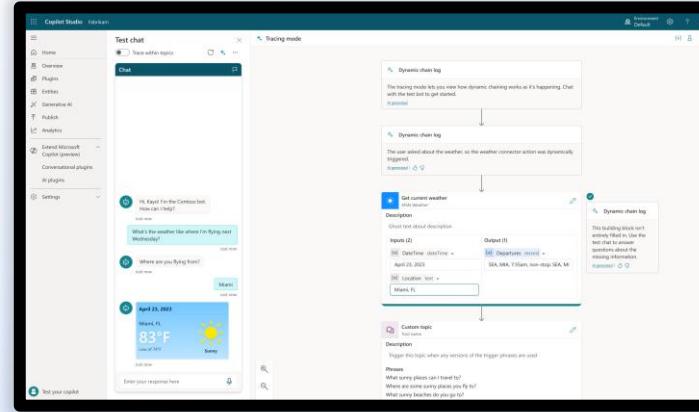
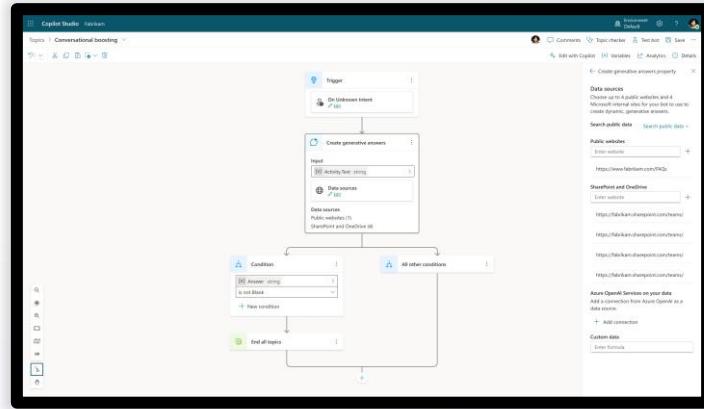
AI-driven features will improve your copilot over time and provide suggestions on how to optimize your conversations.

# Design copilot experiences with ease



# Generative AI in Copilot Studio

Powered by Azure OpenAI Service



## Generative answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

## Generative actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

## Bring your own custom Azure OpenAI model

Use Azure OpenAI on your data (ChatGPT, GPT-4...) and connect it to Copilot Studio.

# Describe your agent to create it

Helpdesk    Expense tracking    HR and benefits

Use everyday words to describe what your agent should do

This AI-powered feature above is currently in preview. [See terms](#) and [supplemental terms](#)

## Explore agents

Templates are currently a preview feature. See [supplemental terms](#)

[See more](#)



### Safe Travels

Provides answers to common travel questions and related health and safety guidelines.



### Website Q&A

Instantly answer user questions using the content of your web site or other knowledge.



### Team Navigator

Assists employees in finding colleagues and their hierarchy within the organization using Microsoft Teams.



### IT Helpdesk

Empowers employees to resolve issues and effortlessly create/view support tickets.



### Store Operations

Improve the efficiency of retail frontline workers by enabling easy access to store procedures and policies



### Financial Insights

Help financial services professionals get quick and concise info from their org's financial documents and other available resources.

## Learning resources

Quick start: Create and deploy an agent

Documentation

Security and Governance



# Examples to bring to life

## Custom copilot

### IT Service

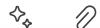
Transform IT service processes with employee self service.

#### Ask the copilot

What is the status of my [IT ticket](#)?



What are the [new laptop](#) options for my device refresh



What [software](#) can I use for photo editing and how much [budget](#) does my team have?



## Custom copilot

### Customer Facing

Interact with your CRM systems to provide a first-class experience for customers

#### Ask the copilot

Can you send me a receipt of my recent purchase and a "[how to](#)" guide on the product



What is the [best product](#) based on my needs?



What's the [next availability](#) for my service?



## Custom copilot

### Human Resources

Interface with your HRM systems to streamline your employees HR processes

#### Ask the copilot

Kick off the [onboarding](#) processes and associated task for [new colleague](#)



What is the budget for [learning and development](#) and what courses are available



Request [time off](#) and let me know how much [holiday](#) I have left



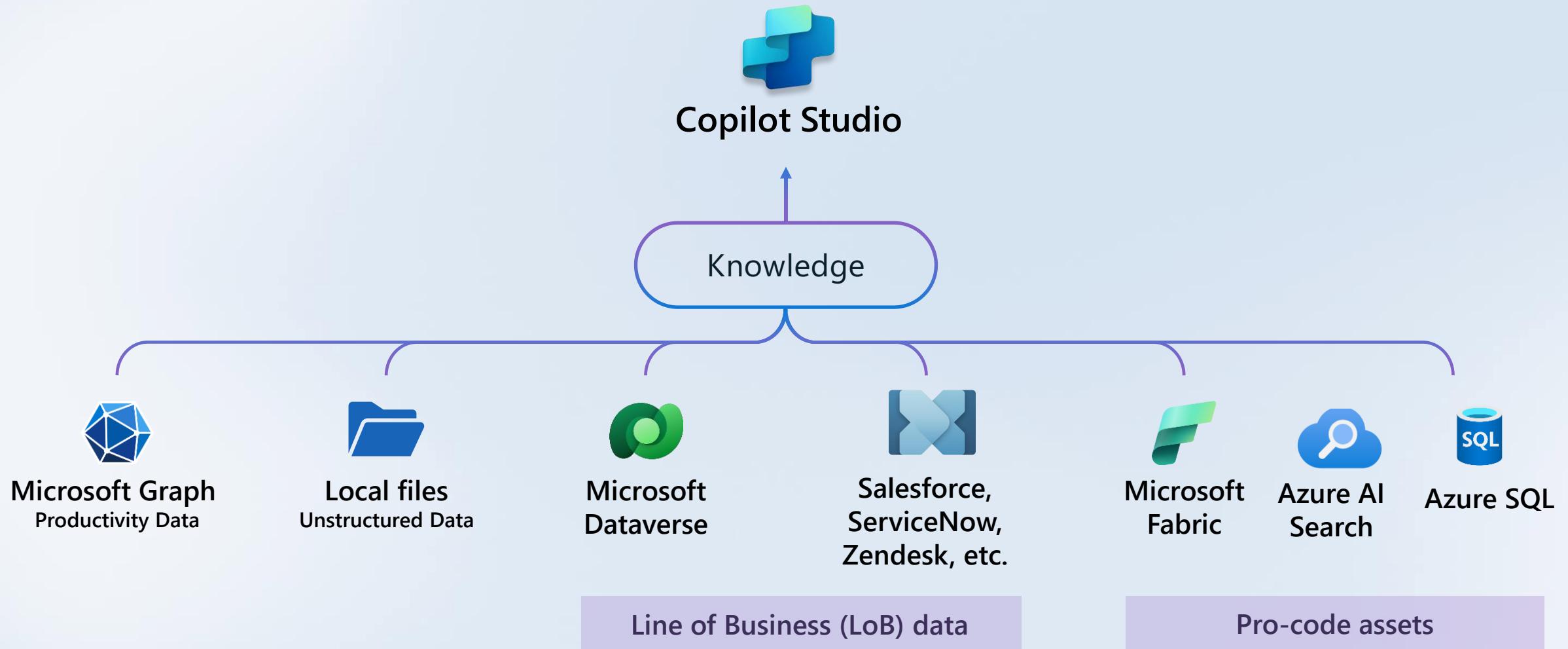
# **Knowledge**

in Copilot Studio



**Knowledge**

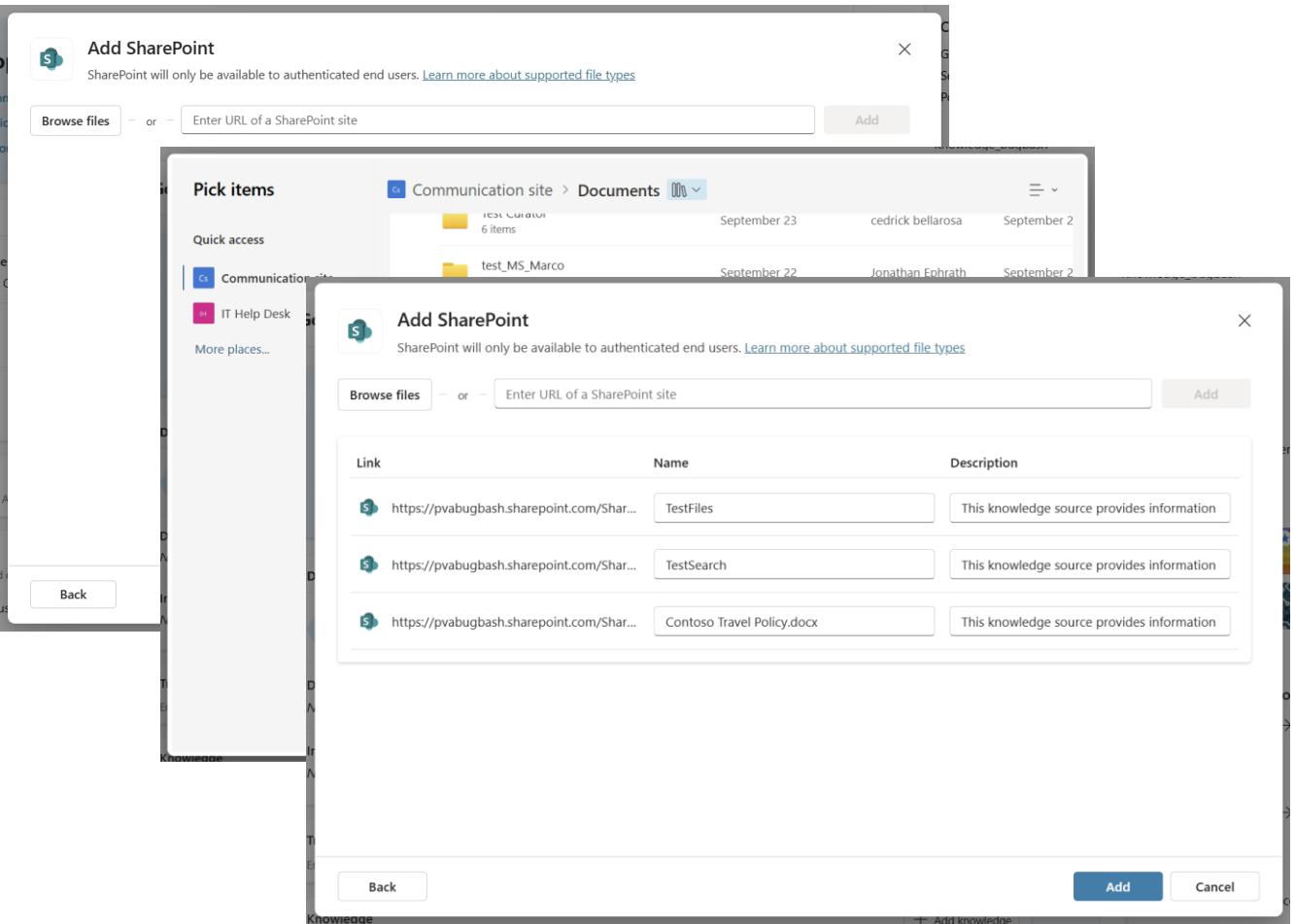
# Knowledge in Copilot Studio



GA

# SharePoint

- ✓ Sites, Pages and Files
- ✓ Support for selecting specific files / specific folders



GA

# File uploads

- ✓ Text-based files including images
- ✓ Up to 512MB per file (industry leading)
- ✓ Hundreds of files per agent supported
- ✓ Multiple file formats supported

**Add knowledge**

Add knowledge so your agent can provide more relevant information and insights. Once set up, other people with edit permissions for this agent can reuse these knowledge sources for additional topics. [Learn more about knowledge sources](#)

Featured Advanced Search More

**Public websites** Add public websites for real-time answers

**SharePoint** Securely integrate and manage internal data

**Dataverse (preview)** Customize and deploy structured data tables

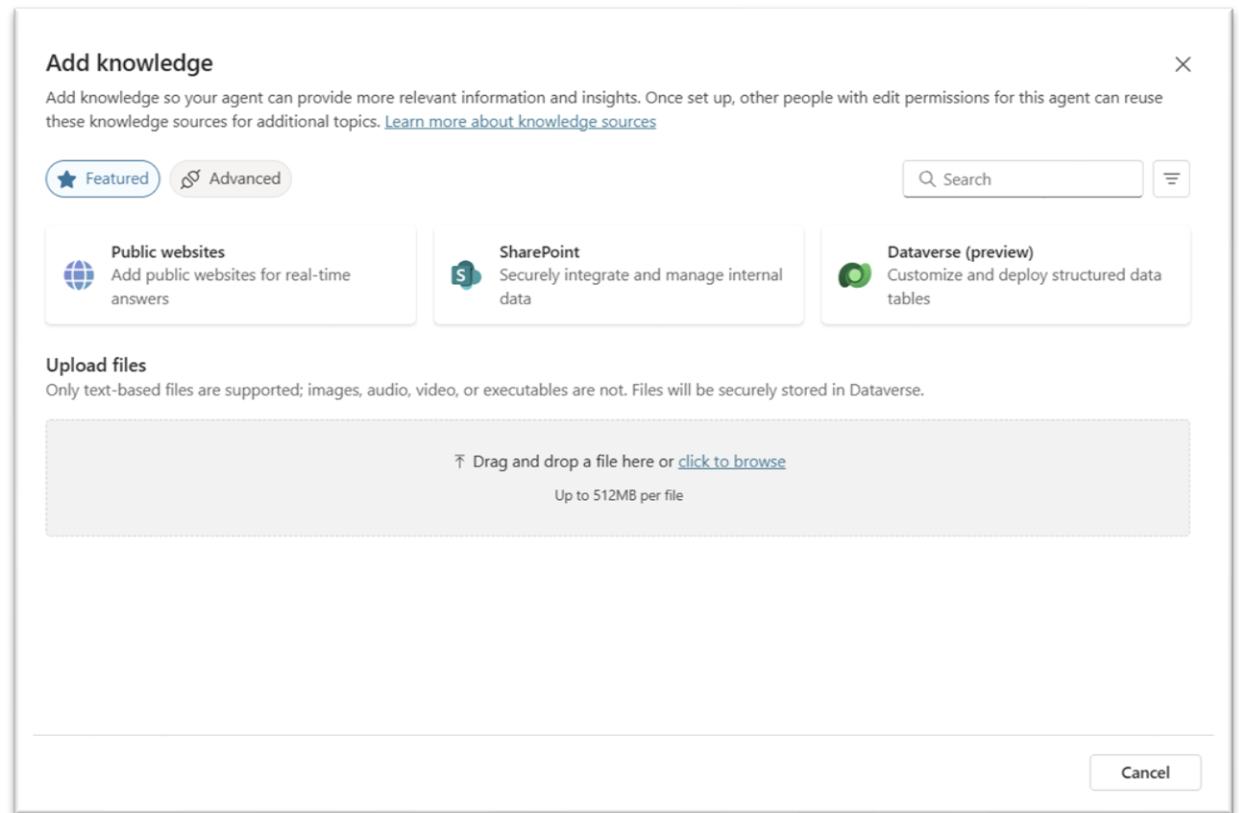
**Upload files**

Only text-based files are supported; images, audio, video, or executables are not. Files will be securely stored in Dataverse.

Drag and drop a file here or [click to browse](#)

Up to 512MB per file

Cancel



Preview

# New Knowledge sources

- ✓ No data movement
- ✓ Real-time knowledge
- ✓ Q&A over relational tables
- ✓ Leverages the same connections as actions
- ✓ Honors existing security roles

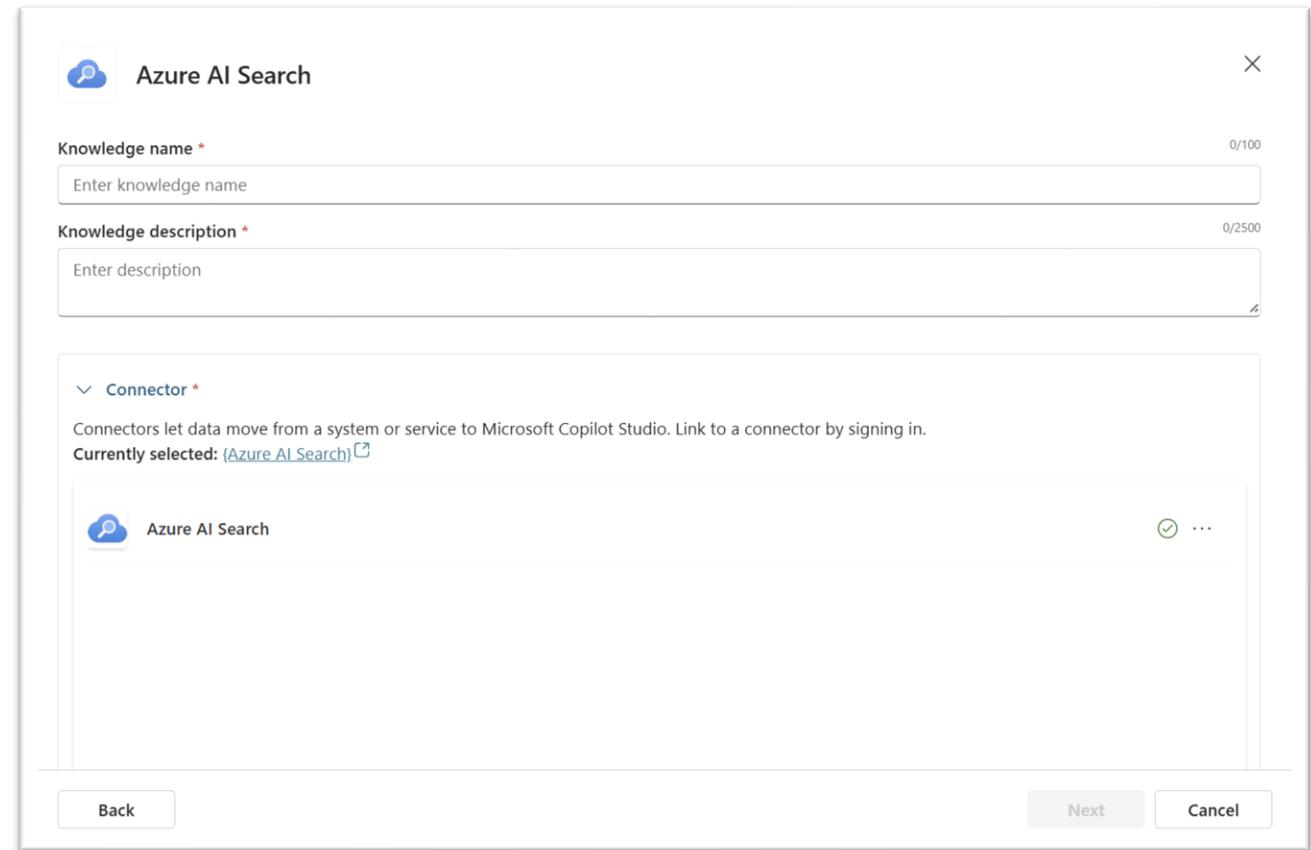


Salesforce  
ServiceNow  
Zendesk

Preview

# Azure AI Search

Use Azure AI Search **Vector Index** against your data, as knowledge for your agents



Preview

# Azure SQL

Use Azure SQL database instances to power real-time knowledge in agents

Add knowledge

Add knowledge so your agent can provide more relevant information and insights. Once set up, other people with edit permissions for this agent can reuse these knowledge sources for additional topics. [Learn more about knowledge sources](#)

Featured Advanced Search X

Enterprise data connections (preview)  
Powered by Copilot connectors. Some options may require admin approval or end user licensing. [Learn more](#)

 Azure AI Search	 Azure OpenAI on your data	 Microsoft Fabric	 ADLS Gen2
 Azure SQL	 Confluence	 Enterprise websites	 Salesforce
 ServiceNow Catalog	 ServiceNow Knowledge	 ServiceNow Tickets	 Zendesk

Cancel

# What's new in knowledge

Faster, relevant enterprise knowledge sources

E2E experience for discovering, adding, and managing knowledge sources

## Create



Internet



SharePoint



Files



Microsoft Graph  
(Preview)



Dataverse  
(Preview)



Salesforce,  
ServiceNow,  
Zendesk, etc.  
(Preview)  
**\*\*NEW\*\***

No-cliffs for pro-dev to extend existing investments bring more data



Azure AI Search  
(Preview)  
**\*\*NEW\*\***

Bring your own knowledge index



Microsoft Fabric  
(Private Preview)

Data Insights



Azure SQL  
(Preview)  
**\*\*NEW\*\***



Custom Data  
JSON, file thru Connectors

## Customize

## Tuning

Built-in advanced knowledge tuning [\(coming soon\)](#)

- Knowledge recommendations
- Finding and fixing gaps with prompts
- Knowledge analytics

... and many more on the way



# Partner Opportunity





# Partner opportunity

## Paths to developing and growing your Copilot Studio offerings

### Microsoft Copilot Studio

#### Extend 1<sup>st</sup> party copilots

##### Extend Copilot for Microsoft 365

If you're currently a Modern Work partner, build on that expertise by focusing on the Copilot Studio capabilities included in Copilot for Microsoft 365 (currently in preview). Help your customers understand how to leverage these capabilities to expand the ROI and business impact of their investment.

##### Extend Microsoft 1<sup>st</sup> Party Copilots

If you're currently a Power Platform or Dynamics partner, discover opportunities to extend the Copilots available in those applications (where supported) to optimize customer experiences and increase value. *Available today for Power Apps, Copilot for Service with additional copilots becoming available soon.*

##### Become an end-to-end Copilot expert

Become your customer's Microsoft Copilot trusted advisor, enabling them across Copilot to navigate the options and opportunities to extend and customize their Copilots with Copilot Studio - from consulting & discovery through to implementation and adoption.

##### Build IP Solutions

Begin exploring how to embed copilot experiences within your product, as standalone offerings, or topics and plugins to extend Microsoft Copilots to create integrated and connected solutions. Additional opportunities coming for ISVs, stay tuned for more!

#### Build custom copilots

##### Develop a Conversational AI Practice

Become a go-to partner for Conversational AI, developing depth skills in deploying to value-added customer-facing channels including mobile and web. Bring strong skills in data & AI to support process transformation, differentiating from the competition by specializing in key industries and core systems to provide depth expertise.



# Copilot Studio go-to-market overview

	Copilot Studio in Copilot for Microsoft 365 (Preview)	Copilot Studio
<b>Use Case</b>	Extend Copilot for Microsoft 365	Copilots for customers and employees
<b>Licensing</b>	Included in the Copilot for Microsoft 365 license	Capacity pack per tenant, \$200 for 25K messages
<b>Value Prop</b>	Customize and use Copilot Studio plug-ins in Teams and Microsoft 365	Use B2C standalone copilots, publish to any channel Use internal standalone copilots with employees
<b>Channels where copilot can be deployed</b>	Copilot for Microsoft 365 only	External channels (Web, mobile, social); Internal channels AAD authenticated (Web, Teams)
<b>Availability</b>	Available in Public Preview	Generally Available
<b>Example Scenarios</b>	<p>Productivity scenarios consumed via Copilot for Microsoft 365</p> <ul style="list-style-type: none"><li>▪ Specifically designed responses for critical scenarios (e.g., legal requests, HR sensitive topics, Finance requests)</li><li>▪ Horizontal workflows backed with automation (e.g., expense management, vacation requests, reset my passwords)</li></ul>	<p>Customer facing copilot on the web, social media</p> <ul style="list-style-type: none"><li>▪ Account management</li><li>▪ Order management</li><li>▪ Find your product</li><li>▪ Make and manage bookings</li><li>▪ Help customers get started with services</li></ul> <p>Host your own copilot to any channel for employees:</p> <ul style="list-style-type: none"><li>▪ HR Copilot on SharePoint page</li><li>▪ IT services copilot on custom IT employee website</li><li>▪ Internal support</li></ul>

**Use case examples:** [How early adopters are transforming their organizations with Copilot Studio](#)

# Develop Copilot Studio services

Drive innovation and business transformation for customers around the world with Copilot Studio offers. Tap into the millions of Microsoft 365 customers and bring conversational AI to the forefront, setting them up for success with pre-sales and post-sales support alongside best-of-breed protection and education.

## Services Partners Opportunities



### Advisory

- Lead business transformation conversations with Microsoft Copilot and Copilot Studio
- Provide guidance for the responsible use of conversational AI
- Identify personas and scenarios that would deliver the most value if reimagined with conversational AI



### Readiness

- Assess licensing and technical readiness, and the best path for Copilot Studio
- Assess customer data protection and governance
- Showcase the benefits of Copilot Studio with an In-a-Day session
- Identify high-value scenarios



### Build & Deploy

- Close readiness gaps
- Build a business case for initial copilot(s), develop a Proof of Concept (POC)
- Develop the architecture, define volumes and performance standards
- Develop governance and security strategy
- Test, measure performance, and publish the copilot



### Governance & Adoption

- Develop Governance strategy
- Develop a COE, implement the COE Toolkit
- Drive adoption and change management programs
- Establish employee communication channels
- Measure business impact
- Conduct employee training
- Continuously support and optimize



### Ongoing Services

- Develop a Center of Excellence (or extend a Low Code COE) for your customer and provide ongoing support services
- Provide outsourced resourcing for COE
- Sell managed services for roadmap development
- Offer ongoing training and community building



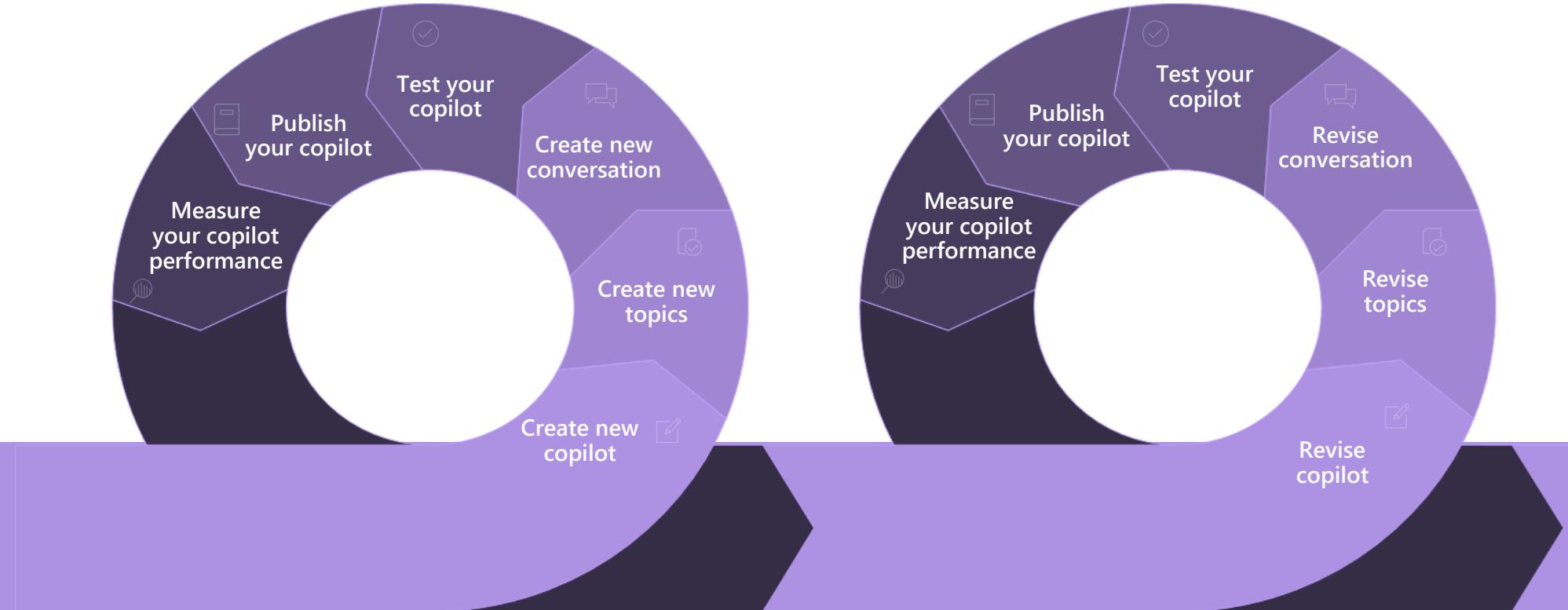
# Deploying Copilot Studio



# Copilot creation process overview



Creating a copilot is an easy step by step process.



# Resources to support Implementation

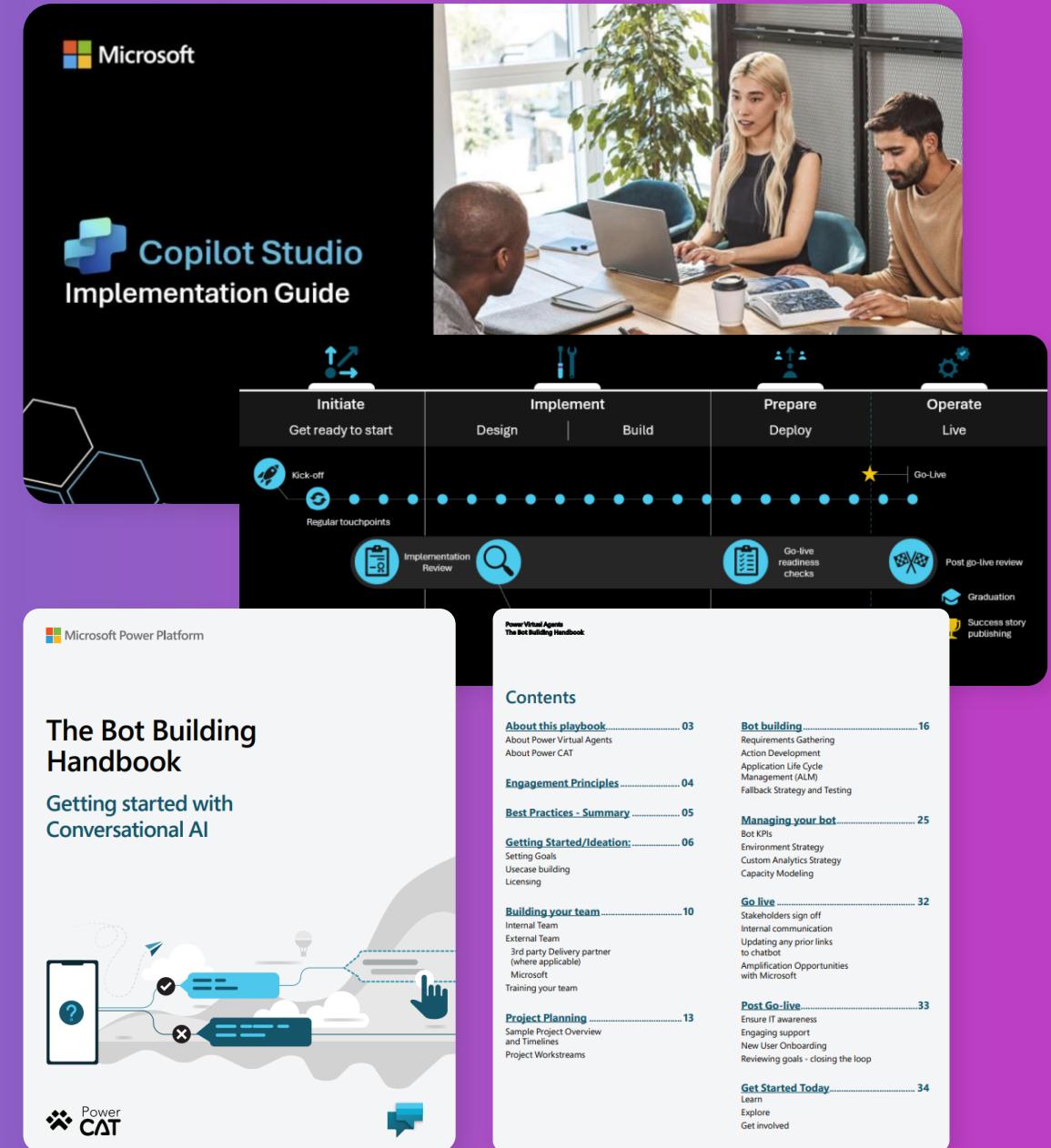
## Copilot Studio Implementation Blueprint Deck (Success by Design)

Use this as part of your blueprint and customer discussions when pitching POCs and projects  
**[aka.ms/copilotstudioimplementationguide](https://aka.ms/copilotstudioimplementationguide)**

## Copilot Studio Guidebook

Use this role-based guide to understand the fundamentals of Conversational AI and Copilot Studio  
**[aka.ms/copilotstudioguidebook](https://aka.ms/copilotstudioguidebook)**

**Note:** Currently these resources cover the Build Copilots scenario.  
Additional resources to support the Extend Copilots scenario will be coming soon.



# Offer Copilot Studio In-a-Day

## Copilot Studio in a Day

Learn how to respond rapidly to your customers and employees at scale using intelligent conversational chatbots. No matter if you are a business expert or IT developer, you will learn to develop intelligent chatbots quickly, in a single day using Copilot Studio.

### At the end of the day, you will be able to:

- Easily create your own chatbots and copilots
- Take action quickly with seamless integrations
- Build smart bots using rich, personalized conversations

This training provides practical hands-on experience with an experienced partner who specializes in creating Copilot Studio solutions in a full-day of instructor-led chatbot creation workshop.

**Note:** Currently this content covers the *Build Copilots* scenario. Additional modules to support the *Extend* and *Customize* scenarios will be coming soon.

Module	ID	Name	Length
Overview	1	What is Conversational AI? Introductory Presentation	30 minutes
Module 1: Access and Setup	2	Access your tenant and preview access	10 minutes
Module 2: Planning your Copilot	3	Plan your copilot using the planning template from the Bot Building Playbook	40 minutes
Module 3: Creating your Copilot	4	Create your first topic, test and publish your Copilot	40 minutes
Module 4: Authoring 101 in Unified Canvas	5	Author copilots using the latest features in Copilot Studio	40 minutes
Module 5: Using Power Automate Connectors in Copilot Studio	6	Build Power Automate flows for your Copilot	40 minutes

### Where can I learn about how to join the In-a-Day partner program?

- One-pager [aka.ms/Partner4XIAD](https://aka.ms/Partner4XIAD)
- Partner overview deck [aka.ms/XIADPartnerOpportunity](https://aka.ms/XIADPartnerOpportunity)

### Where can I access training materials?

Copilot Studio in a Day (CiaD) guided Microsoft Learn Student material can be accessed [here](#)

### Where can I access IAD Instructor materials?

Resources for the Copilot Studio Instructors including the presentation decks can be found at [aka.ms/CSIADinstructor](https://aka.ms/CSIADinstructor)



# Get started and find resources



# Copilot Studio page on Partner Hub

Your one-stop shop for the latest  
partner resources



[aka.ms/CopilotStudio\\_Partner](https://aka.ms/CopilotStudio_Partner)

Microsoft

Home | Power Platform for Partners | Practice Development | Go to market | Program | More | Search | Ginny Hoban

Home > Go To Market > Low Code >

## Microsoft Copilot Studio

Built on the foundations of Power Virtual Agents and the broader Microsoft conversational AI ecosystem, Copilot Studio is an end-to-end conversational AI platform that provides new ways to build your own copilots and extend Microsoft 365 with the latest generative AI capabilities.



### Meet Microsoft Copilot Studio

Partners can use Microsoft Copilot Studio to guide customers in how modified or custom copilots can help them drive business transformation and impact. Learn how to take advantage of this opportunity with these new and soon to be available assets.

- [Blog: Announcing Microsoft Copilot Studio](#)
- [Blog: Partner Opportunities with Copilot Studio](#)
- [Copilot Studio overview video](#)
- [Copilot Studio pitch deck](#)
- [Copilot Studio FAQ \(coming soon!\)](#)

### Deliver In-a-day workshops

The best way to get customers excited about Microsoft Copilot Studio is to show it at work. Use these resources to build one-day workshops that focus on solving business challenges.

- [Power Platform – in-a-day workshop program](#)
- [Sign up to deliver XiAD events](#)
- [Copilot Studio in-a-day materials \(coming soon!\)](#)



# Microsoft Copilot Studio Partner Growth Plan

Join to build and grow your Conversational AI capabilities and unlock benefits as you go

## Base

### Requirements

- Understand the basic principals of Conversational AI
- Review and provide feedback on the [Copilot Studio Playbook as part of your submission](#)
- At least 5 people within the Partner to achieve the [Power Platform Fundamentals Certification](#)
- Lead at least 3 active Microsoft Copilot Studio opportunities, logged via the Partner Portal
- Complete product demonstration/pitch of Microsoft Copilot Studio following review of your submission request (recorded or live)
- Attend at least 3 Tech Talks Community calls
- [Contribute](#) at least 10 feature requests at [aka.ms/PVAFeatureRequest](http://aka.ms/PVAFeatureRequest)

### Benefits (once completed)

- After completion and review, register with your PDM or Account Team to schedule for a yearly PG led Roadmap Session with Q&A
- Receive communications on product updates
- Feedback on how to improve your product pitch

## Build

### Requirements

- Taking steps to create a Conversational AI team, COE, or practice
- Have at least 1 Microsoft Copilot Studio consulting services offer on AppSource
- Host a [XIAD event](#) on Microsoft Copilot Studio via the MS events portal (at least 1 per year)
- Publish an approved public case study on Microsoft Customer Stories website for Microsoft Copilot Studio
- Complete at least 1 Microsoft Copilot Studio delivery engagement to production
- Lead at least 5 Microsoft Copilot Studio opportunities submitted via Partner Portal
- Log active Microsoft Copilot Studio opportunities via the Partner Portal with a combined revenue of at least \$200k

### Benefits (once completed)

- 2 x yearly product update newsletter
- Join product group led trainings
- Be featured on the PG Managed Partners Deck
- Bi-yearly PG led Roadmap Session with Q&A

## Expand & Specialize

### Requirements

- Deploy 3 new Microsoft Copilot Studio implementations per year
- Lead at least 8 active Microsoft Copilot Studio opportunities via Partner Portal
- Log active Microsoft Copilot Studio Opportunities via the Partner Portal with a combined revenue of at least \$450k

### Benefits (once completed)

- PowerCAT and FastTrack sponsored projects (where requirements are met)
- Be featured in Partner implementation spotlights (in alignment with Microsoft Marketing Process)
- Copilot Studio PG NDA meetings and events
- Monthly pipeline review meetings with your Sales Team

Submit your request at [aka.ms/copilotstudio/partnergrowthplan](http://aka.ms/copilotstudio/partnergrowthplan)

# Resources



[aka.ms/trycopilotstudio](https://aka.ms/trycopilotstudio)



## Learn more

Copilot Studio website	<a href="https://aka.ms/copilotstudio">aka.ms/copilotstudio</a>
Blog	<a href="https://aka.ms/copilotstudиoblog">aka.ms/copilotstudиoblog</a>
Demo	<a href="https://aka.ms/copilotstudиodemo">aka.ms/copilotstudиodemo</a>
Sizzle video	<a href="https://aka.ms/copilotstudиosizzle">aka.ms/copilotstudиosizzle</a>
Pitch deck	<a href="https://aka.ms/copilotstudiопitch_partner">aka.ms/copilotstudiопitch_partner</a>
Product documentation	<a href="https://aka.ms/copilotstudиодocs">aka.ms/copilotstudиодocs</a>
Licensing guide	<a href="https://aka.ms/copilotstudиолicensing">aka.ms/copilotstudиолicensing</a>
Ignite on-demand session	<a href="https://aka.ms/copilotstudиоatignite">aka.ms/copilotstudиоatignite</a>
Partner Hub page	<a href="https://aka.ms/copilotstudio_partner">aka.ms/copilotstudio_partner</a>
Community page	<a href="https://aka.ms/copilotstudиocommunity">aka.ms/copilotstudиocommunity</a>



**Copilot for Sales**



# Microsoft Copilot for Sales

## Your AI assistant for sellers

### Maximize seller productivity

AI capabilities to streamline processes and create personalized sales content

### Personalize customer engagements

AI-generated insights and recommendations for next steps

### Enhance sales team performance

AI-powered manager insights and collaboration tools

### Customize for your needs

Customization for a uniquely tailored sales solution

\$50 pnpm, includes Microsoft Copilot for Microsoft 365

# Works with your CRM platform

The screenshot shows an Outlook inbox with several emails. One email from Alberto Burgos is highlighted, showing a proposal. Two Copilot modals are overlaid on the screen, one for each CRM platform.

**Copilot for Salesforce:**

Add this contact to Salesforce  
Once alberto@alpineskihouse.com is a contact, you'll get customer info and rich insights here.

New contact

First name	Last name *
Alberto	Burgos
Job title	Cafeteria manager
Email	alberto@alpineskihouse.com
Company	Alpine Ski House
Phone number	1 619 555 0127
Mobile phone	1 619 555 0127

**Copilot for Dynamics 365:**

Add this contact to Dynamics 365  
Once alberto@alpineskihouse.com is a contact, you'll get customer info and rich insights here.

New contact

First name	Last name *
Alberto	Burgos
Job title	Cafeteria manager
Email	alberto@alpineskihouse.com
Company	Alpine Ski House
Phone number	1 619 555 0127
Mobile phone	1 619 555 0127

Connects to  
Salesforce Sales  
Cloud or Microsoft  
Dynamics 365 Sales

Q Search

Help

Delete Archive Sweep Move to Quick steps Read/Unread Summarize

1/2 Monarch Project Update in 5 min Microsoft Teams Meet... New Outlook

Focused Other

[EXTERNAL] Inquiry Regarding Specifications and Availability of New Coffee Machine Model

Summary by Copilot

1 Alberto Burgos, the operations manager at Fourth Coffee, is writing to ask about coffee machines and organic Arabica beans for five new locations.

2 Alberto requests more information on product offerings, pricing details, and any available special offers or bundles.

3 A budget of \$12,000 was mentioned, and possible stakeholders are Alberto, Rebecca, and Miguel.

4 Details about timing and need don't seem to be mentioned.

5 Miguel raised a potential issue about his storage limitations and the shipment time.

Suggested action items

Schedule follow-up Reply to all Open Sales ...

AI-generated content may be incorrect

Alberto Burgos To: Daisy Phillips Thu 3/17/2023 11:09 AM

Hi Daisy,

Thank you for your swift response and the detailed information on the Café A-100 Automatic coffee machine. It sounds like an excellent fit for our new locations, and I appreciate your recommendation.

The budget aligns well with our initial estimates, and we are ready to move forward with the purchase, hoping to finalize it by Aug 20. Inna Laar, our purchasing manager, is eager to discuss the premium bundle and finalize the details.

Best regards,  
Alberto Burgos  
Operations Manager  
Fourth Coffee

...

6 Miguel Garcia 50 Café A-100 Automatic • Alpine Ski Ho...

Leads (1)

Miguel Garcia 50 Café A-100 Automatic • Alpine Ski Ho...

Contacts (3)

Alberto Burgos Cafeteria manager • Alpine Ski House

Inna Laar Department manager • Alpine Ski House

# Outlook Email Summary

Copilot for Sales helps sellers catch up on email in a snap

- 1 Email summary provided by Copilot for Microsoft 365 enriched with information for the CRM and key sales insights: Budget, Authority, Needs, Timing, buying intent and more
- 2 Email summary has a link to open Copilot for Sales sidebar
- 3 Sales-specific information about the customer
- 4 Links to recent deals related to this customer or account
- 5 Sales-specific suggested next actions
- 6 Related CRM records

The screenshot shows the Microsoft Outlook interface with an open email draft window. The title bar indicates "Message" is selected. The ribbon includes "Format text" and "Options". The main area shows a list of recent messages on the left and the draft body on the right. The draft body has a recipient field "To: Katri Ahokas; Henry Brill; Robin Counts" and a placeholder "Start typing or Draft with Copilot". A Copilot for Sales sidebar is open, showing a "Draft saved at 11:00 AM" message and two buttons: "Make a proposal" and "Request more details". A callout bubble labeled "1" points to the "Copilot for Sales" button. Another callout bubble labeled "2" points to a "Generate" button in a modal window titled "Draft with Copilot". The modal contains the instruction "Greet Alberto, make sure to include how much a valued customer he is and answer his questions and suggest a follow up".

# Outlook Email Draft



Copilot for Sales generates customer replies using sales prompts, data, and insights

- 1 Suggested sales-specific email prompts
- 2 Email draft provided by Copilot for Microsoft 365 enriched with CRM information and sales insights like BANT (Budget, Authority, Needs, Timing) analysis, buying intent, and more

The screenshot shows a Microsoft Word document titled "Word Content Generation". A Copilot window is open, displaying the prompt: "Help me prep for the pitch meeting with Relecloud meeting". Below the prompt, there's a "Generate" button and a "Reference your content" link. The main content area of the Word document includes sections for "Open tasks for this opportunity" (listing three tasks), "Recent meeting insights" (mentioning an intro meeting for coffee machines), "Highlights" (noting Alberto had questions about games he couldn't attend), "Follow-ups" (listing two items), and "Email thread summary" (mentioning updated price information for espresso beans). At the bottom of the Copilot window, it says "Still working on it..." with a progress bar.

1

2

File Home Insert Layout References Review View Help

Meeting Share ...

Aptos (Body) 11 B I U L A ... E Copilot Share

Draft with Copilot Preview

Help me prep for the pitch meeting with Relecloud meeting

9/300

Generate Reference your content

Open tasks for this opportunity

Subject	Priority	Due	Created on	Owner
Installation of a new panel in new cafeteria building	High	In progress	07/06/2023	Eva Terrazas
Low production from 3 solar panels	High	In progress	06/06/2023	Inna Laar
Send new autumn catalog	Low	Delayed	06/01/2023	Inna Laar

Recent meeting insights

Intro meeting for new coffee machines deal

07/03/2023 2:00 PM – 2:30 PM

Highlights

Alberto had questions about some of the games he was unable to attend, and why he couldn't exchange his tickets. Daisy explained the deposit process for next season, and how it works.

Follow-ups

- Daisy will send Alberto the refund information on Friday
- Alberto will confirm next week if he can place a deposit

Email thread summary

Alberto from Trey Research requested updated price information for monthly espresso beans order from Daisy Philip

Alberto added his colleague Miguel in CC for the new store location in San Diego and asks for an estimate of the shipping time to their new location

Alberto wanted to discuss purchasing coffee machines with a range of cartridge and milk options and self-cleaning features for convenience in their new San Diego office with Daisy on their weekly call

Still working on it... Stop generating ESC

Page View Web View 100% Fit Give Feedback to Microsoft

1 of 1 229 words English (U.S.) Text Predictions: On

## Sales meeting preparation brief: Copilot for Sales helps sellers prepare for customer engagements

- 1 CRM records included directly into the content generation prompt
- 2 CRM insights and enrichment blended directly into the generated content

The image shows two side-by-side screenshots of the Microsoft Teams Copilot for Sales interface. At the top, there are two video feeds of participants: a woman on the left and a man on the right. Below each video feed is a Copilot card.

**Screenshot 1:** The card is titled "Copilot 10:35 a.m." and "Sales Copilot". It displays an "Opportunity Summary" for "50 Cafe A-100 Automatic". The summary states: "50 Cafe A-100 Automatic was opened for Contoso on July 6th, 2010. The expected close date is June 20th, 2023. Alberto Burgos is the primary contact. The budget for this opportunity is \$24,000." Below this is a "Latest activity" section with a bulleted list of recent interactions. At the bottom of the card are buttons for "View in Dynamics365" and "Ask me anything about this meeting".

**Screenshot 2:** The card is titled "Copilot 10:35 a.m." and "Sales Copilot". It displays information about the brand "Proseware", mentioning it was "Brand mentioned by Miguel". The card provides a detailed overview of Proseware's history, products, and market position. It also includes sections for "Strengths" (bullet points: Strong global presence, Wide range of products, Strong brand recognition, Strong financial position) and "Weaknesses" (bullet points: Reliance on sugary drinks, High debt levels, Vulnerable to changing consumer tastes). At the bottom are buttons for "View in Dynamics365", "Learn more in Bing", and "Ask me anything about this meeting".

# Teams in Meeting



During meetings, Copilot for Sales brings sellers real-time information and tips

## 1 Opportunity Summary

Opportunity summary surfaces summarizing previous action items, notes and other related CRM information

## 2 Real-time Brand/Competitor detection

When a brand name is mentioned, Copilot detects it and surfaces a SWOT analysis and overview of the brand from Bing's database

A screenshot of the Copilot for Sales recap interface in Microsoft Teams. At the top, there's a search bar and a user profile for Daisy Phillips. Below the search bar, tabs include 'Recap' (which is selected), 'Recordings & Transcr...', and 'Copilot for Sales'. The main area shows a grid of video participants: Ina Bauer (top-left), Babak Shamma (top-right), and Erik Nason (bottom). Below the participants is a 'Content' section with two files: 'RFP Strategic Advisory - Wingtip Toys' and 'Eco\_1\_product\_brochure.pptx'. A 'Follow-up tasks' section lists three items: 'Daisy will send email an email with the new quote.', 'Alberto and Hillary will get back with info about the storage facilities.', and 'Daisy and Alberto will meet on Monday to discuss the terms.' Each task has a 'Create task' button next to it. A purple circle with the number '1' is placed over the first task. Below the tasks is a 'Participant statistics' section. It shows data for participants from the organization (Daisy Phillips, Babak Shamma) and outside the organization (Inna Laar, Alberto Burgos, Ruth Renatsson). The stats include talk-to-listen ratio, switches per conversation, average pause, and longest monologue. A purple circle with the number '2' is placed over the participant statistics table. At the bottom, there are engagement metrics represented by colored progress bars.

# Teams Meeting Recap



Copilot for Sales brings sales insights to the Teams meeting summary

- 1 Suggested CRM updates and an option to save to CRM as a task
- 2 Sales conversational KPIs (talk to listen ratio, customer longest monolog, etc.)

# Microsoft Copilot for Sales roadmap



## February 2024

### Email

- Sales email summaries with BANT analysis and buying intent
- Suggested CRM updates to add and update records
- Save emails to CRM

## March 2024

### Email

- Issue & Question detection in email summaries
- @mention CRM entities

## April-May 2024

### Email

- CRM record search
- Competitor analysis in email summaries



## February 2024

### During the meeting

- Real-time call insights with opportunity summary and brand/competitor analysis

### After the meeting

- Sales meeting summary with KPIs and suggested tasks

### Collaboration Spaces

- Private and public sales workspaces with suggested planner tasks

## March 2024

### After the meeting

- Manager Power BI reports

## April-May 2024

### During the meeting

- Natural language chat inquiries
- Suggested CRM updates to add and update records



## February 2024

### Content generation

- Meeting preparation brief

## April-May 2024

### Content generation

- RFP responses



## April-May 2024

### Content generation

- Pitch deck creation



## April-May 2024

### CRM connection

- Save notes to CRM



## Microsoft Copilot

## February 2024

### Chat experience

- CRM record and sales meeting insights (Dynamics 365 support)
- KPI insights like Conversion rate, sales pipeline, sales cycle, and win rate (Dynamics 365 support)

## March 2024

### Chat experience

- Support for Salesforce
- Brand/competitor analysis

## April-May 2024

### Chat experience

- Advanced sales insights



## Copilot Dashboard

## April-May 2024

- Adoption, impact, and readiness reporting

The background of the slide features abstract, flowing, translucent shapes in a variety of colors, including orange, yellow, pink, and blue. These shapes overlap and curve across the frame, creating a sense of motion and depth.

# Copilot for Sales

Pricing, licensing, and packaging

# Copilot for Sales includes everything in Copilot for Microsoft 365, plus sales insights from CRM platform

	App/scenario	Capability	Copilot for Microsoft 365	Copilot for Sales
 Outlook	Email read	Highlight Key Emails	Y	+ Sales value
		Summarize Email Threads	Y	+ Sales value
		Save Emails and Appointments to CRM		+ Sales value
		Auto Update Contact Info To CRM		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	Email composure	Draft New Email	Y	+ Sales value
		Draft Reply Email	Y	+ Sales value
		Use Excel Data In Email Reply	Y	+ Sales value
		Set Up Teams Channels From Outlook (Collab Spaces / Deal Rooms)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
 Teams	Calendar	Meeting Prep w/ CRM Opportunity Summary		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
		Catch Me Up, Q&A On Discussion So Far, Wrap Up	Y	+ Sales value
		Real-time sales tips (Competitor/Brand mentions)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	During meeting	Summary, Notes & Tasks	Y	+ Sales value
		Follow Up Q&A	Y	+ Sales value
		Sentiments, Talking Speed, Talk To Listen Ratio for seller self-improvement		+ Sales value
		Create CRM Tasks from Follow-ups		+ Sales value
		Collaborate using Collab Spaces - Account and Deal Room sales templates		+ Sales value
 Word	Chat	Summarize and Q&A On Content	Y	+ Sales value
	Meeting extension	Search and share CRM entities as adaptive cards across Outlook and Teams		+ Sales value
	Prepare for meeting	Generate meeting preparation brief	Y	+ Sales value
 Copilot chat	Get sales insights	Q&A with sales insights on conversion rate, sales pipeline, sales cycle, and win rate		+ Sales value

# FAQs

	License I have today	I have Copilot for Microsoft 365 license today	SKU to buy
<b>What do I buy to get access to Copilot for Sales as a Salesforce user?</b>	Salesforce Sales Cloud	No	Copilot for Sales (\$50) <i>Includes Microsoft 365 Copilot entitlements</i>
	Salesforce Sales Cloud	Yes	Step up (\$20)
<b>What do I buy to get access to Copilot for Sales as a Dynamics 365 Sales user?</b>	Dynamics 365 Sales Pro Dynamics 365 Sales Enterprise*	No	Copilot for Sales (\$50)
	Dynamics 365 Sales Pro Dynamics 365 Sales Enterprise	Yes	Step up (\$20)
	Dynamics 365 Sales Premium	No	Copilot for Microsoft 365 (\$30) <i>As the \$20 step up value is included with Sales Premium</i>
	Dynamics 365 Sales Premium	Yes	Fully Licensed

\*Includes CE Plan, MRSs customers

## Microsoft Copilot for Sales

Close more deals with  
the AI assistant  
designed for sellers

- + Out-of-the-box CRM connectivity
- + Real-time sales insights
- + Sales content generation



# Copilot for Microsoft 365

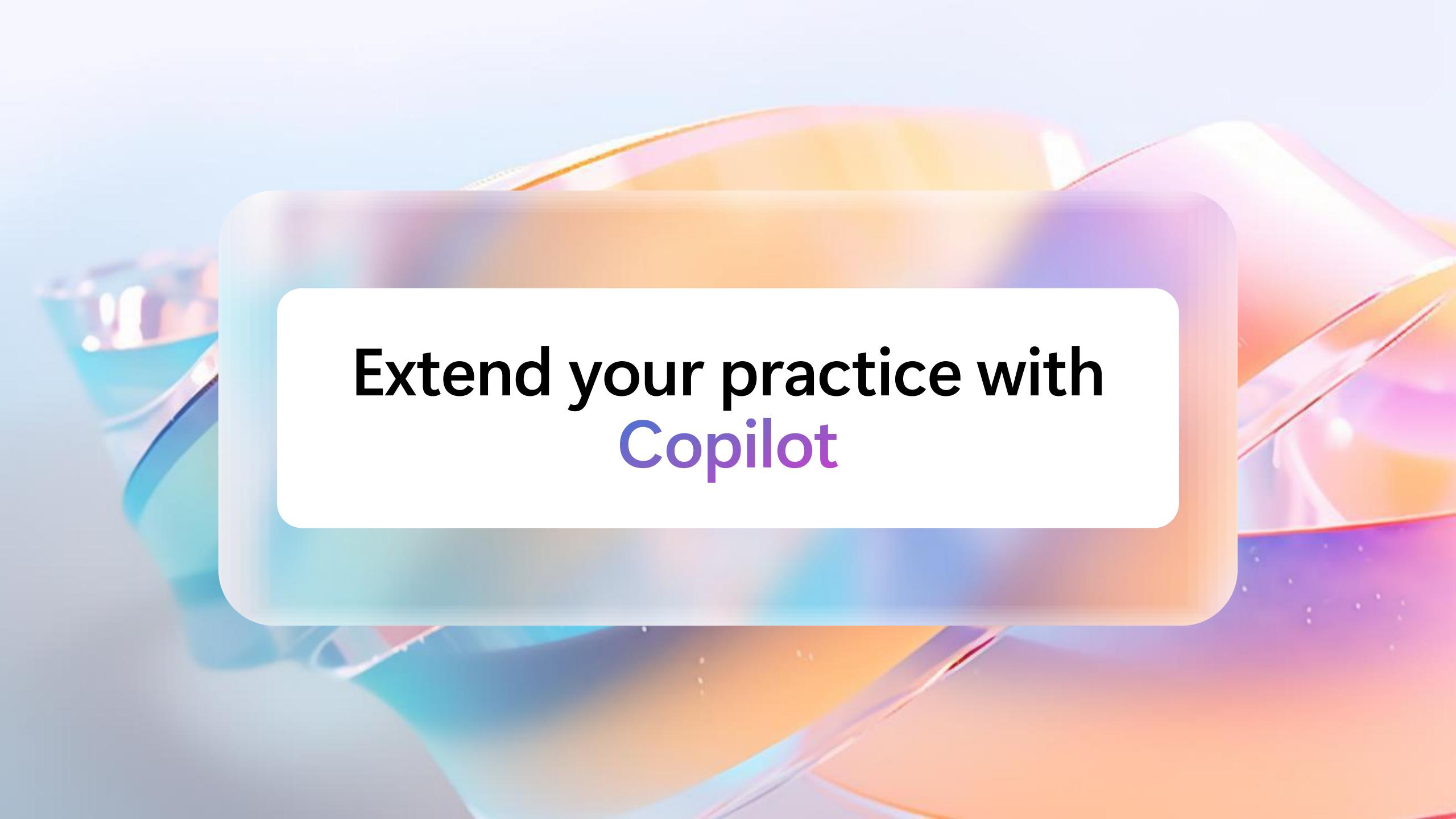
## Copilot Studio

Customize and build Copilots to meet your business needs

## Microsoft Copilot for Service

Modernize your contact  
center with a copilot  
designed for service

- + CRM and knowledge source connectivity
- + Case and service insights
- + Embed into third-party agent desktops



Extend your practice with  
**Copilot**

# Copilot partner opportunities

AI + Copilot  
Advisory

Readiness  
Assessment

Deployment

Adoption &  
Change  
Management

Extensibility

# Take action today!

## Capability development

### Learn the pitch



- Read the GA Blog:  
[aka.ms/CopilotGAFeb2024](https://aka.ms/CopilotGAFeb2024)
- Review practice building content:  
[aka.ms/AIFutureOfWorkPartner](https://aka.ms/AIFutureOfWorkPartner)
- Familiarize yourself with the scenarios, capabilities, and pitch on Partner Hub:  
[aka.ms/CopilotforSales\\_Service](https://aka.ms/CopilotforSales_Service)
- Align your Modern Work and Business Applications practice leads as you build Copilot practice

### Training



- Consume the Microsoft Learn modules:
  - [Microsoft Copilot for Sales](#)
  - [Microsoft Copilot for Service](#)
- Review the Microsoft Copilot Partner Bootcamp content on-demand at:  
[aka.ms/SalesEnablementHub](https://aka.ms/SalesEnablementHub)

## GTM Execution

### Offer development



- Provide visibility to field, customers, and other partners of your Copilot capabilities through creation of offers:
  - AI Advisory Services
  - Readiness Assessment
  - Deployment
  - Adoption and Change Management
  - Extensibility
- Offer development guidance  
[aka.ms/AIFutureOfWorkPartner](https://aka.ms/AIFutureOfWorkPartner)

Share your Copilot wins!



**Copilot for Service**



# Microsoft Copilot for Service

## Your AI assistant for agents

### Boost agent productivity in the flow of work

Help agents improve efficiency and automate tasks in the tools they use every day

### Connect trusted knowledge sources

Bridge existing contact center systems and other trusted knowledge sources to enable real-time responses

### Infuse generative AI into your contact center

Meet your needs with built-in integrations, point-and-click extensibility and easy customization

\$50 pnpm, includes Copilot for Microsoft 365

# Boost agent productivity in the flow of work

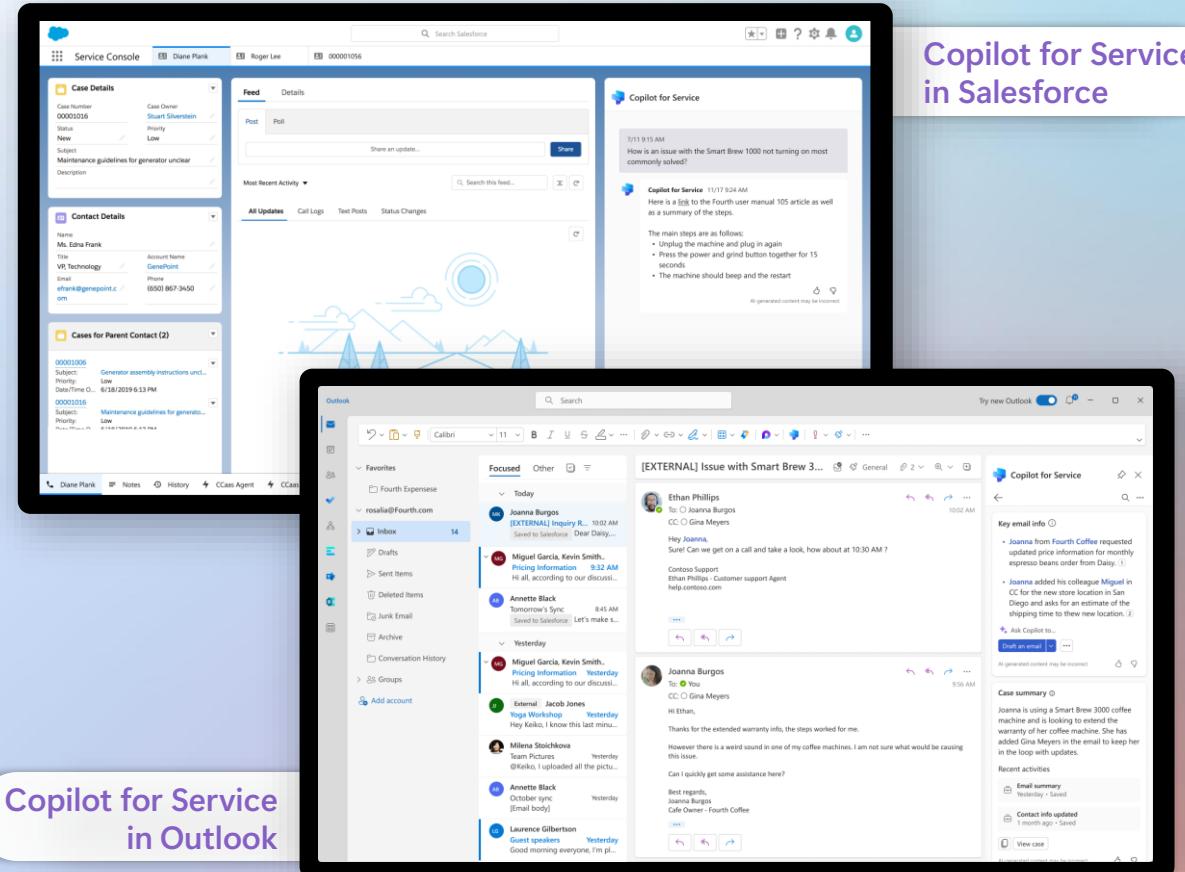
Access productivity enhancements in the tools agents already use every day

Copilot for Service includes Copilot for Microsoft 365, enriching productivity tools like Outlook and Teams with advanced CRM and knowledge capabilities

Embed directly into agent desktops including Salesforce, ServiceNow, Zendesk, and others

Intuitive, natural language interface to get answers and insights from across contact center systems and organizational data

Copilot for Service  
in Outlook



Copilot for Service  
in Salesforce

# Boost agent productivity in the flow of work

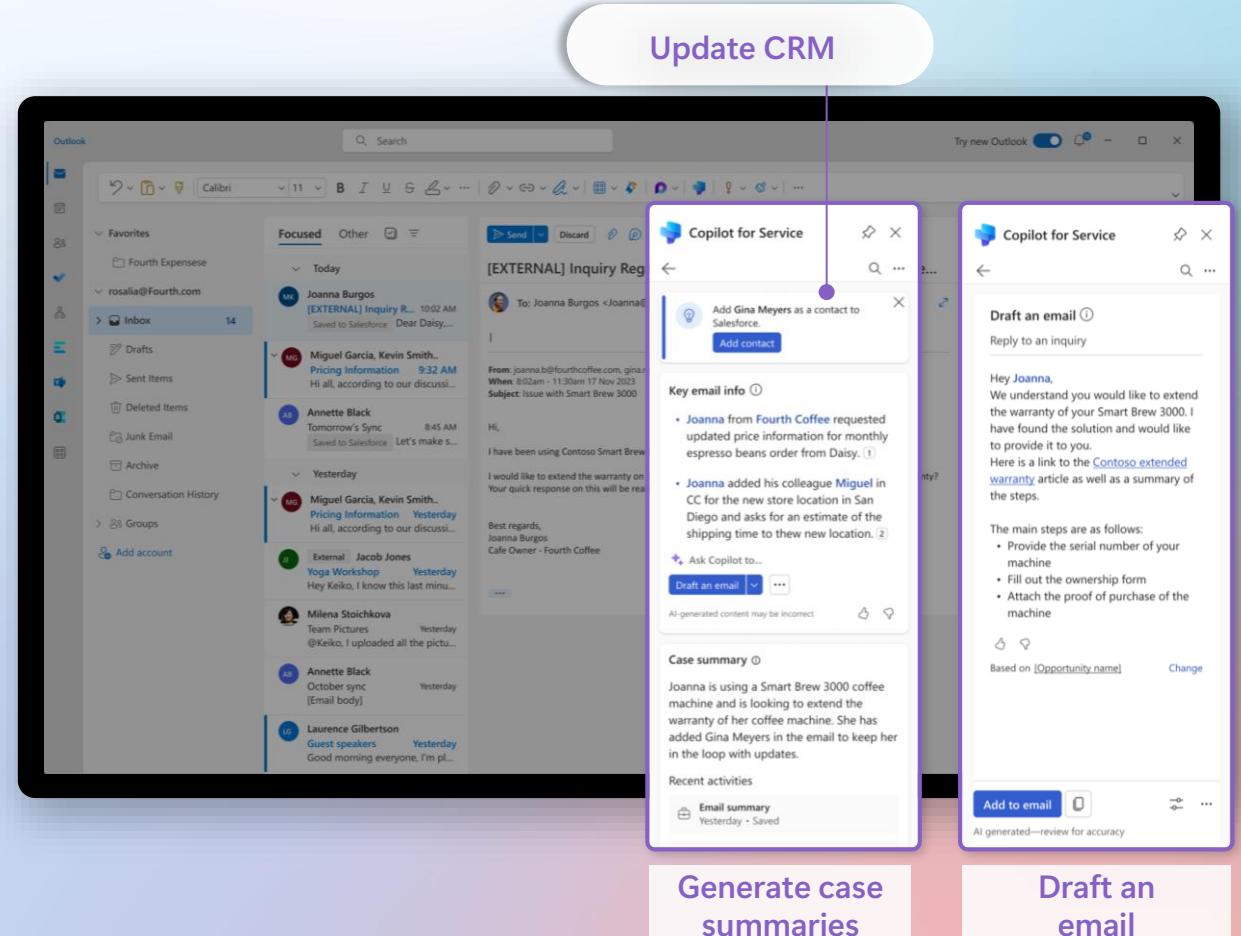
Get answers and respond to customers fast

View Copilot-generated case summaries pulling insights from CRM data to **rapidly understand history and reduce onboarding time**

Generate personalized emails and contextual follow-ups that pull in email conversations and CRM information to **accelerate responses**

Get automated summaries of conversations for **fast wrap-ups and handoffs**, reducing time spent on writing or skimming for context

View and update CRM records directly from Outlook and Teams to **simplify wrap-ups**



# Boost agent productivity in the flow of work

Automate routine tasks with ease

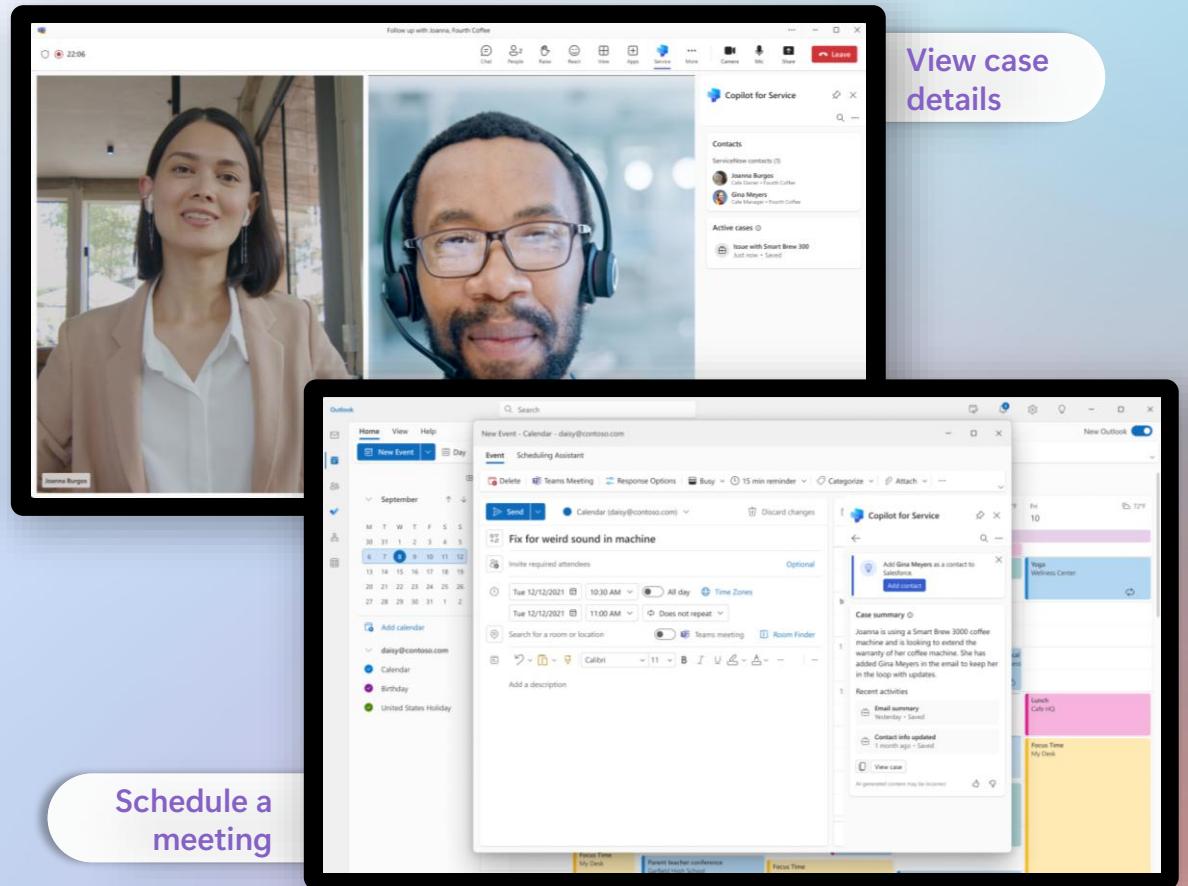
Schedule meetings and pull in case summaries to  
**quickly add context**

View case details directly in Teams to **ramp up quickly** during a meeting

Generate meeting recaps with summaries  
of key discussion points and suggested next  
steps to **accelerate wrap-ups**

Schedule a  
meeting

View case  
details



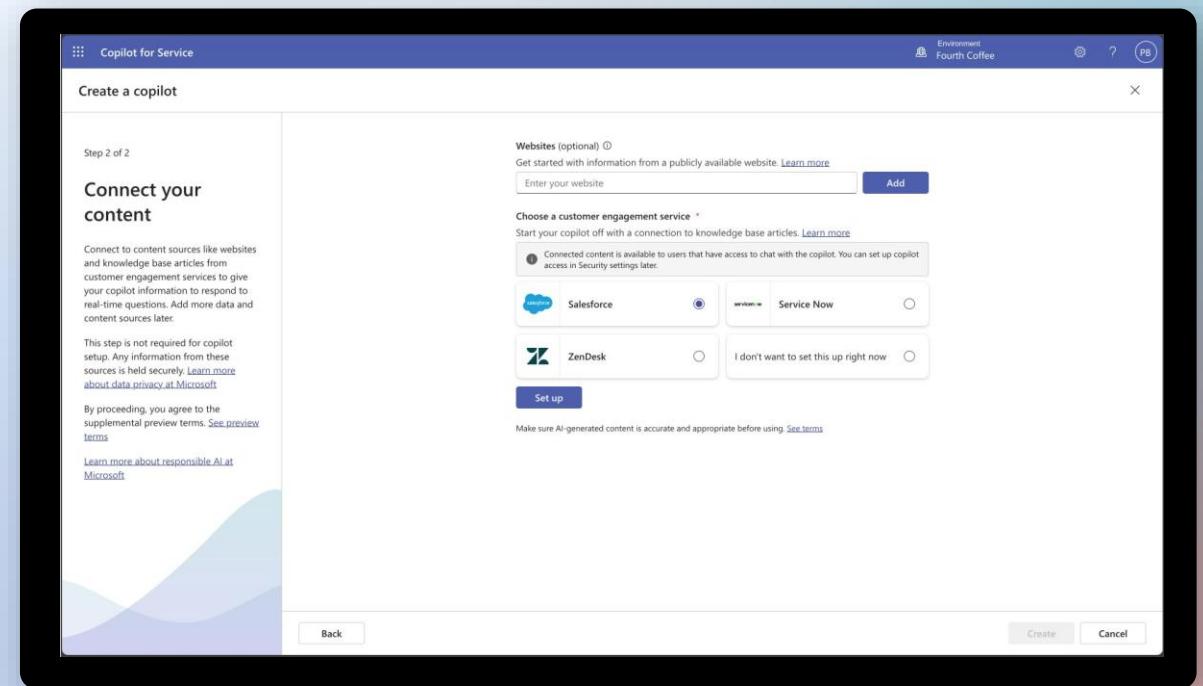
# Connect trusted knowledge sources

## Combine generative AI with contact center knowledge

Connect to existing contact center systems and other trusted knowledge sources like public websites, SharePoint, knowledgebase articles, and offline files

Out-of-the-box integrations with major service vendors including Salesforce, ServiceNow, and Zendesk

Copilot analyzes CRM data, internal knowledge, historical cases, and customer interaction data to deliver customized, relevant responses to agents



Connect knowledge sources

# Infuse generative AI into your contact center

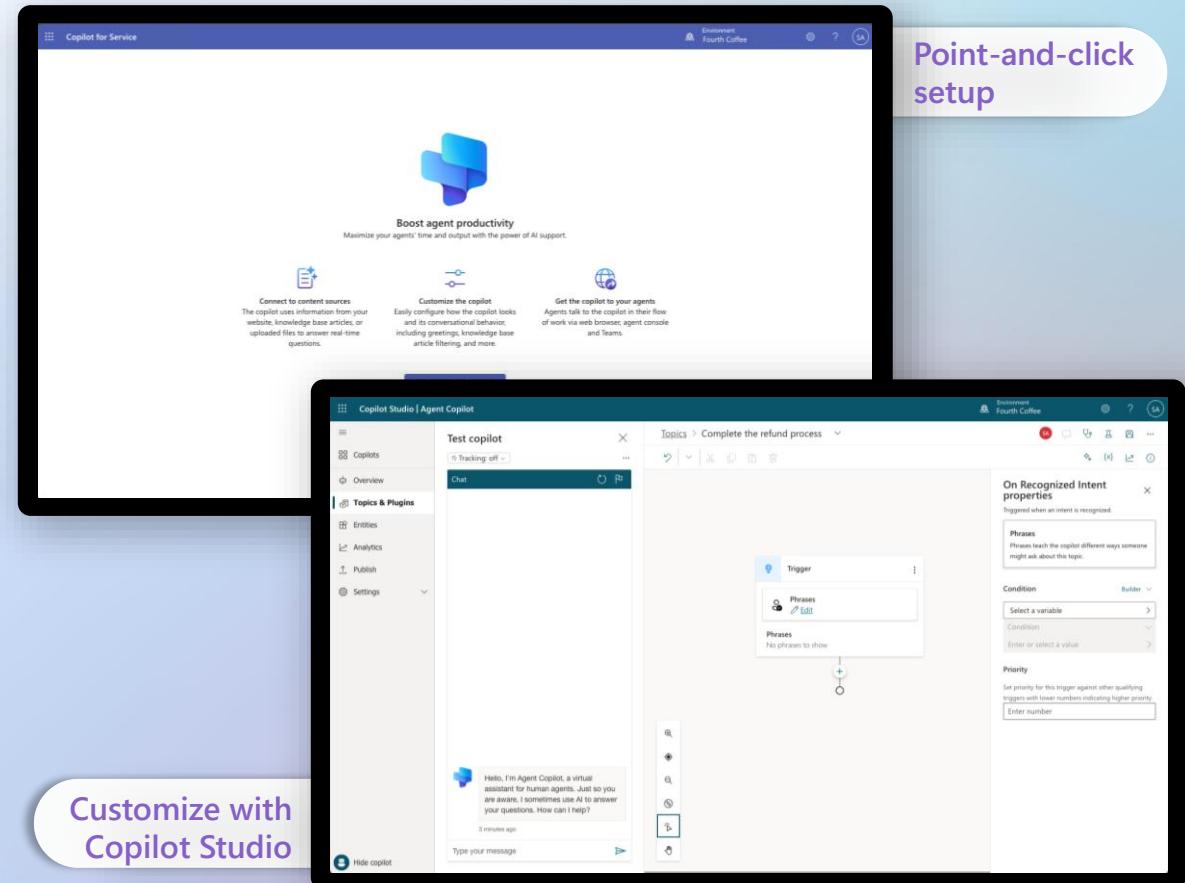
Accelerate go-live with pre-built integrations and easy customization

Accelerate time to production with point-and-click setup

Customize with Microsoft Copilot Studio—add additional topics, automate actions and workflows

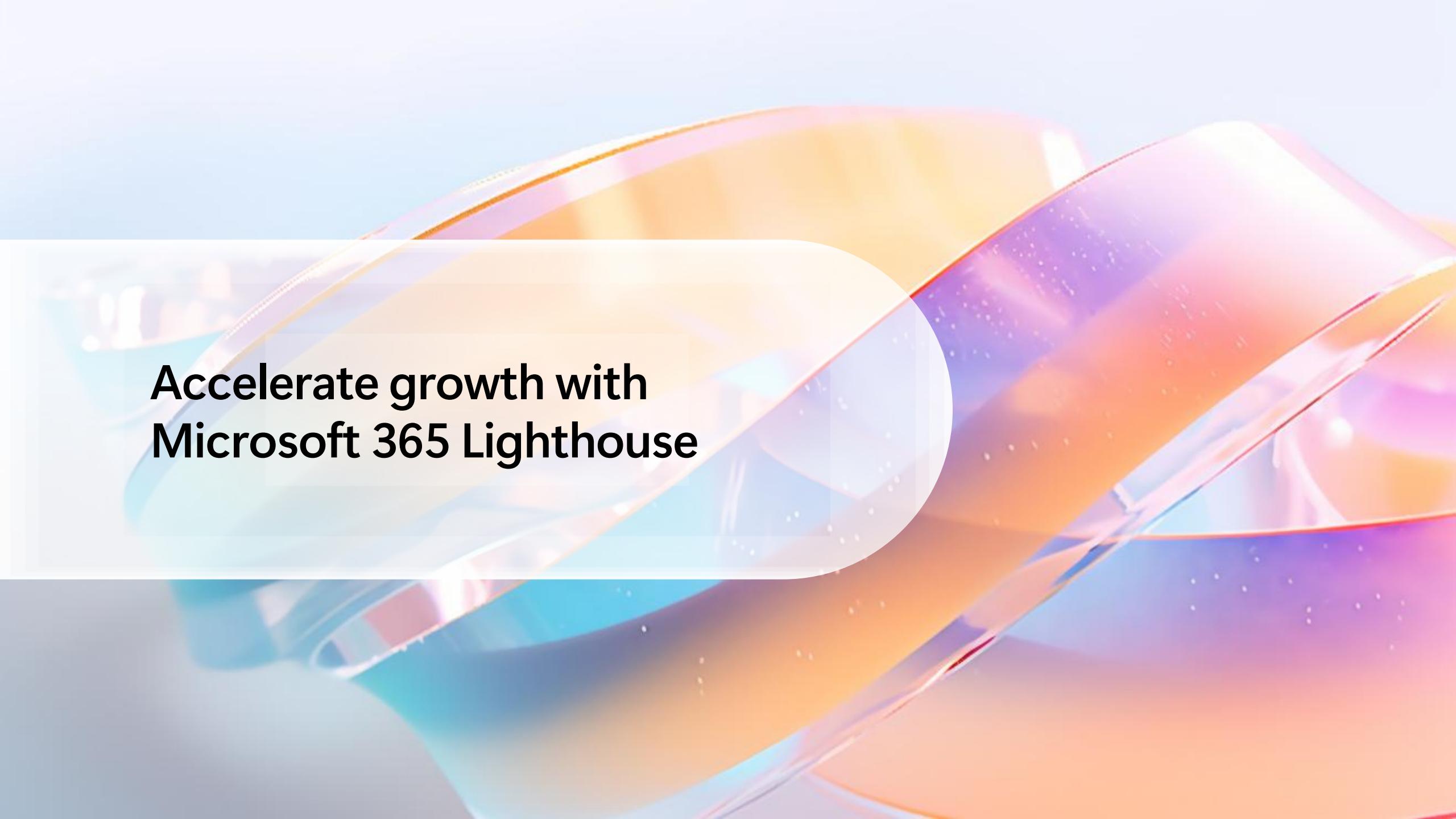
Extend to other systems with more than 1,000 pre-built and custom connectors that eliminate the need for expensive IT integration work

Customize with  
Copilot Studio



# Licensing details with Microsoft Copilot for Service

App	Scenario	Capability	Copilot for Microsoft 365	Copilot for Service
 Outlook	Email read	Highlight key emails	Y	Y
		Summarize email threads	Y	Y
		Save emails and appointments to CRM		Service value
		Summarize email threads with CRM data		Service value
		Add/update contacts to CRM		Service value
		Read/write/summarize access to CRM entities		Service value
	Email compose	Draft new email	Y	Y
		Draft reply email	Y	Y
		Use excel data in email reply	Y	Y
		Draft reply with CRM data		Service value
		Draft reply with Teams meeting summary and tasks		Service value
		Read/write/summarize access to related CRM entities		Service value
	Calendar	Meeting prep with CRM case summary		Service value
		Read/write/summarize access to related CRM entities		Service value
 Teams	During meeting	Catch me up, Q&A, discussion so far, wrap up	Y	Y
		Real time service prompts and tips		Service value
		Read/write/summarize* access to related CRM entities		Service value
	Post meeting	Summary, notes, tasks	Y	Y
		Follow up items with CRM task creation		Service value
	Chat/ Microsoft 365 Chat	Q&A and summarize* over content	Y	Y
		Q&A over connectors (Salesforce, ServiceNow, Zendesk)	Y	Y
		Summarize and Q&A over CRM data		Service value



**Accelerate growth with  
Microsoft 365 Lighthouse**

# Microsoft 365 Lighthouse



## Monitoring and Alerts

Monitor customers centrally to identify gaps in end-customer configuration



## Proactive Account Management

Tap into AI-driven customer insights to help you better plan and engage with customers



## Simplified Onboarding

Quickly and easily configure settings, create users and assign licenses



## Tenant Configuration

Create, apply and manage configuration baselines across all your tenants



## User, Device & Data Protection

Ensure your customers stay protected across devices, data, and users



Simple. Secure. AI-powered.

# Tap into three opportunities with Microsoft 365 Lighthouse

01



Unlock Copilot Opportunities

02



Get customers AI-Ready

03



Use renewals as compelling moment

Identify which customers are eligible

>40% customers are not AI-Ready

>60% of renewals happening in H2

# Proactive account management made easy with Sales Advisor



Take your customer relationships to the next level with AI-powered insights & recommendations.

Anticipate your customers' needs and discover the best ways to add value and support business growth.

## Key Scenarios:

- Discover opportunities to improve retention & grow
- Identify and manage active trials to improve conversion
- Prepare & manage upcoming subscription renewals

The screenshot shows the Microsoft 365 Lighthouse interface. On the left is a navigation sidebar with options like Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, and Sales advisor (which is selected). The main content area is titled 'Opportunities' with a sub-section 'Customer acquisition'. It displays an 'Acquisition summary' with counts for total tenants (114), total opportunities (161), total seats (6.4k), and high-probability opportunities (5). Below this is a chart titled 'Opportunities by product' showing distribution across Microsoft 365 Business Premium, Microsoft Teams Exploratory, and Microsoft 365 Business Standard. A table lists opportunities for various tenants, including Bellows College, Contoso Pharmaceuticals, Fourth Coffee, Graphic Design Institute, Humongous Insurance, Lucerne Publishing, Liberty's Delightful Sinful Bake..., and Lemoyne Healthcare Company. Each row includes details like recommendation, probability, product, total seats, date created, and a 'Provide feedback' link.

Tenant	Recommendation	Probability	Product	Total seats	Date created	Provide feedback
Bellows College	Convert customer with usage on expiring trial to paid license	High	Microsoft Teams Exploratory	76	12/19/2022	
Contoso Pharmaceuticals	Facilitate deployment of customer's new trial	High	Microsoft 365 Business Basic	676	12/13/2022	
Fourth Coffee	Facilitate deployment of customer's ongoing trial	High	Microsoft 365 Business Basic	2343	11/29/2022	
Graphic Design Institute	Facilitate customer's new trial usage	Medium	Microsoft 365 Business Premium	76	11/29/2022	
Humongous Insurance	Convert customer with usage on expiring trial to paid license	Medium	Microsoft 365 Business Premium	76	11/29/2022	
Lucerne Publishing	Facilitate deployment of customer's ongoing trial	High	Microsoft 365 Business Basic	56	11/29/2022	
Liberty's Delightful Sinful Bake...	Facilitate usage during customer's ongoing trial	Medium	Microsoft Teams Exploratory	67	11/29/2022	
Lemoyne Healthcare Company	Convert customer with usage on expiring trial to paid license	High	Microsoft Teams Exploratory	67	11/29/2022	

Available Now

# Unlock the Copilot for Microsoft 365 opportunity



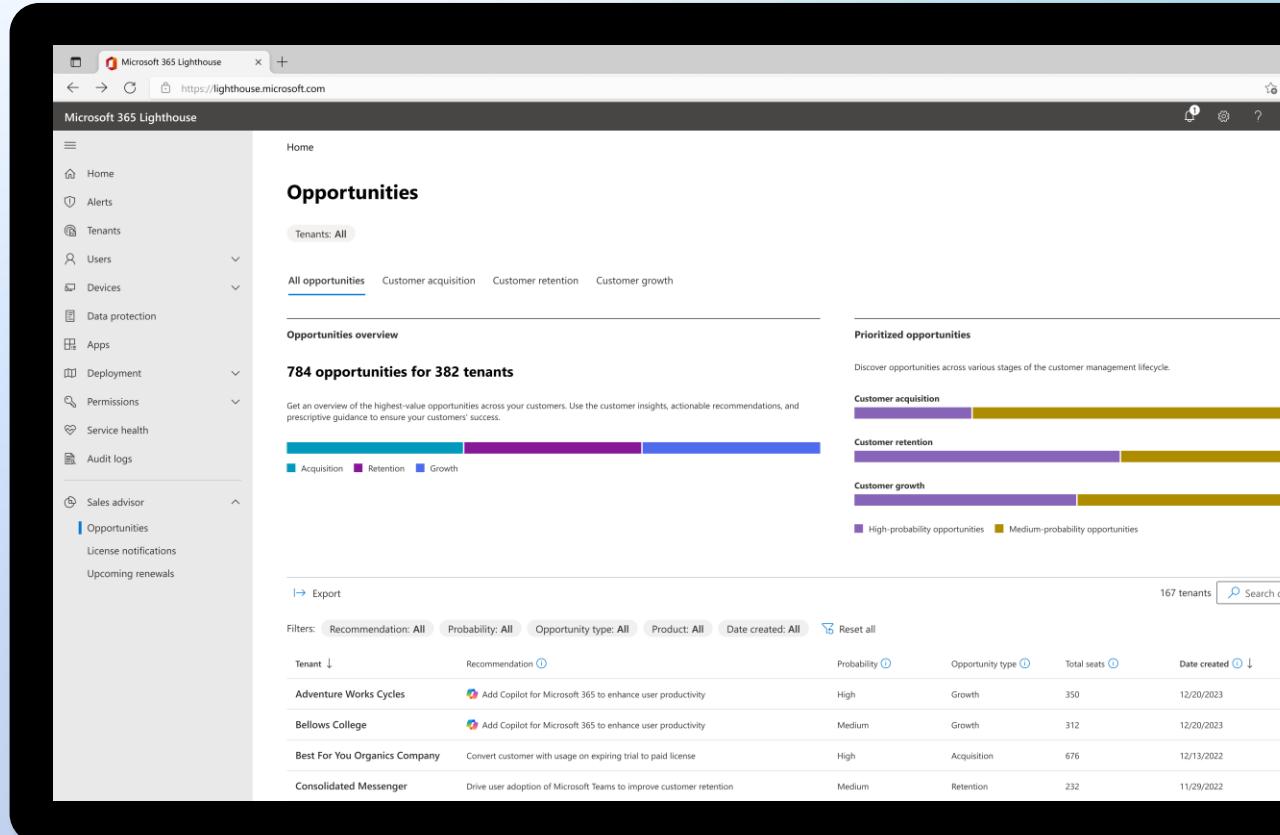
Accelerate your GTM with guidance on which customers are eligible and ready for Copilot for Microsoft 365

With Sales Advisor you can:

**Proactively identify** customers with eligible licenses

**Prioritize and target customers** based on insights and propensity scoring

**Optimize customer engagement** with best practice guidance and marketing content



The screenshot shows the Microsoft 365 Lighthouse Opportunities page. The left sidebar includes Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, and Sales advisor (which is expanded to show Opportunities, License notifications, and Upcoming renewals). The main content area is titled 'Opportunities' with a sub-section 'Opportunities overview'. It displays '784 opportunities for 382 tenants' with a bar chart showing the distribution of opportunities by stage: Acquisition (blue), Retention (purple), and Growth (yellow). A callout box highlights the 'Customer acquisition' bar. To the right, there's a section titled 'Prioritized opportunities' with three horizontal bars: 'Customer acquisition' (High-probability opportunities in blue), 'Customer retention' (Medium-probability opportunities in purple), and 'Customer growth' (Medium-probability opportunities in yellow). At the bottom, a table lists opportunities for four tenants: Adventure Works Cycles, Bellows College, Best For You Organics Company, and Consolidated Messenger, with columns for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created.

Tenant	Recommendation	Probability	Opportunity type	Total seats	Date created
Adventure Works Cycles	Add Copilot for Microsoft 365 to enhance user productivity	High	Growth	350	12/20/2023
Bellows College	Add Copilot for Microsoft 365 to enhance user productivity	Medium	Growth	312	12/20/2023
Best For You Organics Company	Convert customer with usage on expiring trial to paid license	High	Acquisition	676	12/13/2023
Consolidated Messenger	Drive user adoption of Microsoft Teams to improve customer retention	Medium	Retention	232	11/29/2022

Available Now

# Get customers AI Ready



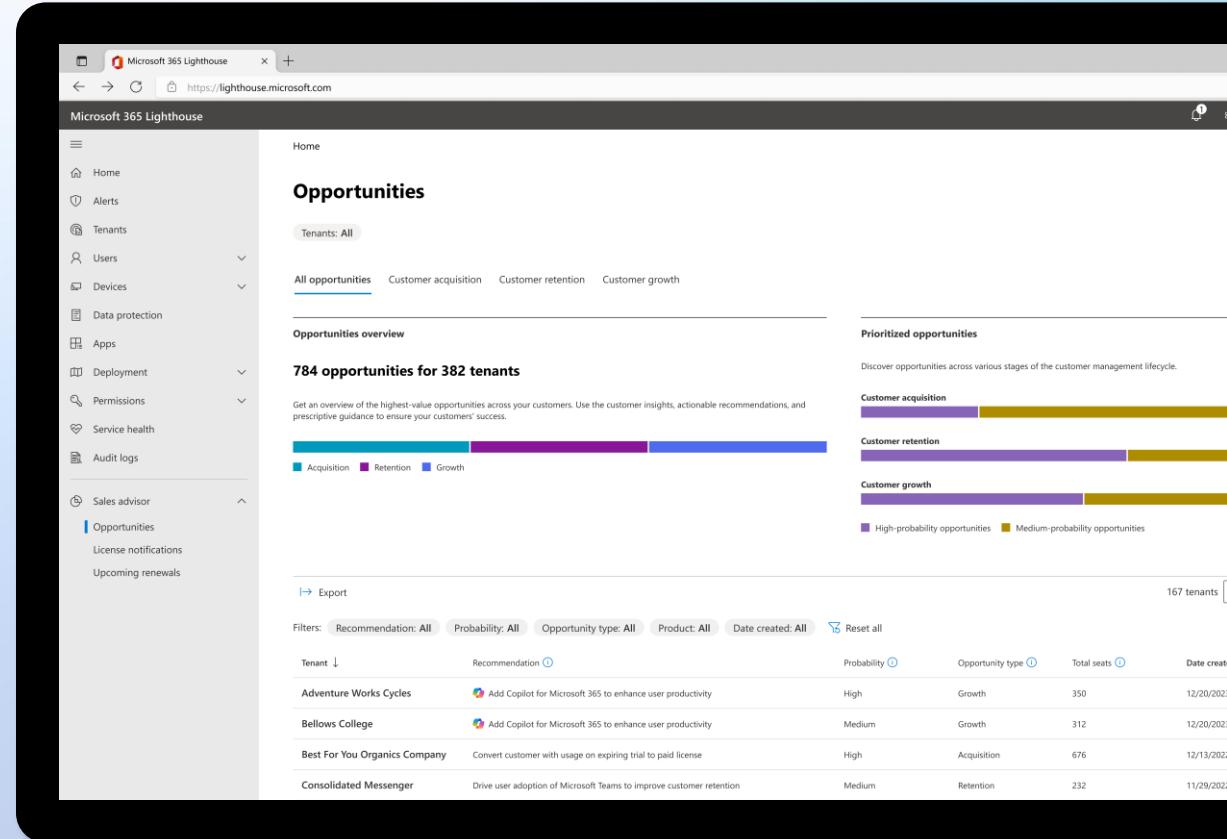
Help your customers get AI-ready to unlock Copilot's full potential for their organization

With Sales Advisor you can:

**Proactively identify** customers ready to move to more premium offers

**Prioritize and target customers** based on insights and propensity scoring

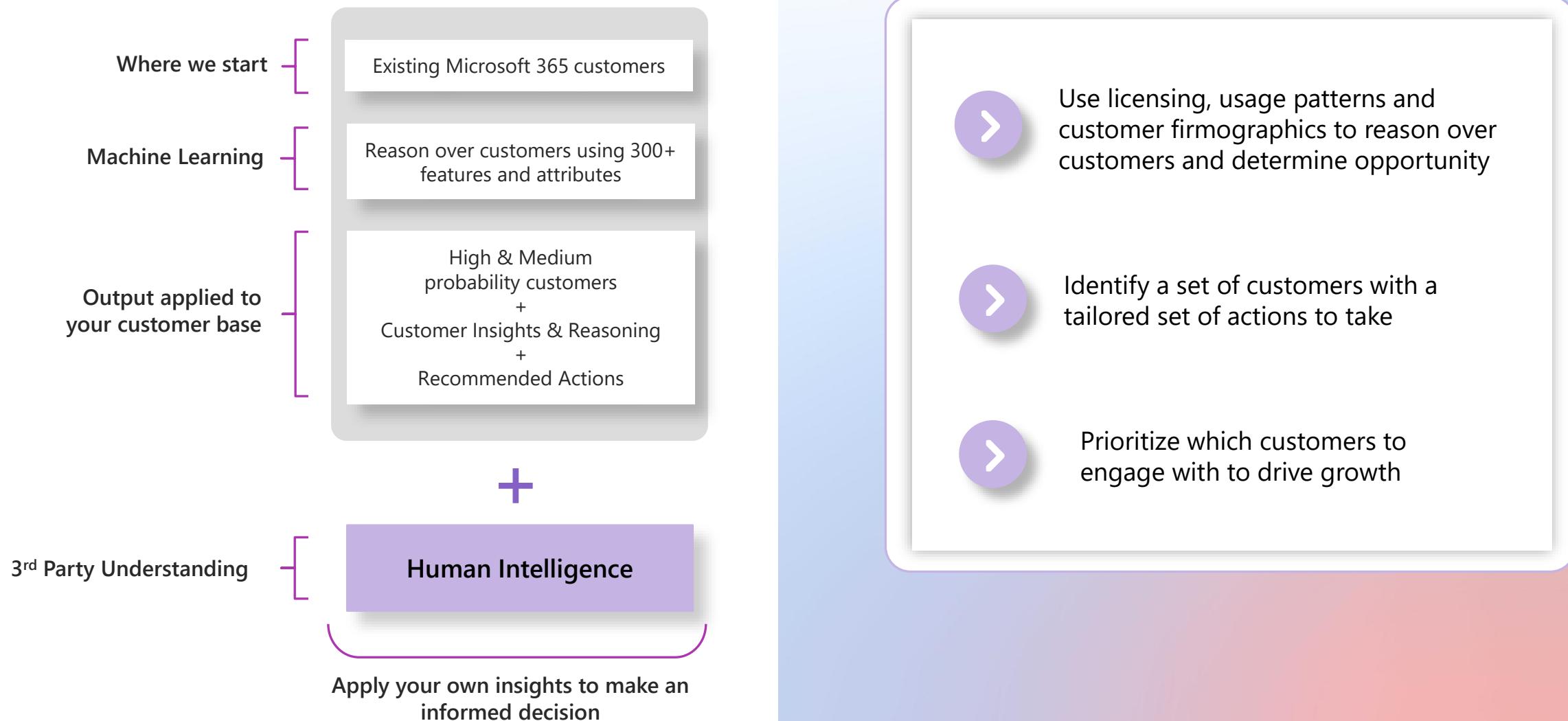
**Optimize customer engagement** with best practice guidance and marketing content



The screenshot shows the Microsoft 365 Lighthouse interface. On the left is a navigation sidebar with Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, and Audit logs. Below these are Sales advisor sections for Opportunities, License notifications, and Upcoming renewals. The main content area is titled 'Opportunities' under 'Microsoft 365 Lighthouse'. It shows a summary: '784 opportunities for 382 tenants'. A chart indicates the distribution of opportunities by stage: Acquisition (blue), Retention (purple), and Growth (yellow). Below the chart, there's a section for 'Prioritized opportunities' with three bars: Customer acquisition (purple), Customer retention (purple), and Customer growth (purple). At the bottom, a table lists opportunities for various tenants, showing columns for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created. Examples include Adventure Works Cycles, Bellows College, Best For You Organics Company, and Consolidated Messenger.

Tenant	Recommendation	Probability	Opportunity type	Total seats	Date created
Adventure Works Cycles	Add Copilot for Microsoft 365 to enhance user productivity	High	Growth	350	12/20/2023
Bellows College	Add Copilot for Microsoft 365 to enhance user productivity	Medium	Growth	312	12/20/2023
Best For You Organics Company	Convert customer with usage on expiring trial to paid license	High	Acquisition	676	12/13/2023
Consolidated Messenger	Drive user adoption of Microsoft Teams to improve customer retention	Medium	Retention	232	11/29/2023

# AI-driven opportunities & insights



Available Now

# Renewal management made easy with M365 Lighthouse

Boost customer retention & grow revenue with new renewal insights and recommendations

With Sales Advisor you can:

**Quickly & easily track** subscriptions approaching expiration within the next 7-90 days

**Prioritize customer outreach** by sorting or filtering on expiration, seat size, product or auto-renew status

**Optimize the renewal conversation** with contextual retention, upsell and expansion recommendations

The screenshot shows the Microsoft 365 Lighthouse web interface. On the left is a sidebar with navigation links: Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, Sales advisor, Opportunities, and Upcoming renewals (which is currently selected). The main content area is titled 'Upcoming renewals'. It displays a summary of tenant renewals: Within 30 days (12), Within 60 days (2), Within 90 days (115), and No recurring billing (45). Below this is a table of tenant details. The columns include Tenant, End date, Product, Recurring billing, Total licenses, Recommendations, Status, and Actioned by. Each row lists a tenant name, its remaining days until expiration, the product it uses, whether it has recurring billing, the total number of licenses, the number of recommendations, its current status (e.g., New, Accepted, Dismissed), and the user who last interacted with it. The table is paginated at the bottom.

# Partners have seen benefit both in **productivity** as well as **increased revenue** when using Microsoft 365 Lighthouse

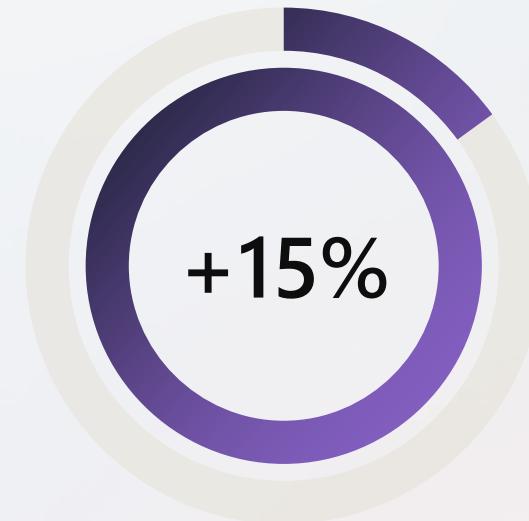
## Increased productivity

Partners are able to engage customers faster with relevant recommendations, allowing them to scale.



## Increased revenue

Partners have seen a 15% increase in revenue across existing customer base.



Revenue





Let us help you get started:

If you are not already using  
Microsoft 365 Lighthouse, visit:



[Lighthouse.microsoft.com](https://Lighthouse.microsoft.com)

If you are a current Microsoft 365  
Lighthouse user, start building your  
plan to leverage AI-driven insights  
today with Sales Advisor



# Partner Opportunity



# Become an **AI-Powered Organization**

Equip customers with a Copilot for every employee and agents to scale their impact

# Become an AI-Powered Organization

Equip customers with a Copilot for every employee and agents to scale their impact

Best-in-class AI Assistant



Copilot

For users & teams ready to  
supercharge their productivity

\$30 pnpm

- ✓ Secure web grounded chat + enhanced work chat grounded in your business data
- ✓ AI assistant within the Office apps you know and love
- ✓ Enterprise-grade security, privacy, and compliance

# Become an AI-Powered Organization

Equip customers with a Copilot for every employee and agents to scale their impact

## Best-in-class AI Assistant

For users & teams ready to supercharge their productivity



### Copilot

\$30 pum

- ✓ Secure web grounded chat + enhanced work chat grounded in your business data
- ✓ AI assistant within the Office apps you know and love
- ✓ Enterprise-grade security, privacy, and compliance



## Secure AI-Chat for all

For users just getting started with AI



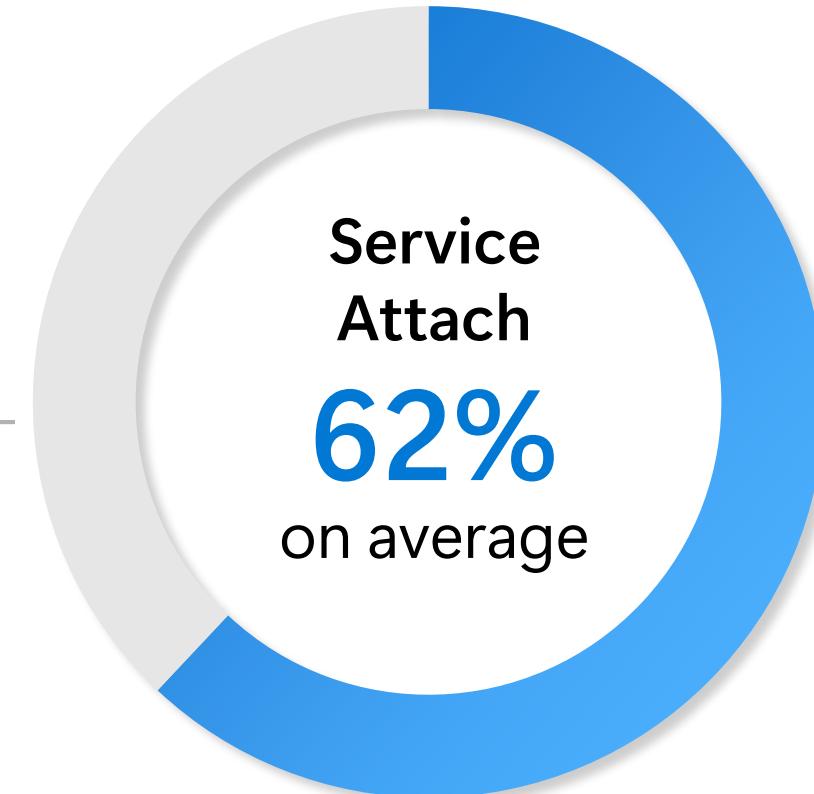
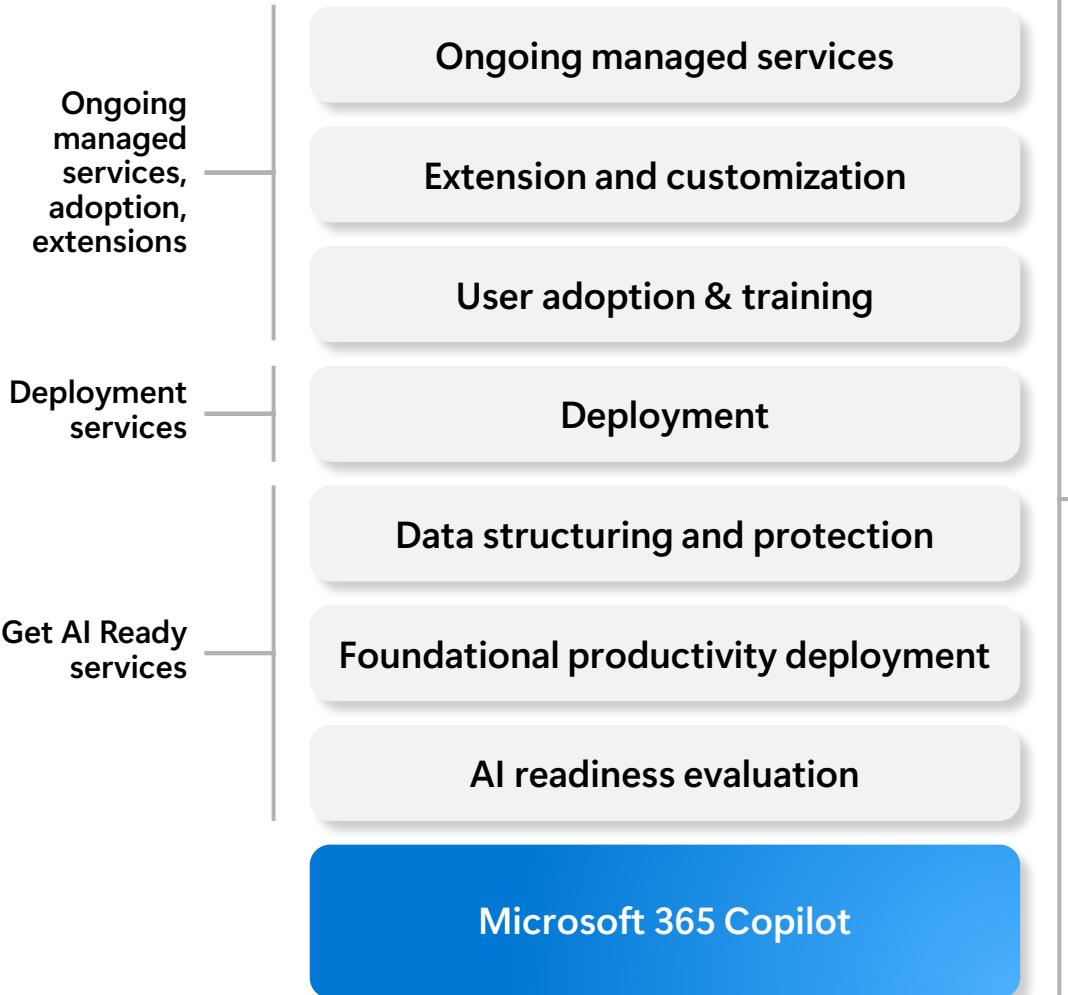
### Copilot Chat

Free + Consumption

- ✓ Secure web grounded AI chat to find answers and spark creativity
- ✓ IT management controls

Automate tasks and business processes with agents

# The Copilot partner opportunity



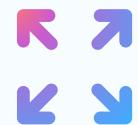
Potential services revenue for Enterprise customers.

Source: 2024 Modern Work Partner Total Economic Impact™ study, a commissioned study conducted by Forrester Consulting on behalf of Microsoft

## Go-to-market with the winning formula



Build your Getting Started Offer

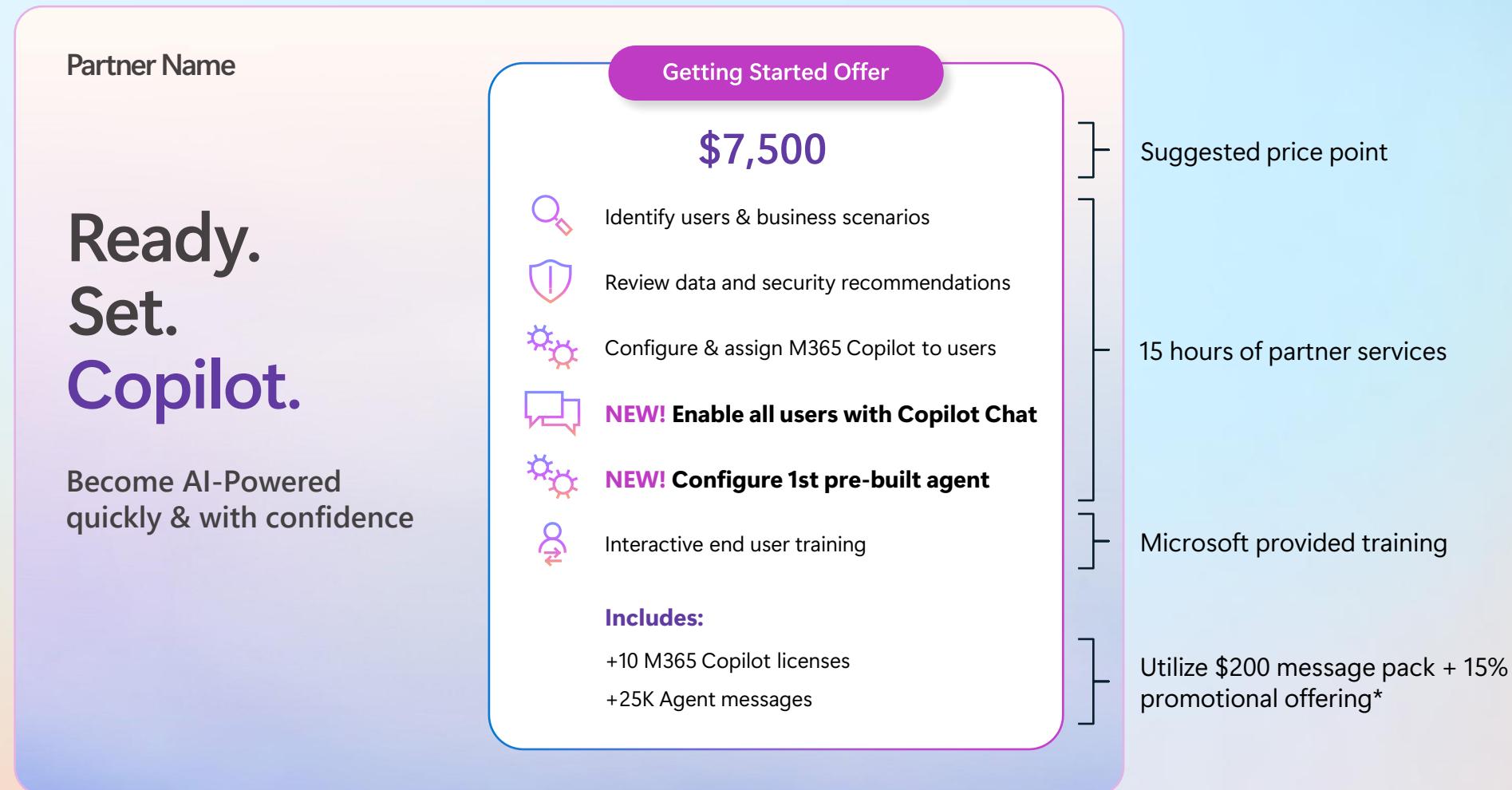


Extend Copilot Chat + agents to all



Land the Getting Started Offer  
during M365 renewals

# M365 Copilot Getting Started offer blueprint



# Adding Copilot Chat + Agent value to your offering



1. Add SharePoint  
agents to your offer

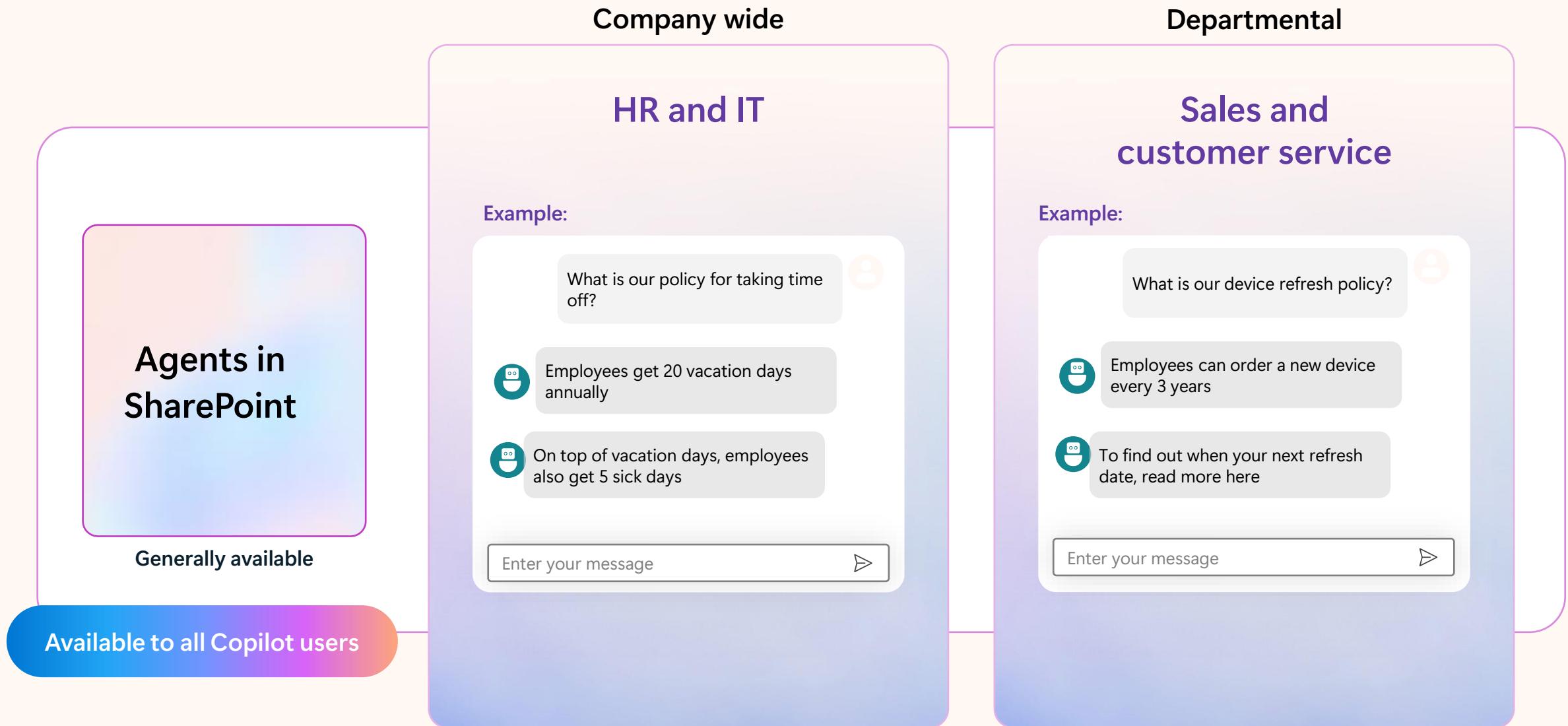


2. Set up the  
consumption meter



3. Earn PEC on  
consumption

# IT admins can build and deploy SharePoint agents quickly



# Users can build and use simple agents in Agent Builder

## Use a template

Mention (@) an existing agent template to get started

Agent templates:  
[Writing Coach](#), [Idea Coach](#), [Prompt Coach](#), [Career Coach](#), [Visual Creator](#), [Learning Coach](#)

## Build your own

Use Agent Builder to start creating your own agents

Agent possibilities:  
[Onboarding Buddy](#), [Resume Reviewer](#), [Contract/Legal Review](#), [Research Assistant](#), [Policy Search](#)

*(IT admin enablement required)*

**Go to market with  
agents**



# Go to market with Copilot agents

Meet customer demand and maximize revenue opportunity with offers spanning across the spectrum of agent capabilities

## Option 1

**Embed agents to your existing M365 Copilot offer**

M365 Copilot license + CSP services to customize M365 Copilot with agents connecting to key systems and apps

## Option 2

**Build a new agent specific CSP offering**

Copilot Studio license + CSP services to build and maintain an agent with capabilities to retrieve information

## Option 3

**Expand your agent specific CSP offering**

Copilot Studio license + CSP services to build and maintain internal and external service agents with capabilities to retrieve information and take actions

**CSP service opportunity**

\$

\$\$

\$\$\$

# #1 Opportunity in CSP: Sell customer service agents

Drive additional revenue and profitability by upselling customers with a website Gen AI chatbot

**Supercharge sales  
and service with an  
AI assistant**

Drive sales and service with a  
chatbot powered by Gen AI

**Get started today!**

**Get started offer:  
\$5,000**

- ✓ Resolve customer inquiries faster with an AI powered chatbot on your website
- ✓ Increase customer service and reduce customer service workload
- ✓ Pay only for what you use, in a flexible model that helps to grow your business

## Customer service agent

Empower customers to interact 24/7 on your website.

### Example:

Which of your laptops are suitable for a student and what is your return policy?



The Surface Laptop 3 brings performance and light weight – perfect for a student!



Our return policy is 30-days, so you can order today and test it at home

Enter your message 



# Blueprint: Copilot Studio "getting started" offer

Introduce a clear, predictable and cost-effective customer entry offer, with Copilot Studio licenses bundled with a baseline set of CSP services to support a successful initial implementation

Contoso Partner

## Supercharge sales and service with an AI assistant

Drive sales and service with a chatbot powered by Gen AI

**Get started today!**

Best Value!  
**\$5,000**

Getting started with confidence

- Identify agent need and define timeline
- Design and develop agent
- Connect data sources and test agent
- Launch agent on the website
- + Copilot Studio usage for the first 6 months<sup>1</sup>

1:1 Needs Assessment provided by partner, sponsored by Microsoft

17 hours of services provided by partner

Copilot Studio usage for the first 6 months

<sup>1</sup> Licenses are provided as part of package for the first 6 months, up to 20K messages per month

# Blueprint: Copilot Studio "getting started" offer

Introduce a clear, predictable and cost-effective customer entry offer, with Copilot Studio licenses bundled with a baseline set of CSP services to support a successful initial implementation

Your logo

Define your offer

Define your tagline

Define your CTA

Contoso Partner

**Supercharge sales and service with an AI assistant**

Drive sales and service with a chatbot powered by Gen AI

**Get started today!**

Best Value!  
**\$5,000**

Getting started with confidence

- Identify agent need and define timeline
- Design and develop agent
- Connect data sources and test agent
- Launch agent on the website
- + Copilot Studio usage for the first 6 months<sup>1</sup>

Define your price

Define your customer engagement model

Define services, license inclusion and terms

<sup>1</sup> Licenses are provided as part of package for the first 6 months, up to 20K messages per month

# Blueprint: Partner Economics for “getting started” offer

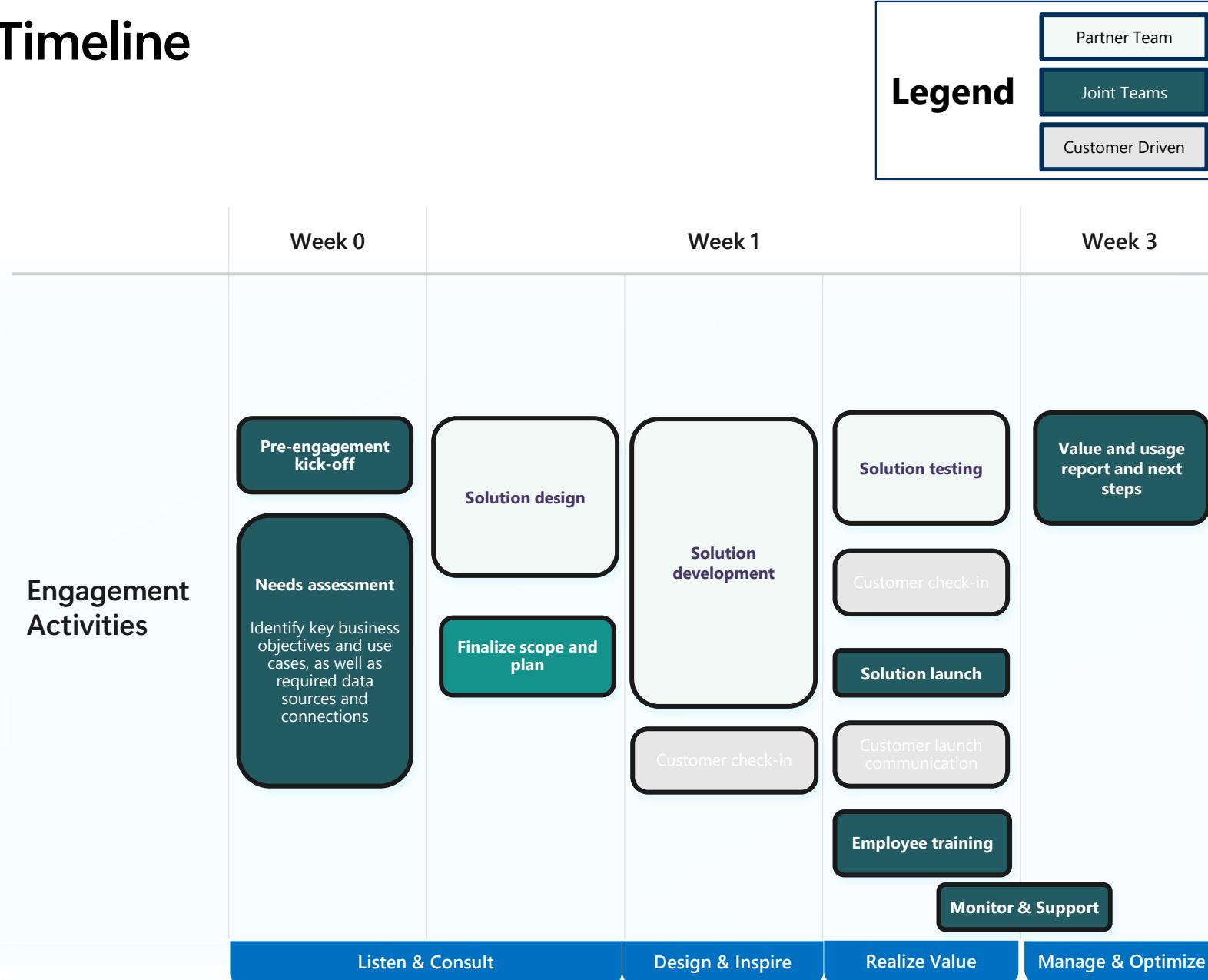
Offer gross margin of 42-50%, with an onramp for sales of additional Power Platform solutions (Power Apps, Power Automate, Copilot Studio) and services

Line Item	Qty. (licenses or hours)	Partner Cost	Customer Cost	Perceived customer value
Copilot Studio consumption	20K messages / month	\$1,200 Assumes 6 months @ 200/tenant/month	\$0.00	\$1,200 Assumes \$200/month
Partner Services	17	\$1,700 Assumes \$100/hour employee cost	\$5,000	\$4,250 Assumes \$250/hour billable rate
Automation features	--	\$0 Limited Power Automate capabilities included in Copilot Studio	Included	--
Needs Assessment	1	\$0 Assumes Microsoft provides assessment	Included	\$1,500 Assumes Microsoft rewards
Launch Kit	--	\$0 Assumes Microsoft provides the kit	Included	--
<b>Total</b>		<b>\$2,900</b>	<b>\$5,000</b>	<b>\$6,950</b>

# Blueprint: Partner services

Services item	Execution	Est. Hours
Identify use cases and design solution	Use case identification and agent overview: capabilities, data sources, connections, and automation (1:1 Needs Assessments or 1:many Copilot Briefings)	3-4
Solution development	Agent development	13
Solution testing, optimization and launch	Initial roll out to limited users to allow for optimization before launching org wide	1

# Example Timeline



# NEW! Copilot Studio agents simulated demos

Demo Copilot Studio to your customers and learn how to build your first solution.  
Watch the short instruction [video](#) to get started.

## To customer: show the value

Website agent: product discovery

[One Screen](#)

[Two Screens](#)

Website agent: return a product

[One Screen](#)

[Two Screens](#)

Agents in Copilot for M365 (plug-in):

[One Screen](#)

[Two Screens](#)

## To partner: step by step tutorials

Website agent: product discovery

[One Screen](#)

[Two Screens](#)

Website agent: return a product

[One Screen](#)

[Two Screens](#)

Agents in Copilot for M365 (plug-in):

[One Screen](#)

[Two Screens](#)

## Drive customer demand

[aka.ms/lowcodeneedsassessment](https://aka.ms/lowcodeneedsassessment)

Needs Assessments are 1:1 engagements for CSPs to build customer purchase intent and accelerate Low Code deals

Partner led customer engagement to drive low code purchase intent

Includes Copilot Studio, Power Apps & Power Automate

Partners eligible for a fixed payout from Microsoft

### Funding Amount

Market A = \$1500  
Market B = \$1,200  
Market C = \$800

[POE template](#)

[Content kit](#)

[More information](#)

Customer not eligible? Go to:  
[aka.ms/BAPartnerActivitiesCustomerAdd](https://aka.ms/BAPartnerActivitiesCustomerAdd)

# Selling Microsoft 365 E3 and E5



# Defending against cybercrimes has never been harder...

...and the security  
team's work is **endless**



## Growing frequency, speed, and targeting of threats

Microsoft security researchers have tracked  
a >130% increase in ransomware attacks.<sup>1</sup>



## Security gaps from fragmented tools

80 security tools for an average sized organization.<sup>2</sup>



## Alert fatigue and SOC burnout

2 in 5 security leaders feel they're at risk  
due to cybersecurity staff shortage.<sup>2</sup>

**How do I investigate more effectively?**



**How do I prioritize?**



**How do I prevent and stop attacks quickly?**



1. "Cyber Resilience". May 2021, Microsoft Security Insider.

2. February 2022 survey of 200 US compliance decision-makers (n=100 599-999 employees,  
n=100 1000+ employees)commissioned by Microsoft with MDC Research

# Sophisticated attacks cross multiple domains

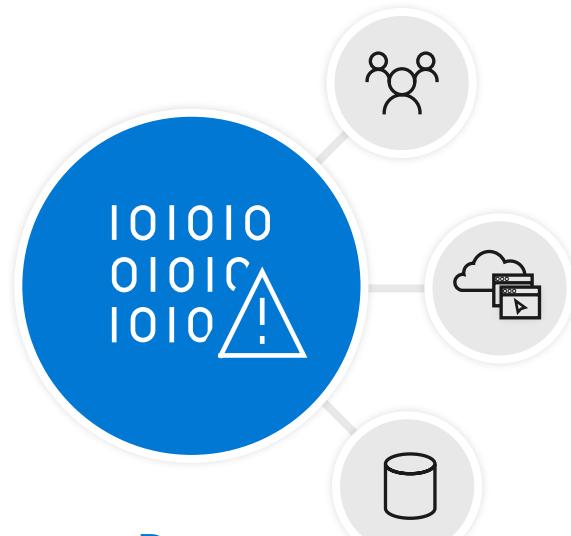
Growing frequency, speed, and targeting of threats



Human-operated  
ransomware campaign



Business email  
compromise campaign



Data  
exfiltration



Email



Endpoints



Identities



SaaS apps

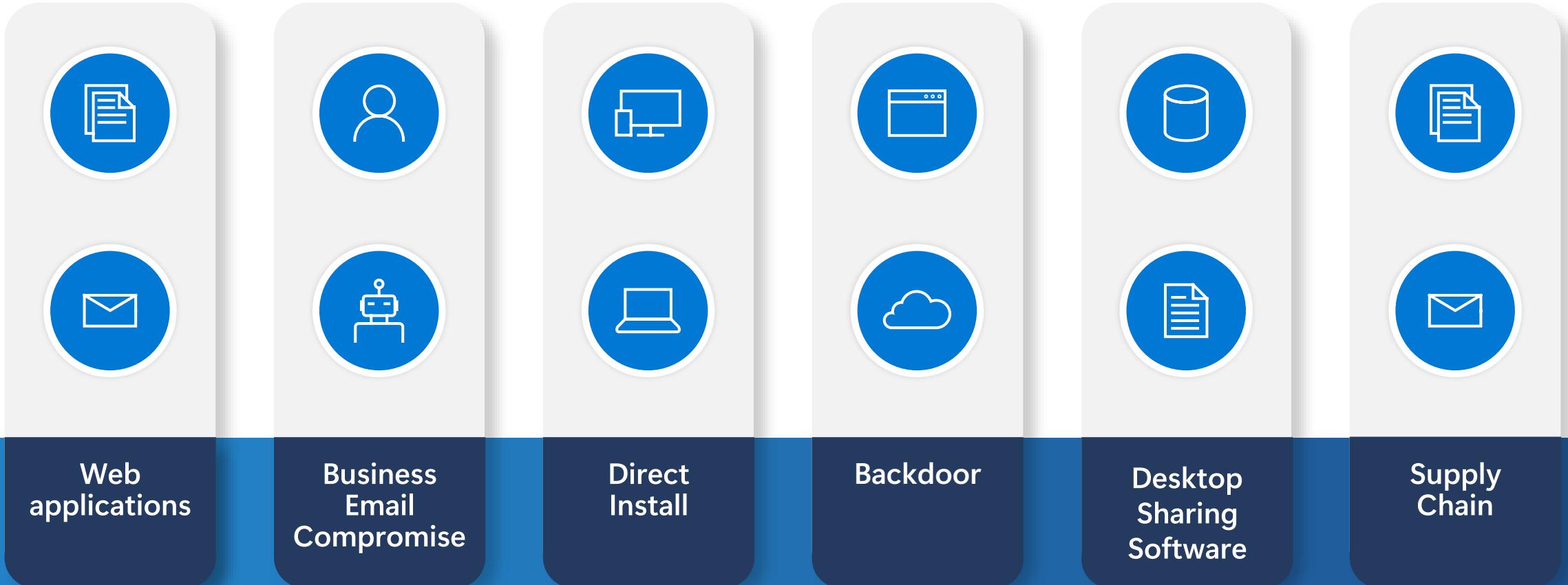


Data



Cloud workloads

# How attackers get in



Web applications account for 90% of data breaches<sup>1</sup>

# Securely harness the power of productivity tools and AI



## Secure productivity

Transform the way you work while reducing security risks with productivity apps and web-grounded AI experiences.



## AI-ready business protection

Protect your organization and business data, ensuring employees have access to the tools, resources, and applications they need.



## Optimized IT enablement

Empower IT to enhance business potential through performance, reliability, and safety provided by optimized cloud infrastructure control.

# New findings

New tactics



# The limits of comparison

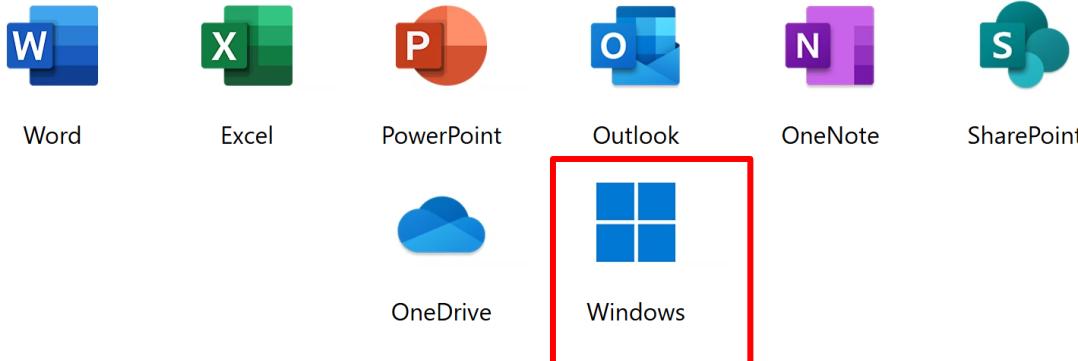
\$20.75

Office 365 E3 includes



\$33.75

Microsoft 365 E3 includes



- Microsoft Entra ID1 Plan 1
- Microsoft Defender for Cloud Apps Discovery
- Azure Information Protection Plan 1
- Personal Data Encryption
- Windows Information Protection
- Cloud user self-service password reset
- Hybrid user self-service password change/reset with on-premises write-back
- Advanced Security Reports
- DirectAccess supported
- Windows Hello for Business
- Microsoft Advanced Threat Analytics
- Intune Plan 1
- Mobile application management
- Windows Autopilot
- Group Policy support for Windows
- Endpoint Analytics
- Microsoft Defender Antimalware
- Microsoft Defender Firewall
- Microsoft Defender Exploit Guard
- Microsoft Defender Credential Guard
- BitLocker and BitLocker To Go
- Microsoft Defender for Endpoint Plan 1
- Microsoft Defender Application Guard for Edge

# New Tactic: Focus on outcomes

**Simplified messaging** about security that centers on recognizable use cases performs far better than product specifics in testing.

Top ranked challenges:

1. Confidential data protection/managing work data on personal devices
2. Phishing and ransomware
3. Securing access for remote workers

- [Cybersecurity Trends Research FINAL.pptx](#), Slide 24
- [Final Microsoft Intune MSP Report v10.30](#), Slide 42
- [IDC Worldwide SMB Cybersecurity Outlook, 2024](#), Slide 12
- [M365 Secure Productivity MPF Final Report](#), Slide 103
- [Analysys Mason, SMB IT spending: 5-year priorities](#), Slide 8

Larger customers (and those in regulated industries) are much **more likely to upgrade SKUs** for advanced security features.

Sources:

- [Cybersecurity Trends Research FINAL.pptx](#), Slide 24
- [Final Microsoft Intune MSP Report v10.30](#), Slide 42
- [Analysys Mason, SMB IT spending: 5-year priorities](#), Slide 8

# Confidential data protection

To

Microsoft 365 E3



From

Office 365 E1 Plus / E3

Verify user identities and devices before granting access to files



Keep work files: separate, encrypted, removable



Protect and label files: prevent downloading, editing or unauthorized viewing



# Managing work data on personal devices

To

Microsoft 365 E3



From

Office 365 E1 Plus / E3

Verify identities before granting access to files



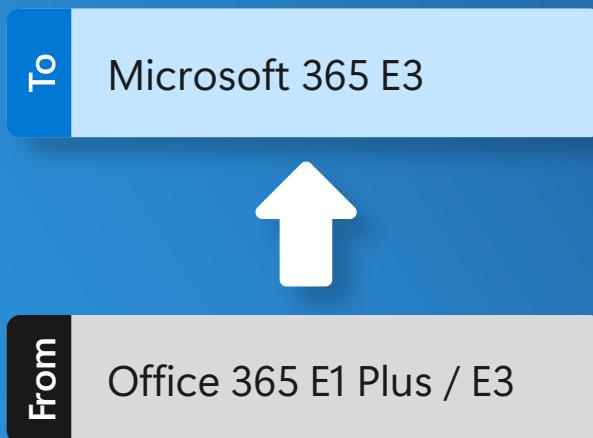
No company control over devices – access only through permitted apps



Prevent copy+paste of work data to other applications



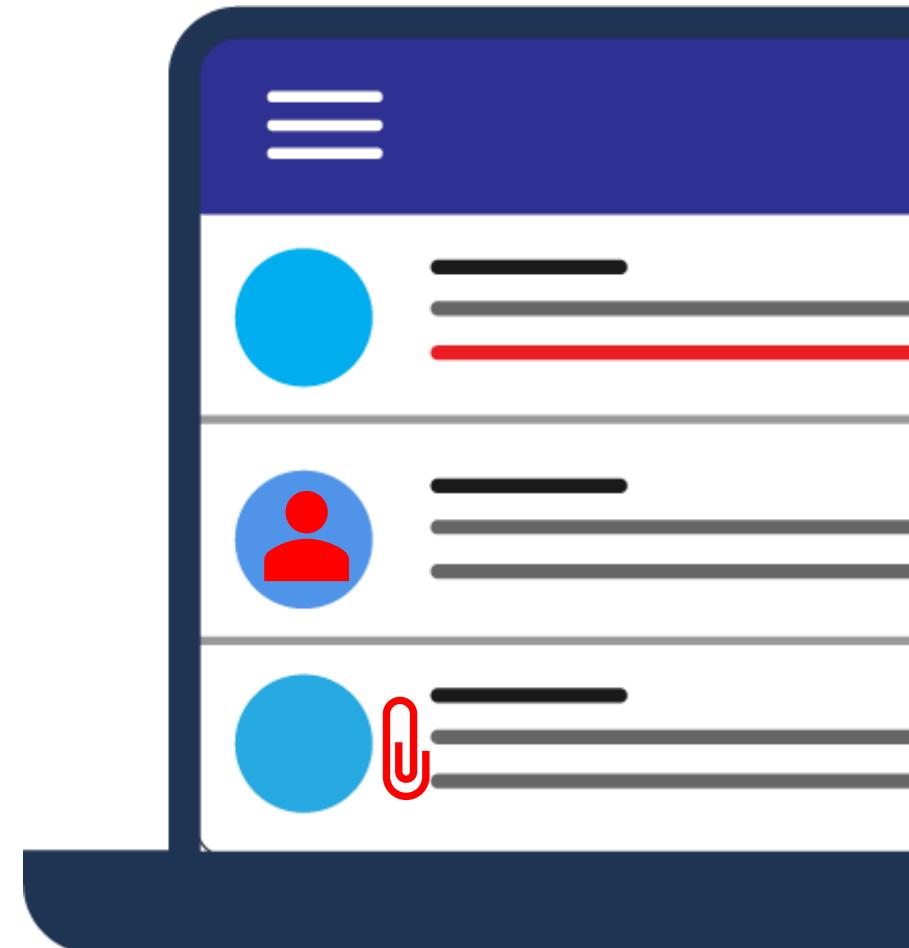
# Phishing and ransomware



Protection from clicking on a suspicious link

Verify email senders

Scanning of email attachments in real time



# Securing access for remote workers

To

Microsoft 365 E3



From

Office 365 E1 Plus / E3

Help stop password attacks with  
a text message or security app  
(multi-factor authentication)

Close security gaps by  
automating updates

Prevent device  
impersonation or  
“spoofing”

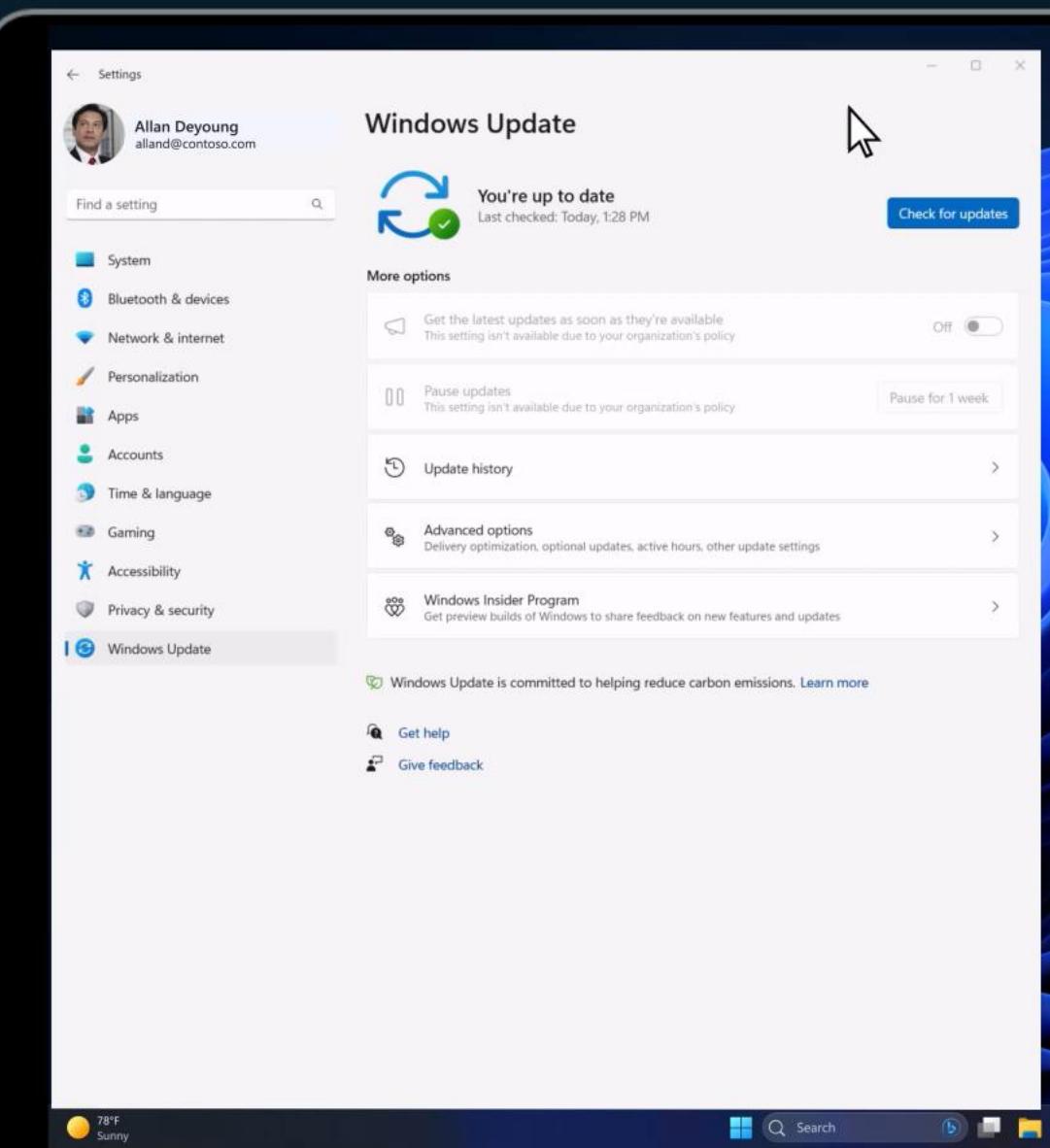
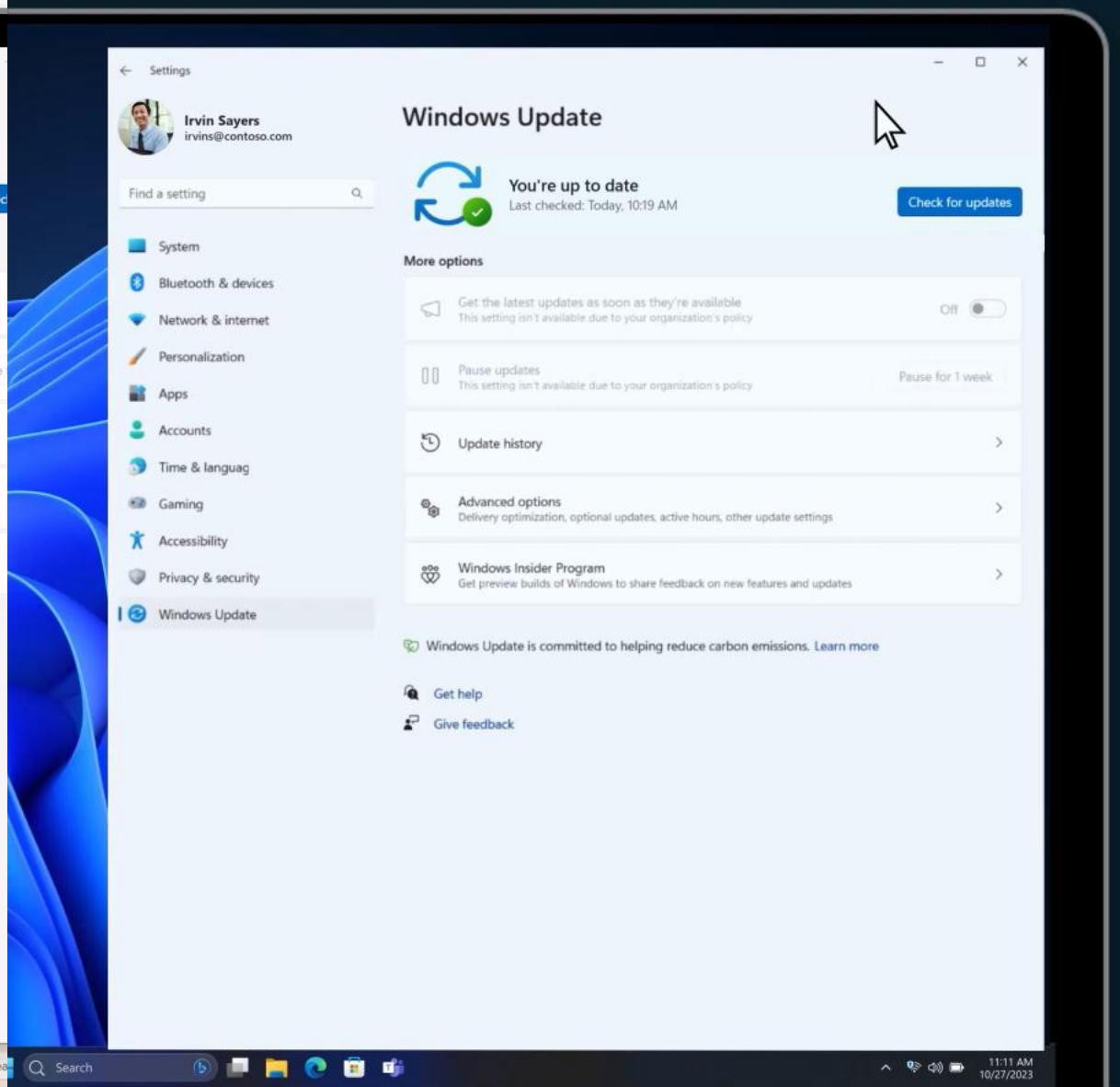
**99%**

of identity attacks are thwarted  
by multifactor authentication.<sup>1</sup>

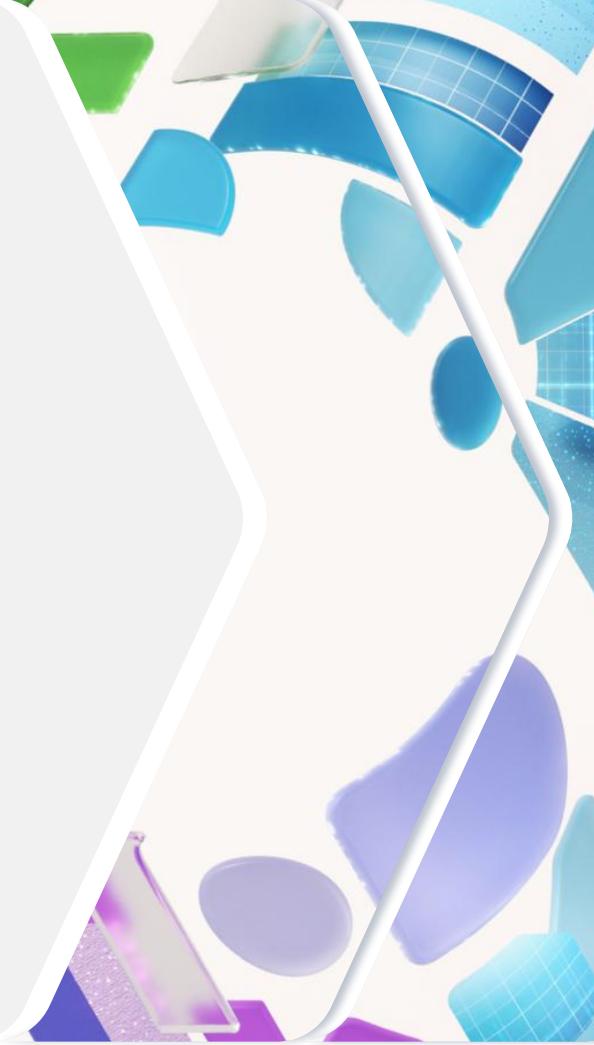


\*\*\*\*\*





# Microsoft E5



# Elevate your business security with ME5

To

Microsoft 365 E5



From

Office 365 E5/  
Microsoft 365 E3

## Benefits of Microsoft 365 E5

### Best-in-class security controls

Microsoft 365 E5



User/session risk  
and access control



Automatic sensitivity  
and retention labels for  
content that can be  
processed by Copilot



Discover and evaluate  
the risk of 400+ AI apps  
and implement controls  
for their use at work

# Features unique to Microsoft 365 E5



## Microsoft Entra ID P2

Microsoft Entra ID (formerly known as Azure Active Directory or Azure AD) provides identity and access management solutions for hybrid and multi-cloud environments.

[Learn more >](#)



## Microsoft Defender XDR

Protect your organization against sophisticated attacks such as phishing and zero-day malware.

[Learn more >](#)



## Azure Information Protection Plan 2

Discover, classify, label, and protect sensitive documents and emails.

## Information protection and governance

Identify risks by locating data and understanding how it's used. Help safeguard data where it lives by configuring protection and retention labels.

[Learn more >](#)



## Microsoft Purview Insider Risk Management

Intelligently identify, investigate, and take quick action on insider risks.

[Learn more >](#)



## Microsoft Teams Audio Conferencing

Conduct or call into meetings from your phone with Microsoft Teams Audio Conferencing, which allows up to 250 phone attendees.

[Learn more >](#)



## Power BI Pro

Deliver insights to enable fast, informed decisions with business analytics.

[Learn more >](#)



## Microsoft Defender for Endpoint

Scale your security with a unified endpoint security platform for preventative protection, post-breach detection, automated investigation, and response.

[Learn more >](#)



## Microsoft Defender for Identity

Use a cloud-based solution that helps protect your organization's identities from multiple types of advanced targeted cyberattacks.

[Learn more >](#)



## Microsoft Defender for Cloud Apps

View apps used in your organization, identify and combat cyberthreats, and monitor and control data travel in real time.

[Learn more >](#)



## Microsoft Purview eDiscovery

Help your organization find relevant data quickly and cost-effectively.

[Learn more >](#)



## Built-in non-Microsoft connectors

Empower multiple compliance solutions with high-fidelity data ingestion from a multitude of non-Microsoft data sources including social media platforms, instant messaging platforms, and document collaboration platforms.

[Learn more >](#)



## Microsoft Teams Phone Standard

Enable call control and Private Branch Exchange (PBX) capabilities in the cloud with Microsoft Teams Phone Standard.

[Learn more >](#)

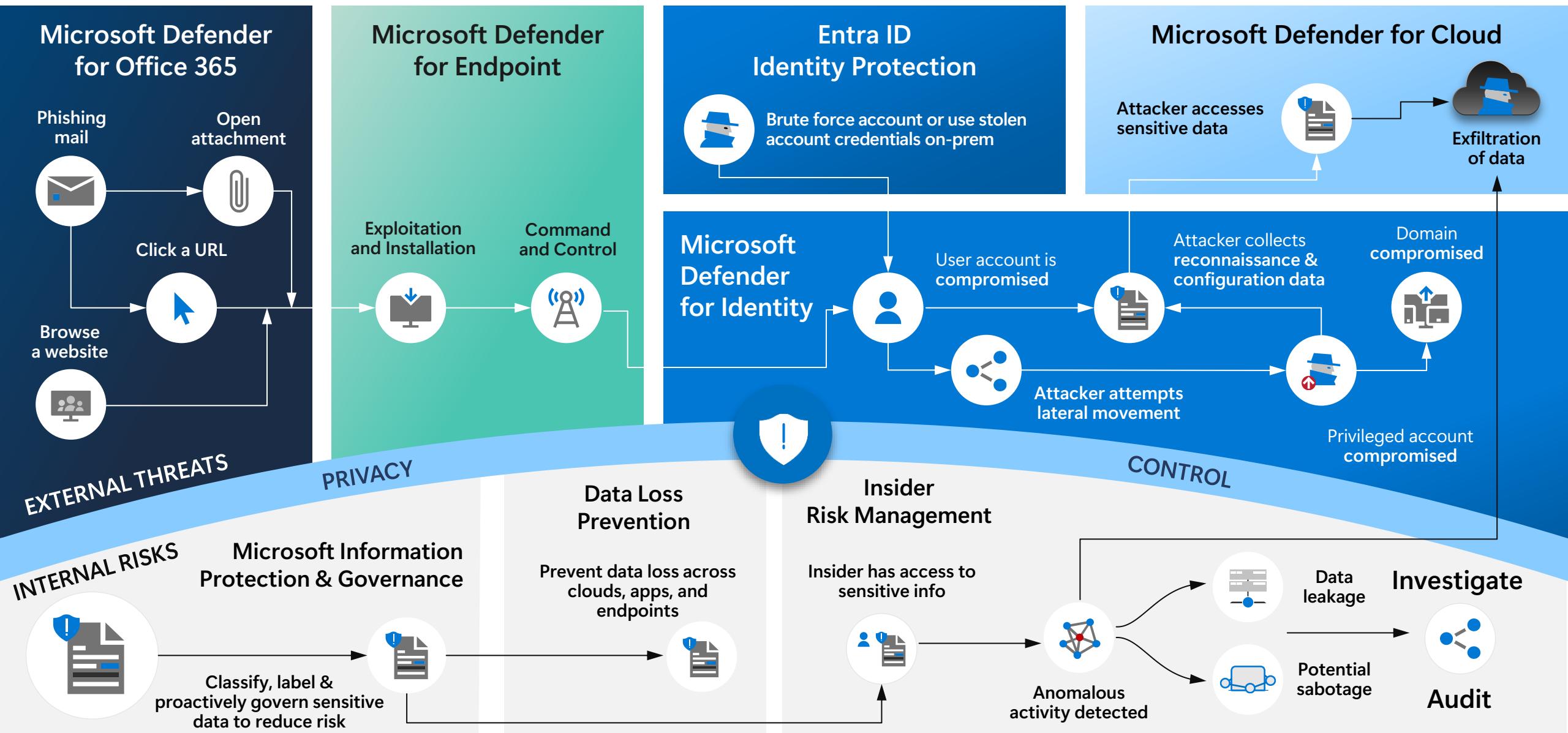
# Strengthen security posture



**Microsoft 365 E5 advanced security and compliance capabilities** can reduce or eliminate the business impact of loss and damage due to cyber threats.

**Protect your business** from malicious network attacks and identity theft with integrated and automated security from Microsoft Defender for Endpoint

# Microsoft 365 E5 protection from external threats



Security Features	M365 E3	M365 BP	M365 E5
Email and collab	Exchange Online Protection	Safe Attachments Safe links Advanced anti-phishing Exchange Online Protection	Threat explorer & trackers Compromised user detection Campaign views Automated investigation & response Attack simulation training Safe Attachments Safe links Advanced anti-phishing Exchange Online Protection
Apps and clouds	Cloud app discovery	Cloud app discovery	Defender for Cloud Apps Defender for Identity (on-prem) App governance Cloud app discovery
Identity Protection	Conditional Access	Conditional Access	Access Reviews Entitlement Management MFA registration policy Privileged Identity Management Identity Protection Risk-based conditional access Conditional Access
Endpoint Protection (Windows, macOS, Android, iOS)	Attack Surface Reduction Next generation protection (AV)	Auto investigation & remediation Vulnerability Management Endpoint Detection & Response Attack Surface Reduction Next generation protection (AV)	Auto investigation & remediation Vulnerability Management Endpoint Detection & Response Attack Surface Reduction Next generation protection (AV)
Endpoint Management (Windows, macOS, Android, iOS)	Application Management Device Management Zero-touch Windows deployment Endpoint Security Policies	Application Management Device Management Zero-touch Windows deployment Endpoint Security Policies	Application Management Device Management Zero-touch Windows deployment Endpoint Security Policies

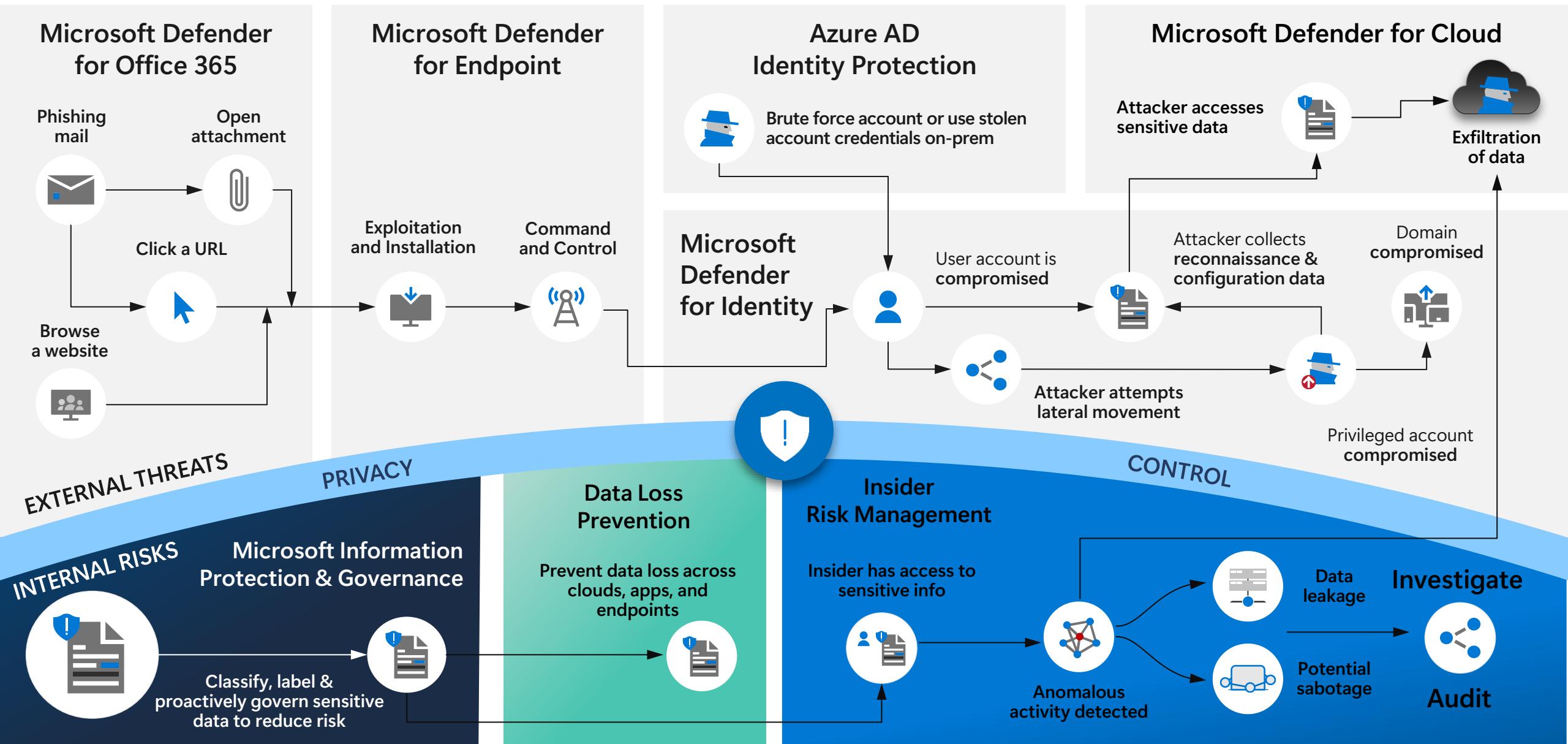
# Improve data management



Microsoft 365 **E5 best-in-class compliance capabilities** improve your compliance posture as industry and government requirements evolve and become more complex.

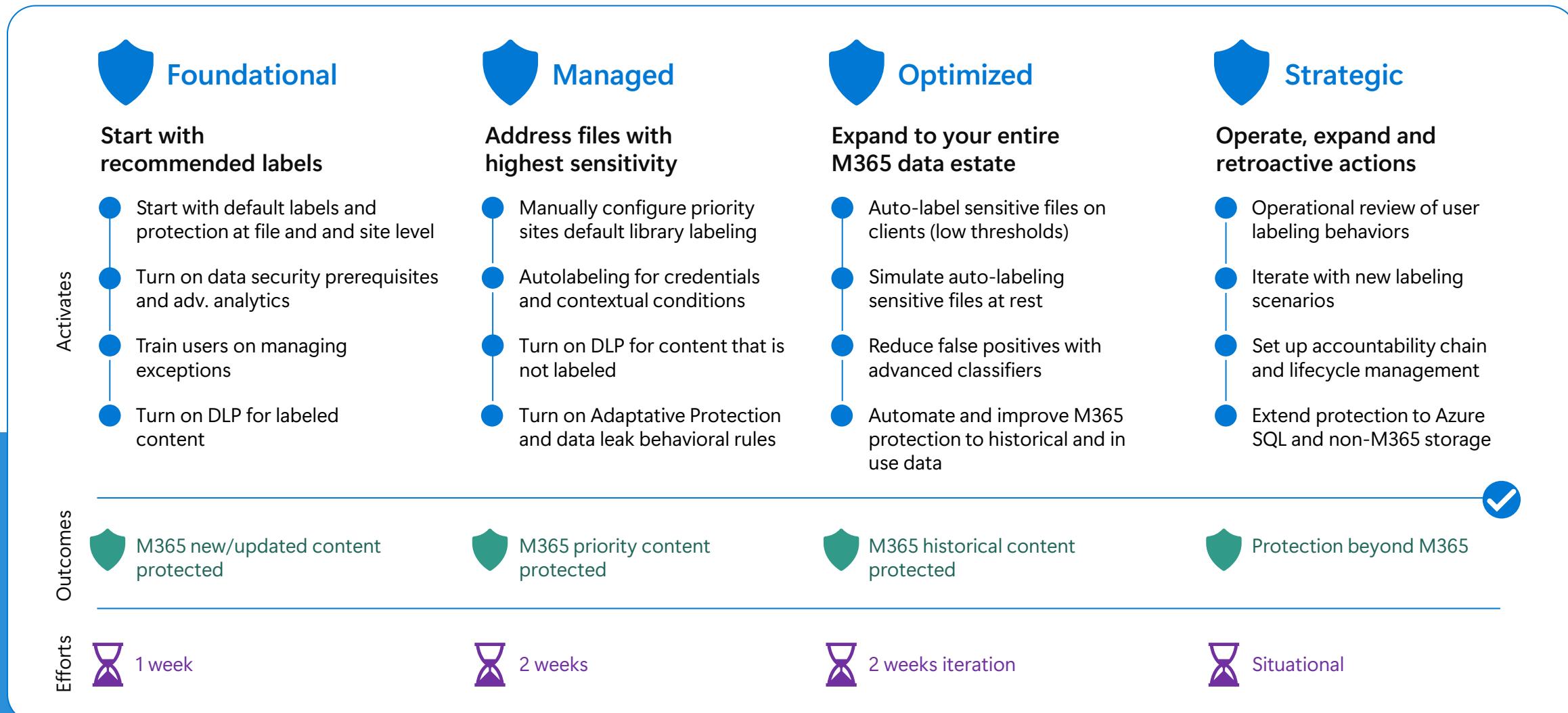
[Extend data governance](#) to reduce risk related to mistakes and abuses by insiders and support investigations when necessary.

# Microsoft 365 E5 internal risk protection





# Secure and default with Microsoft Purview and protect against oversharing



Compliance Features	M365 E3	M365 BP	M365 E5
Insider Risk Management			Privileged Access Management Information Barriers Customer Lockbox Communication compliance Premium & custom templates Compliance Manager
	Compliance Manager	Compliance Manager	Compliance Manager
Apps and clouds			Defender for Cloud Apps App governance Cloud app discovery
	Cloud app discovery	Cloud app discovery	Cloud app discovery
Information Protection & Governance	Automatic rule-based classification		Automatic rule-based classification Records management Data lifecycle management Teams DLP Endpoint DLP Trainable classifiers Sensitivity labels
			Sensitivity labels
	Sensitivity labels	Sensitivity labels	Sensitivity labels
	Data Loss Prevention (DLP)	Data Loss Prevention (DLP)	Data Loss Prevention (DLP)
eDiscovery & Audit			Custom compliance templates eDiscovery premium Audit Premium eDiscovery Content Search Audit
	eDiscovery	eDiscovery	eDiscovery
	Content Search	Content Search	Content Search
	Audit	Audit	Audit

# Download the full plan comparison table

» [Download >>](#)

**Microsoft 365, Office 365, Enterprise Mobility + Security, and Windows 11 Subscriptions**

Connect, protect, and empower every employee, from the office to the frontline worker, with a subscription plan that enhances productivity and drives innovation.

Jump to section → Microsoft 365 apps Social, intranet, and storage Analytics Data loss prevention (DLP) Endpoint and app management eDiscovery and auditing Windows

Email, calendar, and scheduling Knowledge, insights, and content Microsoft Viva Information protection Threat protection Insider risk management Add-on subscriptions

Meetings, calling, and chat Project and task management Cloud access security broker Identity and access management Data lifecycle management

● = Included + = Available by adding Teams Enterprise/Teams EEA

**Information Worker Plans**

Microsoft 365				Office 365			Microsoft		Enterprise Mobility + Security		Windows 11			Microsoft 365					Office 365
E3 (no Teams)	E5 (no Teams) <sup>1</sup>	E5 Security <sup>2</sup>	E5 Compliance <sup>3</sup>	E1 (no Teams)	E3 (no Teams) <sup>1</sup>	E5 (no Teams) <sup>1</sup>	Enterprise/ Teams EEA	E3	E5	Pro (for reference)	Enterprise E3	Enterprise E5	F1 (no Teams)	F1 (no Teams) <sup>1</sup>	F3 (no Teams)	F5 Security <sup>1</sup>	F5 Compliance <sup>2</sup>	F5 Sec+Compl <sup>3</sup>	F3 <sup>4</sup>
●	●			●	●	●													
Microsoft 365 for mobile	●	●		●	●	●	●												
Install apps on up to 5 PCs/Mac + 5 tablets + 5 smartphones	●	●		● <sup>5</sup>	●	●	● <sup>3</sup>												
Microsoft 365 for the web	●	●		●	●	●	●												
Visio for the web	●	●		●	●	●	●												
Loop components	●	●		●	●	●	●												
Create and share Loop pages <sup>4</sup> and workspaces	●	●		●	●	●	●												
Contribute to Loop pages and workspaces	●	●		●	●	●	●												
Clipchamp Standard	●	●																	
Microsoft Editor premium features	●	●																	
Multilingual user interface for Microsoft 365 apps	●	●																	
<small><sup>1</sup>Includes EEA (no Teams) plans. <sup>2</sup>Requires Microsoft 365 E3 (or Office 365 E3 and Enterprise Mobility + Security E3). <sup>3</sup>Limited to devices with integrated screens smaller than 10.9". <sup>4</sup>Mobile apps only. <sup>5</sup>Any user can create and share pages within a workspace to which they have been invited.</small>																			
<b>Email, calendar, and scheduling</b>																			
Exchange Kiosk (2 GB mailbox)																			
Exchange Plan 1 (50 GB mailbox + 50 GB archive)																			
Exchange Plan 2 (100 GB mailbox + up to 1.5 TB archive <sup>6</sup> )	●	●			●	●	●												
Calendar	●	●			●	●	●	●											
Outlook desktop client	●	●			●	●	●	●											
Auto-expanding email archive	●	●			●	●	●	●											
Exchange Online Protection	●	●			●	●	●	●											
Public folder mailboxes	●	●			●	●	●	●											
Resource mailboxes	●	●			●	●	●	●											
Inactive mailboxes	●	●			●	●	●	●											
Microsoft Shifts	+	+			+	+	+	+											
Microsoft Bookings	+	+			+	+	+	+											
<small><sup>6</sup>Microsoft 365 F1 includes the Exchange Kiosk service plan to enable Teams calendar only. It does not include mailbox rights. <sup>7</sup>100 GB initial archive with automatic expansion up to 1.5 TB.</small>																			

Microsoft 365

Windows

Frontline Worker Plans

● = Included + = Available by adding Teams Enterprise/Teams EEA

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<sup>4</sup>Mobile apps only.  
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