



# FY26 AI Business Solutions Partner Playbook

Partner Ready



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# Business Overview

# Five MCAPS Priorities



Copilots on every device across every role



Frontier AI solutions



Securing the cyber foundation



M365 and D365 core execution



Migrations and modernization

GROWTH

REVENUE

New

# AI Business Solutions



Modern work



Business  
applications

# Priorities Aligned to Solution Areas

## AI Business Solutions



Copilots on every device  
across every role

## Cloud & AI Platforms



Frontier AI solutions

## Security



Securing the cyber foundation



M365 and D365  
core execution



Migrations and modernization

# FY26 AI Business Solutions Opportunity and Partner GTM

# Agentic AI is driving the next wave of business transformation

**\$47.1B**

By 2030

The AI agent market will grow from \$5.1B in 2024.

**33%**

By 2030

Enterprise software applications will include agentic AI, up from less than 1% in 2024.

**>15%**

By 2030

Day-to-day work decisions will be made autonomously through agentic AI, up from 0% in 2024.

66% of M365 Copilot Incremental Revenue influenced by partners in FY25

82% Partner Influenced Usage of M365 Copilot

# AI Business Process Total Addressable Market (TAM)

Category	Total Addressable Market (\$B)	Total Addressable Market (\$B)	CAGR
	FY25	FY28	3-Year
Customer Experience	\$25	\$38	 15%
Service (Including CCaaS)	\$40	\$63	 16%
ERP	\$40	\$69	 20%
Low Code (Apps + Auto)	\$31	\$46	 14%
<b>Total</b>	<b>\$135</b>	<b>\$216</b>	 17%

Market/Subsegment aligned FY24-H2, data source updated FY25-Q2, Cloud is an approximation

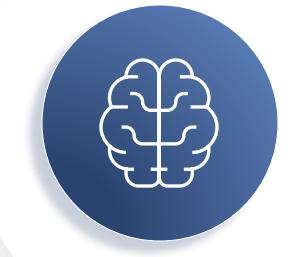
## Category: Gartner Report: Gartner Subsegments

- Customer Experience: CRM: Sales
- Service: CRM: Customer Service and Support
- ERP: FMS Components, Procurement Supply Chain Execution (SCE), Supply Chain Planning (SCP), Enterprise Asset Management (EAM), Manufacturing & Operations (M&O)
- Low Code: Low-code Application Platforms (LCAP), Robotic Process Automation (RPA), Citizen Automation & Development Platform (CADP), Process Mining

# FY26 AI Business Solutions GTM

		FY26 Growth Drivers	Solution Plays	Enterprise	Corporate	SMB
AI Workforce	Mainstream	M365 Copilot, Copilot Chat, Copilot Studio, Viva	Copilot and Agents at Work	✓	✓	✓
	Mainstream	ME3, Frontline Worker	Secure AI Productivity	✓	✓	✓
	Mainstream	W365, AVD, W365 Link	Scale with Cloud and AI Endpoints	✓		
	Mainstream	Teams Phone, Rooms, Premium	Converged Comms	✓		
AI Business Process	Mainstream	Power Apps, Power Automate, Copilot Studio	Innovate with Low Code AI and Agents	✓	✓	
	Mainstream	D365 Sales, Copilot Studio	Sales Transformation with AI	✓	✓	
	Mainstream	D365 Service, Field Service, CCaaS, Copilot Studio	Service Transformation with AI	✓	✓	
	Mainstream	D365 Finance, Supply Chain, Copilot Studio	ERP Transformation with AI	✓	✓	✓
		Business Central, Copilot Studio	Scale Business Operations with AI			✓

# FY26 AI Business Solutions Plays and Partner GTM



# *AI Workforce Solution Plays*

# Copilot and Agents at Work

# FY26 Copilot and Agents at work Customer Opportunity



## Acquire

New Customers

Acquire new customer, Drive penetration with Copilot Paid licenses or Copilot MAU



## Monetize

Unpaid Users

Land Copilot for all leading with Copilot Chat targeting Information workers and Frontline workers



## Grow

Existing Customers

Drive extensibility with agents scenarios associated with high impact business impact scenarios

# Copilot and Agents at Work: Customer Win Formula with GTM Support

<b>Customer Outcome</b>	Provide AI led business transformation benefits to Customers through Partner led solutions and services that meets the evolving needs of businesses and supports their digital transformation journeys	<b>Partner Outcome</b>	Win customer by advise, deploy, extend and drive adoption of Copilot for all
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## Differentiated Partners Capabilities

- Be the AI & Copilot Advisor to Business decision makers
- Get customer ready for Copilot addressing data security and privacy
- Deliver end user Copilot adoption & change management
- Extend Copilot with integrations and customization

## Win Formula aligning to MCEM

### 1 Listen & consult

**Build Pipeline**  
Position Wall-to-Wall **Copilot** coverage for all users  
Target customers and execute campaigns

### 2 Inspire & design

**Design Solution**  
Build intent by delivering **immersive customer experiences**, like prompt-a-thons

### 3 Empower & achieve

**Win Deal**  
Enhance Copilot with **Agents experiences to transform business process**

### 4 Realize value

**Deploy/Drive Usage**  
Land **business value** and **ROI** with healthy usage  
Address data security and privacy while driving end user enablement

### 5 Manage & optimize

**Drive Expansion**  
Align with MSFT sellers to drive **upsell** and build business case for expansion  
Extend business value with 3P ISV extensions  
Claim Partner of record for Copilot (CPOR)

#### Copilot +Power Accelerate

[Campaign in a box](#)  
[Customer Propensity](#)

Immersion Briefings  
Envisioning & PoC

Transactional Incentives

Deployment Accelerator

Deployment Offers

# Copilot Partner Differentiated Capability

	AI + Copilot Advisory	Copilot Deployment + Data Governance	Adoption + Change Management	Extensibility	
Initiation	<b>GenAI Advisory</b> Advising customers on their entire GenAI strategy ladder up to business priorities.	<b>Readiness</b> Advising customers on tenant readiness to adopt Copilot with a structured process and remediating blockers.	<b>Engagement Strategy</b> Designing a plan that outlines communication and workforce transformation strategy that aligns with overall Gen AI strategy to effectively drive adoption.	<b>Industry &amp; FLW Agent</b> Clearly defining agentic scenarios by industry and functions, including the problem, solution, key metrics for success and monetization strategy.	
Activation	<b>Business Transformation</b> Completing scenario discovery and solution design leading to transforming business processes.	<b>Deployment</b> Optimizing and deploying Copilot environment and ongoing service health reviews.	<b>Security and Compliance*</b> Addressing & remediation of security and compliance.	<b>People Transformation</b> Driving Copilot adoption by training users, building skills, knowledge, and mindsets necessary to transform customer's work using AI.	<b>Agent Development *</b> Using tools like M365 Agent Builder, Copilot Studio, Power Plat, Azure AI, create and deploy agents to support complex enterprise scenarios.
Impact	<b>Business Value *</b> Driving the ROI of their Copilot investments and quantifying benefits (Copilot Analytics).		<b>Impact Measurement *</b> Using Copilot Analytics to track impact and show value realization.		* Key capability focus in FY26

## M365 Copilot + Agents+ Copilot Chat

[Services Offer Development guidance](#)

[CSP Offer Development guidance](#)

# Copilot and Agents at Work | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads

### Customer Scenario

### Sales Motion

### Propensity Tool

### Campaign-in-a-Box (CiaB)

### Get Started

#### Acquire New Customers

- Lead with Copilot for All
- Win Copilot Chat across IW +FLW
- Land Agentic value
- Win Microsoft 365 Copilot

SPARK/FRX

[PMC](#)

#### Monetize Unpaid Users

- Drive Copilot Agentic value with high impact business scenarios
- Upsell to Microsoft 365 Copilot

SPARK/FRX

Copilot for all [UPDATED](#)

[PMC](#)

#### Grow Existing Customers

- Drive Copilot Agentic value with high impact business scenarios
- Expand Agentic scenarios to improve customer ROI
- Expand M365 Copilot seats

SPARK/FRXdem

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Copilot Specialization

July 2025 launch

A new specialization is proposed that will look to differentiate partner capabilities in Copilot, including **Copilot for Microsoft 365, Copilot Chat, Copilot Studio and agents**. Partners with this specialization should be able to help their customers with the following areas:

- ✓ AI + Copilot Advisory services
- ✓ Assess readiness and deliver secure deployment plan
- ✓ Copilot adoption + change management
- ✓ Extensibility with agentic focus



## Prerequisite

Attain the **Solutions Partner designation in Modern Work, Business Applications or Security**



## Performance requirements

1,000 MAU growth of Microsoft 365 Copilot in TTM (CPOR, CSP Tier 1, 2)

5 M365 Copilot net customer growth in TTM (CPOR, CSP Tier 1, 2)



## Skilling requirements

5 people with [MS-102](#) M365 Certified: Enterprise Administrator Expert

5 people with cumulatively:

SC-401: Implement Information Protection in Microsoft 365

OR

APL-4002: Prepare security and compliance to support Copilot for Microsoft 365

5 people with APL-7008: Create agents in Microsoft Copilot Studio



## Customer references

Provide three customer references which must include **at least one example of transforming business process with agent implementation.**

# Copilot and Agents at Work | Partner Skilling

		Pre-MCEM to achieve Designation and Specialization				
		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Copilot and Agents at Work		Credential Ready	Sales Ready	Tech Deal Ready	Project Ready	
New to Practice (Build)	<a href="#">Use AI for Everyday Tasks</a>	<a href="#">Introduction to Microsoft 365 Copilot for Partners</a>	Elevate user productivity with Microsoft 365 Copilot (End user training)	Elevate user productivity with Microsoft 365 Copilot (End user training)		
	<a href="#">Empower your workforce with M365 Copilot Use Cases</a>	Pitch and land the power of Copilot and the Copilot Stack	<a href="#">Copilot for Microsoft 365: The AI-powered Future of Work</a>	Secure and govern AI to enable responsible adoption		
	<a href="#">Prepare security &amp; compliance to support Microsoft 365 Copilot (Applied Skills)</a>	<a href="#">Level Up CSP: Copilot for Microsoft 365 Sales Bootcamp</a>	<a href="#">Level Up CSP: Copilot for Microsoft 365 Technical Bootcamp</a>	Deploy and adopt Microsoft 365 Copilot + Agents		
Improve Practice (Enhance)	<a href="#">Create agents in Microsoft Copilot Studio (Applied Skills)</a>	<a href="#">Copilot Sales Champion on LevelUp</a>	Secure & Govern Copilot for M365 with Microsoft Purview	Simplify agent development with Copilot Studio		
	<a href="#">MS-102: Enterprise Administrator Expert</a>	Microsoft Power Hour for Sellers	Guide customer conversation on Copilot and the Copilot Stack	Develop pro-code agents with Copilot Studio		
Specialize (Innovate and Grow)	<a href="#">Build custom engine copilots for Microsoft Teams</a>	Microsoft AI Agents Day for Partners		Copilot Studio Agentathon		

- Register for an upcoming live session at [Partner skilling hub](#)
- Check out [Microsoft LevelUp](#) for Self-serve partner skilling LMS
- Opt-in at [aka.ms/PartnerSkillingNews](#) for the latest partner skilling updates
- Browse [Certifications](#), [Applied Skills](#), and [Learning Paths](#) for Microsoft Certifications

# Jumpstart | Copilot – Tiered Engagement Model FY26

## GOALS

- Accelerate & scale building capability across more partners with guidance, resources and community
- Align incentives, marketing resources and Co-sell with top performing partners
- Align to MCAIPP – Unlock incentives based on performance

### Eligibility Criteria

#### Prioritized

Customer wins +  
Specialization  
attainment

- Copilot Specialization++
  - +1,000 MAU [CPOR/CSP1/CSP2](#) from at least 5 new customer adds TTM
  - 3 customer references (*to meet FY26 Copilot Specialization requirements*)
- Readiness
  - 10+ trained resources per area through ESI Bootcamps
  - Meet APL/Certification requirements: (*to meet FY26 Copilot Specialization requirements*)
- Practice
  - Validated practice including AI Advisory, Extensibility AND Adoption & Change Management

#### Ready

Unlocked by  
partners with  
established  
practice/offer

- Vetted Copilot Practice
  - [Completed Copilot offer consultation with PSA team](#) (Vetted Copilot capability validated with CSA/PTS/PSA)
  - 5+ trained resources per area through learning channels and required courses
  - Meet required Seats and MAU on internal usage of Copilot for Microsoft 365, Agents and Chat

Community  
Enlist qualified  
partners for  
practice  
development –

- +1 Modern Work or Business Applications or Security Solutions Specialization
- Invited eligible advisory/service partner
- Max 6 month window to get to 'Ready' tier

### Partner Positioning

- Partners with Proven Impact
- Key partners for Co-sell

- Access to GTM Investments

- Build with support

# Copilot Jumpstart training requirements

## FY26 H1 (July to December)

Starting July 2025

\*MS-102 4 total certified individuals (to meet future Copilot Specialization requirements)

To graduate to or retain Prioritized Tier (10 trained per area; trained resources can count against multiple markets; TTM)

(Sales) Copilot Business Value Bootcamp  
DW-100  
[aka.ms/DW-100](https://aka.ms/DW-100)  
6 hours

(Technical) Innovate with M365 Copilot and build your own agents  
DW-101  
[aka.ms/DW-101](https://aka.ms/DW-101)  
12 hours

(Technical) Build & extend AI-powered copilots with Copilot Studio  
DW-102  
[aka.ms/DW-102](https://aka.ms/DW-102)  
12 hours

(Pre-Sales) Secure & Govern Copilot for M365 with Microsoft Purview  
DW-103  
[aka.ms/DW-103](https://aka.ms/DW-103)  
4 hours

(Technical) Build and extend your own agents using pro-code capabilities  
DW-104  
[aka.ms/DW-104](https://aka.ms/DW-104)  
12 hours

\*MS-102 M365 Certified: Enterprise Administrator Expert  
[aka.ms/MS-102](https://aka.ms/MS-102)

To graduate to or retain Ready Tier (5 trained per area; trained resources can count against multiple markets; TTM)

(Sales) Copilot Business Value Bootcamp  
DW-100  
[aka.ms/DW-100](https://aka.ms/DW-100)  
6 hours

(Technical) Innovate with M365 Copilot and build your own agents  
DW-101  
[aka.ms/DW-101](https://aka.ms/DW-101)  
12 hours

(Technical) Build & extend AI-powered copilots with Copilot Studio  
DW-102  
[aka.ms/DW-102](https://aka.ms/DW-102)  
12 hours

**Prioritized Tier**  
Total training hours per resource = 46 hours (10 sales, 36 technical)

**Ready Tier**  
Total training hours per resource = 30 hours (6 sales, 24 technical)  
TTM – Training taken over Trailing Twelve Months will be counted, unless there is new training content

[aka.ms/JumpstartBootcamps](https://aka.ms/JumpstartBootcamps) to see all Jumpstart trainings

Sales focused training

Technical focused training

# Secure AI Productivity

[\(Back to Solution Play Listing\)](#)

# FY26 Secure AI Productivity Customer Opportunity



## Office 2016/2019

End of Support

Customers using Office 2016/2019 or older perpetual versions



## Secure AI

Customers looking at M365 Copilot but still in O365 or dark accounts



## BYOAI

Shadow IT Discovery

O365 and Dark customers without M365 Copilot seat

# Secure Productivity: Customer Win Formula with GTM Support

## Customer Outcome

Enable customers' to safely run their businesses from anywhere with a secure, AI-powered cloud solution in a hybrid work scenario.

## Partner Outcome

Drive deployment and usage in Enterprise; Drive customer upsell from Office 365 to Microsoft 365 E3 winning additional Intune, Entra ID P1, and Purview usage.

## Differentiated Partners Capabilities

Execute campaigns to generate leads – New customer acquisition and Premium Suite upsell

Build customer intent; Message – Get Copilot ready, vendor consolidation, security concerns

Leverage CSP offers to win new customers/ seats

Accelerate deals and drive migration and with Adoption Accelerator

## Win Formula aligning to MCEM

### 1 Listen & consult

#### Build Pipeline

Target customers and execute campaigns

### 2 Inspire & design

#### Deliver

Secure Productivity build intent engagements

### 3 Empower & achieve

#### Win Deal

Influence or close E3  
Include Zero Trust Assessment to explore additional security gaps and opportunities

#### Microsoft 365 Accelerate

### 4 Realize value

#### Deploy/Drive Adoption

Address data security and privacy while driving end user enablement

### 5 Manage & optimize

#### Drive Expansion

Build business case for expansion to include Copilot Chat and Microsoft Security and Compliance mini-bundles

[Secure Productivity ENT Campaign in a box](#)  
[SPARK Propensity](#)

[Immersion Briefings](#)  
[Envisioning & PoC](#)

[Transactional Incentives](#)

[Deployment Offers](#)  
CSP Deployment Accelerator  
ME3/ME5

[EA Deployment Voucher](#)

# Secure AI Productivity Differentiated Capability View

	Secure AI Advisory	ME3 Deployment + Expansion	Adoption + Change Management	Extensibility
Initiation	<b>Secure AI Advisory</b> Advising customers on their entire Secure AI strategy ladder up to business priorities within Modern Work.	<b>Readiness</b> Advising customers on tenant readiness to adopt ME3 and Secure AI with a structured process and remediating blockers.	<b>Engagement Strategy</b> Designing a plan that outlines communication and workforce transformation strategy that aligns with overall Secure AI strategy to effectively drive adoption.	<b>Industry &amp; FLW</b> Clearly defining Frontline Worker scenarios by industry and functions, including the problem, solution, key metrics for success and monetization strategy through Teams for Frontline Worker, Copilot Chat, and Frontline Worker Agents
Activation	<b>Business Transformation</b> Completing scenario discovery and solution design leading to transforming business processes.	<b>Deployment</b> Optimizing and deploying Intune, Entra ID Premium P1 and Purview and ongoing service health reviews	<b>People Transformation</b> Driving ME3 growth by training users, building skills, knowledge, and mindsets necessary to transform customer's work using Secure AI and compliance tools in M365 core suites.	<b>Security and Compliance*</b> Preparing step-up pathways for additional security and compliance products.
Impact	<b>Business Value *</b> Driving growth from O to M on major accounts and through renewals while focusing on Secure AI story (EMS, Intune, Entra ID P1, etc.).		<b>Impact Measurement *</b> Measured through net seat adds and PIIR as well as workshop and engagement execution.	<small>* Key capability focus in FY26</small>

Microsoft 365 E3

[Services Offer Development guidance](#)

[CSP Offer Development guidance](#)

# Secure AI Productivity | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads



Customer Scenario



Sales Motion



Propensity  
Tool



Campaign-in-a-Box (CiaB)



Get Started

### EOS Office 2016/2019

- Plan the move to Microsoft 365
- Leverage on demand Microsoft 365 E3 Demos
- Engage with FastTrack ME3 Go Back Program for ME3

SPARK

### Secure AI-Powered Productivity

- Leverage the Secure AI Pitch Deck
- Engage Secure Productivity Proof of Value engagements
- Leverage Microsoft Purview for M365 E3

SPARK

Secure Productivity ENT – *UPDATED*

[PMC](#)

[Partner GTM](#)

[Partner Practice Development](#)

### Shadow IT

- Explore BYOAI Shadow IT Discovery with M365 E3
- Position Simplifying Endpoint Management with Microsoft 365
- Land Elevating Security for Copilot with Microsoft 365

SPARK

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Secure AI Productivity | Partner Skilling

Pre-MCEM to achieve Designation and Specialization		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Secure AI Productivity	Credential Ready	Sales Ready	Tech Deal Ready	Project Ready		
New to Practice (Build)	<a href="#">MS-900: Microsoft 365 Fundamentals</a>	Pitch and land the power of Copilot and the Copilot Stack	<a href="#">Secure Productivity for Microsoft 365 E3</a>	Secure and govern AI to enable responsible adoption		
	<a href="#">Security, Compliance, and Identity Fundamentals</a>	Build a foundation of secure productivity to get AI-ready (Sales Ready)	Secure & Govern Copilot for M365 with Microsoft Purview	Knowledge management using Microsoft 365		
	<a href="#">Get started with identities and access using Microsoft Entra (Applied Skills)</a>	<a href="#">Level Up CSP: Sales Bootcamp</a>	<a href="#">Level Up CSP: Technical Bootcamp</a>	Microsoft Syntex (SharePoint Premium)		
Improve Practice (Enhance)	<a href="#">Prepare security &amp; compliance to support Microsoft 365 Copilot (Applied Skills)</a>	Microsoft security sales bootcamp	Build a foundation of secure productivity to get AI-ready (Deal Ready)	Improving productivity for Frontline workers (FLW) with Microsoft 365		
	<a href="#">MS-102: Enterprise Administrator Expert</a>	Microsoft Power Hour for Sellers	Guide customer conversation on Copilot and the Copilot Stack	Revolutionize Employee Experiences with Microsoft VIVA		
	<a href="#">SC-100: Microsoft Cybersecurity</a>	Microsoft AI Agents Day for Partners		Develop secure AI productivity foundations		

- Register for an upcoming live session at [Partner skilling hub](#)
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- Opt-in at [aka.ms/PartnerSkillingNews](#) for the latest partner skilling updates
- Browse [Certifications](#), [Applied Skills](#), and [Learning Paths](#) for Microsoft Certifications

# Scale with Cloud and AI Endpoints

# FY26 Scale with Cloud and AI Endpoints Customer Opportunity



## W365 expansion

Follow up with customers who tried or piloted W365



## AVD Expansion

Follow up with AVD customers with low ACR for expansion



## OnPrem VDI/RDS migration

Target accounts using virtualization either via Windows RDS or a legacy VDI vendor



## Windows to Cloud Migration

Customers currently using Windows Enterprise and Intune (prerequisite) on a local device, who could benefit from running Windows in the cloud

# Scale with Cloud and AI Endpoints: Customer Win Formula with GTM Support

## Customer Outcome

Securely deployed Cloud based Windows 365 and applications across Azure Virtual Desktop for secure AI-powered productivity and development on any device.

## Partner Outcome

Drive deployment and usage in Enterprise; Monetize on deployment and usage services opportunity with W365, Intune suite and AVD for application development, and secure endpoints.

### Differentiated Partners Capabilities

Create virtualization opportunities across W365 & AVD

Drive pre-sales activities via secure migration opportunity and app modernization projects to win deals

Drive Virtualization migration and deployment through Partner Incentives and One Azure Program

Drive Virtualization expansion to additional users and nurture customer skilling and environment growth

### Win Formula aligning to MCEM

#### 1 Listen & consult

##### **Build Pipeline**

Target customers with Partner GTM resources, creating new pipeline

#### 2 Inspire & design

##### **Design Solution**

Assess legacy environment and create clear vision roadmap for enabling endpoints to gain customer confidence

[Propensity Lists](#)

[Secure Cloud Migration & Modernization Campaign in a box](#)

#### 3 Empower & achieve

##### **Win Deal**

Secure migration and/or modernization positioning business value to customer

[Transactional incentives](#)

#### 4 Realize value

##### **Deploy/Drive Usage**

Ensure Azure Infrastructure and Databases deployment is secured by Defender for Cloud (DfC)

[Partner led](#)

Azure Accelerate

[Field led](#)

AVD W365 (ECIF)

[Deployment vouchers \(not locked\)](#)

#### 5 Manage & optimize

##### **Drive Expansion**

Nurture, train, and grow cloud environment with 1<sup>st</sup> and 3<sup>rd</sup> party solutions

# Scale with Cloud and AI Endpoints Differentiated Capability View

	Listen + Consult	Inspire + Design	Realize Value	Manage + Optimize
Initiation	<b>Discovery</b> Helping customers to understand their entire Cloud AI strategy ladder up to business priorities around devices and identity. Understanding the value of Windows 365 and Azure Virtual Desktop.	<b>Environment Readiness Assessment</b> Advising customers on technical assessments, helping to identify personas, assist with architecture design, and leveraging proofs of concept.	<b>Deployment</b> Prepare the environment to deploy and configure W365 and AVD.	<b>Adoption + Change Mgmt.</b> Implement identity and access solutions, endpoint policies, security and threat protection, end-user support for applications, OS image, and infrastructure monitoring.
Activation	<b>Advisory</b> Build a business transformation strategy to meet your customers' business needs to reimagine flexible work with W365 and AVD through demos to showcase the art of the possible.	<b>Design Solution</b> Assess legacy environment and create clear vision roadmap for enabling endpoints to gain customer confidence	<b>Cloud Transformation</b> Driving ME3 growth by training users, building skills, knowledge, and mindsets necessary to transform customer's work using Secure AI and compliance tools in M365 core suites.	<b>Security and Compliance</b> Develop a strategy to drive adoption of W365 and AVD <ul style="list-style-type: none"> <li>• Enablement services: onboarding and ongoing management</li> <li>• End-user training</li> <li>• Technical management trainings</li> </ul>
Impact	<b>Business Value</b> Driving growth of W365 and AVD through major third partners while focusing on secure endpoints connectivity and AI story (EMS, Intune, Entra ID P1, etc.).			

[Services Offer Development guidance](#)

**Windows 365 + AVD + Intune**

[CSP Offer Development guidance](#)

# Scale with Cloud and AI Endpoints | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads

### Customer Scenario

### Sales Motion

### Propensity Tool

### Campaign-in-a-Box (CiaB)

### Get Started

#### Windows 365 Expansion

- Follow up with customers who tried or piloted W365

SPARK

#### Azure Virtual Desktop Expansion

- Follow up with AVD customers with low ACR for expansion

SPARK

#### OnPrem VDI/RDS Migration

- Target accounts using virtualization either via Windows RRDS or a legacy VDI vendor

SPARK

Cloud Endpoints – *UPDATED*

[PMC](#)

[Partner Practice Development](#)  
[Partner GTM](#)

#### Windows to Cloud Migration

- Customers currently using the Windows Enterprise and Intune (prerequisite) on a local device who could benefit from running Windows in the cloud

SPARK

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Scale with Cloud and AI Endpoints | Partner Skilling

		Pre-MCEM to achieve Designation and Specialization				
		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Scale with Cloud and AI Endpoints		Credential Ready	Sales ready	Tech Deal Ready	Project Ready	
New to Practice (Build)	MS-900: Microsoft 365 Fundamentals	Pitch and land the power of Copilot and the Copilot Stack  <a href="#">Cloud Endpoint Partner Sales Bootcamp</a> (available on demand from June 15)		Secure & Govern Copilot for M365 with Microsoft Purview	<a href="#">Windows 365 and Azure Virtual Desktop solution overview</a>	
	<a href="#">Prepare security &amp; compliance to support Microsoft 365 Copilot (Applied Skills)</a>		<a href="#">Level Up CSP: Sales Bootcamp</a>	<a href="#">Level Up CSP: Technical Bootcamp</a>	Implementing Windows 365 Cloud PC	
	<a href="#">MD-102: Endpoint Administrator Associate</a>		Microsoft Power Hour for Sellers	Guide customer conversation on Copilot and the Copilot Stack	Implementing Azure Virtual Desktop (AVD)	<a href="#">Endpoint Management with Microsoft Intune</a>

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- Browse [Certifications](#), [Applied Skills](#), and [Learning Paths](#) for Microsoft Certifications

# Converged Communications: AI-enhanced Smart Workplace

# FY26 Converged Communication Customer Opportunity



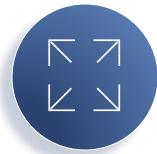
## Modernization of legacy platforms

Customers using Office 2016/2019 or legacy CUCM/AVAYA systems are prime targets for Teams Phone and Teams Rooms migration



## Secure AI Collaboration

Organizations facing increased security and compliance demands, especially regulated industries are ideal candidates for Teams Premium



## Hybrid Work Optimization

Target Enterprise customers with distributed or hybrid workforces to position Teams Rooms and Microsoft Places to optimize space utilization and meeting quality



## Copilot Attach Expansion

Accelerate expansion by bundling Teams Phone + Copilot offers

# Converged Communications: Customer Win Formula with GTM Support

## Customer Outcome

Empower hybrid teams to work smarter and more securely by unifying calling, meetings, and collaboration with AI-powered experiences through the Smart Workplace

## Partner Outcome

Expanding and accelerating Teams Phone Market Share by leveraging the Teams base & leading with AI and the differentiated value of Copilot to secure revenue and consumption

## Differentiated Partners Capabilities

Uncover communication gaps and co-create a vision for AI-powered collaboration

Drive pre-sales activities to showcase Teams Phone, Rooms, and Premium w/ Copilot integration

Expanding cross-workload value realization to integrate AI into calling and meeting workflows

Drive rapid time-to-value and long-term customer success to retain and accelerate expansion

## Win Formula aligning to MCEM

### 1 Listen & consult

#### Build Pipeline

Target customers with Partner Go to Market resources, creating new pipeline

### 2 Inspire & design

#### Deliver

Assess customer needs and amplify how Teams is the smart and secure place for customers to work

**Converged Comms Immersion Briefings (1:many)**  
Envisioning & PoC

### 3 Empower & achieve

#### Win Deal

Make it real through a Proof of Value customer engagement

**Phone Accelerate**

*Private Invite Only Initiative*

### 4 Realize value

#### Deploy/Drive Adoption

Execute customer deployment plans and drive adoption and change management services

**Deployment Accelerator**

### 5 Manage & optimize

#### Drive Expansion

Identify upsell opportunities for go back motion using propensity lists and claim usage incentives

[Smart workplace with Teams Propensity Lists](#)

Guided demos: [Teams Phone](#)  
[Teams Rooms](#)  
[Teams Premium](#)

Briefing kits:  
[Teams Phone](#)  
[Meetings and Rooms](#)

[Teams Phone Proof of Value](#)  
[Teams Rooms Proof of Value](#)  
[Microsoft Places Proof of Value](#)  
[Rooms Customer Look Book](#)

Deployment guides:  
[Teams Phone deployment guide](#)  
[Teams Rooms deployment guide](#)  
[Teams Premium deployment guide](#)  
[Microsoft Places deployment guide](#)

[Propensity Lists](#)

# Converged Comms Differentiated Capability View

	Listen + Consult	Inspire + Design	Realize Value	Manage + Optimize
Initiation		<b>Teams Phone Deployment</b> Implement PSTN connectivity, Direct Routing, Operator Connect, and survivable branch appliances	<b>Engagement Strategy</b> Designing a plan that outlines communication and workforce transformation strategy that aligns with overall Secure AI strategy to effectively drive adoption	
Activation	<b>Business Transformation</b> Completing scenario discovery and solution design leading to addressing customer needs highlighted through Teams Phone, Premium and Rooms	<b>Deployment</b> Deploy and optimize shared spaces with certified devices, layout planning, and Pro Management	<b>People Transformation</b> Driving ME5 growth by training users, building skills, knowledge, and mindsets necessary to transform customer's work using Secure AI and compliance tools in M365 core suites	<b>Voice &amp; Meeting Integration</b> Integrate with third-party voice platforms, CRMs, and industry-specific workflows
Impact	<b>Business Value</b> Conduct Teams Phone and Rooms assessments to identify gaps and opportunities	<b>Premium Feature Enablement</b> Configure and activate Teams Premium features like watermarking, sensitivity labels, and AI-powered recap	<b>Impact Measurement</b> Track adoption KPIs, call quality, and meeting effectiveness using CQD and Viva Insights	
Teams Phone, Rooms, and Premium <small>Services Offer Development guidance</small>				
Skilling	<a href="#">Partner technical readiness plan for Teams Phone, Teams Rooms, and Teams Meetings</a>			Register for an upcoming live session at <a href="#">Partner skilling hub</a>

# Converged Communications | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads



Customer Scenario



Sales Motion



Propensity  
Tool



Campaign-in-a-Box (CiB)



Get Started

### Upsell to ME5

- Increase # of seats in existing accounts across Teams Phone, Teams Rooms, Teams Premium, and Microsoft Places

SPARK

### Teams Premium

- Add new workload customers across Teams Phone, Teams Rooms, Teams Premium, and Microsoft Places

SPARK

Smart Workplace with Teams –  
*UPDATED*

[PMC](#)

[Partner GTM](#)

[Partner Practice Development](#)

### Teams Phone Standalone Copilot

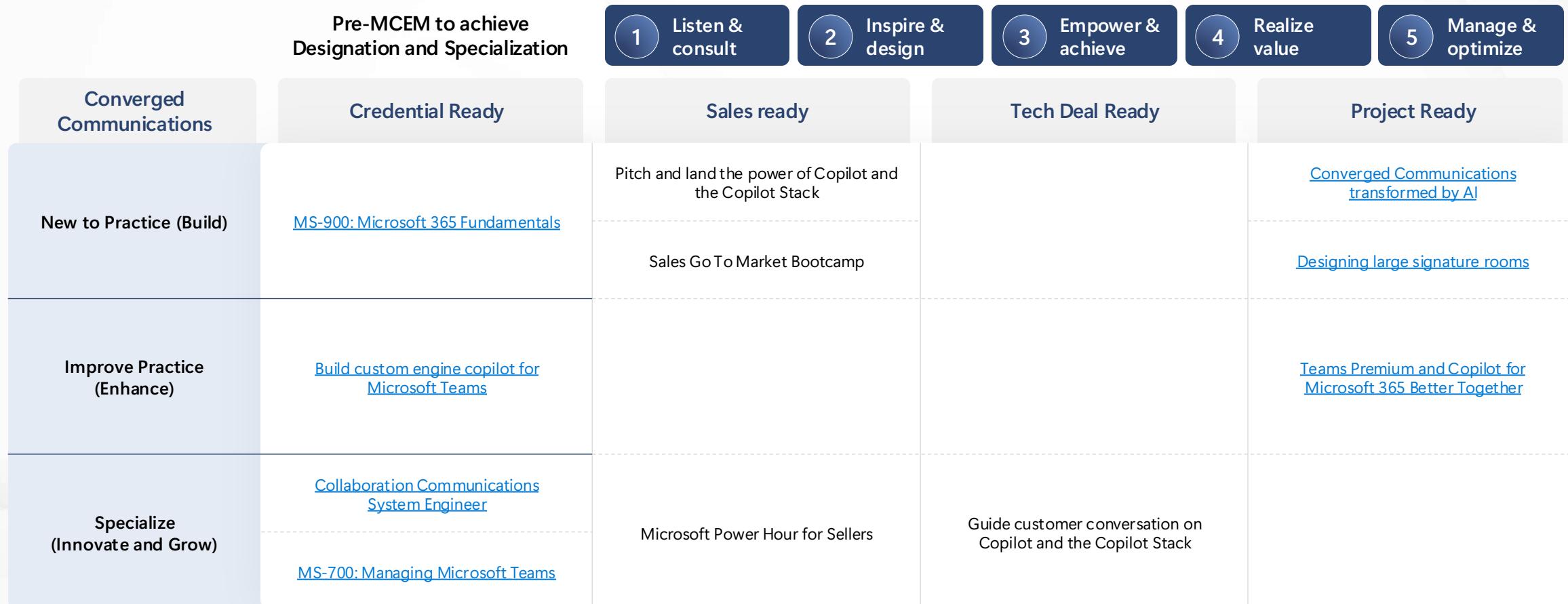
- Attach Copilot to all new workloads; bundle Teams Phone + Copilot offers

SPARK

[Learn more about Propensity Tools](#)

[Learn more about CiB](#)

# Converged Communications | Partner Skilling



- Register for an upcoming live session at [Partner skilling hub](#)
- Check out [Microsoft LevelUp](#) for Self-serve partner skilling LMS
- Opt-in at [aka.ms/PartnerSkillingNews](#) for the latest partner skilling updates
- Browse [Certifications](#), [Applied Skills](#), and [Learning Paths](#) for Microsoft Certifications

# Win Formula: SME&C AI Business Solutions – AI Workforce zoom-in

<b>Customer Outcome</b>	Help customers to safely run their businesses from anywhere with a secure, AI-powered cloud solution in a hybrid work scenario, while providing AI led business transformation benefits to Customers through Partner led solutions and services.	<b>Partner Outcome</b>	Drive upsell from ME3 to ME5, O to M, and BS to BP. Acquire new customers with O and BS. Win customers by advising, deploying, and driving adoption of Copilot for all.
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## Differentiated Partners Capabilities

Execute campaigns to help generate leads – New customer acquisition, upsell, and Copilot attach

Help build customer intent; Message – Get Copilot ready, vendor consolidation, security concerns

Leverage CSP offers to help win new customers/seats

Deliver end user Copilot adoption & change management to help drive Copilot for all

## Win Formula aligning to MCEM

### 1 Listen & consult

#### Build Pipeline

Target customers and execute campaigns

### 2 Inspire & design

#### Deliver

Build intent by delivering immersive customer experiences.

### 3 Empower & achieve

#### Win Deal

Influence or close E3  
Include Zero Trust Assessment to explore additional security gaps and opportunities

### 4 Realize value

#### Deploy/Drive Adoption

Address data security and privacy while helping drive end user enablement

### 5 Manage & optimize

#### Drive Expansion

Build business case for expansion to include Copilot Chat and Microsoft Security and Compliance mini-bundles.

Campaigns in a Box

Cloud Ascent

SPARK Propensity

Sales Advisor (Lighthouse)

Partner Coop Funds

Immersion Briefings  
Envisioning & PoC

Microsoft 365 & Copilot Accelerate

Deployment Accelerators

Sales Advisor (Lighthouse)



**Joint Territory Planning is Microsoft's new field-partner model for SMC-E sellers to engage directly with partner sellers early in the sales cycle.**



Enables SMC-E sellers to help connect, plan and share leads/unqualified opportunities through Partner Center.



Promotes early engagement and helps enable the creation of customized offerings.



Strengthens collaboration among PDMs, PSS, SME&C sellers, and partners.



SMC-E sellers gain the ability to engage directly with partners sellers.

# Partners Commitments for Joint Planning



**Keep engaged with shared leads in Partner Center**

Use the Leads tab > Planned Items to take action (accept or decline leads) within 14 days.



**Collaborate with MSFT sellers to drive opportunities**

Seek assistance from Microsoft SME&C seller by transforming the referral into a Co-sell opportunity.



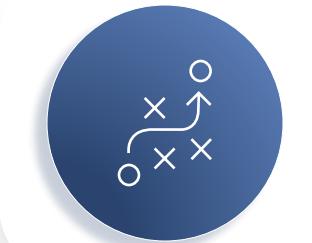
**Track performance from engagements**

Review leads details and performance to determine next best action and have regular discussions with your PDM/PSS.



**Keep the feedback loop**

Share your experience and ideas to improve to foster mutual growth.



# *AI Business Process Solution Plays*

# Sales Transformation with AI

# AI is helping reimagine Sales

\$36B

By 2026

CAGR  
+15%

40%

Of sales teams will  
use AI for CX by  
2027

Source: Microsoft internal analysis, Gartner Research

**AI-first sales teams will deliver better results:**  
GenAI is fundamentally changing how CX teams  
deliver personalized experiences at scale. Late  
adopters risk losing deals to the competition

**Buyer expectations are evolving fast:**  
Buyers are increasingly looking for a digital-first  
experience going deep into the sales cycle  
necessitating CX teams to retool

**Not all AI is built the same:**  
Customers need help from trusted voices in the  
partner community to help identify AI platforms that  
deliver CX results and fit into their unique tech stacks

# Sales Transformation with AI: Customer Win Formula with GTM Support

## Customer Outcome

Create a sales function powered by an AI-driven application, delivering increased win rates, enhanced productivity, and a reduced total cost of ownership

## Partner Outcome

Highly profitable Sales practice that drive impactful and sustainable sales transformation and provides exceptional delivery quality

### Differentiated Partner Capabilities

Be the AI Transformation advisor to Sales BDM and IT with industry expertise

Deploy AI D365 Sales and secure end-user adoption through excellence in change management

Expand usage, value and loyalty by extending with AI and Agent integrations as well as 3P ISV solutions

### Win Formula aligning to MCEM

#### 1 Listen & consult

##### Build Pipeline

Target customers and execute campaigns

Connect with Microsoft seller to align on next steps

#### 2 Inspire & design

##### Design Solution

Build customer intent with Envisioning workshops

Define customer success with Business Value Assessments

#### 3 Empower & achieve

##### Win Deal

Influence and close new AI Sales deal

Renew & Upsell AI Sales in existing D365 accounts

#### 4 Realize value

##### Deploy/Drive Usage

Address data, security and privacy while driving end user enablement

Deliver customer success leveraging FastTrack Portfolio engagement

#### 5 Manage & optimize

##### Drive Expansion

Revisit vision and value to build business case for usage maximization

Deliver additional business value with Agents and 3P ISV extensions

[Solution Play assets](#)  
[SPARK](#)  
[Campaign in a Box](#)

[CRM Envisioning](#)

[Salesforce Migration Discovery](#)

[Salesforce Migration Tool](#)  
[Salesforce Replace ECIF\\*](#)  
[FastTrack Portfolio](#)  
[Deployment Success Program](#)

\* Seller nominated

# Sales Partner Differentiated Capability View

	Be the AI transformation advisor	Drive adoption through change management	Extend with AI and Agent integrations
Initiation	<p><b>AI Sales Advantage</b></p> <p>Land the Solution Play narrative to CRO, CSO and CIO showcasing how AI Sales can provide customers with a competitive edge, enhance efficiency, improve agility to adapt to market changes, and increase business profitability.</p> <p><b>Sales Specializations: Transforming Sales with AI Solution Play.</b></p>	<p><b>Deployment &amp; Adoption</b></p> <p>Alongside or following the Solution Design and deployment, conduct Adoption workshops with teams and users to discuss process and role impacts, identify obstacles, and outline requirements for a seamless transition.</p> <p><b>Salesforce Migration Tool &amp; ECI, Adoption Hub. Success by Design. Dynamics 365 Implementation Methodology/Portal. FastTrack Portfolio.</b></p>	<p><b>Enhance Value</b></p> <p>Explore AppSource and Marketplace for ISV solutions to streamline implementation and reduce complexity. Maximize value with Low Code, Microsoft 1<sup>st</sup> Party Agents, and develop your own 3<sup>rd</sup> Party agents to fill any gaps.</p> <p><b>AppSource. Marketplace. Microsoft 365 Copilot. Copilot Studio.</b></p>
Activation	<p><b>AI Transformation</b></p> <p>Embark on an Envisioning journey that starts with evaluating the current Sales infrastructure. Shape the vision through workshops exploring the realm of possibilities and conclude by presenting both the migration strategy and the anticipated business results.</p> <p><b>CRM Envisioning.</b></p>	<p><b>Change Management Plan</b></p> <p>Deliver a detailed Change Management Plan with a communication strategy, a training schedule tailored to specific roles, and support materials. Set metrics to track adoption and usage. Select and empower internal Champions to act as expert users and advocates within the organization.</p> <p><b>Utilize methodologies like Prosci ADKAR.</b></p>	<p><b>Demo &amp; Proof of Concept</b></p> <p>To encourage the use of unused seats and to help customers who haven't begun deployment, start with CRM Envisioning. Follow this with a Demo and Proof of Concept (POC) that provides an immersive customer experience using their data, demonstrating the capabilities of our solutions.</p> <p><b>CRM Envisioning (unfunded), Demo.</b></p>
Impact	<p><b>AI Business Value</b></p> <p>Provide insights into potential business outcomes through Business Value Assessments, including an ROI perspective to influence customer decisions. Utilize CRM Envisioning to assist customers in their decision-making process.</p> <p><b>CRM Envisioning, Business Value Assessment, Demo, Salesforce Replacement Discovery.</b></p>	<p><b>Secure Usage</b></p> <p>Monitor the adoption of AI Sales and the usage by teams and users in relation to the plan. If the adoption and usage do not meet expectations, review the customer's AI Business Value and Change Management Plan.</p> <p><b>Copilot Analytics.</b></p>	

# Sales Transformation with AI | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

### Customer Scenario

#### Sales Transformation with AI

### Sales Motion

- **Land:** Focus on D365 Sales, targeting accounts in target industries with D365 Customer Service or Salesforce CRM
- **Expand:** Leverage Premium SKU, Agents, Copilot Studio and Customer Insights to drive growth

### Propensity Tool

SPARK

## Generate leads

### Campaign-in-a-Box (CiaB)

- [AI Powered CRM](#)
- [Accelerate Sales with Dynamics 365](#)
- [Maximize Sales Impact \(SMB\)](#)

### Get Started

**SPARK**  
Campaign in a Box  
(PMC)

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Sales Transformation with AI | Partner Skilling

		Pre-MCEM to achieve Designation and Specialization				
		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Sales Transformation with AI		Credential Ready	Sales ready	Tech Deal Ready	Project Ready	
New to Practice (Build)		<a href="#">MB-910: Fundamentals (CRM)</a>	Autonomous CRM	Autonomous CRM	Implement autonomous CRM and expand with other AI & agent capabilities	
		<a href="#">MB-280: Customer Experience Analyst</a>	Business processes in Dynamics 365 (e.g. CRM BAFE)  Salesforce compete & migration narrative	Business processes in Dynamics 365 (e.g. CRM BAFE)  Salesforce compete & migration best practices	Business processes in Dynamics 365 (e.g. CRM BAFE)	Migration best practices
		<a href="#">PL-600: Power Platform Solution Architect</a>		CRM migration tools usage  CRM solution architect bootcamp – implementation best practices	CRM migration tools usage  CRM solution architect bootcamp – implementation best practices	CRM migration tools usage  CRM solution architect bootcamp – implementation best practices

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- Check out [Microsoft LevelUp](#) for Self-serve partner skilling LMS
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- Browse [Certifications](#), [Applied Skills](#), and [Learning Paths](#) for Microsoft Certifications

# Service Transformation with AI

# The forces driving service transformation

## Platforms are converging

60%

By 2028 60% of customer service and support organizations undergoing technology transformation projects will opt for a unified customer service and support suite, up from less than 5% today.<sup>1</sup>

## Smart service, higher value

14–17%

The business value provided by generative AI (GenAI)-enabled customer service and support (CSS) applications will let providers command a price uplift of 14% to 17% through 2028<sup>2</sup>

## AI doesn't just assist, it acts

80%

By 2029, agentic AI will autonomously resolve 80% of common customer service issues without human intervention, leading to a 30% reduction in operational costs<sup>3</sup>

## Digital labor is the new teammate

82%

of leaders say they'll use digital labor to expand workforce capacity in the next 12–18 months<sup>4</sup>

<sup>1</sup>Gartner, Innovation Insight: Unified CRM CEC and CCaaS Lays Foundation for Future of Customer Service, 19 February 2025

<sup>2</sup>Gartner, Forecast Analysis: CRM Customer Service and Support Software, Worldwide, 11 March 2025

<sup>3</sup>Gartner, Gartner Predicts Agentic AI Will Autonomously Resolve 80% of Common Customer Service Issues Without Human Intervention by 2029, 5 March 2025

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<sup>4</sup>Microsoft Work Trend Index Annual Report, 2025: The Year the Frontier Firm is Born, April 2025

# Service Transformation with AI: Customer Win Formula with GTM Support

## Customer Outcome

Transform service operations into a function with an AI-driven application, enabling superb outcomes, enhanced efficiency, and a lower total cost of ownership

## Partner Outcome

Cultivate highly profitable service practices that drive impactful and sustainable service transformation while maintaining exceptional quality

### Differentiated Partner Capabilities

Be the AI Transformation advisor to IT and BDM with industry expertise

Deploy AI D365 Service with end user adoption & change management

Expand usage, value and loyalty by extending with AI and Agent integrations as well as 3P ISV solutions

### Win Formula aligning to MCEM

#### 1 Listen & consult

##### Build Pipeline

Target customers and execute campaigns

Connect with Microsoft seller to align on next steps

#### 2 Inspire & design

##### Design Solution

Build customer intent with assessments

Define customer success with vision and value workshops

#### 3 Empower & achieve

##### Win Deal

Influence and close new AI Service deal

Renew & Upsell AI Service in existing D365 accounts

#### 4 Realize value

##### Deploy/Drive Usage

Address data security and privacy while driving end user enablement

Deliver customer success leveraging FastTrack Portfolio engagement

#### 5 Manage & optimize

##### Drive Expansion

Revisit vision and value to build business case for usage maximization

Deliver additional business value with own Agents and 3P ISV extensions

[Solution Play assets](#)  
[SPARK](#)  
[Campaign in a Box](#)

[CRM Envisioning](#)

[Salesforce Migration Discovery](#)

[Salesforce Migration Tool](#)  
 Salesforce Replace ECIF\*  
 Contact Center Accelerate ECIF\*  
[FastTrack Portfolio](#)  
[Deployment Success Program](#)

\* Seller nominated

# Service Partner Differentiated Capability View

	Be the AI transformation advisor	Drive adoption through change management	Extend with AI and Agent integrations
Initiation	<p><b>AI Service Advantage</b></p> <p>Land the Solution Play narrative to CCSO, CEXO, CTO, and CIO, showcasing how AI Service can provide customers with a competitive edge, enhance efficiency, improve agility to adapt to market changes, and increase business profitability.</p> <p><b>Service Specializations:</b> Transforming Service with AI Solution Play.</p>	<p><b>Deployment &amp; Adoption</b></p> <p>Alongside or following the Solution Design and deployment, conduct Adoption workshops with teams and users to discuss process and role impacts, identify obstacles, and outline requirements for a seamless transition.</p> <p><b>Salesforce Migration Tool &amp; ECIF, Adoption Hub. Success by Design. Dynamics 365 Implementation Methodology/Portal. FastTrack Portfolio.</b></p>	<p><b>Enhance Value</b></p> <p>Explore AppSource and Marketplace for ISV solutions to streamline implementation and reduce complexity. Maximize value with Low Code, Microsoft 1<sup>st</sup> Party Agents, and develop your own 3<sup>rd</sup> Party agents to fill any gaps.</p> <p><b>AppSource. Marketplace. Microsoft 365 Copilot. Copilot Studio.</b></p>
Activation	<p><b>AI Transformation</b></p> <p>Embark on an Envisioning journey that starts with evaluating the current Service infrastructure. Shape the vision through workshops exploring the realm of possibilities and conclude by presenting both the migration strategy and the anticipated business results.</p> <p><b>CRM Envisioning.</b></p>	<p><b>Change Management Plan</b></p> <p>Deliver a detailed Change Management Plan with a communication strategy, a training schedule tailored to specific roles, and support materials. Set metrics to track adoption and usage. Select and empower internal Champions to act as expert users and advocates within the organization.</p> <p><b>Utilize methodologies like Prosci ADKAR.</b></p>	<p><b>Demo &amp; Proof of Concept</b></p> <p>To encourage the use of unused seats and to help customers who haven't begun deployment, start with CRM Envisioning. Follow this with a Demo and Proof of Concept (POC) that provides an immersive customer experience using their data, demonstrating the capabilities of our solutions.</p> <p><b>Service Envisioning (unfunded), Demo.</b></p>
Impact	<p><b>AI Business Value</b></p> <p>Provide insights into potential business outcomes through Business Value Assessments, including an ROI perspective to influence customer decisions. Utilize CRM Envisioning to assist customers in their decision-making process.</p> <p><b>CRM Envisioning, Business Value Assessment, Demo, Salesforce Replacement Discovery.</b></p>	<p><b>Secure Usage</b></p> <p>Monitor the adoption of AI Service and the usage by teams and users in relation to the plan. If the adoption and usage do not meet expectations, review the customer's AI Business Value and Change Management Plan.</p> <p><b>Copilot Analytics.</b></p>	

# Service Transformation with AI | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers



### Service Transformation with AI



- **Land:** Focus on D365 Customer Service, Contact Center and Field Service in accounts in target industries with existing D365 CRM or Power Platform footprint or competitor Contact Center solution
- **Expand:** Leverage Premium SKU, Agents, and Copilot Studio to drive growth



SPARK

## Generate leads



- [AI Powered Customer Service](#)
- [Modernize Customer Service – Healthcare](#)
- [Modernize Customer Service – Banking](#)
- [Modernize Customer Service – Government](#)



SPARK  
[Campaign in a Box](#)  
(PMC)

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Service Transformation with AI | Partner Skilling

		Pre-MCEM to achieve Designation and Specialization				
		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Service Transformation with AI		Credential Ready	Sales Ready	Tech Deal Ready	Project Ready	
New to Practice (Build)	New to Practice (Build)	<a href="#">MB-910: Fundamentals (CRM)</a>	Autonomous CRM	Autonomous CRM	Implement autonomous CRM and expand with other AI & agent capabilities	
	Improve Practice (Enhance)	<a href="#">MB-230: Customer Service Functional Consultant</a>	Business processes in Dynamics 365 (e.g. CRM BAFE)	Business processes in Dynamics 365 (e.g. CRM BAFE)	Business processes in Dynamics 365 (e.g. CRM BAFE)	Dynamics 365 Customer Service & Field Service
	Specialize (Innovate and Grow)	<a href="#">MB-240: Field Service Functional Consultant</a>	Dynamics 365 service narrative including Contact Center	Dynamics 365 service demo delivery including Contact Center	Dynamics 365 Contact Center	CRM solution architect bootcamp – implementation best practices
		<a href="#">PL-600: Power Platform Solution Architect</a>		CRM solution architect bootcamp – implementation best practices	CRM solution architect bootcamp – implementation best practices	

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# ERP Transformation with AI

# The cloud ERP market continues to grow

\$90.5B

By 2026

CAGR  
+17.5%

57%

SMCs Plan to  
increase ERP  
spending<sup>2</sup>

## Transformation to AI-first Organization:

Gen AI and agentic AI are catalysts to drive business processes but are not built for on-prem. AI is top reason for spend increase and new selection criteria

## Evolving market and user expectations:

real-time insights, hybrid work support, UX, tech debt reductions, industry specific innovations, scalability, security, compliance

## A competitive vendor landscape:

Expansion to new market segments, rapid product innovation, end of support for on-prem

Source: Gartner® Forecast Analysis: Enterprise Application Software, Worldwide, 2023-2026 (Published 2024). Calculations performed by Microsoft

2: Crafting a Vision for ERP Success: A Guide for Midsize Enterprises By: Alexander Buschek May 2025

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# ERP Transformation with AI: Customer Win Formula with GTM Support

<b>Customer Outcome</b>	Microsoft Dynamics 365 (D365) delivers ERP that helps you adapt faster, achieve more, and perform better. Built on the Microsoft Cloud, it brings AI, agents, and connected data into the flow of work to support better decisions and stronger execution.	<b>Partner Outcome</b>	Build, expand and cultivate highly profitable ERP practices that drive impactful and sustainable customer ERP transformations while maintaining exceptional sales and deployment quality.
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## Differentiated Partner Capabilities

Be the AI D365 ERP Transformation advisor to IT and BDM with industry expertise

Deploy AI D365 ERP with change management & end user adoption

Extend AI D365 ERP with Agents, integrations and 3<sup>rd</sup> party ISV solutions

## Win Formula aligning to Microsoft Customer Engagement Methodology (MCEM)

### 1 Listen & consult

#### Build Pipeline

Target customers and execute campaigns  
Connect with Microsoft seller to align on next steps

### 2 Inspire & design

#### Design Solution

Build customer intent with assessments  
Define customer success with vision and value workshops

### 3 Empower & achieve

#### Win Deal

Influence or close the new AI ERP deal  
Renew & Upsell AI ERP in existing D365 accounts

### 4 Realize value

#### Deploy/Drive Usage

Address data security and privacy while driving end user enablement  
Deliver customer success with FastTrack Portfolio engagement

### 5 Manage & optimize

#### Drive Expansion

Revisit vision and value to build business case for usage maximization  
Deliver additional business value with Agents and 3<sup>rd</sup> party ISV extensions

[Solution Play assets](#)  
[SPARK](#)  
[Campaign in a Box](#)

[ERP Accelerate](#)  
[ERP Envisioning](#)

[ERP Accelerate](#)  
[Microsoft Commercial Incentives](#)

[ERP Accelerate](#)  
[FastTrack Portfolio](#)  
[Deployment Success Program](#)

# ERP Partner Differentiated Capability View

	Be the AI transformation advisor	Secure adoption through change management	Extend with AI and Agent integrations
Initiation	<p><b>AI ERP Benefit</b></p> <p>Land the Solution Play narrative with CFOs and COOs on how AI ERP can help customers drive efficiency, gain agility to adapt to changing market conditions and grow their business profitability.</p> <p><b>Finance and Supply Chain Specializations. ERP Transformation with AI Solution Play.</b></p>	<p><b>Adopting Planning</b></p> <p>After or in parallel with the Solution Design, conduct Adoption Planning workshops with the teams and users to discuss process and role impact, identify obstacles and outline requirements for seamless transition.</p> <p><b>Adoption Hub. Success by Design. Dynamics 365 Implementation Methodology/Portal. FastTrack Portfolio.</b></p>	<p><b>Extend Value</b></p> <p>Explore AppSource and Marketplace for Software Development Company (aka ISV) solutions to reduce implementation time and complexity. Maximize value with Low Code, Microsoft 1<sup>st</sup> Party Agents and build your own 3<sup>rd</sup> Party agents to address gaps.</p> <p><b>AppSource. Marketplace. Microsoft 365 Copilot. Copilot Studio.</b></p>
Activation	<p><b>AI Transformation</b></p> <p>Embark on an Envisioning journey starting with an assessment of the existing ERP infrastructure. Shape the vision through the art of possible workshops and conclude with presenting the migration plan and expected business outcomes.</p> <p><b>ERP Envisioning.</b></p>	<p><b>Change Management Plan</b></p> <p>Deliver a Change Management Plan that covers the communication strategy, training session schedule tailored to specific roles, and support materials. Define metrics to track adoption and usage. Select and empower internal Champions to act as expert users and advocates within the organization.</p> <p><b>Utilize methodologies like Prosci ADKAR.</b></p>	<p><b>Demo &amp; Proof of Concept</b></p> <p>To encourage the use of unused seats and to help customers who haven't begun deployment, start with ERP Envisioning. Follow this with a Demo and Proof of Concept (POC) that provides an immersive customer experience using their data, demonstrating the capabilities of our solutions.</p> <p><b>ERP Demo. ECIF. Sandbox.</b></p>
Impact	<p><b>AI Business Value</b></p> <p>Provide insights into potential business outcomes through Business Value Assessments, including an ROI perspective to influence customer decisions. Leverage ERP Accelerate to assist customers in their decision process.</p> <p><b>ERP Envisioning. Business Value Assessment. ERP Accelerate.</b></p>	<p><b>Secure Usage</b></p> <p>Monitor the adoption of AI ERP and the usage by teams and users in relation to the plan. If the adoption and usage do not meet expectations, review the customer's AI Business Value and Change Management Plan.</p> <p><b>Copilot Analytics.</b></p>	

# ERP Transformation with AI | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads



Customer Scenario



Sales Motion



Propensity  
Tool



Campaign-in-a-Box (CiaB)



Get Started

ERP Transformation with AI

- **Land:** Target ERP compete (SAP, Oracle, IFS and Infor on-prem) accounts and migrate or surround with Dynamics 365 Finance & Supply Chain
- **Land:** Target Dynamics AX, GP, NAV accounts and migrate to Dynamics 365 Finance & Supply Chain
- **Expand:** Target existing Dynamics 365 Finance & Supply Chain accounts and upsell users, Finance Premium, Supply Chain Premium and/or Agents

SPARK

- **FY25:** [Optimize financial and operating models – service centric ERPs](#)
- **FY25:** [Migrate and modernize your ERP with Dynamics 365](#)
- **FY26:** ERP Transformation with AI (FY26 Q1)

[SPARK](#)

[Campaign in a Box](#)  
(PMC)

Learn more about Propensity Tools

Learn more about CiaB

# ERP Transformation with AI | Partner Skilling

		Pre-MCEM to achieve Designation and Specialization				
		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
ERP Transformation with AI		Credential Ready	Sales Ready	Tech Deal Ready	Project Ready	
New to Practice (Build)	New to Practice (Build)	<a href="#">MB-920: Fundamentals (ERP)</a>	ERP Transformation with AI  Business Processes in Dynamics 365 + ERP Envisioning	ERP Agents  Business Processes in Dynamics 365	ERP Agents, Microsoft Copilot + Copilot Studio	
	Improve Practice (Enhance)	<a href="#">MB-310: Finance Functional Consultant</a>  <a href="#">MB-330: Supply Chain Functional Consultant</a>  <a href="#">MB-500: Finance and Operations Developer</a>	ERP Compete	ERP Compete  Project Operations	Project Operations	
	Specialize (Innovate and Grow)	<a href="#">MB-335: Supply Chain Functional Consultant Expert</a>  <a href="#">MB-700: Finance and Operations Solution Architect</a>	Supply Chain Premium: Demand Planning & Warehouse management  ERP Solution Architect Bootcamp – implementation best practices	Finance Premium: Business Performance Planning & Analytics  ERP Solution Architect Bootcamp – implementation best practices	Finance Premium: Business Performance Planning & Analytics  ERP Solution Architect Bootcamp – implementation best practices	

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- Browse [Certifications](#), [Applied Skills](#), and [Learning Paths](#) for Microsoft Certifications

# Innovate with Low Code AI and Agents

# The low code AI and agent market is transforming

**\$47.1B**

AI Agents market size by 2030<sup>1</sup>

**80%**

enterprises with mature automation practices will pivot to a consolidated platform by 2029

**33%**

Of enterprise software applications will include agentic AI by 2028<sup>2</sup>

**1B**

IDC projects 1B new logical applications by 2028<sup>3</sup>

## Consolidation of Automation Platform:

82% of leaders say this is a pivotal year to rethink strategy and operations, with 81% expecting agents to be moderately or extensively integrated into their company's AI strategy in the next 12–18 months<sup>4</sup>

## AI Adoption Acceleration:

24% of leaders say their companies have already deployed AI organization-wide.<sup>4</sup> By 2027, 80% of automation platforms will offer AI-assisted development.

## Microsoft offers end-to-end low code tools

In a market with a growing list of hundreds of stand-alone products, Microsoft offers differentiated value with composable product architectures, generative AI (GenAI) capabilities and integration catalogs.

1. World Economic Forum. (2025, May 23). Here's how to pick the right AI agent for your organization. <https://www.weforum.org/stories/2025/05/ai-agents-select-the-right-agent/>

2. Gartner®, Intelligent Agents in AI Really Can Work Alone. Here's How, October 1, [Tom Coshow](#) 2024

3. IDC. (2024). *1 Billion New Logical Applications: More Background*.

4. *Work Trend Index | 2025: The Year the Frontier Firm Is Born*, Microsoft, Inc., April 23, 2025.

# Innovate with Low Code AI and Agents: Customer Win Formula with GTM Support

## Customer Outcome

Drive AI business transformation modernizing intelligent apps and agent-powered business processes to enhance productivity, foster rapid operational agility and maximize ROI.

## Partner Outcome

Lead with differentiated AI and Copilot platform value to win customer business process transformation.

### Differentiated Partner Capabilities

Be the AI Transformation Advisor to ITDM and BDM with Industry Expertise

Enable fast and secure intelligent apps agent deployment

Deliver Center of Excellence (COE) adoption & change management services

Expand and integrate AI practices to solve business challenges

### Aligning to Microsoft Customer Engagement Methodology (MCEM)

#### 1 Listen & consult

##### Build Pipeline

Target Customers, apply industry expertise, and create pipeline across scenarios

#### 2 Inspire & design

##### Deliver

Build a clear customer vision and quantify value.  
Explore Software Development Companies (SDC) extensions.

#### 3 Empower & achieve

##### Win Deal

Drive scalable adoption through strong governance and COE framework  
Upsell M365 for better AI transformation

#### 4 Realize value

##### Deploy/Drive Usage

Ensure COE use case activation  
Leverage industry repeatable assets to realize value

#### 5 Manage & optimize

##### Drive Expansion

Drive adoption and extend new agentic workloads using Copilot Studio or Azure AI Foundry

### Copilot + Power Accelerate

#### Immersion Briefings (1:Many)

#### Envisioning & PoC

#### Deployment Accelerator

#### Power CAT Self-Serve Tools

#### Solution Play Assets

[SPARK](#)  
[Campaign in a box](#)

#### Innovate with AI Apps and Agents solution play

#### In a Day Program

# Low Code AI Partner Differentiated Capability View

	Low Code AI + Copilot Advisor	Deployment + Data Governance	Adoption + Change Management	Extend with AI and Agent integrations
Initiation	<b>GenAI Advisory</b> Advising customers on their entire AI strategy ladder up to business priorities. Determine high-value scenarios for business process modernization.	<b>Readiness</b> Advising customers with an assessment of their state and needs, identifying and prioritizing the most effective innovation initiatives, aligning to an objectives-based AI adoption plan.	<b>Engagement Strategy</b> Designing a plan that outlines communication, and workforce transformation strategy that aligns with overall AI plan to effectively drive adoption aligned to the Center of Excellence principles.	<b>Unlock Full Potential</b> Identifying the next set of scenarios, integrating to new agents and technologies, that will fuel the growth of the modern business.
Activation	<b>Business Transformation</b> Completing scenario discovery and solution design applying industry expertise that will lead to the business transformation process.	<b>Deployment</b> Optimizing and deploying the solutions aligned to the objectives-based plan.  <b>Security and Compliance</b> Addressing & remediation of security and compliance	<b>People Transformation</b> Training users on low code AI and copilot solutions adoption, building up skills and mindsets necessary to transform customer's work using AI.	<b>Agent of Change</b> Using tools like M365 Agent Builder, Copilot Studio, Power Platform plugins, Azure AI Foundry, to create and deploy agents to support for enterprise scenarios, and deep system integration.
Impact	<b>Business Value</b> Driving the ROI of their Copilot investments and quantifying benefits (Copilot Analytics).	<b>Platforms of Power</b> Show the art of the possible with Microsoft 365 Copilot, Copilot Studio Agentic Tools, and Power Platform.	<b>Impact Measurement</b> Using Copilot Studio Analytics to track consumption, impact and show value realization.	<b>Success Measurement</b> Revaluating key metrics for success plus the monetization strategy. Using Copilot Studio Analytics to track impact and show value realization.

# Innovate with Low Code AI & Agents | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads



### Customer Scenario

#### Modernize Intelligent Apps



### Sales Motion

**Land:** Underpenetrated PowerApps Accounts (\$1-2.5K Monthly Revenue) AND <25% Coverage of PowerApps Seats vs ME3+ME5 seats



### Propensity Tool

SPARK, Biz Apps LXP



### Campaign-in-a-Box (CiaB)



### Get Started

- [Modernize at scale with AI and Microsoft Power Platform](#)
- [In A Day Workshops](#)

SPARK, PMC

#### Agent-powered business process



**Land and Expand:** Underpenetrated Power Automate and Copilot Studio accounts (<\$2.5K)

- Land:** Focus on D365 Customer Service, Contact Center and Field Service in accounts in target industries with existing D365 CRM or Power Platform footprint or competitor Contact Center solution
- Expand:** Leverage M365 SKU, Agents, and Copilot Studio to drive growth

SPARK, Biz Apps LXP

- [Automate business processes with agents](#)
- [In A Day Workshops](#)
- [1:Many Immersion](#)

SPARK, PMC

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Innovate with Low Code AI and Agents | Partner Skilling

		Pre-MCEM to achieve Designation and Specialization				
		1 Listen & consult	2 Inspire & design	3 Empower & achieve	4 Realize value	5 Manage & optimize
Innovate with Low Code AI and Agents		Credential Ready	Sales Ready	Tech Deal Ready	Project Ready	
New to Practice (Build)	<a href="#">PL-900: Power Platform Fundamentals</a>		Low Code sales bootcamp	Low Code sales bootcamp	Build and innovate agents with Microsoft 365 Copilot, Copilot Studio & Azure AI Foundry	
	<a href="#">Create &amp; manage automated processes</a>		AI agents day for partners	AI agents day for partners	Security & governance (full stack & Power Platform)	
	<a href="#">Create &amp; manage canvas apps</a>		Power your AI transformation with Copilot and the Copilot stack	Build, extend, or buy? Driving customer conversations with Copilot and Copilot stack	Copilot Studio architecture bootcamp	
Improve Practice (Enhance)	<a href="#">Create &amp; manage model-driven apps</a>		Drive AI transformation with Power Platform, AI and agents	Modernize with intelligent apps (Power Apps + Power Pages)	Modernize with intelligent apps (Power Apps + Power Pages)	
	<a href="#">PL-200: Power Platform Functional Consultant</a>			Agent-powered business processes (Copilot Studio + Power Automate)	Agent-powered business processes (Copilot Studio + Power Automate)	
	<a href="#">PL-400: Power Platform Developer</a>			Copilot Studio agent-a-thon		
Specialize (Innovate and Grow)	<a href="#">PL-500: Power Automate RPA Developer</a>					
	<a href="#">Implement AI models with AI Builder</a>					
	<a href="#">Create agents in Copilot Studio</a>	<a href="#">PL-600: Power Platform Solution Architect</a>				

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# Scale Business Operations with AI

Named “the Best ERP System” in 2024 by Forbes Advisor

\$66B total addressable SMB software market by 2028

\$17B total addressable ERP market within SMB by 2028

3 in 5 small businesses implementing AI within 2 years

SMBs more open to adopting AI than enterprises

38% of SMBs evaluating AI products and will select one in next 6 months

35% of SMBs prioritizing AI – a 45% increase from the previous year

350M SMBs worldwide 90% of global organizations

The  
opportunity  
is now

# Scale Business Operations with AI: Customer Win Formula with GTM Support

## Customer Outcome

Enhanced Efficiency and Agility with AI-powered tools to help streamline business processes, improve collaboration, and enable faster change.

## Partner Outcome

Partners leverage AI to help drive customer acquisition, achieve higher return on investment, and enhance their market expertise.

### Differentiated Partner Capabilities

Drive AI adoption and built-in Agent and Copilot usage

Cross-Sell Business Central to M365 customers through intentional lead gen activities

Help increase sales and delivery capacity with repeatable offerings

Migrate legacy ERP customers to Business Central

### Win Formula aligning to MCEM

#### 1 Listen & consult

##### **Build Pipeline**

Target Cloud Ascent accounts to cross-sell Business Central  
Land Campaign in a Box with high propensity customers to generate demand

#### 2 Inspire & design

##### **Design Solution**

Build customer intent with one-to-many events and drive acquisition  
Define customer success with vision and value workshops

#### 3 Empower & achieve

##### **Win Deal**

Land Compete value proposition to win deals  
Finalize deal design with proofs of concept

#### 4 Realize value

##### **Deploy/Drive Usage**

Deliver customer business outcomes through greater usage  
Accelerate deals Sales Cycle with CSP Vouchers

#### 5 Manage & optimize

##### **Drive Expansion**

Drive upsell and next best workloads opportunities  
Deliver additional business value using Copilot Studio to make agentic solutions

##### Cloud Ascent

Campaign in a Box ([DMC/PMC](#))  
Co-op

##### 1:many Immersion Briefings

Big Opportunities:[ERP Envisioning](#)

##### Migration Promo Offer (BTTC2) CSP Incentive

##### Business Central Concierge

##### Attach SKU

In a Day Workshop  
AI Red Carpet

# BC Partner Differentiated Capability View

BC Partner Differentiated Capability View				
	Drive AI adoption and built-in Agent usage	Cross-Sell Business Central to M365 customers through intentional lead gen activities	Increase sales and delivery capacity with repeatable offerings	Migrate legacy ERP customers to Business Central
Initiation	<b>GenAI Advisory</b> Advising customers on their entire GenAI strategy ladder up to business priorities.	<b>AI first company</b> Business Central accelerates an AI-first GTM by integrating seamlessly with Microsoft 365 to streamline workflows, enhance productivity with Copilot, and enable scalable, data-driven selling across SMBs.	<b>Engagement Strategy</b> Transform from a project-based services to a repeatable, subscription-driven model.	<b>AI first company</b> Help customers modernize outdated compete ERP systems or Microsoft OnPrem ERP by moving to them to Dynamics 365 Business Central.
Activation	<b>Business Transformation</b> Integrate AI and agent capabilities into Business Central by delivering envisioning workshops, showcasing in-context demos, and building transformation scenarios that align with customer needs.	<b>Lean Generation</b> Target high-propensity Microsoft 365 customers for Business Central using "Campaign in a Box" and BC Immersion Briefing assets to drive efficient cross-sell and lead conversion.	<b>Change Management Plan</b> Develop a change management plan to drive consistent adoption across marketing, sales, and delivery.  Set clear adoption metrics, identify internal champions, and build a dedicated practice to scale success.	<b>Demo &amp; Proof of Concept</b> Run envisioning workshops with demos and PoCs to highlight ROI and align solutions with customer goals. Use promotions to accelerate the sales cycle and help customers prioritize must-have vs. optional functionalities.
Impact	<b>Business Value</b> The business value of AI and agents in Business Central is to automate tasks, enhance decision-making, and drive productivity, helping customers operate more efficiently and partners differentiate their offerings.	<b>Impact Measurement</b> Track M365 base penetration and monitor up-sell and cross-sell performance.	<b>Impact Measurement</b> Boost lead generation, improve win rate, and grow sales.	<b>Cloud Business Value</b> Ensure a smooth transition and early adoption by guiding usage of cloud features and supporting users throughout onboarding.

# Scale Business Operations with AI | Demand Generation



Gain insights into high propensity customers for priority customer scenarios

Drive top of funnel leads through ready to launch customizable campaigns

## Identify high propensity customers

## Generate leads

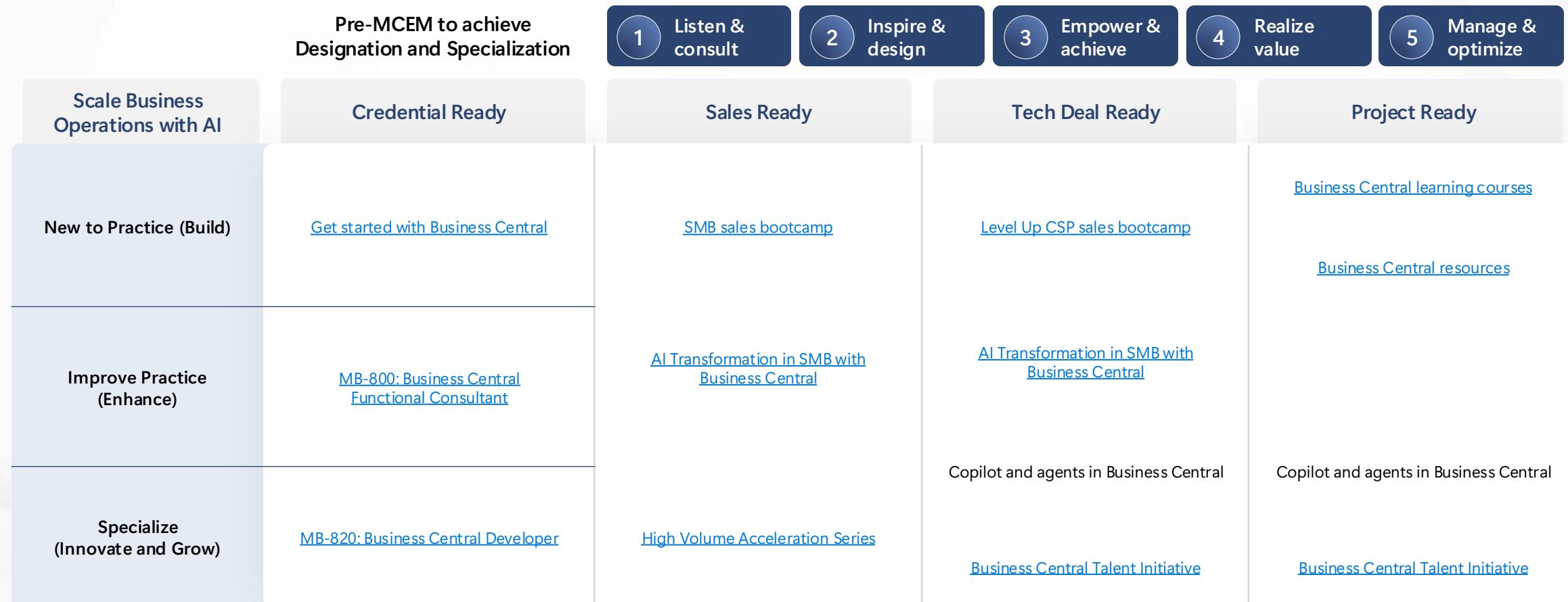
Solution Play	Targeting Scenario	Customer Targeting Lists (aka Cohorts)	Campaign in a Box (CiaB)	Get Started
Scale Business Operations with AI	D365 Acquisition	Modernize Accounting/ERP Systems with D365 Business Central	Business Central for SMB	<a href="#">Digital Marketing Content (DMC)   Partner Marketing Center(PMC)</a>
	Migrate to Cloud	Migrate from Dynamics OnPrem to Business Central	Migrating your SMB customers from Microsoft Dynamics GP to Dynamics 365 Business Central	<a href="#">Digital Marketing Content   Partner Marketing Center (PMC)</a>

[Learn more about CloudAscent/CloudAscent Partner Trainings](#)

[Learn more about Propensity Tools](#)

[Learn more about CiaB](#)

# Scale Business Operations with AI | Partner Skilling



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# Win Formula: SME&C AI Business Solutions – AI Business Process

<b>Customer Outcome</b>	Empower your organization to help achieve measurable business growth by embedding AI-powered applications and agents that optimize operations, enhance customer engagement, and streamline processes through automation.	<b>Partner Outcome</b>	Help grow your profit and win customers by supporting businesses adopt AI-powered business processes with Dynamics 365 and Power Platform, delivering measurable outcomes through intelligent automation, streamlined operations, and enhanced customer engagement.
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## Differentiated Partners Capabilities

Land lead generation campaigns to help drive customer acquisition, cross-sell, and **Copilot adoption**.

Scale Business Operations with AI

ERP Transformation with AI

Attain **Specialization** and build repeatable offering to help grow your capacity

Innovate with Low Code AI and Agents

**Migrate** legacy customers to Dynamics 365 online

Sales Transformation with AI

Service Transformation with AI

## Win Formula aligning to MCEM

### 1 Listen & consult

#### Build Pipeline

Target customers and execute Campaign in a Box to help drive AI-driven process transformation

### 2 Inspire & design

#### Deliver

Use 1:many events to build intent and engage customers with envisioning workshops

### 3 Empower & achieve

#### Win Deal

Deliver proof of value with Copilot and automation

### 4 Realize value

#### Deploy/Drive Adoption

Accelerate delivery cycle with repeatable solutions and deployment offers.

### 5 Manage & optimize

#### Drive Expansion

Build business case for expansion to include Copilot Studio and ensure adoption of built-in AI Copilot Agents

#### Accelerate

[Campaign in a Box](#)  
Cloud Ascent (SMB)  
[SPARK Propensity](#)  
Partner Coop Funds

[Proof of Concept Envisioning Workshop](#)

[Immersion Briefings \(BC, Copilot + Agent\)](#)

[Partner Incentives](#)  
CSP Promotions

#### Deployment Offers

[Fastrack / BC Concierge](#)  
ECIF & Tools

[In a Day workshops](#)  
Attached SKUs

# AI Business Process GTM levers in detail

Lever	Details	Sales	Service	ERP	Low Code	Business Central
<b>Solution Play Assets</b> <i>MCEM STAGE 1</i>	Collection of go-to-market assets to assist partners building customer intent	←	✓	→		
<b>SPARK/Cloud Ascent</b> <i>MCEM STAGE 1</i>	Centralized approach to distribute white space accounts to managed/unmanaged partners based on MAICPP partner attainment and revenue contribution	←	✓	→		
<b>Campaign in a Box (CiaB)</b> <i>MCEM STAGE 1</i>	Collection of marketing campaign assets to generate customer interest and qualify intent that partners can download and modify	←	✓	→		
<b>1:many Immersion</b> <i>MCEM STAGE 1</i>	Hands-on workshops, to BDMs, to engage customers with the first immersion in Copilots and Agents (90-120 min) and generate pipeline				✓	✓
<b>In a Day Workshops</b> <i>MCEM STAGES 1 &amp; 5</i>	Experience how Microsoft products can meet your business challenges quickly and effectively by attending a virtual, one-day training workshop. App in a Day, Automation in a Day, Power Pages in a Day, Copilot Studio in a Day				✓	
<b>BAFE Envisioning</b> <i>MCEM STAGE 2</i>	Envisioning helps customers build a vision, define business value outcomes and a plan to deploy Dynamics 365 and Low Code	←	✓	→		
<b>Power Plat Envisioning</b> <i>MCEM STAGE 2</i>	Create a clear customer vision including power apps, agents, SDC solutions integration, and build the base for the customers to quantify value. 1:1 engagements. 2–3 business days.				✓	

# AI Business Process GTM levers in detail

Lever	Details	Sales	Service	ERP	Low Code	Business Central
<b>Salesforce Migration Discovery</b> <i>MCEM STAGE 2 &amp; 3</i>	Tools provided by Microsoft to assist partners with Solution Assessment	✓	✓			
<b>Commercial Incentives</b> <i>MCEM STAGE 2 &amp; 3</i>	Commercial platform and program for providing incentives to partners incl. Business Applications Funded Engagements (BAFE), Cloud Solution Partner (CSP) and Pre-sales Advisor	✓	✓	✓		✓
<b>Bridge to the Cloud 2</b> <i>MCEM STAGE 2 &amp; 3</i>	Any Dynamics 365 online licenses at 40% discount. Extended through December 31, 2025. Eligible products include Dynamics NAV, GP, SL and AX			✓		✓
<b>Business Central Concierge</b> <i>MCEM STAGE 2–4</i>	Team of cloud solution architects who engage with partners, customers, and the Microsoft sales teams to provide technical assistance and close Business Central deal > \$50K licensing value					✓
<b>ERP Accelerate</b> <i>MCEM STAGE 2–4</i>	A program designed to accelerate ERP migrations to Dynamics 365, offering expert guidance, hands-on coaching, acceleration tools, and ECIF deployment funding.			✓		✓
<b>Copilot + Power POC/Deployment</b> <i>MCEM STAGE 3 &amp; 4</i>	Multi-day engagement to ensure successful deployment and adoption of the solution.				✓	

# AI Business Process GTM levers in detail

Lever	Details	Sales	Service	ERP	Low Code	Business Central
<b>Salesforce Migration ECIF</b> <i>MCEM STAGE 4</i>	Funding provided by Microsoft to assist partners with Salesforce migrations	✓	✓			
<b>FastTrack Portfolio</b> <i>MCEM STAGE 4</i>	FastTrack Portfolio allow partners that meet certain criteria to get FastTrack solution architect support on their total deployment project portfolio. Power Platform and Copilot Studio (PowerCat) joint the initiative	✓	✓	✓	✓	
<b>CSP Vouchers</b> <i>MCEM STAGE 4</i>	Offset high implementation costs for your customers, Leverage deployment funds to position a limited-time offer, Increase customer intent to buy and accelerate conversion					✓
<b>Deployment Success Program</b> <i>MCEM STAGE 4</i>	Technology that manipulates digital signals to improve their quality and extract valuable information for various applications	✓	✓	✓		
<b>Salesforce Migration Tool</b> <i>MCEM STAGE 4</i>	Tool provided by Microsoft to assist partners with Salesforce Migrations	✓	✓	✓		
<b>Copilot Studio in a Day (CSIAD)</b> <i>MCEM STAGE 1 &amp; 5</i>	One-day partner-led hands-on workshop includes the basics of building an agent with Microsoft Copilot Studio, authoring fundamentals, enabling generative AI orchestration, integrating and connecting external data sources.					✓

# AI Workforce GTM levers in detail

Lever	Details	Copilot	Secure AI	Endpoints	Converged Comms
<b>AI Workforce Assets</b> <i>MCEM STAGE 1</i>	Collection of go-to-market assets to assist partners building customer intent	←	✓	→	
<b>SPARK/Cloud Ascent</b> <i>MCEM STAGE 1</i>	Centralized approach to distribute white space accounts to managed partners based on MAICPP partner attainment and revenue contribution	←	✓	→	
<b>Campaign in a Box (CiaB)</b> <i>MCEM STAGE 1</i>	Collection of marketing campaign assets to generate customer interest and qualify intent that partners can download and modify	←	✓	→	
<b>Proof of Value</b> <i>MCEM STAGE 2</i>	Proof of Value provides customers the ability to test-drive within their own tenant, using their own data and scenarios unique to their organization	✓	✓		
<b>Win deal</b> <i>MCEM STAGE 3</i>	Secure intent by articulating differentiated value, especially in Enterprise and Regulated Industries	←	✓	→	
<b>Deploy/drive usage</b> <i>MCEM STAGE 4</i>	Lead with business value and ROI with healthy usage, address data security and/or enable users through adoption and change management services	←	✓	→	
<b>Drive Expansion</b> <i>MCEM STAGE 5</i>	Align with Microsoft sellers and/or go back motion for propensity lists to help drive upsell and build for expansion, capture usage incentives	✓	✓	✓	

# Microsoft AI Cloud Partner Program



Action

Accelerate your practice leveraging MAICPP offers and product benefits

Explore

Build

Strengthen

Differentiate

Depth Differentiation

Highlighted Products	Partner Launch Benefits	Partner Success Core Benefits	Partner Success Expanded Benefits	Modern Work Solution Partner Designation	Modern Work Specialization(s)
Microsoft 365	5 seats Business Premium	15 seats Business Premium	35 seats Business Premium	200 seats E5	← +50–150 seats E5
Microsoft 365 Copilot			2 seats	5 seats	← +5–15 seats
Teams Premium			5 seats	10 seats	← +30–90 seats
Teams Room Pro			2 rooms	5 rooms	← +20–60 rooms
Visio Plan 2	1 seat	5 seats	5 seats	5 seats	
Power Apps & Automate Premium	1 seat of each	8 seats of each	15 seats of each	25 seats of each	
Azure Credits	\$700 USD	\$2,400 USD	\$4,000 USD		← +\$4.5K–\$13.5K USD
Visual Studio	1 seat VS Pro	8 seats VS Pro	15 seats VS Pro	25 seats VS Enterprise	← +10–30 seats VS Enterprise
Annual Benefit Package Cost	\$345 USD	\$895 USD	\$3,995 USD	\$4,730 USD	← + no additional fee

# Microsoft AI Cloud Partner Program



Action

Accelerate your practice leveraging MAICPP offers and product benefits

	Explore	Build	Strengthen	Differentiate	Depth Differentiation
Highlighted Products	Partner Launch Benefits	Partner Success Core Benefits	Partner Success Expanded Benefits	Business Applications Solution Partner Designation	Business Applications Specialization(s)
Dynamics 365 Business Central Premium	4 seats	15 seats	35 seats	100 seats	← +25–75 seats
Dynamics 365 Sales Enterprise	4 seats	15 seats	35 seats	100 seats	← +25–75 seats
Microsoft 365 Copilot for Sales/Service/Finance			2 seats of each	5 seats of each	← +5–15 seats of each
Power Apps & Automate Premium	1 seat of each	8 seats of each	15 seats of each	25 seats of each	← +25–75 seats of each
Power BI Premium	4 seats	15 seats	35 seats	100 seats	
Microsoft 365	5 seats Business Premium	15 seats Business Premium	35 seats Business Premium	100 seats E3	← +50–150 seats E3
Azure Credits	\$700 USD	\$2,400 USD	\$4,000 USD		← +\$4.5K–\$13.5K USD
Visual Studio	1 seat VS Pro	8 seats VS Pro	15 seats VS Pro	25 seats VS Enterprise	← +10–30 seats VS Enterprise
Annual Benefit Package Cost	\$345 USD	\$895 USD	\$3,995 USD	\$4,730 USD	← + no additional fee

# Microsoft AI Cloud Partner Program



## Action

Accelerate your practice to AI Workforce Specialization to unlock investments

### Solutions Partner designations

Demonstrate your breadth capabilities in the AI Workforce solution area

#### Stand out to customers

Differentiate with badging

Access to exclusive tools, resources and benefits

Unlock opportunities to sell with Microsoft

#### Flexibility in attainment paths

Qualify on either the SMB or enterprise path

Separate Enterprise & SMB scores

Earn points just by upskilling your teams

### Specializations

Differentiate your AI Workforce practice with specializations



Adoption and Change Management



Teamwork Deployment



Calling for Microsoft Teams



Custom Solutions for Microsoft Teams



Meetings and Meeting Rooms for Microsoft Teams



Modernize Endpoints

Get access to practice accelerating benefits and incentives

Enablement Resources

AI Workforce and other licenses

Access to top investment motions and Co-sell through specializations

GTM Resources

AI Workforce usage incentives

Additional AI Workforce and other licenses

# Microsoft AI Cloud Partner Program



## Action

Accelerate your practice to AI Business Process Specializations to unlock investments

### Solutions Partner designations

Demonstrate your breadth capabilities in the AI Business Process solution area

#### Stand out to customers

Differentiate with badging

Access to exclusive tools, resources and benefits

Unlock opportunities to sell with Microsoft

#### Flexibility in attainment paths

Qualify on either the SMB or enterprise path

Single score in Partner Center

Earn points just by upskilling your teams

### Specializations

Differentiate your AI Business Process practice with Specializations



Finance



Intelligent Automation



Low Code Application Development



Sales



Service



Supply Chain



Small & Midsize Business Management

Get access to practice accelerating benefits and incentives

Enablement Resources

AI Business Process and other licenses

GTM Resources

Business Intelligence Engagement



Access to top investment motions and Co-sell through specializations

Additional AI Business Process and other licenses

# FY26 AI Business Process Solution Play Specializations

## Solution Plays

### Sales Transformation with AI

[Sales](#)

**Knowledge:** 5 role-based certifications, 2 architect certifications  
**Performance:** 3 Deployments >5k MCV, Baseline: 25K MCV>0% MCV growth

### Service Transformation with AI

[Service](#)

**Knowledge:** 5 role-based certifications, 2 architect certifications  
**Performance:** 3 Deployments >5k MCV, Baseline: 25K MCV>0% MCV growth

### ERP Transformation with AI

[Finance](#)  
[Supply Chain](#)

**Knowledge:** 5 role-based certifications, 2 architect certifications  
**Performance:** 3 Deployments >5k MCV, Baseline: 25K MCV>0% MCV growth

### Innovate with Low Code AI and Agents

[Microsoft Low Code Application Development](#)  
[Intelligent Automation](#)

**Knowledge:** 5 Power Plat Functional Associate, 2 Developer Associate, 1 or 3\* architect certifications  
**Performance:** 5 new deployments with 1 flow\* or 5 users/app. MAU >35% TTM. Baseline: 5 new deployments\* or 50 MAU.

### Scale Business Operations

[Small and Midsize Business Management](#)

**Knowledge:** 5 Business Central Associate certifications,  
**Performance:** 10 Deployments w. 5 or more active users TTM, MAU > 35% TTM  
**Appsource:** Consulting Service offering for Business Central

# The Value of Co-sell

## Co-sell and the joint commitment to partnering



### Why we Co-sell

Joint success and solving  
for the customer  
Scale and innovation



### Successful collaboration

Transparency  
Trust  
Early engagement



### What's in it for you

Access to Microsoft  
sellers  
and Customers  
Increased scale and  
velocity  
Upsell and cross-sell  
potential



### Quality engagement

Sharing the right deals  
Quality and  
completeness  
Ongoing collaboration

# Value Acceleration Services | Deployment Success Program (DSP)

*Unified Support service helping customers and partners drive successful project outcomes*



## Expert Microsoft CSAs to speed Dynamics 365 time-to-value

Customer and partner access to best-in-class Microsoft engineers

CSAs skilled in Success By Design with deep, real-world enterprise implementation experience to mitigate risks and maximize results

Advisory and complementary services around IT and Admin education, post-go-live adoption and business process change



**Technical advisory:** Helping customers and partners make the best decisions for implementation and performance planning and health

**Business advisory** to support successful business process change and outcomes

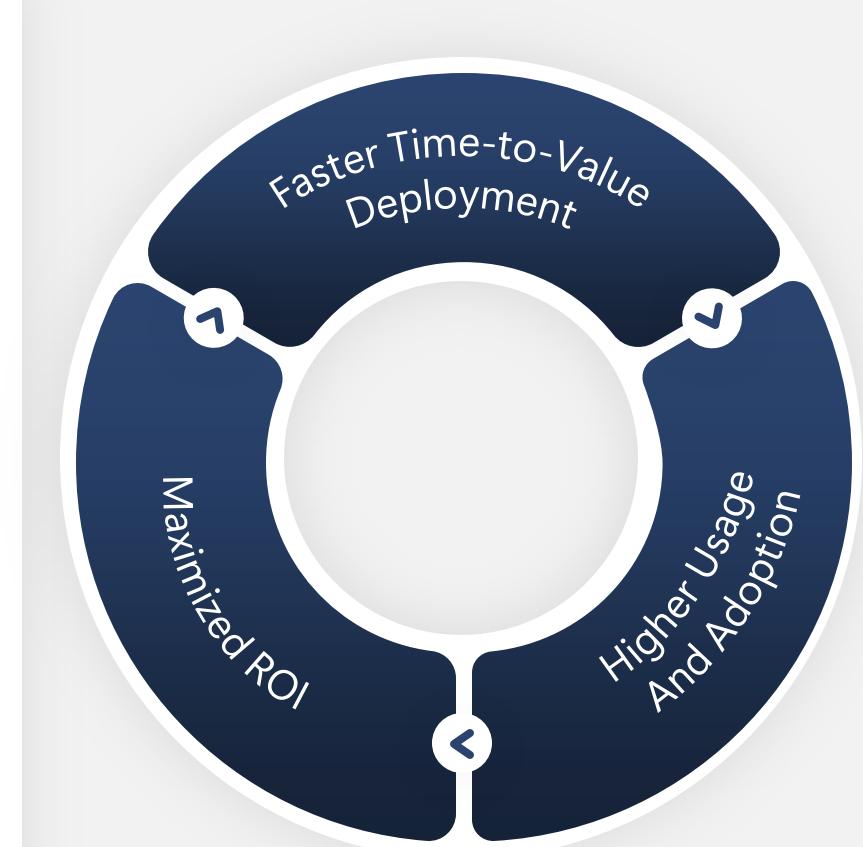


## Take advantage of DSP by engaging with Microsoft CSAs to...

Align on project goals, scope, risks and timelines at project kick-off

Guide customers toward the best deployment decisions

Access services and workshops not part of partner SOW



# FastTrack Engagement Models

## Leverage Microsoft-Led FastTrack

Guided execution of Success by Design in collaboration with a qualified FastTrack Partner and a Solution Architect directly assigned to the Project



Microsoft-Led  
FastTrack  
\$500K+ AAR

## Self-drive your implementation

On-demand guidance, tools & resources, aligned to Success by Design and delivered via the Dynamics 365 Implementation Portal



Self-Service



Partner-Led  
FastTrack  
(FastTrack  
Portfolio Partners)

## Leverage Partner-Led FastTrack

Guided execution of Success by Design by the Center of Excellence (COE) of a FastTrack Portfolio Partner. Indirect model, backed by Microsoft.

Dynamics 365 Implementation Portal

# Campaign in a Box (CiaB): A Snapshot



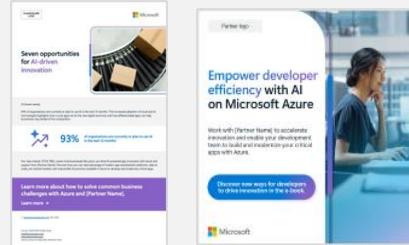
What is  
CiaB?

- Ready to launch customizable campaigns
- Approved Microsoft value propositions, messaging and branding
- Aligned to Microsoft priority solution areas and industries
- Available to all Microsoft AI Cloud Partners
- Microsoft invests so that partners can GTM quicker and faster
- Drive top of the funnel leads through partner-led marketing

## Example: Digital Marketing Content OnDemand Campaign | Build and modernize AI apps

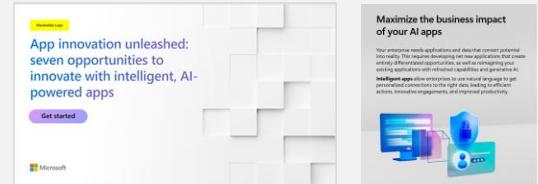
### Build awareness

Demand gen email sequence, social assets/ads, Infographic, Thought Leadership



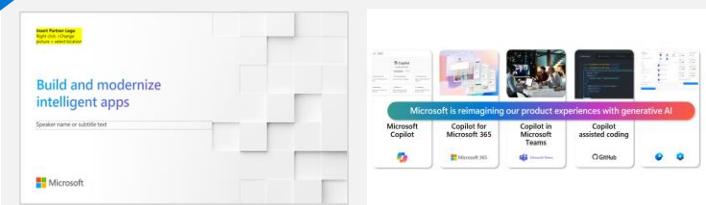
### Acquire leads

E-book: App Innovation unleashed: seven opportunities to innovate with intelligent, AI-powered apps



### Nurture opportunities

To-customer pitch decks



### Two ways partners can leverage CiaB

1. [Partner Marketing Center \(PMC\)](#) -Downloadable customizable assets w/ execution guides

2. [Digital Marketing Center OnDemand \(DMC\)](#) -Platform to launch multi-week campaigns to generate new leads

# FY26 Ciab Roadmap: AI Business Solutions

FY25 Campaigns will stay in place until new/updated Ciabs have launched

FY26 Solution Play	FY26 Campaign Name	Products	Customer	FY25 Campaign Links	Q1	Q2	Q3	Q4
Sales Transformation with AI	AI Powered CRM	D365 Sales, D365 Customer Insights	ENT/SME-C	<a href="#">PMC</a>		✓		
Service Transformation with AI	AI Powered Customer Service	D365 Customer Service, D365 Contact Center, D365 Field Service	ENT/SME-C	<a href="#">PMC</a>		✓		
ERP Transformation with AI	Migrate and Modernize your ERP with Dynamics 365	D365 Finance, Supply Chain, Commerce, HR, Project Operations	ENT/SME-C/SMB	<a href="#">PMC</a>	✓			
Innovate with Low Code AI and Agents	Scale Innovation with Power Platform	Power Apps, Power Automate, Copilot Studio	ENT/SME-C	<a href="#">PMC</a>		✓		
Scale Business Operations with AI	Business Central for SMB	D365 Business Central	SMB	<a href="#">DMC</a> / <a href="#">PMC</a>		✓		
Secure AI Productivity	Secure Productivity SMB	ME3, Frontline Worker	SMB	New in FY26	✓			
	Secure Productivity ENT		ENT/SME-C	<a href="#">PMC</a>		✓		
Converged Communications	Smart Workplace with Teams	Teams Phone, Rooms, Premium	ENT	<a href="#">PMC</a>		✓		
Scale with Cloud AI Endpoints	Cloud Endpoints	W365, AVD, W365 Link	ENT	<a href="#">PMC</a>		✓		
Copilot and Agents at Work	Microsoft 365 Copilot- ENT	M365 Copilot, Copilot Chat, Copilot Studio, Viva	ENT	<a href="#">PMC</a>	✓			
	Microsoft 365 Copilot SMB		SMB	<a href="#">DMC</a> / <a href="#">PMC</a>		✓		
N/A	Accelerate CSP Renewals	M365 Business Standard, Business Premium, E3, E5, Copilot		<a href="#">Disti/Reseller</a>	✓			

\*FY26 Campaign Localization: (11 languages) German, Spanish, Italian, French, Russian, Japanese, Chinese (simplified), Chinese (traditional), Korean, Turkish, Portuguese.

✓ Refreshed content

✓ New for FY26

# What is SPARK Propensity?

SPARK: Solution play Propensity: Accelerate Revenue & KPIs

FY26 COVERAGE:

All Solution Areas

Mainstream Solution Plays

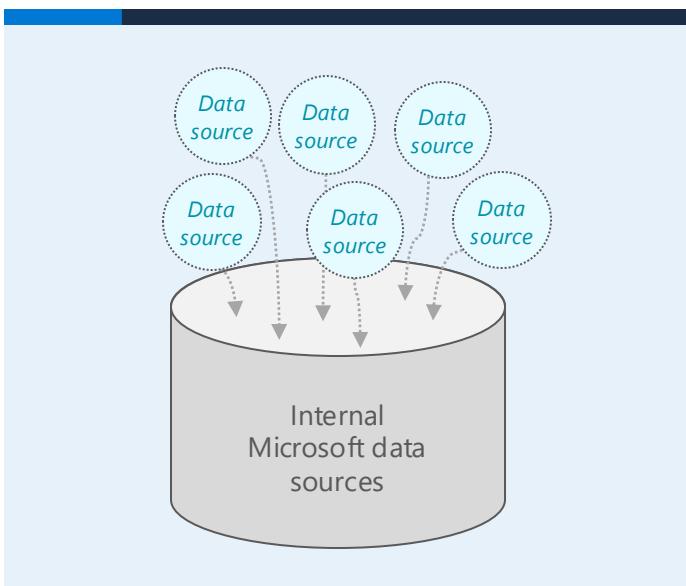
Enterprise & Corporate\* Customer Segments

Eligible Partners<sup>^</sup> Partners

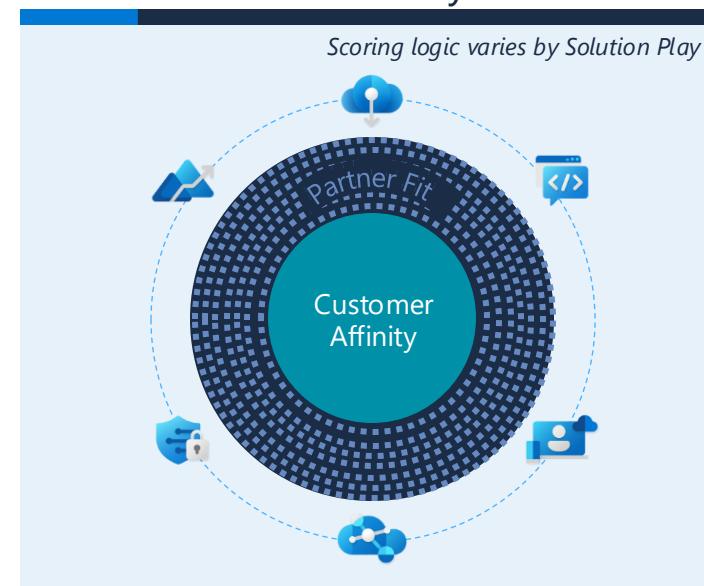
Intelligent data models which leverage telemetry data to predict a customer's likelihood of purchasing a Microsoft solution

## How it works:

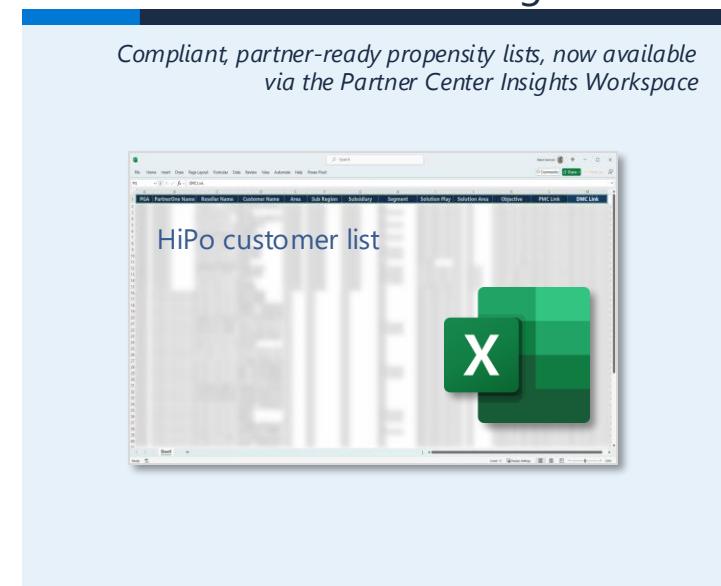
- 1 Aggregate inputs across Microsoft data sources



- 2 Assign propensity score based on affinity & best fit



- 3 Identify high-potential customers to drive growth



# FY26 SPARK Propensity | Partner CTAs

SPARK: Solution play Propensity: Accelerate Revenue & KPIs

## Benefits for partners:

- Increase sales velocity by targeting customers most likely to drive growth
- Stronger collaboration due to shared visibility between partner & MSFT roles
- HiPo customer opportunities are directly aligned to MSFT strategic goals
- Aggregated marketing resources to help easily find & leverage assets
- Dynamic propensity models are continually trained & improved

## Getting started:

Visit [SPARK Propensity in Partner Center Insights](#) on MS Learn for info on:

- How SPARK models work
- How to download SPARK Propensity lists
- Customer targeting scenario CTAs



## Partner Call to Action:

- 1 Download SPARK Propensity data from Partner Center
- 2 Review HiPo customer list with PDM & work together to prioritize execution
- 3 Leverage ready-made marketing assets with targeted HiPo customers (*i.e. CiaB*)
- 4 Work with PDM to monitor solution delivery performance & customer engagement

# FY26 SPARK Propensity | AI Business Solutions (1/2)

SPARK: Solution play Propensity: Accelerate Revenue & KPIs

SOLUTION AREA	SOLUTION PLAY	CUSTOMER TARGETING SCENARIO	PROPENSITY COVERAGE		
			ENTERPRISE	CORPORATE	SMB
AI Business Solutions	1 Copilots and Agents at Work	i. Acquisition: Win new customers with M365 Copilot and Copilot Chat	✓	✓	✓
		ii. Upsell: Drive value of Copilot Agentic and upsell to M365 Copilot	✓	✓	✓
		iii. Expansion: Increase # of M365 Copilot seats and grow existing accounts	✓	✓	✓
	2 Secure AI Productivity	i. Acquisition: Win new customers with M365 E3	✓	✓	✓
Cloud & AI Platforms	3 Scale with Cloud and AI Endpoints	ii. Upsell: Upsell O365 to M365 E3	✓	✓	✓
		iii. Expansion: Land elevating Security for Copilot	✓	✓	✓
		iv. Acquisition: Win new customers with Business Premium			✓
		i. Expansion: Convert accounts who piloted W365 to paid seats	✓		
Security	4 Converged Communications:	ii. Expansion: Drive ACR growth in existing AVD customer accounts	✓		
		iii. Acquisition & Expansion: Win new W365 & AVD customers through on-prem migrations	✓		
		iv. Expansion: Drive Windows to Cloud migrations	✓		
		i. Expansion: Increase # of seats in existing accounts across Teams Phone, Teams Rooms, Teams Premium, and Microsoft Places	✓		
		ii. Acquisition: Add new workload customers across Teams Phone, Teams Rooms, Teams Premium, and Microsoft Places	✓		
		iii. Upsell: Attach Copilot to all new workloads; bundle Teams Phone + Copilot offers	✓		

# FY26 SPARK Propensity | AI Business Solutions (2/2)

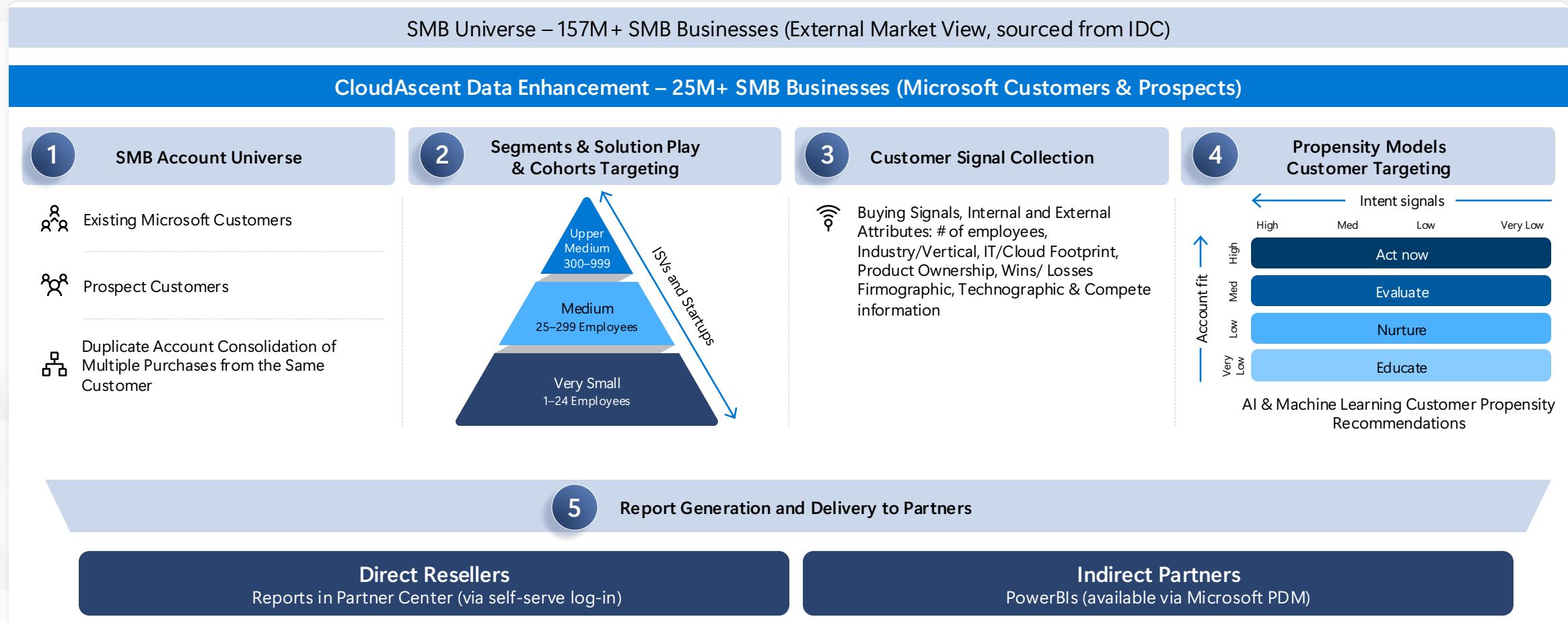
SPARK: Solution play Propensity: Accelerate Revenue & KPIs

SOLUTION AREA	SOLUTION PLAY	CUSTOMER TARGETING SCENARIO	PROPENSITY COVERAGE		
			ENTERPRISE	CORPORATE	SMB
AI Business Solutions	 → Mainstream	i. Land: Win new customers with PowerApps	✓	✓	✓
		ii. Land & Expand: PowerAutomate & Copilot Studio	✓	✓	
		i. Acquisition: Win new customers in with D365 Sales	✓	✓	✓
		ii. Expansion: Expand to Agents, Sales Premium, & Customer Insights	✓	✓	
		i. Acquisition: Win new customers with D365 Customer Service	✓		
Cloud & AI Platforms	 → Mainstream	ii. Acquisition: Win new customers with Contact Center as a Service	✓		
		iii. Expansion: Upsell D365 Field Service and/or Agents	✓		
		i. Acquisition: Win new customers with D365 Finance & Supply Chain	✓	✓	✓
Security	 → Mainstream	ii. Expansion: Expand AI capabilities in existing D365 accounts with Premium & Agents	✓	✓	✓
		i. Acquisition: Win new customers with Dynamics			✓
		ii. Acquisition: Migrate customers to Business Central			✓



# CloudAscent | What is CloudAscent?

CloudAscent (CLAS) is the engine powered by AI, Machine Learning, and customer intelligence that takes internal and external data to deliver high propensity SMB customer targets to partners for Cloud and AI Platforms, AI Business Productivity, and Security solutions



# FY26 CloudAscent SMB Propensity | Partner CTAs



## Benefits for partners

- **Increased sales & marketing efficiency** with data driven insights to allow more precise customer targeting.
- **Reduced cost of sales** by reducing the sales cycle times.
- **Improved customer retention** by providing insights into customer needs and behaviors.
- **Act Now propensity recommendations** conversion rate is 3X other propensity levels for new customer acquisition.
- **Act Now M365 Upsell propensity recommendations** YoY growth rate is 10X the other M365 Upsell propensity levels.



## Getting started

Visit <https://aka.ms/CloudAscent> to gain familiarity with CloudAscent:

- How CloudAscent works
- How to access CloudAscent SMB propensity lists
- Reseller and Indirect Provider training for specific targeting scenarios



## Partner Call to Action

- 01 **Learn about CloudAscent** by visiting <https://aka.ms/CloudAscent>
- 02 **Download CloudAscent customer propensity lists** from Partner Center for resellers OR receive Power BI from PDM for Indirect Providers. Discover more <http://aka.ms/CLASdefinitions>
- 03 **Develop Campaign** by familiarizing yourself with the cohorts and readiness material on <http://aka.ms/smbgtm>
- 04 **Engage Sales & Marketing** by sharing insights from CloudAscent to align their strategies and efforts
- 05 **Execute and Monitor** your marketing campaigns and sales strategies adjusting as needed based on results

# FY26 Partner Solution Area Investments

# FY26 Investment Direction

Driving success in high-value customer scenarios



## Customer Segment

Optimize investments for each segment



## MCEM Stage

Drive **consistency** and **simplification** focused on Inspire & Design and Realize Value



## Activate SME&C Growth

Reward **growth** across new and existing customers, workloads, and seat counts

## Increase Hero Investments Across CSAs



### AI Business Solutions



### Cloud & AI Platforms



### Security

# AI Workforce Partner Incentives FY26 – Open Enrollment

**Solution Play Scenarios**

- Copilot and Agents at Work
- Secure AI Productivity
- Scale with Cloud & AI Endpoints
- Converged Communications
- Cross-Solution Play

**1 Listen & consult**

**2 Inspire & design**

**3 Empower & achieve**

**4 Realize value**

**5 Manage & optimize**

Step	Offer	Value
1 Listen & consult	Copilot + Power Immersion Briefing	Up to \$2K
1 Listen & consult	Copilot + Power Envisioning & PoC	Up to \$25K
2 Inspire & design	Secure Productivity Immersion Briefing	Up to \$2K
2 Inspire & design	Secure Productivity Envisioning & PoC	Up to \$30K
3 Empower & achieve	Cloud Endpoints Envisioning & PoC	Up to \$20K
4 Realize value	Copilot + Power Accelerate	Deployment Accelerator – Up to \$50K
5 Manage & optimize	M365 Accelerate	CSP Deployment Accelerator (ME3/ME5) – Up to \$38K
5 Manage & optimize	Modern Work CSP Incentives	Up to 25.75%

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Resources | [Partner Incentives Site](#)

# FY26 Partner Performance Measurements

## Partner Performance Measures



### Envisioning & PoC and Deployment Accelerators

Partners must meet success rate on 33% of customers who receive an engagement. Success measures will be tied to revenue or usage growth and will be specific to each engagement.

## Cap on Max Partner Earnings



Partner earnings are capped at the incentive initiative, with potential extensions based on partner success assessment and budget. Caps are set at different levels for Global and Regional SI partners.

## Cap on Concurrent Engagements



Partners are capped on concurrent active Copilot + Power Accelerate engagements. Caps are set at different levels for Global and Regional SI partners.

## Performance Criteria



- Claims monitored over a 12-month rolling window and will be measured monthly against quarterly milestones.
- Paused partners may resume participation once they meet the required success rates.
- Partners will be able to track their progress in Partner Center in the MPX dashboard.
- Assessment is done at the Partner One ID level, with a global center of excellence advised for partner monitoring their affiliate claims worldwide.

# Copilot + Power Accelerate

## Initiative summary

Consolidates M365 Copilot and Power Platform (low-code) investments into a single program. Partners can drive end-to-end AI transformation for customers and enable M365 Copilot, Chat MAU, agents with Copilot Studio or Power Platform solutions.

## Engagement summary

- Copilot + Agents Immersion Briefings:** 1: many session to inspire and educate on Copilot and agent capabilities (half-day)
- Copilot + Power Envisioning & PoC:** 1:1 pre-sales engagements for activities like: identify use cases, build a business case, technical & security readiness, and deliver immersion and PoC.
- Copilot + Power Deployment Accelerator:** 1:1 post-sales engagements for activities like: Technical deployment, developing agent and/or Power Platform solutions, training users & ACM

## Performance measures

New Partner Success control will require partners to achieve incremental **revenue growth in M365 Copilot, Copilot Studio or Power Platform**, or growth in **Copilot Chat usage** for completed engagements.

## Engagement Portfolio

Size	Min Customer Size	Pre-Sales		Post-Sales	
		Immersion Briefing	Envisioning & PoC	Deployment Accelerator	
XXS	<500 O/M suite seats	\$2K			
XS	500+ O/M suite seats		\$5K	\$5K	
S	1K+ O/M suite seats		\$10K	\$10K	
M	1.5K+ O/M suite seats		\$25K	\$25K	
L	3K+ O/M suite seats				\$50K

Up to 4 engagements allowed per eligible tenant

**Partner eligibility:** (1) Copilot Jumpstart Ready Tier (2) Immersion Briefings also allow CSP Partners with 100+ customers.

Payouts listed reflect Market A pricing  
Full incentive requirements available in the [FY26 Incentive Guide](#)

# Copilot + Power Accelerate Partner success measures

Pre-sale					Success Measures			
Engagement Name	Type	Min Customer Size	Payout	Field-Initiated	M365 Copilot \$	M365 Copilot MAU	CS \$	PP \$
Copilot + Agents Immersion Briefing	Partner-initiated	10+ customers with 100+ seats of O/M	\$2K	N	N/A	N/A	N/A	N/A
Copilot + Power Envisioning & PoC (XS)	Partner-initiated	500+ O/M seats	\$5K	N	\$50K	500 users	\$5K	\$25K
Copilot + Power Envisioning & PoC (S)	Partner-initiated	1K+ O/M seats	\$10K	N	\$100K	1K users	\$10K	\$50K
Copilot + Power Envisioning & PoC (M)	Partner-initiated	1.5K+ O/M seats	\$25K	N	\$250K	2.5K users	\$25K	\$125K
Post-purchase					Success Measures			
Engagement Name	Type	Min Customer Size	Payout	Field-Initiated	M365 Copilot \$	M365 Copilot MAU	CS \$	PP \$
Copilot + Power Deployment Accelerator (XS)	Partner-initiated	500+ O/M suite seats	\$5K	N	\$50K	500 users	\$5K	\$25K
Copilot + Power Deployment Accelerator (S)	Partner-initiated	1K+ O/M suite seats	\$10K	N	\$100K	1K users	\$10K	\$50K
Copilot + Power Deployment Accelerator (M)	Partner-initiated	1.5K+ O/M suite seats	\$25K	N	\$250K	2.5K users	\$25K	\$125K
Copilot + Power Deployment Accelerator (L)	Partner-initiated	3K+ O/M suite seats	\$50K	N	\$500K	5K users	\$50K	\$250K

O/M suite includes E3/E5/A3/A5/G3/G5 SKUs

# M365 Accelerate

 Field initiated

## Initiative summary

Unifies Secure Productivity investments into a single program, enabling partners to drive end-to-end customer transformation with Microsoft 365 solutions like Entra ID, Intune, Defender for Endpoint, Purview, and Teams.

## Engagement summary

- Secure Productivity Immersion Briefings:** 1:many interactive session using real-world scenarios to showcase Microsoft 365 Business Premium or E3.
- Secure Productivity Envisioning & PoC:** 1:1 engagement to build customer intent through assessments, PoCs, and business case development for Microsoft 365 solutions.
- CSP Deployment Accelerator:** 1:1 post-sale engagement that helps offset partner costs for deployment and accelerating adoption of Microsoft 365 E3/E5.

## Performance measures

New Partner Success control will require partners to achieve incremental growth in **Secure Productivity revenue** for completed engagements.

## Engagement Portfolio • Pre-Sales • • Pre/Post-Sales •

	Initiated	Min Customer Size	Immersion Briefing	Envisioning & PoC	CSP Deployment	EA Deployment Voucher
Partner		< 500 seats	\$2K		\$8K (min 300 seats)	
		500+ seats			\$13K	
		1,000+ seats			\$25K	
		1,500+ seats			\$15K	\$38K
Field	Opportunity based			\$30K (Field-initiated)		Up to \$100K



**Partner eligibility:** (1) Identity and Access Management or Modernize Endpoints specialization, (2) Immersion Briefings also allow CSP Partners with 100+ customers, (3) CSP Deployment requires Modern Work Specialization OR Microsoft Security Specialization.

Payouts listed reflect Market A pricing  
Full incentive requirements available in the [FY26 Incentive Guide](#)

# M365 Accelerate Partner success measures

 Field initiated

Pre-sale					Success Measures	
Engagement Name	Type	Min Customer Size	Payout	Field-Initiated	Secure Productivity \$	
Secure Productivity Immersion Briefing	Partner-initiated	10+ customers with 100+ seats of Microsoft 365 Business Basic/Standard, O365 E3/E5 or on-premises versions of MS software (Office 2016, Windows, Exchange Online)	\$2K	N	N/A	
Secure Productivity Envisioning & PoC (S)	Partner-initiated	≥500 seats of Office 365 E1+E3 or ≥500 seats of Microsoft 365 Apps Standalone, AND [Intune seats/(Office 365 + Microsoft 365 seats)] ≤ 50%	\$7.5K	N	\$50K	
Secure Productivity Envisioning & PoC (M)	Partner-initiated	≥1500 seats of Office 365 E1+E3 or ≥1500 seats of Microsoft 365 Apps Standalone, AND [Intune seats/(Office 365 + Microsoft 365 seats)] ≤ 50%	\$15K	N	\$100K	
Secure Productivity Envisioning & PoC (L)	Field-initiated	≥3000 seats of Office 365 E1+E3 or ≥3000 seats of Microsoft 365 Apps Standalone, AND [Intune seats/(Office 365 + Microsoft 365 seats)] ≤ 50% Minimum Opportunity of \$500K+	\$30K	Y	\$200K	
Post-purchase						Success Measures
Engagement Name	Type	Min Customer Size	Payout	Field-Initiated	Secure Productivity \$	
CSP Deployment Accelerator (S)	Partner-initiated	300–500 new seats of ME3 or ME5	\$8K	N	NA	
CSP Deployment Accelerator (M)	Partner-initiated	500–1K new seats of ME3 or ME5	\$13K	N	NA	
CSP Deployment Accelerator (L)	Partner-initiated	1K–1.5K new seats of ME3 or ME5	\$25K	N	NA	
CSP Deployment Accelerator (XL)	Partner-initiated	1.5K+ new seats of ME3 or ME5	\$38K	N	NA	

# Cloud Endpoints Accelerate

## Initiative summary

Incentivize partner-led pre-sales activities to enable partners to capture the Virtualization opportunity for Microsoft with Windows 365 and AVD.

## Engagement summary

- Envisioning & PoC:** Modular 1:1 engagement targeted at customers for Pre Sales engagements to demonstrate value, build customer intent, and accelerate opportunities with customers interested in migrating endpoints to the cloud with Windows 365 and Intune Suite.
- Azure AVD:** Partner-led post-sales engagements that accelerate customer migrations to AVD and scale Azure consumption. Customer eligibility based on planned Azure consumption in year 1.

## Partner eligibility

Partners with the Modernize Endpoints Specialization. Partners with Azure AVD specialization.

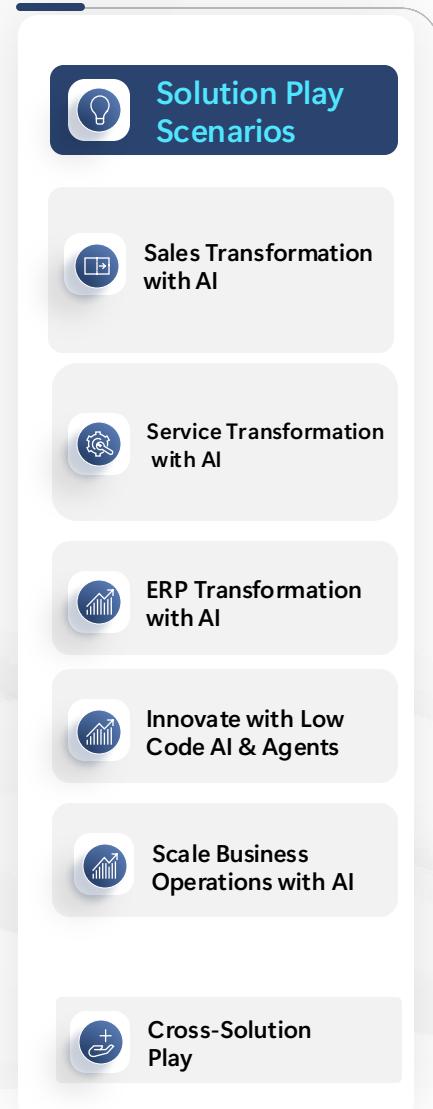
## Performance measures

New Partner Success control will require partners to achieve incremental growth in **Windows 365 or Intune Suite revenue** for competed engagements.

Pre-sale				Success Measures
Engagement Name	Min Customer Size	Payout	Field-Initiated	W365 and Intune Suite \$
Cloud Endpoints Envisioning & PoC (S)	≥1K seats of Windows 11 Enterprise and Intune, AND ≥40% Intune usage	\$10K	N	\$75K
Cloud Endpoints Envisioning & PoC (M)	≥3K seats of Windows 11 Enterprise and Intune, AND ≥40% Intune usage	\$20K	N	\$150K

Payouts listed reflect Market A pricing  
Full incentive requirements available in the [FY26 Incentive Guide](#)

# AI Business Process Partner Investments FY26



## 1. Listen & consult

## 2. Inspire & design

## 3. Empower & achieve

## 4. Realize value

## 5. Manage & optimize

CRM Envisioning Workshop  
Up to \$6K

Enterprise Advisory Incentives  
(formerly OSA)  
Net paid seat growth above HWM

CRM Envisioning Workshop  
Up to \$6K

Enterprise Advisory Incentives  
(formerly OSA)  
Net paid seat growth above HWM

ERP Envisioning Workshop  
Up to \$6K

Enterprise Advisory Incentives  
(formerly OSA)  
Net paid seat growth above HWM

Business Central  
Immersion Briefing  
Up to \$2K

Enterprise Advisory Incentives  
(formerly OSA)  
Net paid seat growth above HWM

ERP Envisioning Workshop  
Up to \$6K

Business Applications  
CSP Incentives

# FY26 Partner Performance Measures

## Claim Volume Limits



### 1:Many Immersion Briefings

Partners may submit a maximum of 50 approved and 10 concurrent claims per customer ID.

## Claim Volume Limits



### 1:1 Envisioning Workshops

Partners may submit a maximum of 1 approved and 1 concurrent claim per customer ID.

## Cap on Max Partner Earnings



- Partner earnings are capped at the incentive initiative
- Partners may earn up to \$250K total across all Envisioning Workshops
- Partners may earn up to \$50K total across all immersion briefings

# FY26 AI Business Process Partner Activities

Funded engagements to drive customer intent to purchase AI Business Process solutions

## FY26 Earning Opportunities

### Inspire & Design Engagements

#### Business Central Immersion Briefing

1:Many

Up to  
\$2K

1:Many

#### CRM Envisioning Workshop

Up to  
\$6K

1:1

#### ERP Envisioning Workshop

Up to  
\$6K

1:1

## Eligibility & Payment

### Immersion Briefings – 1:Many

#### Eligibility

- Business Applications Small and Midsize Business Management Specialization

#### Customer Qualification

- Minimum of 10 attendees from different qualifying commercial customers
- Customers with no Business Central licenses
- Education and Public Sector will not count towards minimum customer requirement but may attend

#### Payout Details

- One time fixed fee paid upon completion of activity and Microsoft approval

#### Offer Description

1:Many engagement to introduce multiple customers to Microsoft's Business Central capabilities via interactive demos, scenario-based discussions, and actionable guidance tailored to common business challenges.

### Envisioning Workshops – 1:1

#### Eligibility

- At least one Business Applications Specialization

#### Customer Qualification

- Valid, Open, MSX Opportunity ID (see MCI Policy Guide for detailed requirements)

#### Payout Details

- One time variable fee paid upon completion of activity and Microsoft approval
- The lesser of 1) Partner Market Rate x #of hours OR 2) 7.5% est. ACV listed in MSX Opportunity

#### Offer Description

1:1 engagement to identify customer goals, use Microsoft solutions to demonstrate business value, and provide solution recommendations.

# Enterprise Advisory Incentives (formerly OSA)



Rewards and recognizes partners for pre-sales activities that drive the platform sale of Dynamics 365.

Rewards partners on net paid seat growth above the High-Water Mark (HWM) at the tenant and workload level.

## Eligible Workloads

- Business Applications Solution Designation
- Licensing Agreement: Enterprise and MCA-E
- CPOR Claim within 120 days of sale

## Partner Eligibility

- Solutions Partner Designation: Business Applications

FY25		
Advisor Fee per incremental seat above HWM	Customer segment Enterprise	Customer segment Small Medium & Corporate
Finance & Supply Chain	\$250	
Sales & Service	\$20	\$80
Activity & Devices	\$75	\$175

- Basic CSU (65 bundle):** \$4,875 for Enterprise (ENT) and \$11,375 for SMC.
- Standard CSU (225 bundle):** \$16,875 for ENT and \$39,375 for SMC.
- Premium CSU Bundle (500):** \$37,500 for ENT and \$87,500 for SMC.

# FY26 Commercial IAP Innovation Acceleration Program

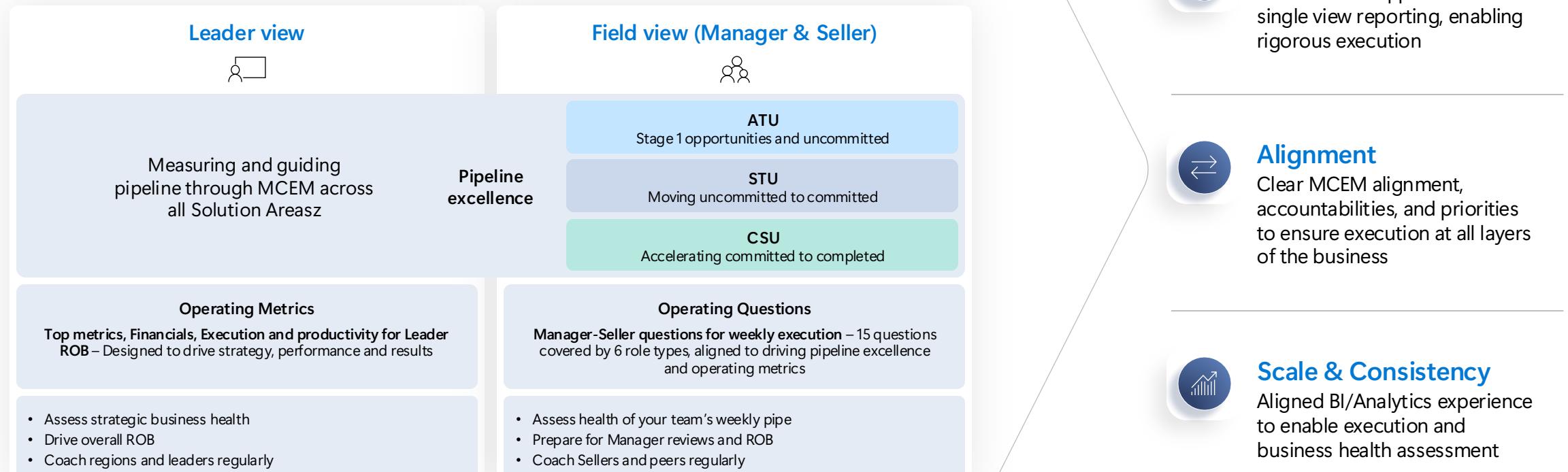
# IAP on a slide

Innovation Acceleration Program

## IAP overview

**IAP is a prioritization framework and an operating model** to run our business.

It measures and guides the health of our selling & consumption efforts through MCEM, and consists of 2 key views across solution areas

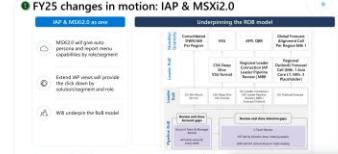
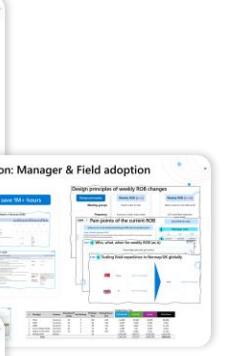
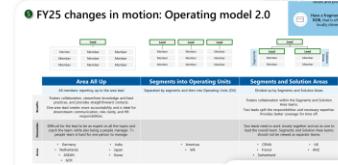
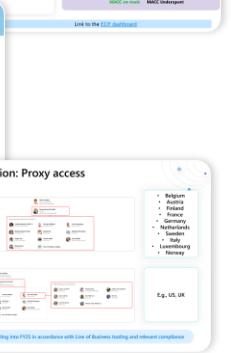


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# FY26 Core Priorities

#	Core Priority Title	Core Priority <i>(What will you focus on in the upcoming period to drive impact for the business?)</i>	Critical Indicators of Success <i>(How will you measure success?)</i>
1	<b>One Sales Execution</b>	<p>Drive and guide consistent Sales Excellence discipline, governance and partner insights within and across Enterprise, GPS, ISD, SMC-C, SMB and roles in a unified approach.</p> <ul style="list-style-type: none"> <li>Enable a coordinated MCEM rhythm of business (ROB) across segments, solution areas and roles with key partners such as Finance, Operations, etc.</li> <li>Support sales managers on executing sales principles, strategy, and expected outcome – steer towards quarterly activations on pipeline, top of funnel and usage, leveraging the power of IAP, MCEM and People.</li> <li>Enable clear guidance to field on landing segment and/or solution area strategic priorities.</li> </ul>	<ol style="list-style-type: none"> <li><b>Oversee weekly process and rhythms</b> to improve financial, solution area and segment critical indicators of success (e.g., VTB, VTF, M/M% growth, Y/Y% growth, SMC/B metrics), leveraging tooling.</li> <li><b>Drive MCEM sales stage coverage</b>, progression and coaching needed to achieve budget – Enable coordinated engagement and conversion between segments, partner (with target coverage) and roles.</li> </ol>
2	<b>Business Health &amp; Management</b>	<p>Partner with leaders to prioritize pipeline management and accelerate revenue reliability, growth and accuracy.</p> <ul style="list-style-type: none"> <li>Drive 'always on' rolling 5-quarter pipeline generation and progression through MCEM stages.</li> <li>On-point field engagement to ensure pipeline hygiene is maintained.</li> <li>Lead &amp; partner with Sales Managers for pipeline health improvement and execution.</li> <li>Ensure pipeline management and forecast accuracy per MCEM standards.</li> <li>Drive strategic ECIF management and excellence.</li> <li>Deliver Usage Excellence and Top of Funnel as applicable.</li> </ul>	<ol style="list-style-type: none"> <li><b>Provide rolling 5Q pipeline health</b> and accuracy, supported with benchmarking via IAP.</li> <li><b>Embed Excellence</b> into standard pipeline building motions &amp; rhythms, including: Pipeline, Usage and Top of Funnel (Marketing Signal Conversion, Inbound Partner referral, Solution Play accelerators and LXP)</li> <li><b>Drive improvement to ECIF lifecycle execution</b> – ensuring % spend utilization and returns.</li> </ol>
3	<b>Sales Execution Transformation and efficiency</b>	<p>Land emerging/updated sales strategies, processes and objectives to drive sustainable growth and improved sales performance.</p> <ul style="list-style-type: none"> <li>Drive efficiency &amp; simplicity to enhance sales effectiveness.</li> <li>Support Sales Managers on seller expectations based on MCEM standards.</li> <li>Continue to work on areas of opportunity for segment transformation.</li> <li>Build a quarterly-weekly repeatable ROB in the business.</li> </ul>	<ol style="list-style-type: none"> <li><b>Lead and evangelize adoption of MCAPS sales execution transformation initiatives</b> (e.g., IAP, MSXi2.0, New Commerce, CSP etc.) – Enabling best practice sharing for leaders, managers and sellers.</li> <li><b>Provide business and deal level insights</b> that help demonstrate strategic success, remove sales blockers, and underpin LT ROB.</li> <li><b>(Where applicable)</b> Drive continuous improvement of % of engine &amp; program capacity and investment utilization.</li> </ol>
4	<b>Agile planning</b>	<p>Support execution of always on planning activities in partnership with segment, accounts and operational leadership.</p> <ul style="list-style-type: none"> <li>Represent the segment on the overall planning processes.</li> <li>Drive or contribute to selected segment fiscal year planning activities.</li> <li>Enable Sales Excellence guidance.</li> </ul>	<ol style="list-style-type: none"> <li><b>Provide Sales Excellence expertise</b> continuously for operating model design, tooling and other planning activities that support business growth.</li> <li><b>Land FY strategies</b> with local teams to support continued business growth (e.g., Q1 faststart, Red Carpet transition etc.).</li> </ol>

# FY26 Guidance in detail | E&O

E&O	Change	How is it changing	
SEL	1.1 IAP & MSXi2.0 – Role & Segment based views	<ul style="list-style-type: none"> <li>Key Sales roles &amp; Segments get curated, auto-persona, MSXi 2.0 landing page, report views and Co-pilot</li> <li>Sales Excellence enabled to orchestrate and drive business solution, segment and role performance</li> </ul>	
	1.2 IAP – Manager adoption and General Field use	<ul style="list-style-type: none"> <li>Enhanced focus on driving Manager adoption of tooling and associated weekly rhythms</li> <li>Opportunity to save time and drive impact in the Field</li> </ul>	
	1.3 IAP – Usage Excellence	<ul style="list-style-type: none"> <li>Accompanying billed and consumption, Sales Excellence enhance collaboration and orchestration on strategic usage</li> <li>Usage impact naturally flows into billed and consumption improvements</li> </ul>	
	1.4 IAP – Strategic ECIF	<ul style="list-style-type: none"> <li>Sales Excellence leverage tooling to reinforce strategic ECIF insights</li> <li>Ensuring that the business gets the best investment and return from working with customers</li> </ul>	
	2 Proxy access	<ul style="list-style-type: none"> <li>Proxy access standardized and enabled consistently WW</li> <li>Allowing lines of business tooling to be effectively used globally</li> <li>Change TBC</li> </ul>	
	3 Operating Model Guidance	<ul style="list-style-type: none"> <li>Organisations prepared for review and standardization of Excellence into FY26</li> <li>Functions becomes streamlined and easier to work with</li> </ul>	

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