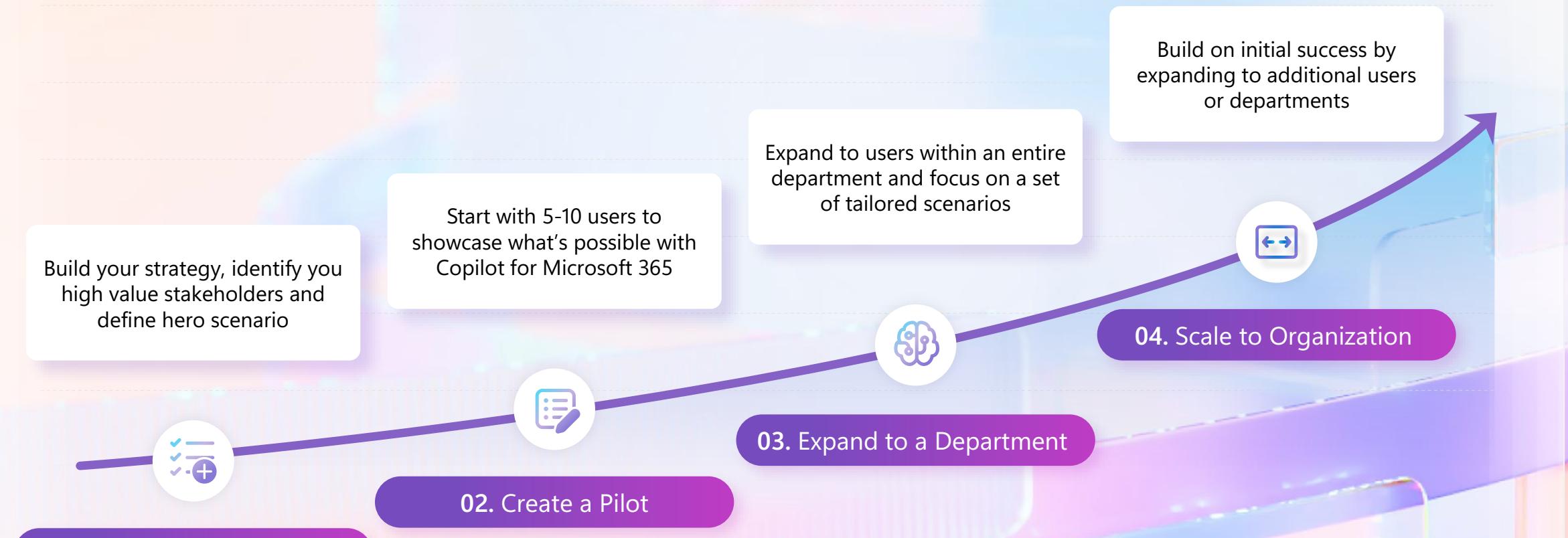


# Four steps to drive Copilot success with customers



# 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 Identify 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)

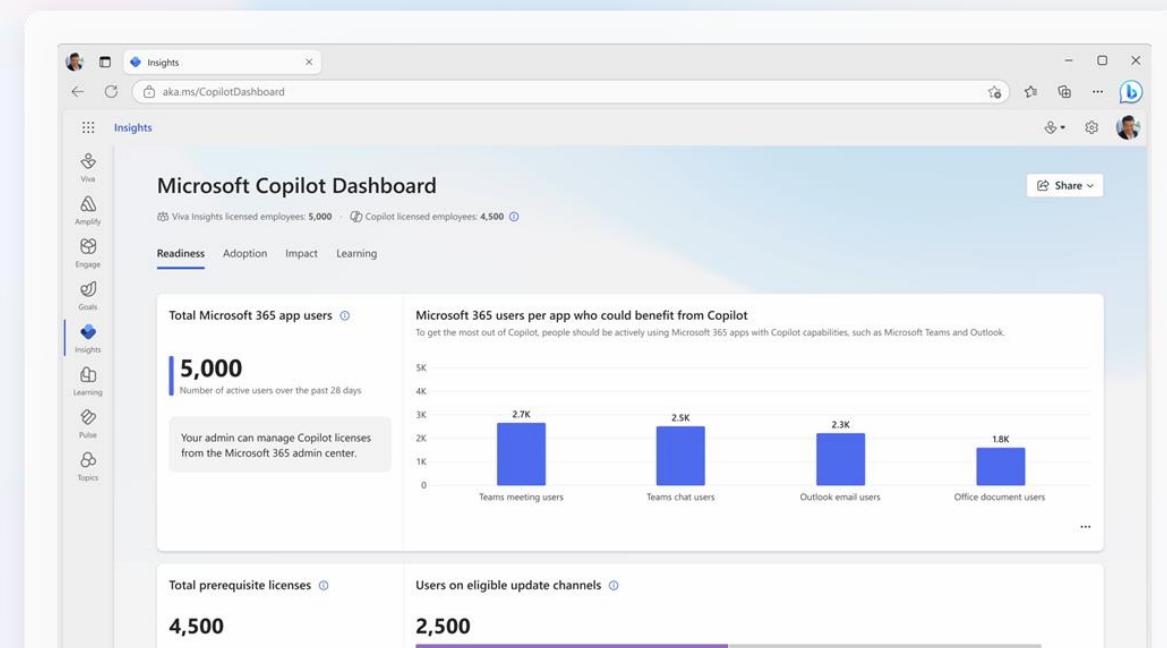
# Measure the impact of your Copilot investment

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

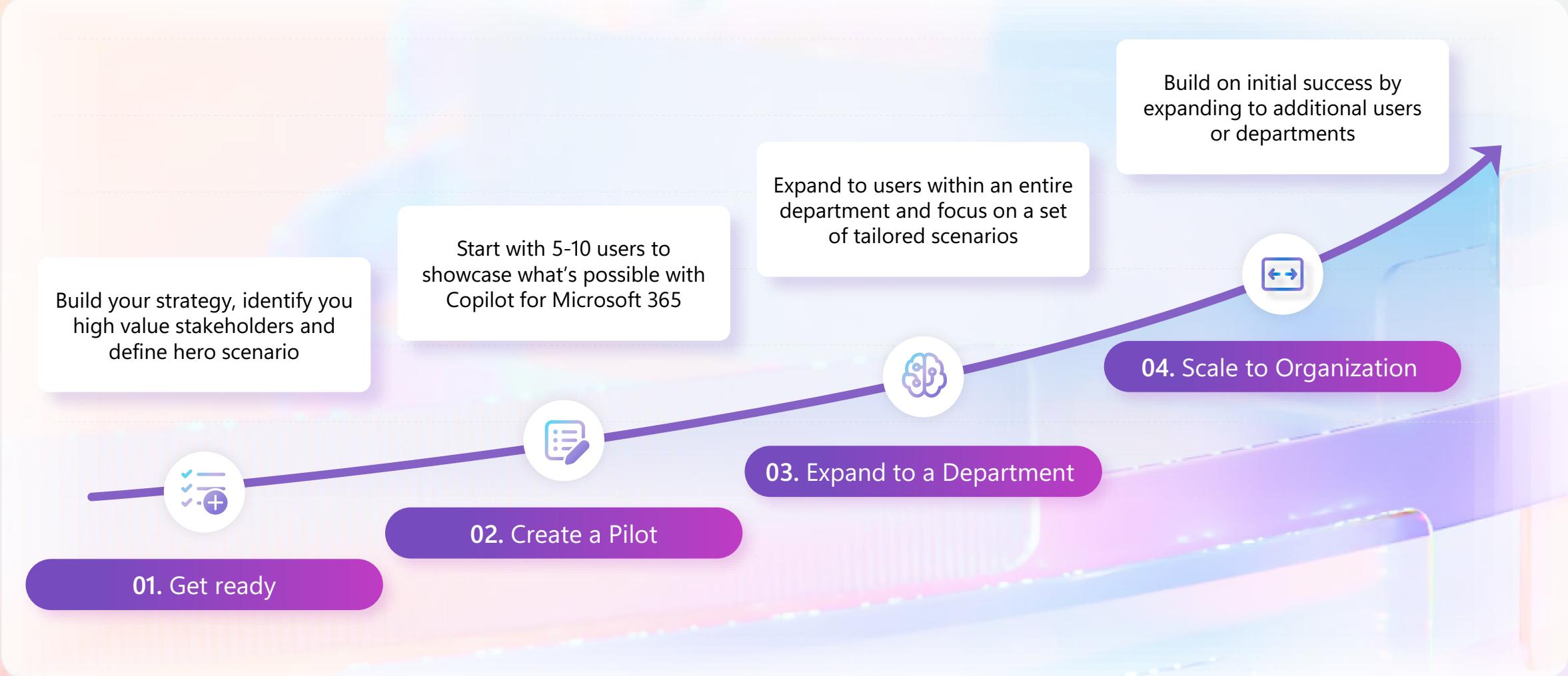
- + With a Microsoft Viva license (*available as add-on*), get advanced analytics across behavioral, collaboration and sentiment data to measure how Copilot has impacted work patterns



## Microsoft Copilot Dashboard

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

# Four steps to drive Copilot success with customers



# 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 selected. Below this are dropdown menus for "Apps" and "Categories". The main area is a grid of 16 cards, each representing a different prompt:

- Share meeting notes**: Draft an email with notes and action items from `meeting`.
- Write a status update**: Write a status report to my manager based on `file`. Include any upcoming deliverables, due dates, and key decisions.
- Catch up on messages**: Summarize Teams messages from this week about...
- How to**: How do I write a request for proposal?
- Help me write**: Write an email to my team about our top priorities for next quarter from `file`.
- 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...
- Draft an FAQ**: Create an FAQ based on `file`.
- Describe something concisely**: Summarize this doc into a high-level overview of the benefits of [topic].
- Get calendar info**: When's my next meeting with `person`?
- Create a quiz**: Write a practice quiz about [Topic]. Include at least 20 questions, and group questions by category. Provide a detailed...
- Create based on a topic**: Create 5 hypothetical courses about [Topic]. Include a brief summary for each course and a catchy title.
- Prep for a meeting**: I've got an upcoming meeting with `person`. Based on my recent communication and recent news items, create a...
- Add images**: Add a relevant image to this...
- Get key info**: List key points from `file`.
- Brainstorm**: Suggest 10 compelling taglines.
- 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 H2 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 of light. 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 more solid and others more transparent, allowing the white space of the slide to show through.

**Deliver 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



**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.

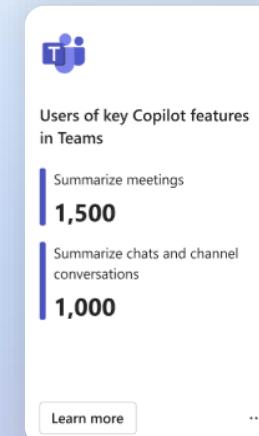
In the Impact tab, you assess Copilot impact by layering the results of Microsoft's quantitative and qualitative research on top of your organization's Copilot and Microsoft 365 usage patterns.

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

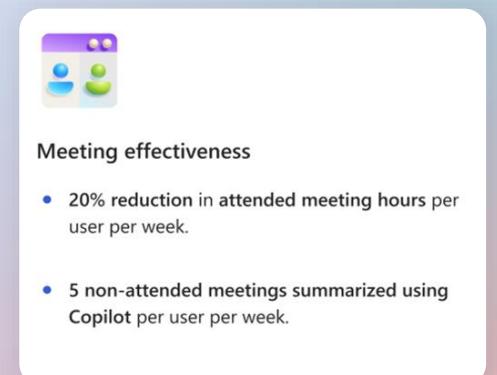
- Instruct users to [access the Copilot Dashboard in Teams or web app](#) to analyze the tabs
- Analyze Readiness, Adoption, and Impact tabs
- Follow the instructions on the Sentiment tab to deliver a survey to users
- [Upload](#) the survey results through the Microsoft 365 admin center to have them 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**

## 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

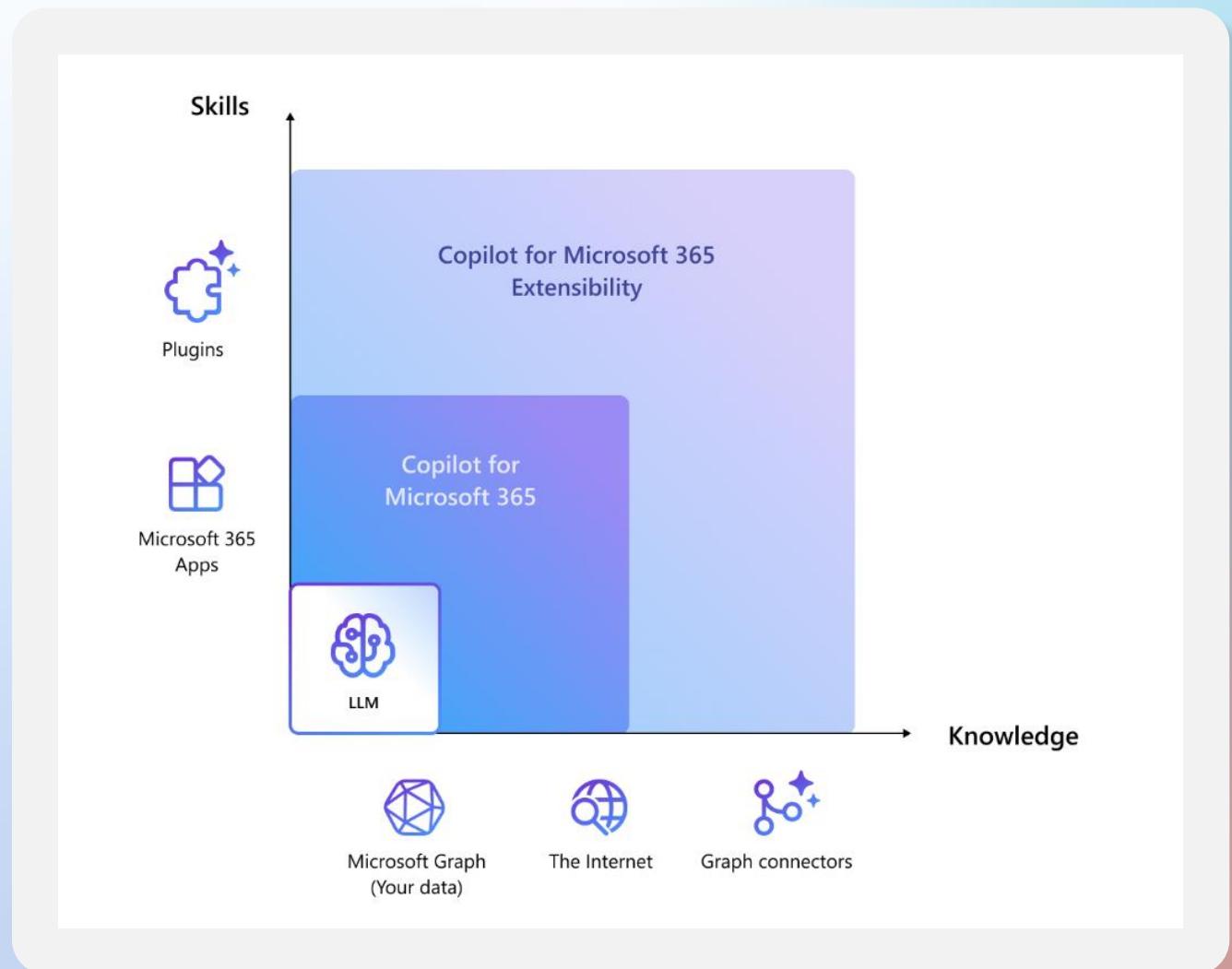
**Enable and publish plugins**

# 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



# 1 Plugins

Plugins expand your users' skills by interacting with your web service using natural language in Microsoft Copilot.

# 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.

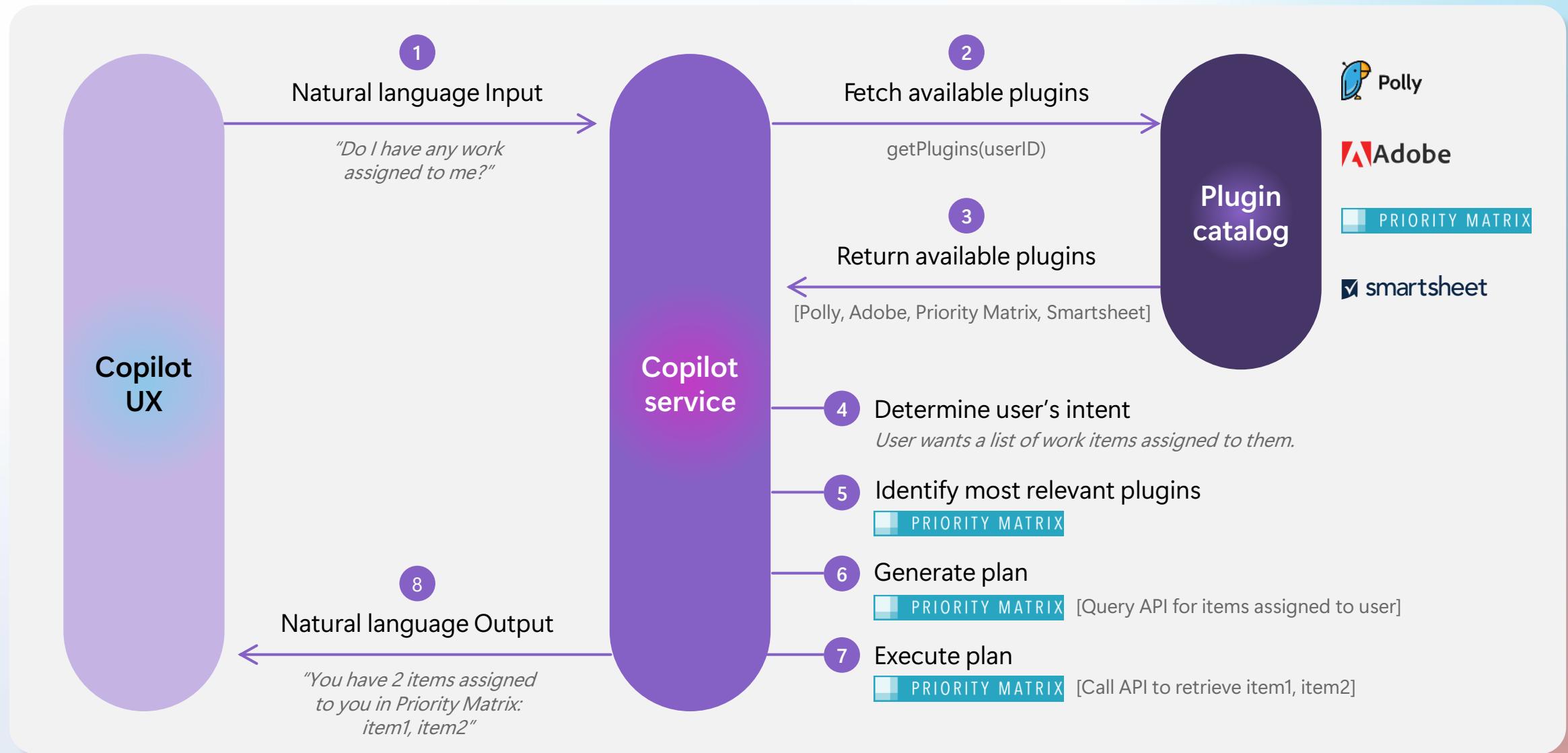


Existing Investments



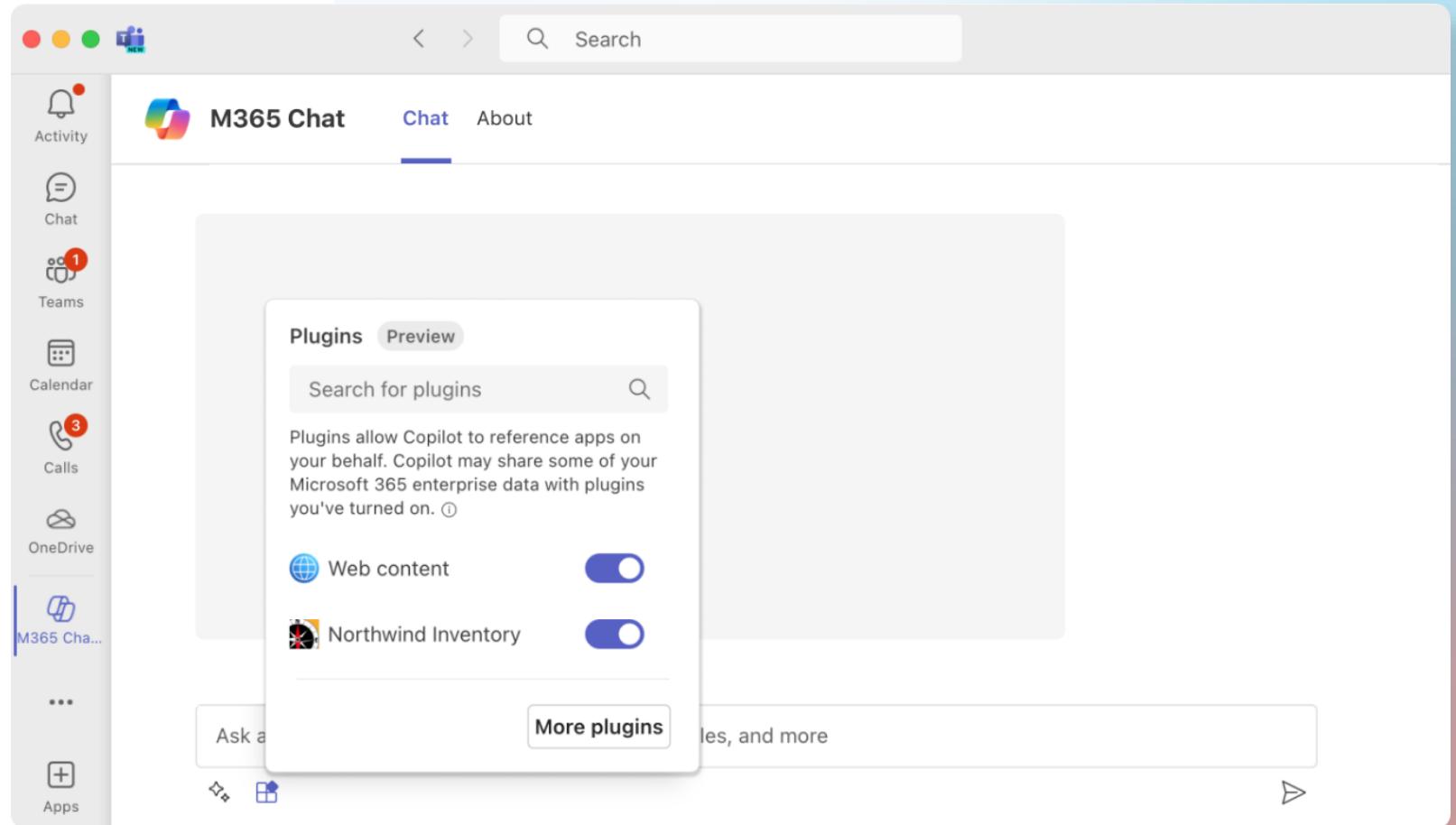
New

# Plugin flow



# Extensibility preview support

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





# Microsoft Graph connectors

Graph connectors increase the discoverability and engagement of your enterprise data by deeply integrating your data into the Copilot for Microsoft 365 experience.

# 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 lists pinned messages from Copilot, Cassandra Dunn, Aadi Kapoor, Eric Ishida, Cortex Framework, Will Little, Marie Beaudouin, Hillary Reyes, Charlotte and Babak, Reta Taylor, Joshua VanBuren, Daichi Fukuda, and Kadji Bell. The main chat area displays a message from Copilot summarizing updates about Adatum's technical design, followed by three numbered references:

- 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]

A "Copy" button is available to copy the summary text. Below the references, a note states "AI-generated content may be incorrect". The bottom of the screen features a search bar and a message input field.

# 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.





# Level-Up CSP Technical Training: Copilot for Microsoft 365

## Create your own Copilot

H2 2024



# 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

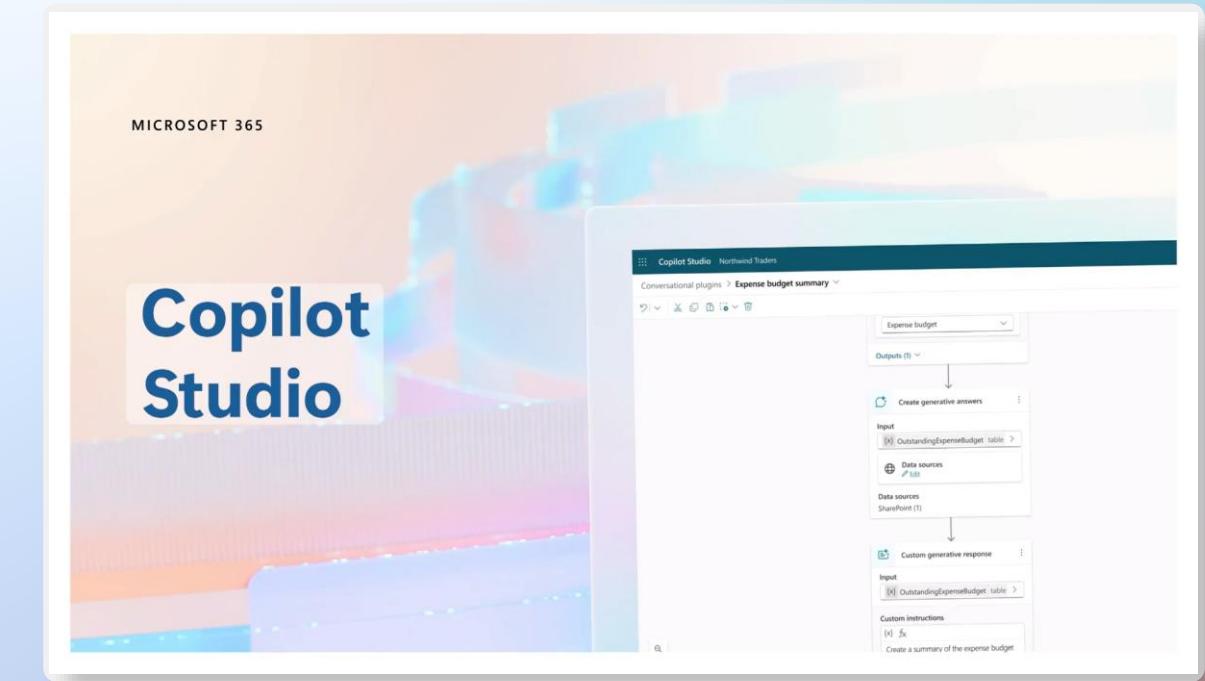
# Customize Copilot for your unique business needs

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:

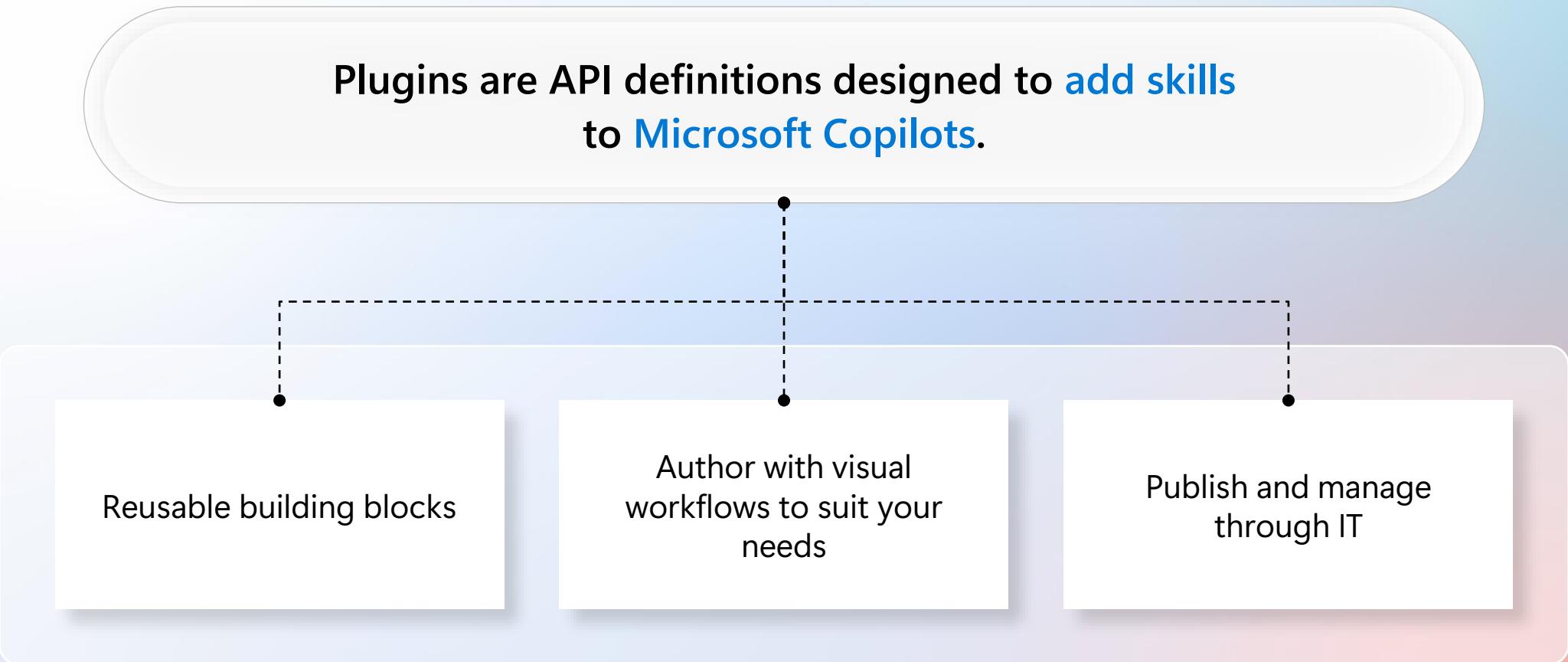
Send a list of **pending invoices** from **this week**.



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



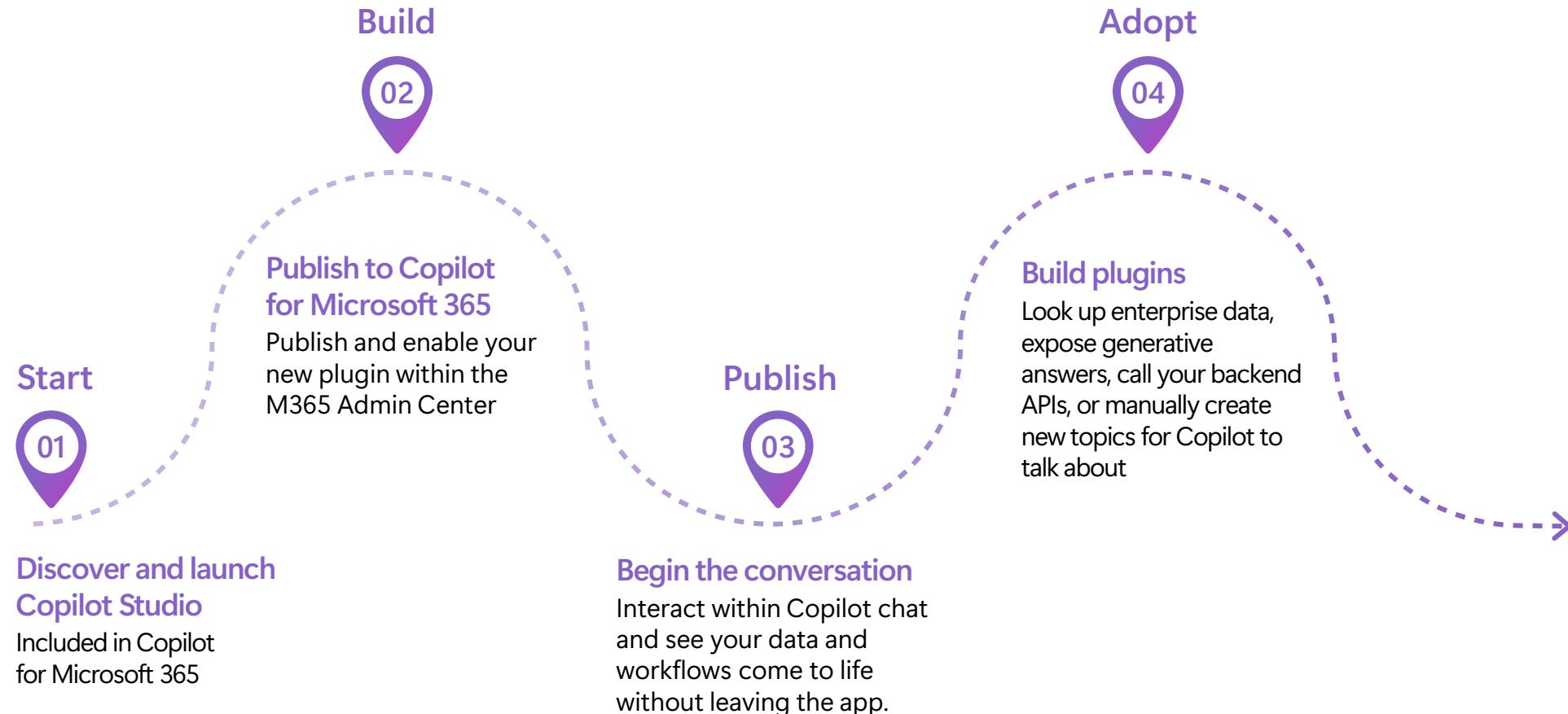
Reduce  
development  
costs



Monitored  
and secure  
through IT



# How to build a plugin for Copilot for Microsoft 365



MICROSOFT 365

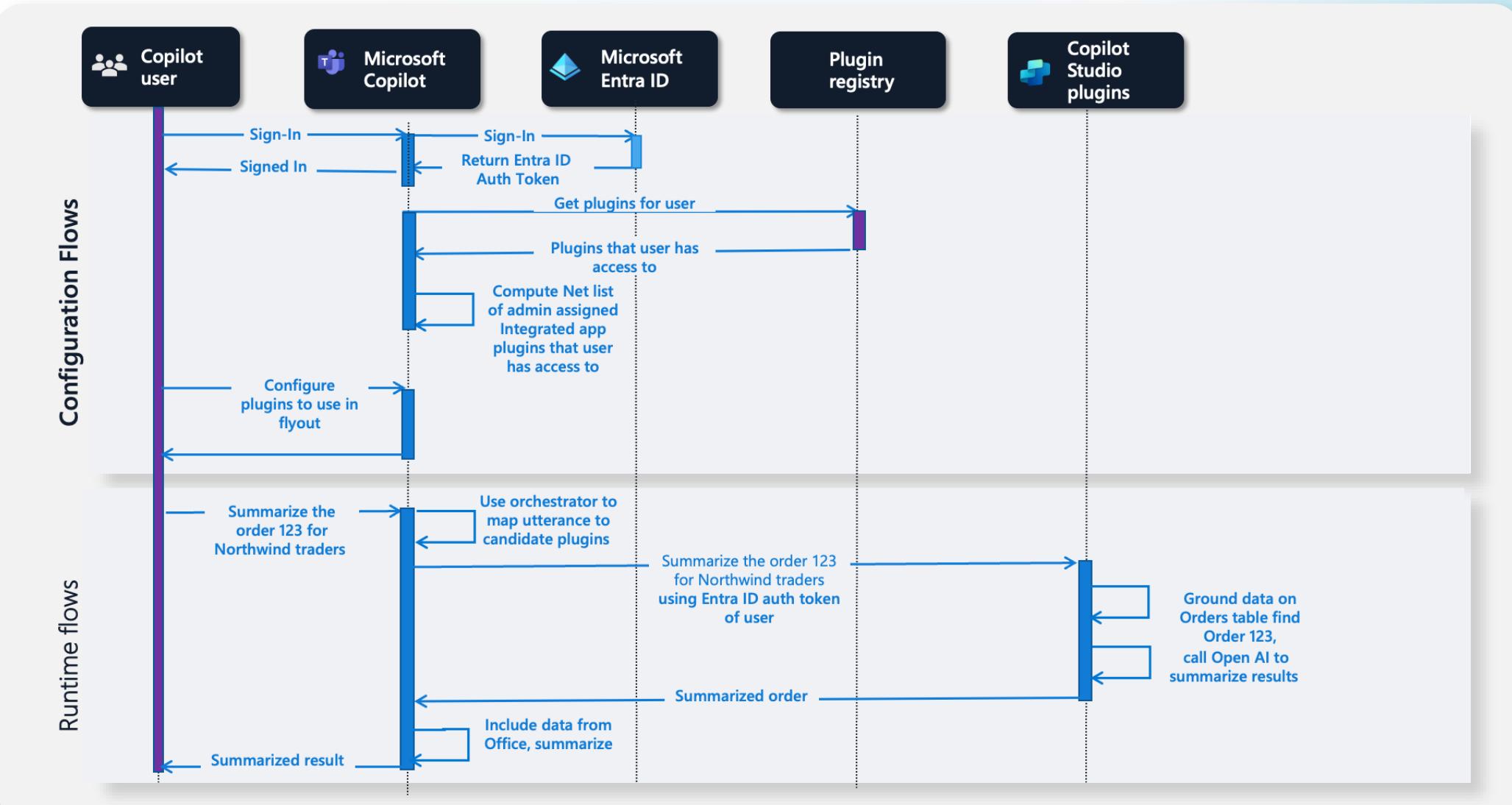
# Copilot Studio

The screenshot shows the Microsoft Copilot Studio interface. At the top, it says "Copilot Studio Northwind Traders". Below that, it shows "Conversational plugins > Expense budget summary". The main area displays a flowchart of a conversational plugin:

- Expense budget** (Input) connects to **Create generative answers**.
- Create generative answers** connects to **Data sources**.
- Data sources** (SharePoint (1)) connects to **Custom generative response**.
- Custom generative response** (Input) connects back to **Expense budget**.
- Custom instructions** (fx) is set to "Create a summary of the expense budget".

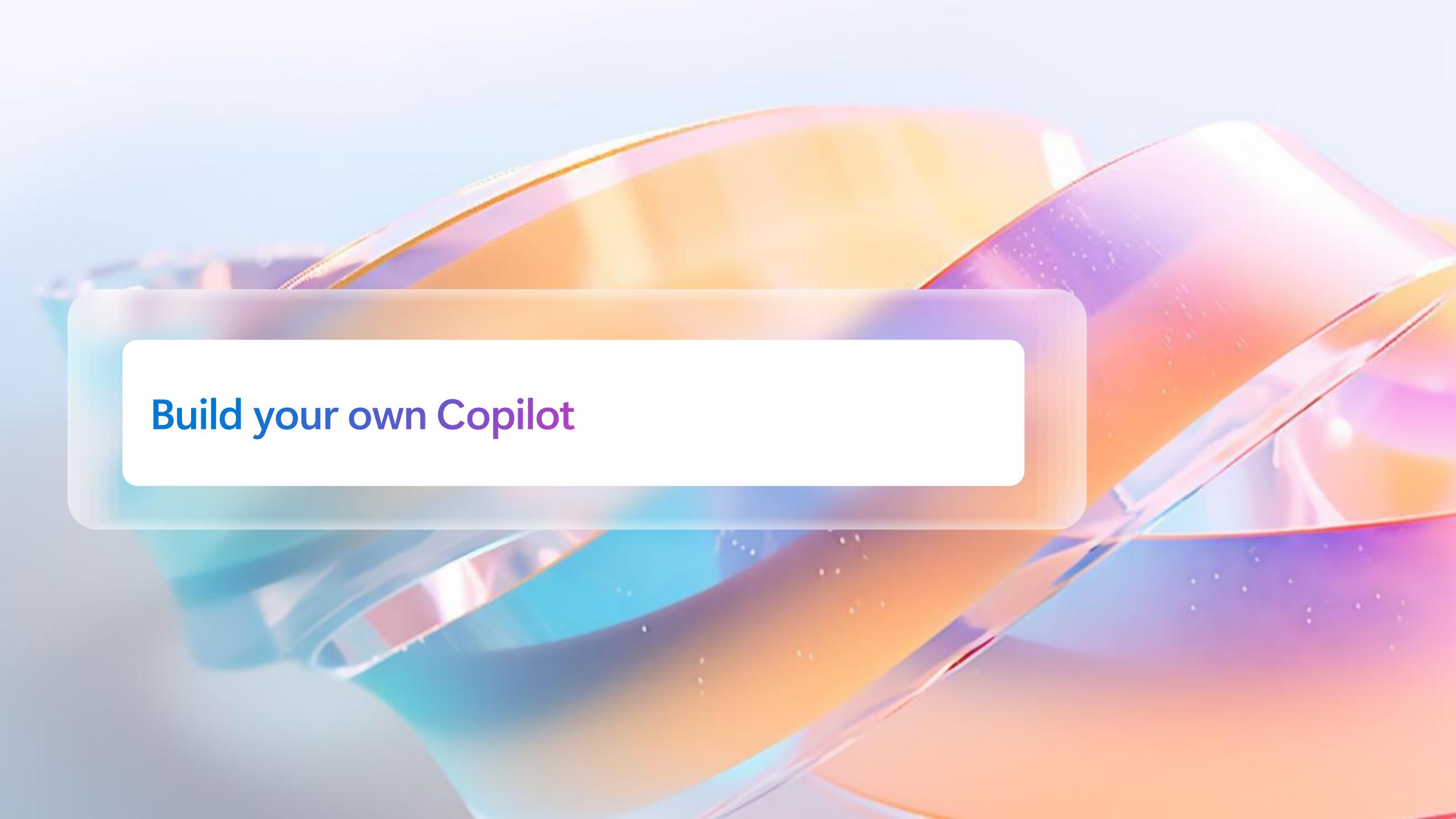
The interface includes a search bar at the bottom.

# How Copilot uses Copilot Studio plugins



**Demo**

Extend Copilot for Microsoft 365 with Copilot Studio



**Build your own Copilot**

# Extend & optimize: Build your own copilots

## Microsoft Copilot Studio for Microsoft 365

### This session

#### What

As part of this session, you'll get a quick introduction to Copilot Studio by building a standalone bot with Q&A capabilities based on Generative AI

#### Duration

45-60 minutes

### Copilot Studio in a day Workshop

#### What

hands-on workshop for subject matter experts and business users, covering the breadth of Copilot Studio.

#### Duration

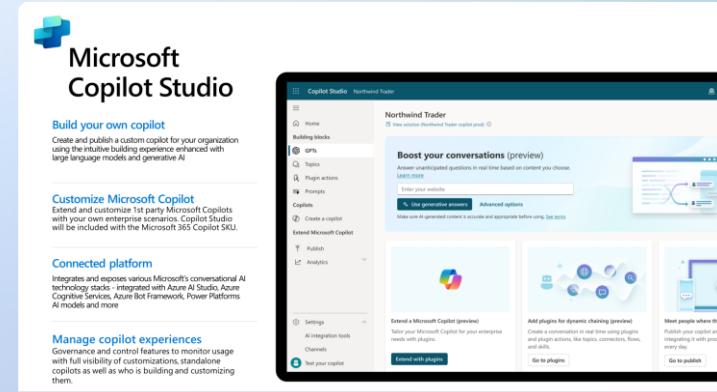
½ day to 1 (one)-day

#### More information

[Microsoft Power Platform Partner Hub](#)

### Sample Agenda

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



- Identify participants
- Determine logistics for the one-day event
- Ensure environment is setup and lab materials are ready before the event
- Confirm key scenarios
- Check for latest content on [Microsoft Power Platform Partner Hub](#)



## Lab Pre-requisites

# Pre-requisites



Laptop



Internet Connectivity



Partner Account

# Customer Digital Experiences

Interactive digital experiences using fully functional Microsoft 365 environments

## Why



Discover why Microsoft 365 is the right choice for your business

## What



Understand what needs to be done to achieve your business goals

## How



Learn how to implement, manage, integrate and support Microsoft 365

The background of the slide features abstract, flowing bands of light. These bands are composed of translucent, overlapping layers of color, primarily in shades of orange, pink, purple, and blue. They curve and twist across the frame, creating a sense of motion and depth. The overall effect is reminiscent of a liquid or a nebula captured in a photograph.

# Lab Introduction

# Meet Adventure Works



## Manufacturing company

Bicycle manufacturing company with 200 employees



## Albuquerque, NM

Located in Albuquerque, New Mexico, US



## Innovation

State-of-the-art company, cutting-edge e-bike components including patents



## Strict Security Controls

Due to proprietary information, strict security and privacy policies

# Customer requirements

The following business requirements apply for Adventure Works

01

## User requirements

Chatbot with 24/7 availability

Be friendly and respectful

Greet customers and ask them what they are looking for

02

## Must-haves

Handle FAQ based on documents on SharePoint and their website

# Lab instructions

Download the Lab Guide at

<https://aka.ms/CSPMastersCopilotTechPPT>

Follow the steps in the Lab Guide to create your first Copilot

- Create a CDX tenant
- Add a Trial License for Copilot Studio
- Create a Copilot
- Update Copilot Configuration
- Test



# Microsoft Copilot Studio



# 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 a sidebar on the left containing navigation links 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. It features a 'Boost your conversations (preview)' card with a form to 'Enter your website' and options for 'Use generative answers' and 'Advanced options'. Below it are three more cards: 'Extend Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'.



# 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, Create a copilot, Extend Microsoft Copilot (Publish, Analytics), Settings, AI integration tools, Channels, and Test your copilot. The main content area shows a preview of "Boost your conversations (preview)" with a text input field and a "Use generative answers" button. Other sections include "Extend a Microsoft Copilot (preview)", "Add plugins for dynamic chaining (preview)", and "Meet people where they are".

## 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

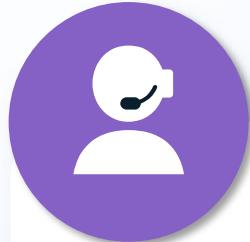
Monitor usage and gain full visibility into who is building copilots and customizing elements through built-in governance and control features.

# Momentum of conversational AI to solve business challenges

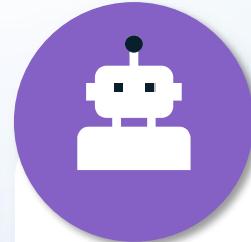
Market trends are clear, don't fall behind on this growing opportunity area



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

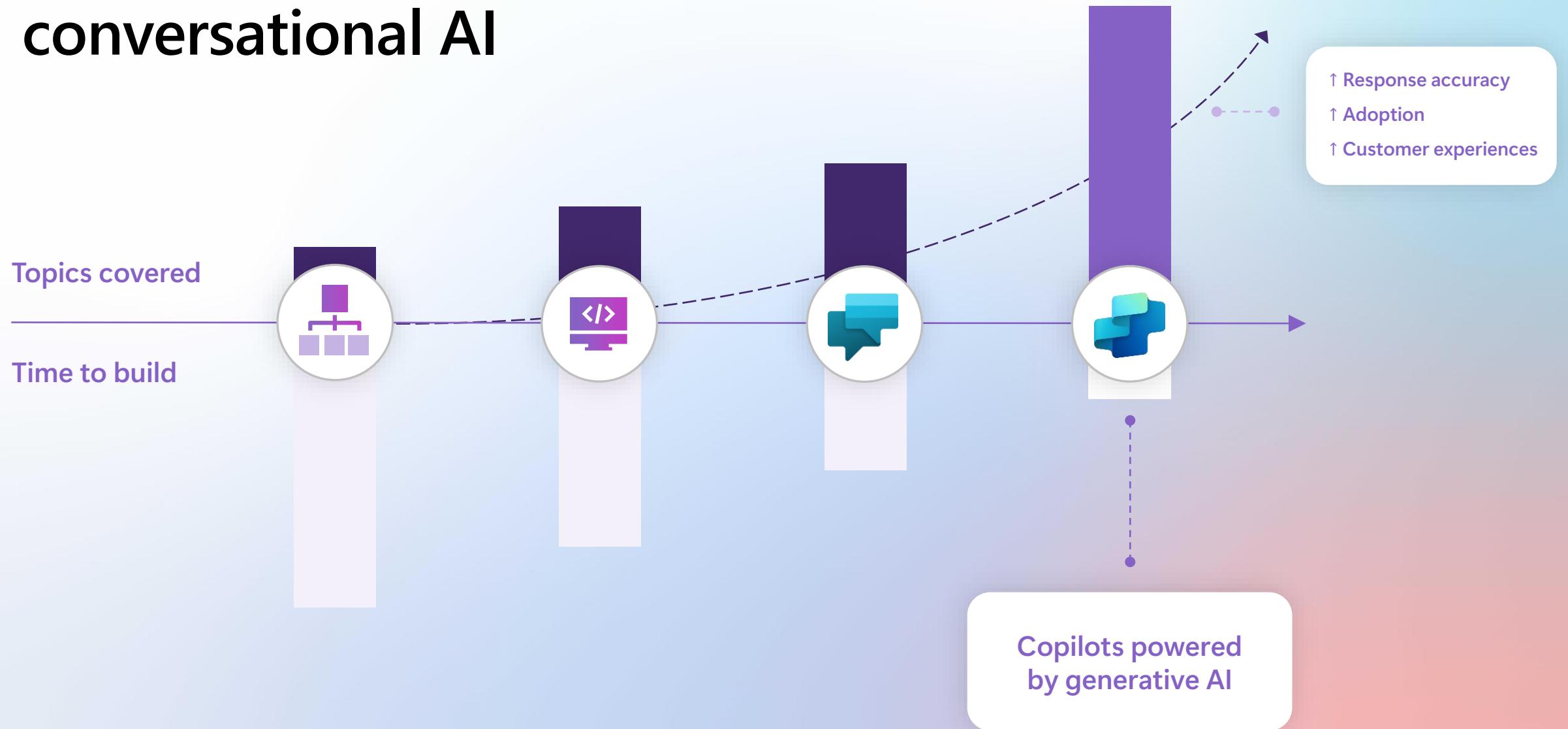
Product & technical onboarding

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.

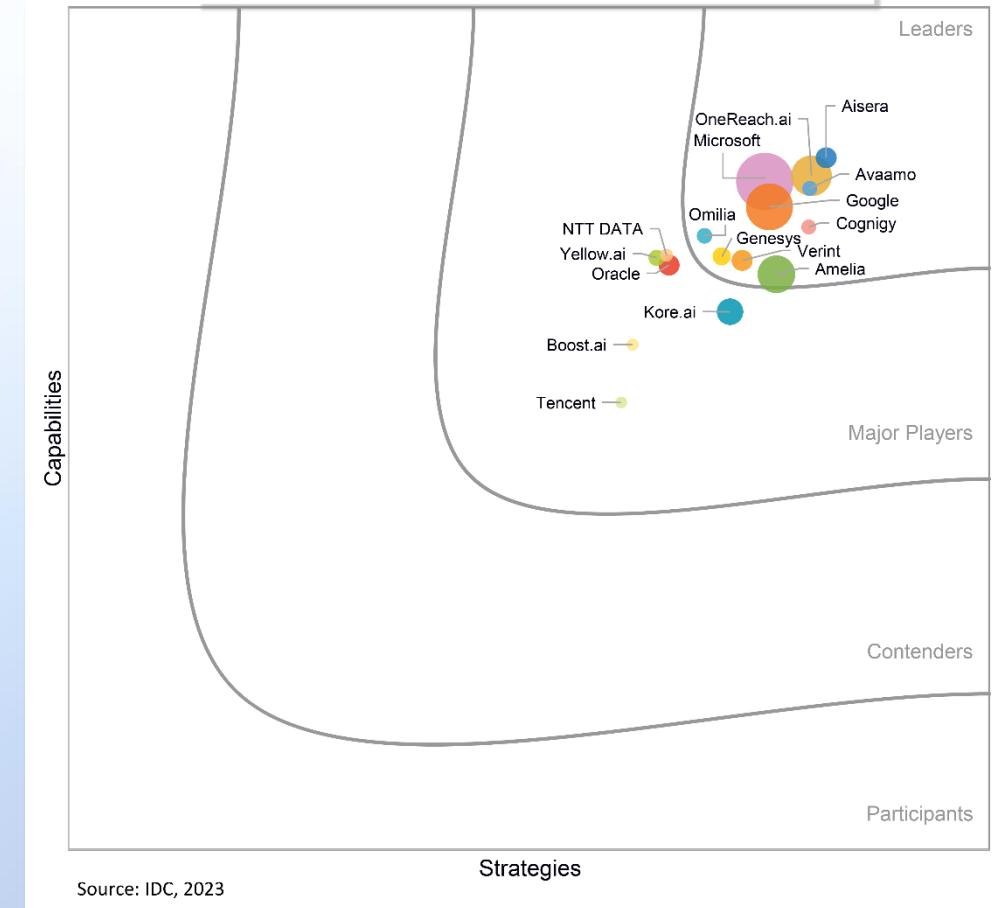
# Transform your business with conversational AI



# 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](#)



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.

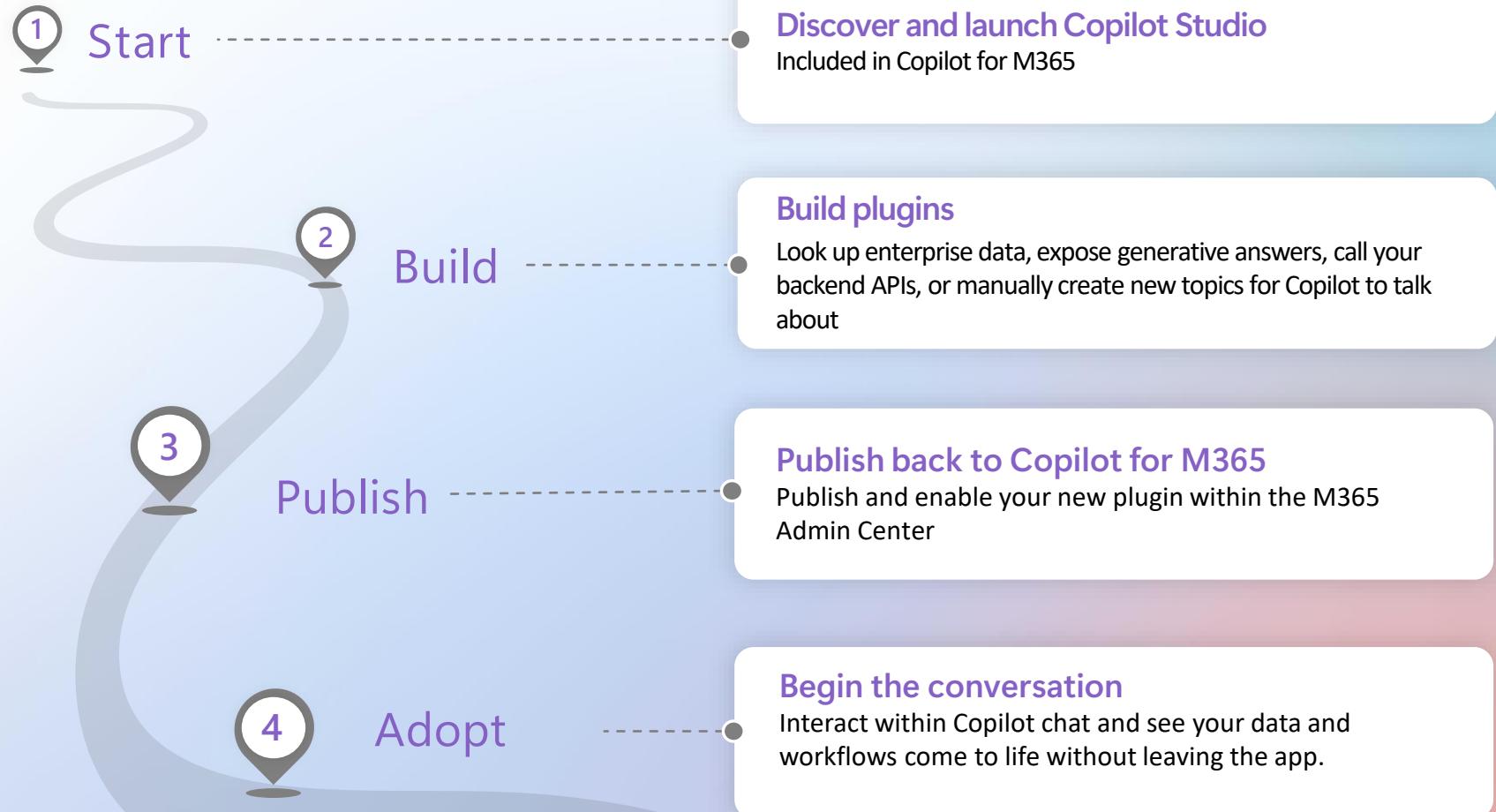
## Configure how Copilot responds

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



# 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

## Create your copilot

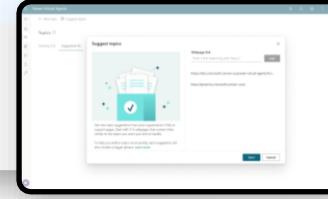
With an end-to-end studio



1

## Chat over your data with generative AI

Files, websites, and internal shares



2

## Consume plugins

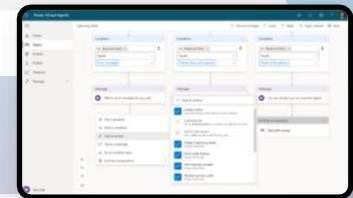
1,000+ connectors, plugins and GPTs



4

## Create rule-based topics

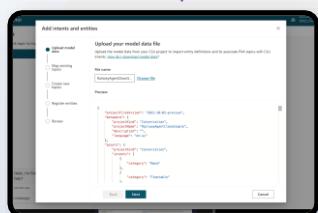
Specific, curated topics  
with full control



3

## Customize with conversational services

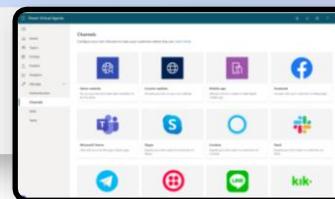
Integrate with Azure AI Studio  
and more



5

## Publish your copilot

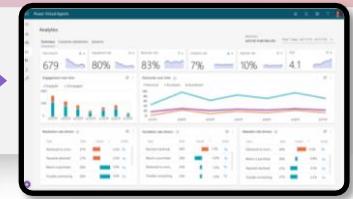
Multiple channels and modalities (text  
and voice)



6

## Learn and improve

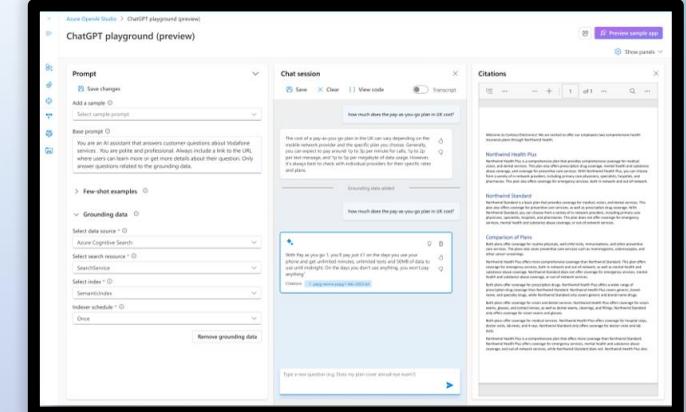
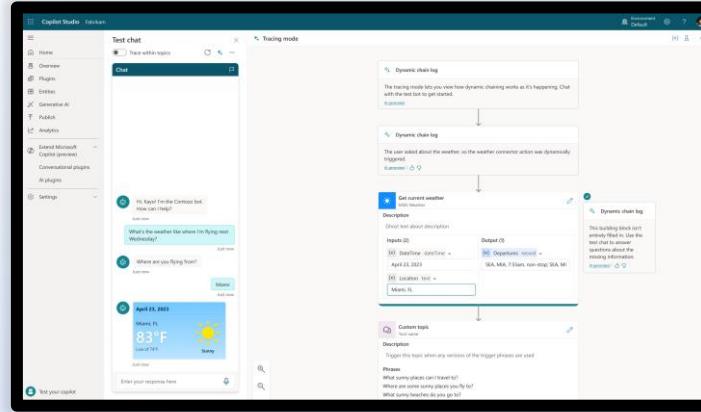
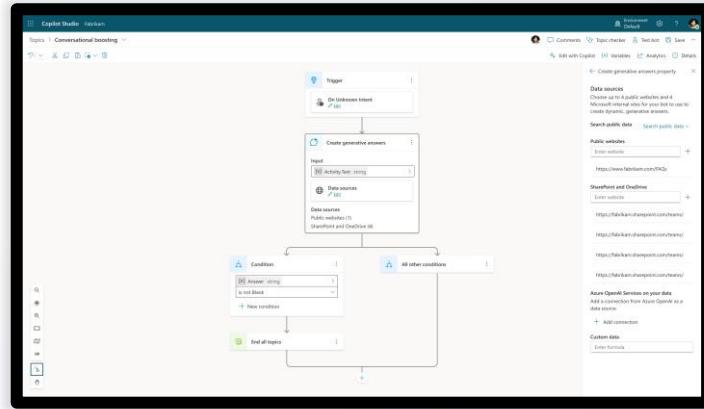
Out-of-the-box telemetry



7

# Generative AI in Copilot Studio

Powered by Azure OpenAI Service



## Generative answers

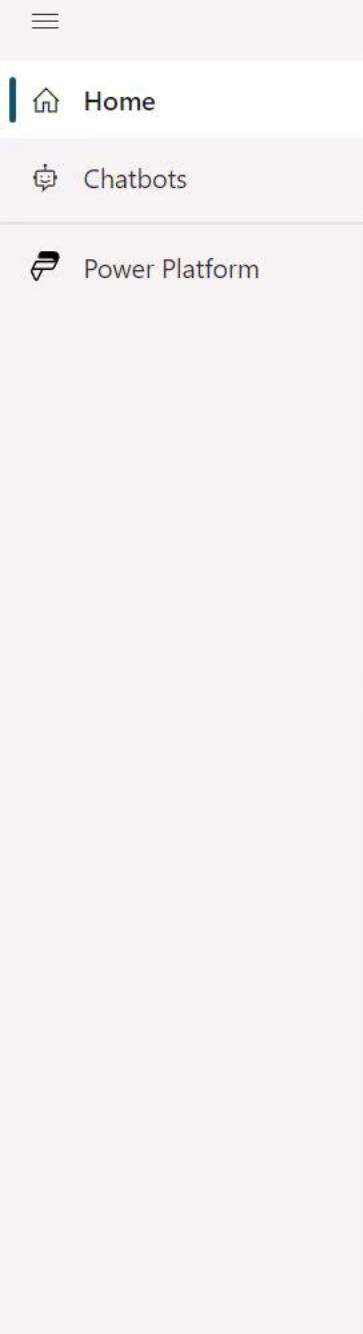
Dynamically generate multi-turn answers based off an organization's content in real-time.

## Generative actions

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

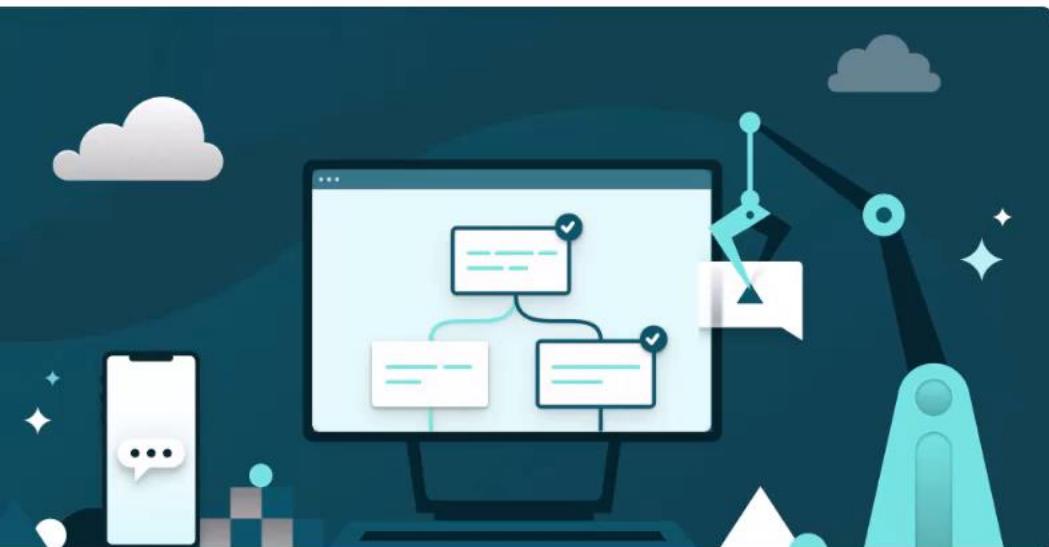
## Bring your own custom Azure OpenAI model

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

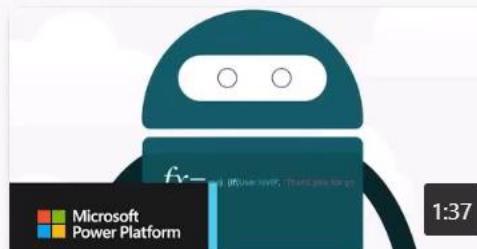


# Create conversational experiences

- 🌐 Build quickly, with no code required
- 📱 Engage with customers where they are
- ⌚ Get insights to monitor and improve performance

[+ Create a bot](#)

## Learning resources

[How-to videos](#)[Documentation](#)[Learning paths](#)

Lifecycle of a Bot in Power Virtual Agents

 YouTube



The evolution of Power Virtual Agents

 YouTube



# 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





# 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>	Productivity scenarios consumed via Copilot for Microsoft 365 <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

# RSM uses Power Platform and AI to help City of Kelowna improve services

Located in British Columbia, Kelowna is the fastest growing metropolitan area in Canada. To help handle this growth, the City of Kelowna's CIO wanted to explore how process automation and AI could help the organization better serve residents and businesses.

Currently, securing a building permit requires applicants to fill out a series of PDF documents and upload them to a website where they are then manually reviewed—a process that could take months to complete. To replace this manual process, RSM worked with the City of Kelowna to develop a Power Platform solution with integrated Azure OpenAI Services.

The team used Power Pages to create a landing page for the building permit tool, which features a Microsoft Copilot Studio (formerly Power Virtual Agents) chatbot that asks natural language questions about what they want to build. Power Automate takes the responses from the chatbot and feeds them to Power Apps, which then populates the official building permit forms on behalf of the user.

[Case study link](#)





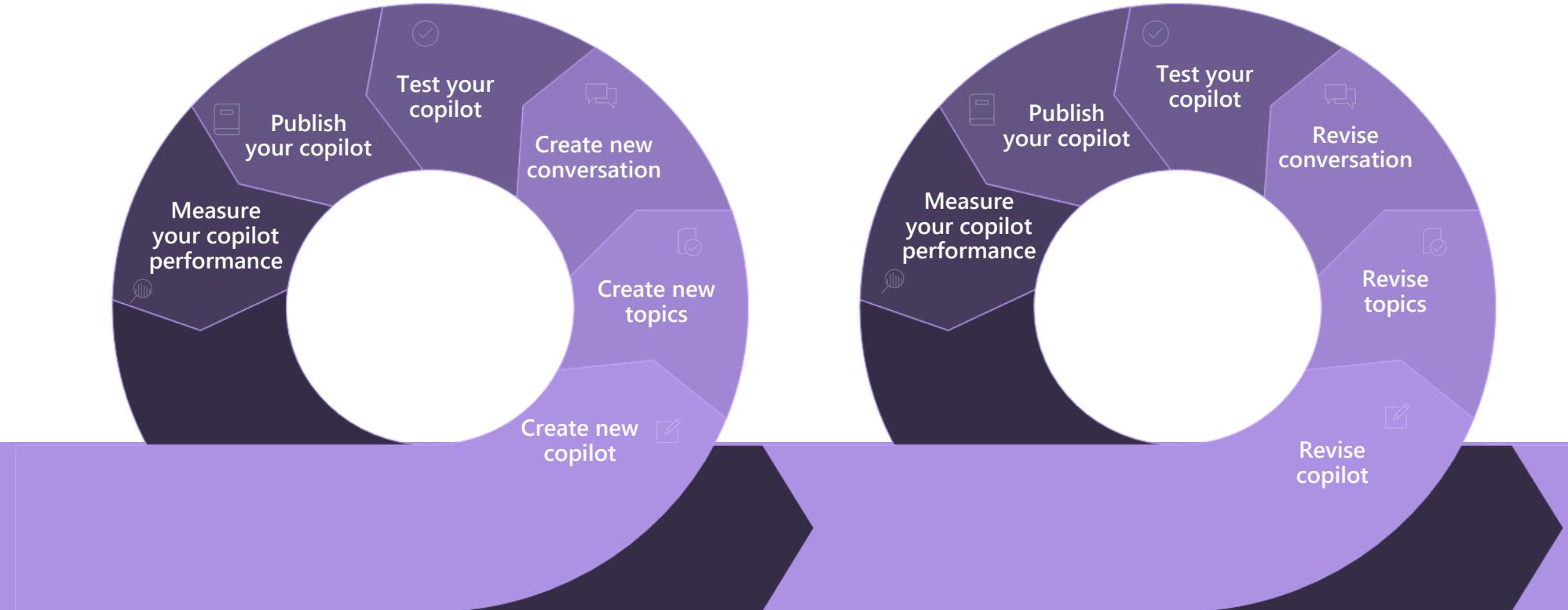
# Deploying Copilot Studio



# Copilot creation process overview



Creating a copilot is an easy step by step process.



# Resources to support Implementation

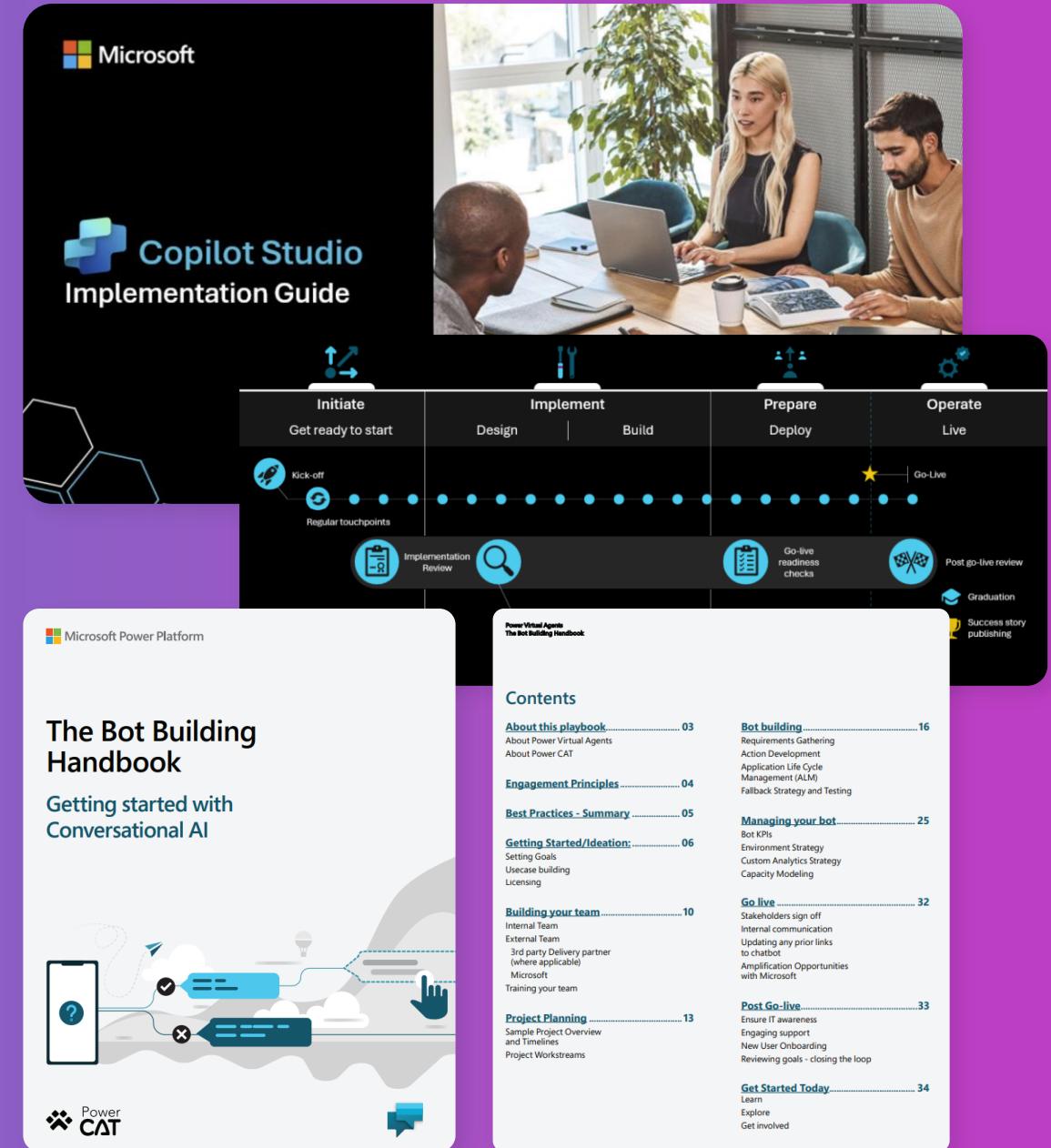
## Copilot Studio Implementation Blueprint Deck (Success by Design)

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 \(coming soon!\)](#)

# Partner Training

Sign up for upcoming trainings, or explore on-demand training opportunities

## 3-day technical training partner workshop

### Build and extend AI-powered copilots with Microsoft Copilot Studio - March 5-7 (PST)

Learn how you can build and extend copilots, boost their capabilities with AI, extend them to perform actions, and provide answers for your copilot users. This three-day virtual training experience includes two-to-four hours a day of structured instructor-led training theory, hands-on labs to help develop specialized skills, and live Q&A with technical experts.

Enroll today at <https://aka.ms/CopilotStudioPartnerTraining>

*(Note: Either register or sign into the Depth Training page, and then click on the Copilot Studio card to enroll, selecting the session appropriate to your time zone.)*



# 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/copilotstudиоатignite">aka.ms/copilotstudиоатignite</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

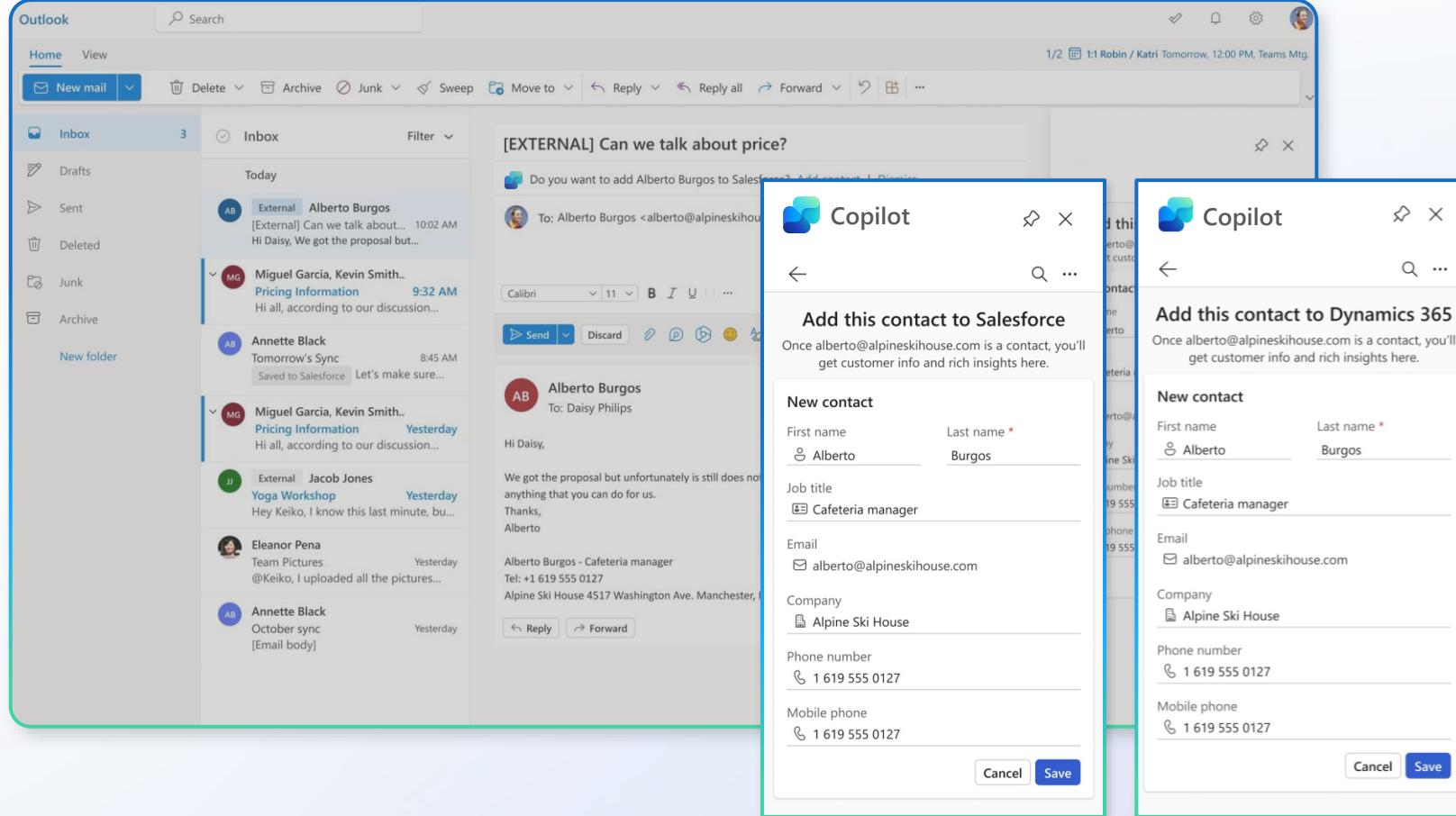
AI-powered manager insights and collaboration tools

### Customize for your needs

Customization for a uniquely tailored sales solution

\$50 pnpm, includes Microsoft Copilot for Microsoft 365

# Works with your CRM platform



Connects to  
Salesforce Sales  
Cloud or Microsoft  
Dynamics 365 Sales

Q Search

Help

Delete Archive Sweep Move to Quick steps Read/Unread ...

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

Copilot for Sales

Email from: Kathryn Murphy Received 10/3/22, 11:35 AM

Save email to Salesforce Save

Key sales info

- Alberto Burgos is the primary contact for the [Fourth Coffee](#) account.
- [Fourth Coffee](#) specializes in high-volume and premium coffee experiences, emphasizing ethically sourced beans and rich flavors.
- 50 Café A-100 Automatic was opened for [Fourth Coffee](#) on 7/6/23. The expected close date is Oct 2023.

Suggested actions

- Update budget to \$12,000
- Update close date to 8/20/23

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

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.
- Alberto requests more information on product offerings, pricing details, and any available special offers or bundles.
- A budget of \$12,000 was mentioned, and possible stakeholders are Alberto, Rebecca, and Miguel.
- Details about timing and need don't seem to be mentioned.
- Miguel raised a potential issue about his storage limitations and the shipment time.

Suggested action items

2

AI-generated content may be incorrect

3

4

5

6

AI-generated content may be incorrect

Thu 3/17/2023 11:09 AM

Alberto Burgos To: Daisy Phillips

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

How Was Your Experience? Yesterday

How Was Your Experience? Yesterday

Exclusive Offer: Special Deal! Yesterday

I hope this email finds you eager to...

# 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 top navigation bar includes 'Search', 'Message' (selected), 'Insert', 'Format text', and 'Options'. The ribbon has sections for 'Focused' and 'Other' with icons for 'Meetings', 'General', and 'New Outlook' (which is turned on). The main pane displays an email to 'Katri Ahokas; Henry Brill; Robin Counts' with the subject 'Team Pictures'. Below the recipient list is a placeholder 'Start typing or Draft with Copilot'. The message body is empty. At the bottom of the draft window, there are buttons for 'Make a proposal' and 'Request more details'. A small 'Copilot for Sales' button is visible. The status bar at the bottom right shows 'Draft saved at 11:00 AM'. The background of the Outlook window shows a list of recent messages in the inbox, including:

- Elvia Atkins - 'The One and Only Moon' (8:32AM)
- Serena Ribeiro - 'NYC Travel Itinerary' (12:55PM) - Message content: 'Hi Katri, I attached the itinerary I started...'
- Daisy Philips - 'PTA Kickoff Picnic' (9:16AM) - Message content: 'Hi all, Lydia, thank you so much for reachi...'
- Margie's Travel - 'Confirmation Letter - MPOWMQ' (2:43PM) - Message content: 'Thanks for booking your flight with...'  
Details: Fri 8/1/2023 2:35PM - 10:
- Woodland Bank - 'Your bill is ready to view' (1:12PM) - Message content: 'Hi Katri, your bill is ready to view. Log in...'
- Cameron Evans - '@ Thanks for joining our networkin...' (7:30AM) - Message content: 'Hi Katri, we want to thank you...

# 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

A screenshot of a Microsoft Word document titled "Word Content Generation". The document contains several sections: "Recent meeting insights" (Intro meeting for new coffee machines deal, 07/03/2023 2:00 PM – 2:30 PM), "Highlights" (Alberto had questions about games he couldn't attend, Daisy explained deposit process), "Follow-ups" (Alberto will send refund info on Friday, Alberto will confirm next week if he can place a deposit), and "Email thread summary" (Alberto requested price info for espresso beans, Miguel added to CC for store location). A floating window titled "Draft with Copilot Preview" has a purple circle with the number 1 over it, containing the text "Help me prep for the pitch meeting with Relecloud meeting". Below the preview window, the status bar shows "Still working on it..." and "Stop generating ESC".

## 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 screenshot shows a Microsoft Teams meeting window. At the top, there are standard meeting controls: Sync, Chat, People, Raise, React, View, Copilot, Sales Copilot, Apps, More, Camera, Mic, Share, and Leave. Below the controls, there are two video feeds: one of a woman with brown hair and another of a man with dark hair and a beard.

**Panel 1: Opportunity Summary**

Copilot 10:35 a.m.

Sales Copilot

**50 Cafe A-100 Automatic**  
Opportunity Summary

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.

Latest activity:

- Daisy saved an email thread summary on 04/15/2023.
- Follow up sent by Alberto Burgos, still no response received.
- Another follow up sent: Quote #252 received but appears incomplete.
- Alberto from Fourth Coffee contacted and requested a price list for the HT1 Coffee Machines.

[View in Dynamics365](#)

AI generated

Ask me anything about this meeting

**Panel 2: Real-time Brand/Competitor detection**

Copilot 10:35 a.m.

Sales Copilot

**Proseware**  
Brand mentioned by Miguel

Proseware is an Italian soda company founded in Turin in 1895. It offers popular soda drinks, its own range of snacks and at home soda makers. Proseware is the most popular soda company constituting 80% of native Italian soda drinkers, and it is also a leading soda company in the world.

Strengths

- Strong global presence
- Wide range of products
- Strong brand recognition
- Strong financial position

Weaknesses

- Reliance on sugary drinks
- High debt levels
- Vulnerable to changing consumer tastes

[View in Dynamics365](#)

[Learn more in Bing](#)

AI generated

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, there's 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 with 'Create task' buttons, each marked with a purple circle containing the number '1'. A 'Participant statistics' section shows data for participants from their organization and outside their organization. For participants from their org, the data is as follows:

From your org	Talk to listen ratio	Switches per conv...	Avg. pause
Daisy Phillips	32/68	14	12 sec
Babak Shamma	23/77	14	8 sec

For participants outside their org, the data is as follows:

Outside your org	Longest monologue
Inna Laar	27 sec
Alberto Burgos	16 sec
Ruth Renatsson	8 sec

# 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

# 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



# Copilot for Microsoft 365

## 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

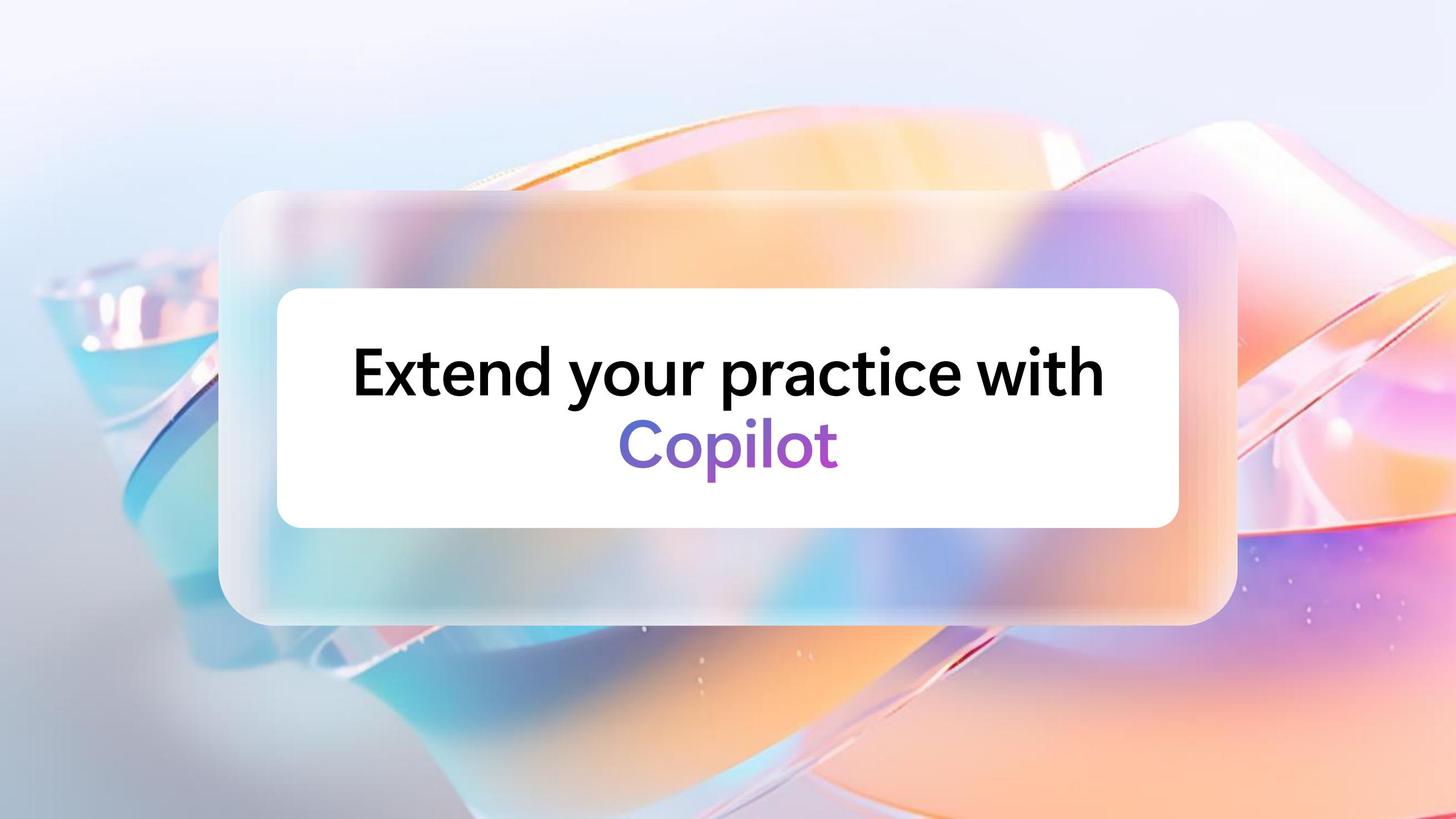
## Microsoft Copilot for Service

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

## Copilot Studio

Customize and build Copilots to meet your business needs

The background of the image features a soft, out-of-focus gradient of colors, including shades of blue, orange, yellow, and pink, creating a dreamlike or futuristic atmosphere.

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

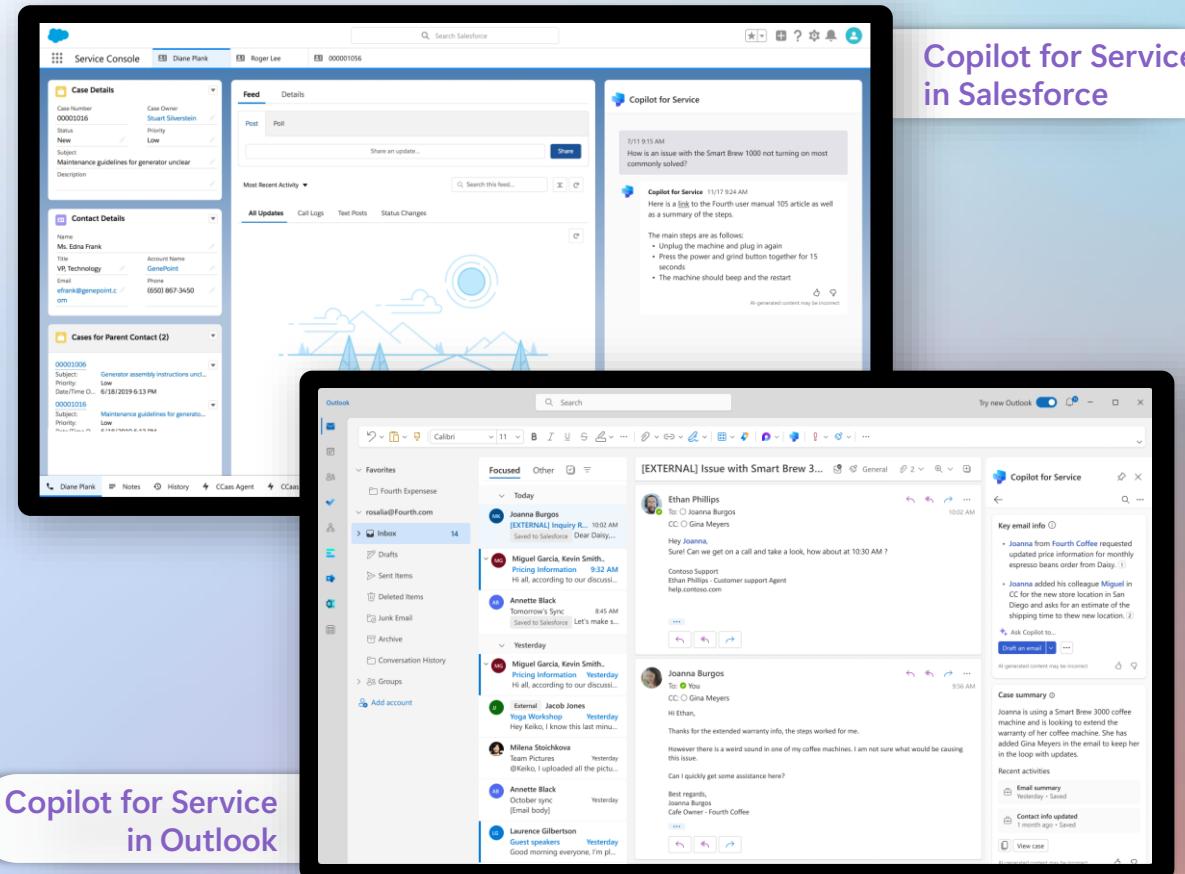
# Boost agent productivity in the flow of work

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



# Boost agent productivity in the flow of work

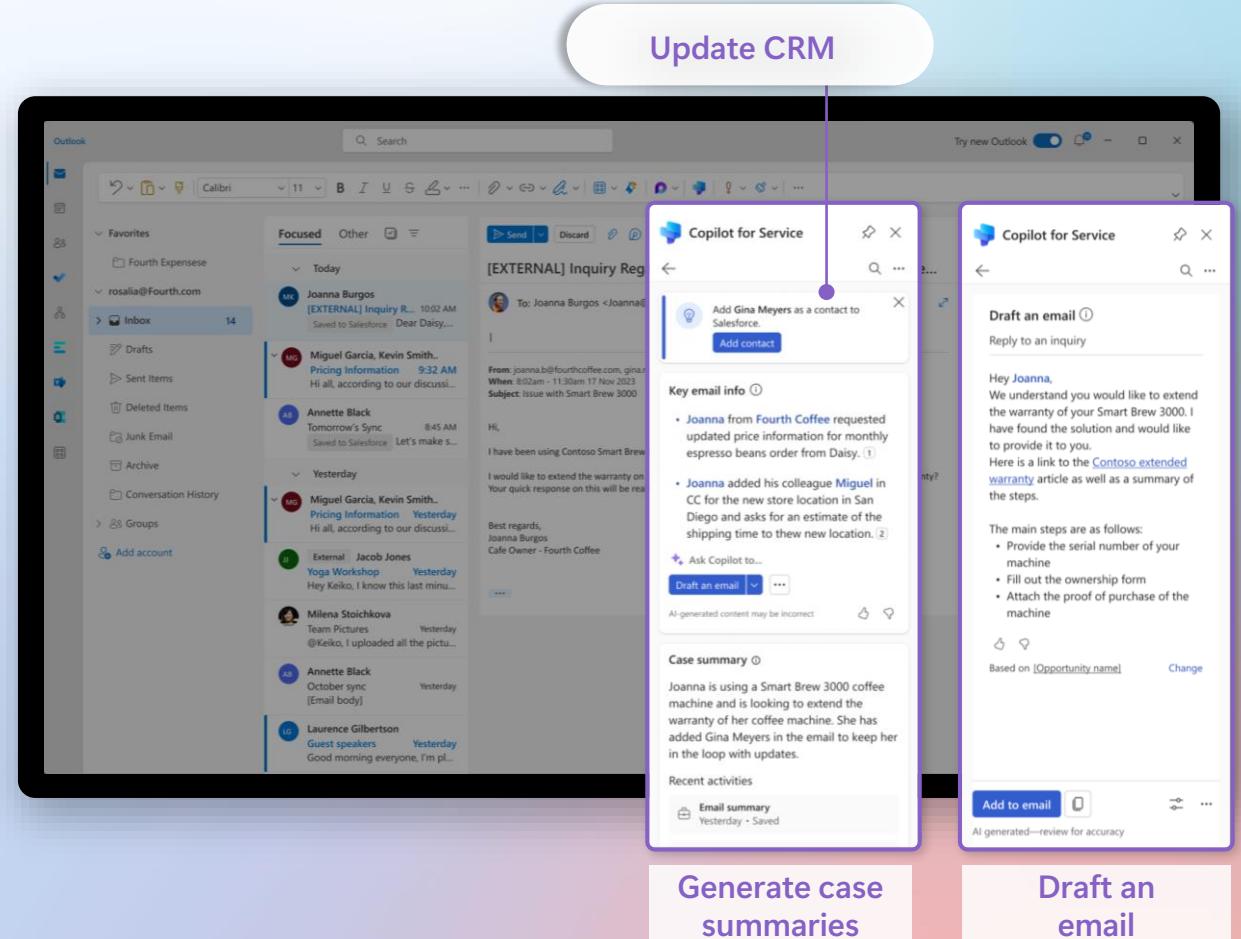
Get answers and respond to customers fast

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

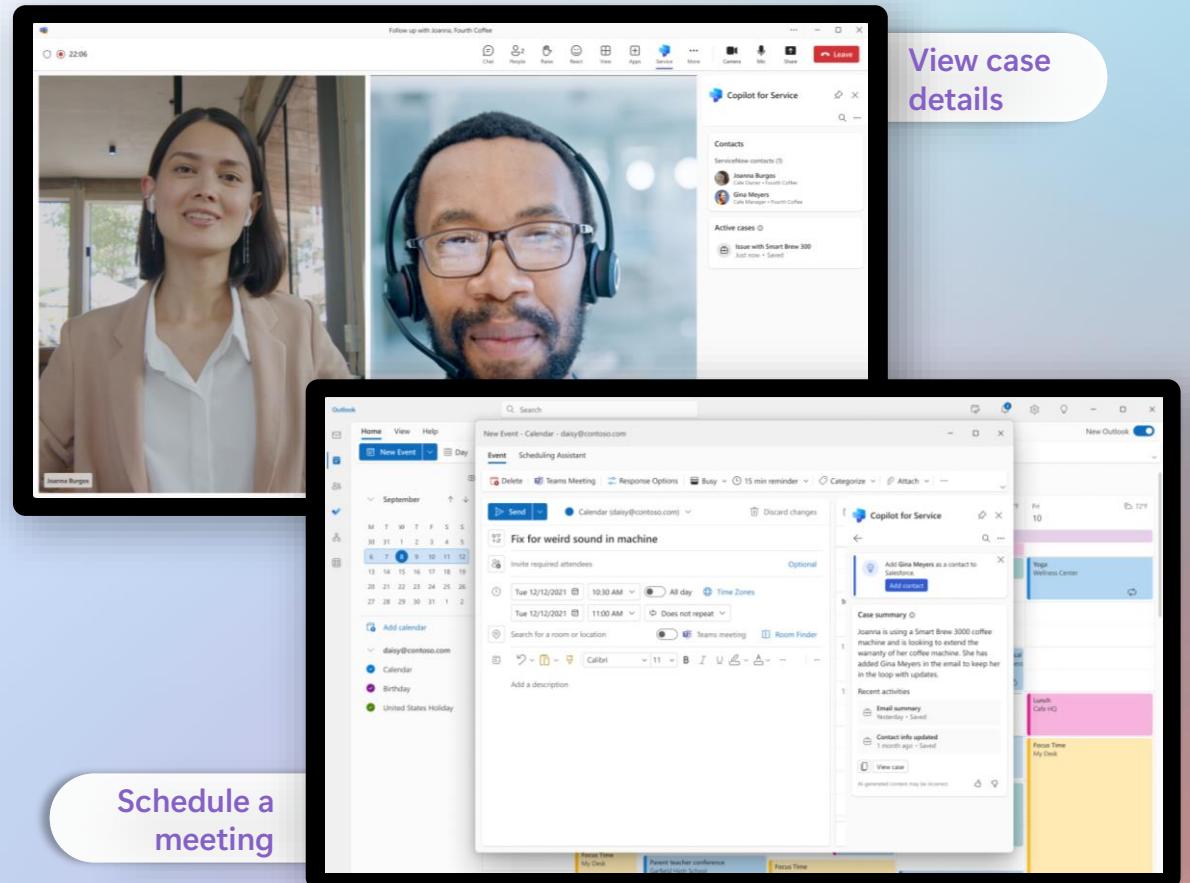
Automate routine tasks with ease

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



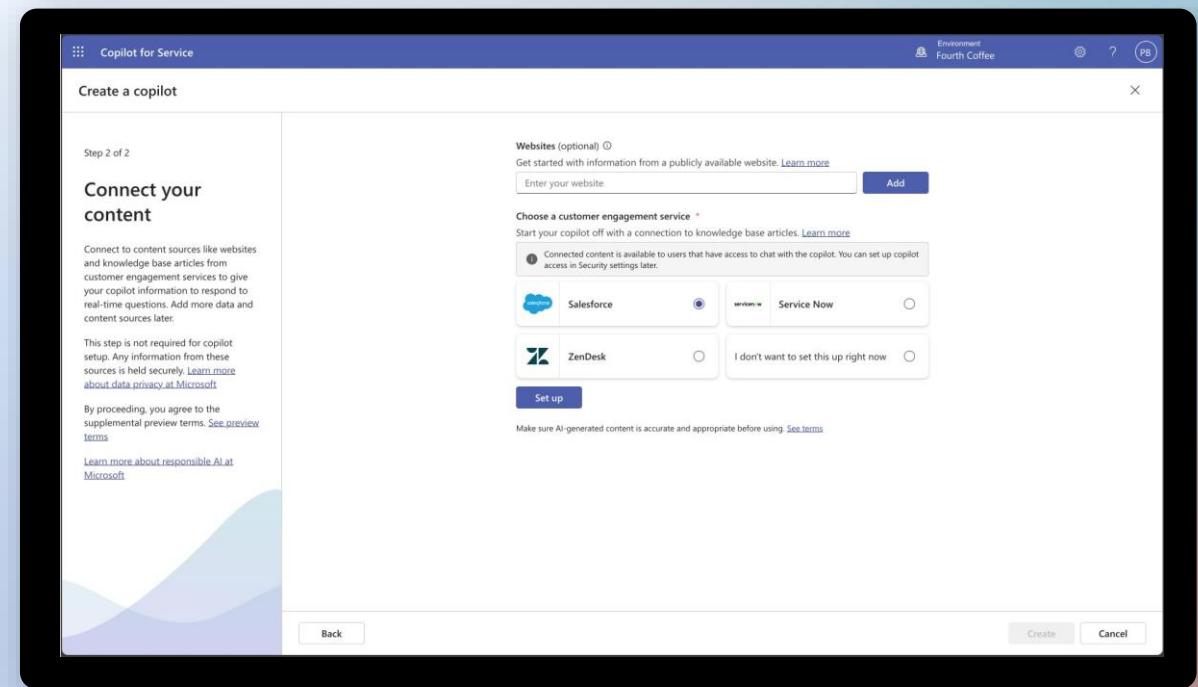
# Connect trusted knowledge sources

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

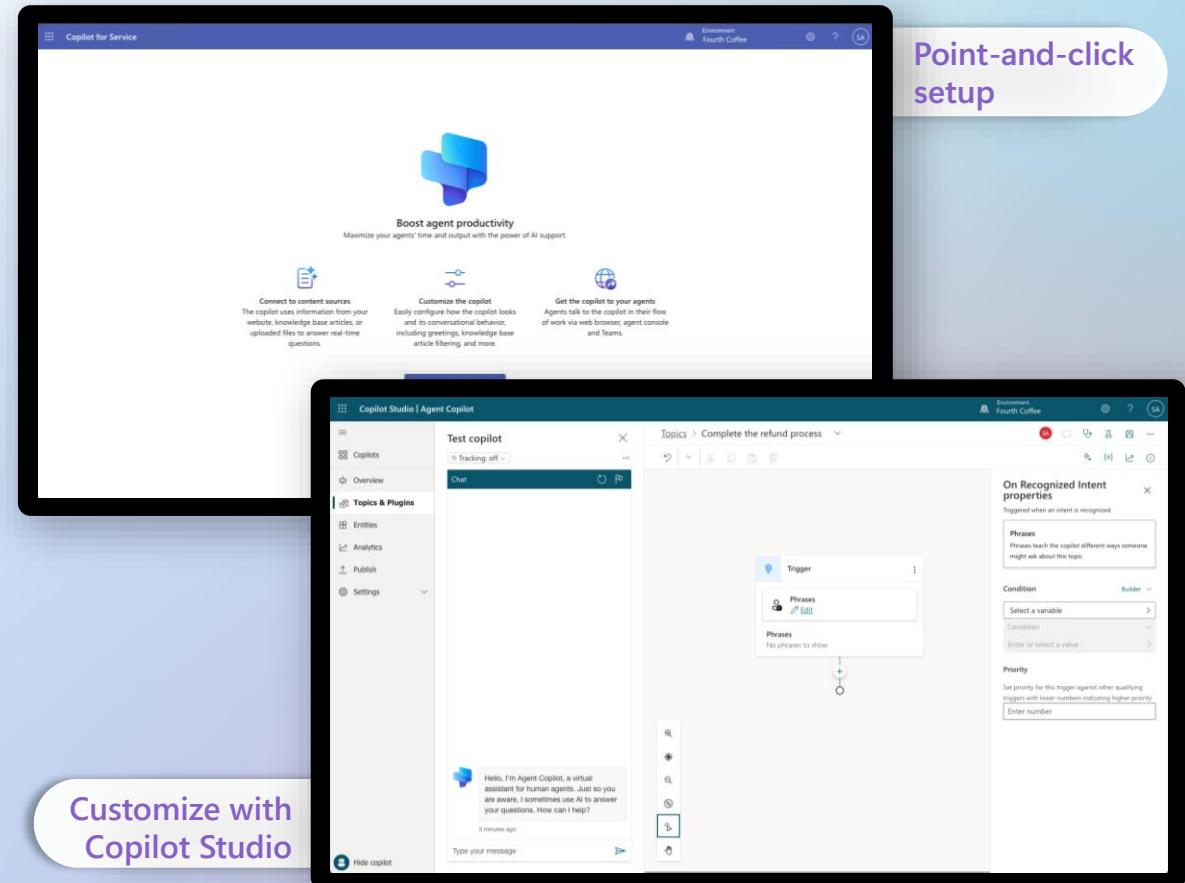
Accelerate go-live with pre-built integrations and easy customization

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



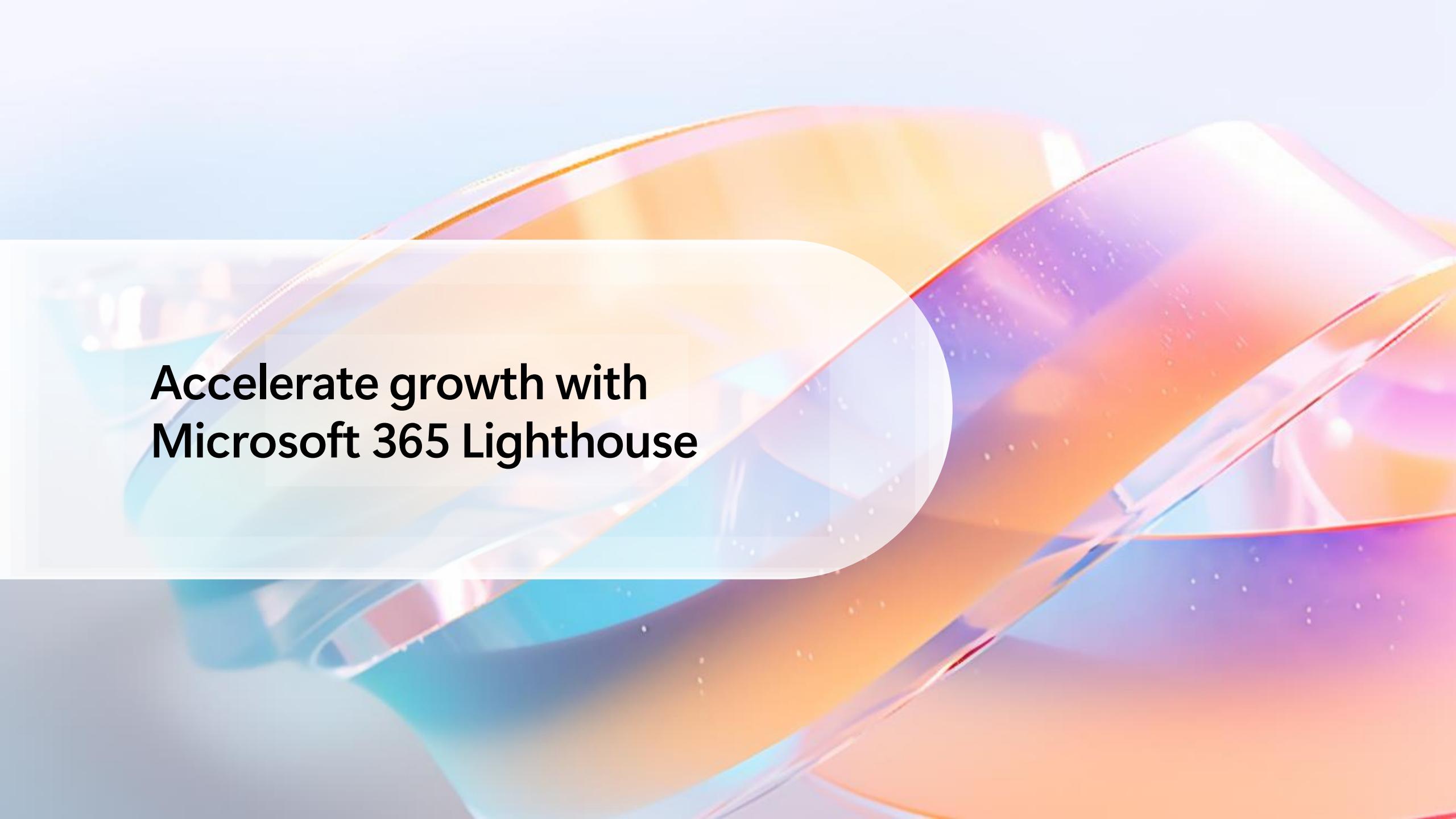
# Our upcoming release plan overview

Microsoft Copilot for Service	Preview	General Availability		
		Q1 CY2024	Q2 CY2024	Q3 CY2024
KEY CAPABILITIES	PUBLIC			
<b>Administrator Experiences</b> Simplified point-and-click access to public websites, SharePoint, knowledge base articles, and offline files.  Pre-built integrations to access knowledge sources for Salesforce, ServiceNow, and Zendesk.	In preview	Feb '24		
<b>Copilot experiences in agent desktops</b> Generative AI-powered conversations across all knowledge with a copilot embedded in agent desktops from Salesforce and other channels to support agents where they work.	In preview	Feb '24		
<b>Copilot experiences in M365 apps</b> In Outlook, summarize and draft emails, access case summaries, browse and update CRM records, and schedule meetings informed by case summaries and other relevant information from CRM records.  In Teams, browse and update CRM records during a meeting, as well as recap meetings, suggest follow-up action items, and create tasks that can all be saved to CRM systems directly from Teams.	Feb '24		Apr—Jul '24	

Microsoft Copilot for Service new capabilities planned	Preview planned	GA planned	Feature details
<b>Agent experiences in Outlook</b>	Generate email drafts and replies using generative AI	Feb 2024	Apr 2024
	Generate email summary with an ability to save to CRM	Feb 2024	Apr 2024
	Provide case summary to agents while working on the emails.	Feb 2024	Apr 2024
	Copilot for Service during customer meeting preparation	Feb 2024	Apr 2024
	Provide recommended CRM updates to agents in Outlook	Feb 2024	Jul 2024
	Schedule a meeting prompt based on the email context in Outlook	-	Jul 2024
<b>Agent experiences in Teams</b>	Access to browse and updates CRM records during the meeting	Feb 2024	Apr 2024
	Provide meeting summary and follow up items to create CRM tasks in Teams Recap	Mar 2024	Apr 2024
<b>Agent copilot in 3P CRM system</b>	Ability to execute the custom plugins in Agent Copilot	Dec 2023	Feb 2024
	Ask questions to Copilot while embedded in 3P CRM systems	Dec 2023	Feb 2024
<b>Administrator Experience</b>			
	Create an agent Copilot to embed in 3P CRM systems	Dec 2023	Feb 2024
	Ability to deploy Copilot in 3P CRM desktops, Teams	Dec 2023	Feb 2024
	Deploy Microsoft Copilot for Service app for Outlook and Teams	Feb 2024	Apr 2024
	Configure copilot features and customize settings in Microsoft Copilot for Service app	Feb 2024	Apr 2024

# 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. The bottom section lists individual opportunities for various tenants, each with a description, probability (High or Medium), product (e.g., Microsoft Teams Exploratory, Microsoft 365 Business Basic), total seats, date created, and a 'Provide feedback' button.

Tenant	Description	Probability	Product	Total seats	Date created	Action
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	
Lemon Healthcare Company	Convert customer with usage on expiring trial to paid license	High	Microsoft Teams Exploratory	67	11/29/2022	

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# Unlock the Copilot for Microsoft 365 opportunity



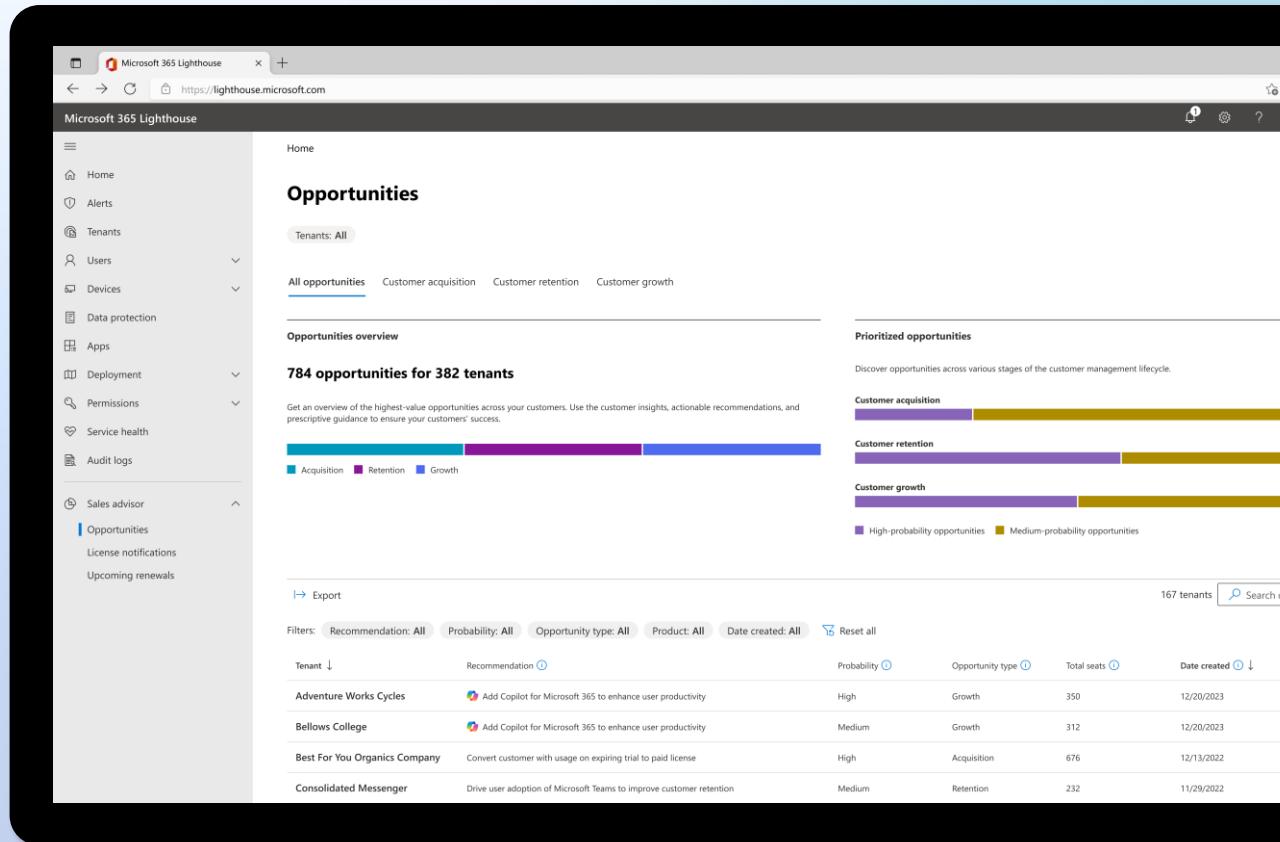
Accelerate your GTM with guidance on which customers are eligible and ready for Copilot for Microsoft 365

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 options like Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, Sales advisor, Opportunities, License notifications, and Upcoming renewals. The main content area displays an 'Opportunities overview' showing '784 opportunities for 382 tenants'. It features a bar chart with three segments: Acquisition (blue), Retention (purple), and Growth (yellow). Below the chart, there's a section titled 'Prioritized opportunities' with three horizontal bars: 'Customer acquisition' (medium probability), 'Customer retention' (high probability), and 'Customer growth' (medium probability). At the bottom, a table lists five opportunities with columns for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created. The first row is for 'Adventure Works Cycles' with a recommendation to 'Add Copilot for Microsoft 365 to enhance user productivity'.

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	12/13/2022
Consolidated Messenger	Drive user adoption of Microsoft Teams to improve customer retention	Medium	Retention	232	11/29/2022

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# Get customers AI Ready



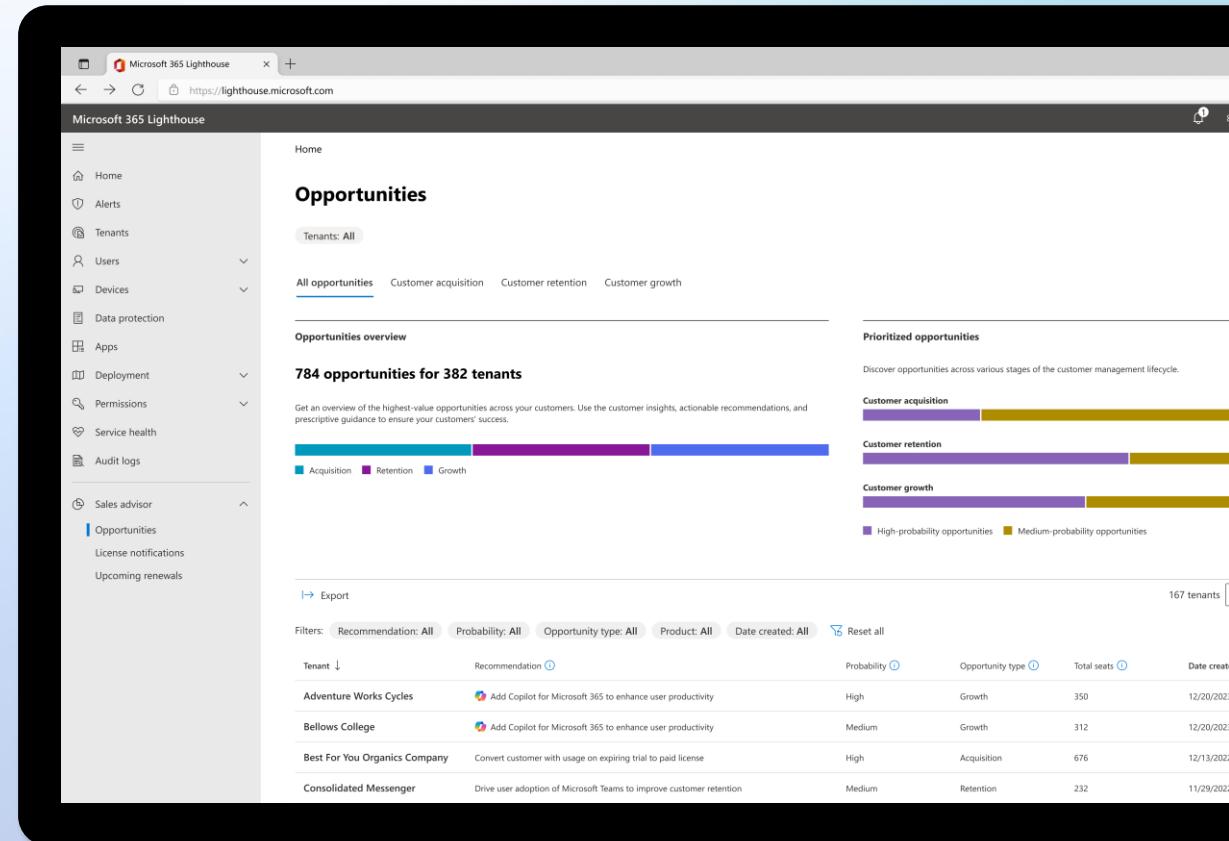
Help your customers get AI-ready to unlock Copilot's full potential for their organization

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

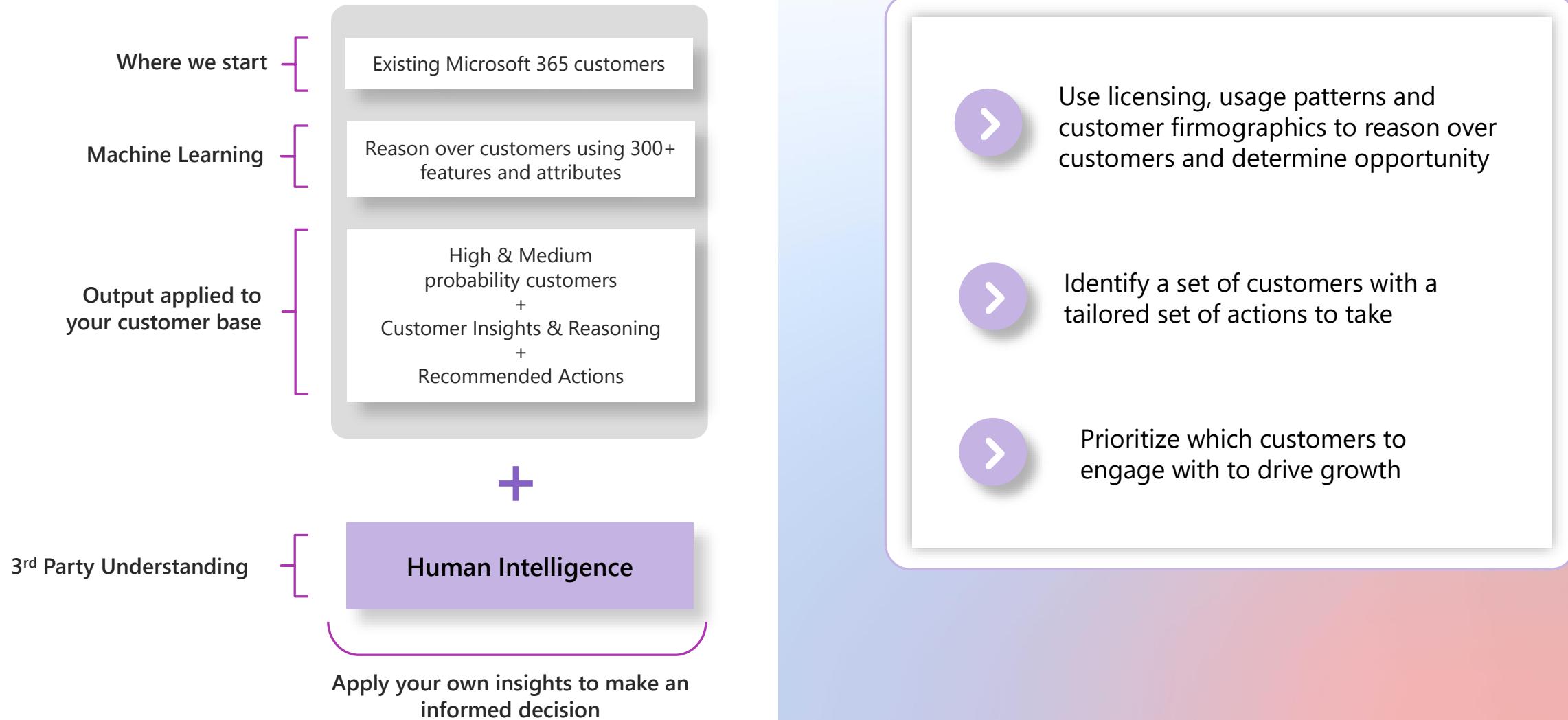
**Optimize customer engagement** with best practice guidance and marketing content



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 'Home'. 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). A callout box highlights the 'Customer acquisition' bar. To the right, there's a section for 'Prioritized opportunities' with three horizontal bars: 'Customer acquisition' (mostly yellow), 'Customer retention' (mostly purple), and 'Customer growth' (mostly purple). At the bottom, a table lists four customer entries 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	11/29/2023

# AI-driven opportunities & insights



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# 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

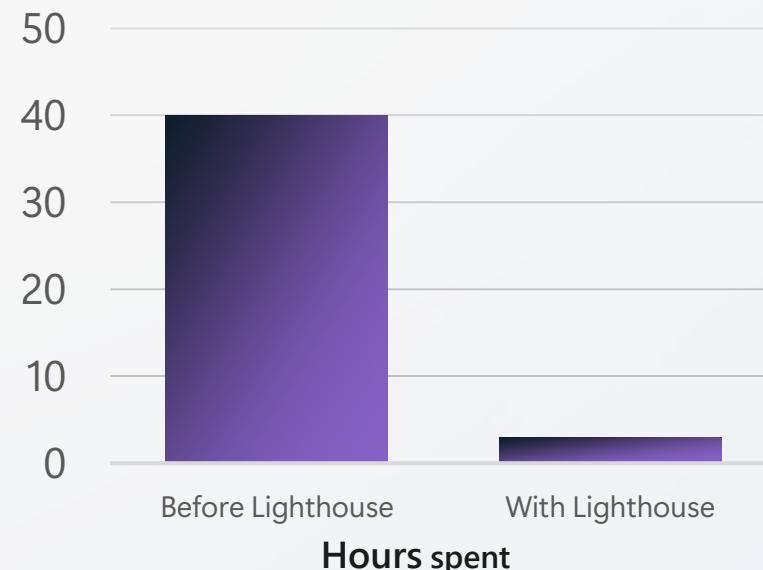
**Optimize the renewal conversation** with contextual retention, upsell and expansion recommendations

The screenshot shows the Microsoft 365 Lighthouse web interface. On the left is a dark 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 has a light background. At the top, it says "Upcoming renewals". Below that is a note: "These are Cloud Solution Provider (CPS) customer tenants in your entire partner organization with subscriptions that will expire in the next 3 months. Get recommendations for each tenant customer to help drive your renewal discussions and help you provide the best solutions for your tenants." Underneath is a summary bar with four categories: "Within 30 days" (12), "Within 60 days" (2), "Within 90 days" (115), and "No recurring billing" (45). Below this is a table with columns: Tenant, End date, Product, Recurring billing, Total licenses, Recommendations, Status, and Actioned by. The table lists various tenants with their respective details. At the bottom of the table, there are buttons for "Edit filters", "Reset filters", and "Reset all".

# 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

