

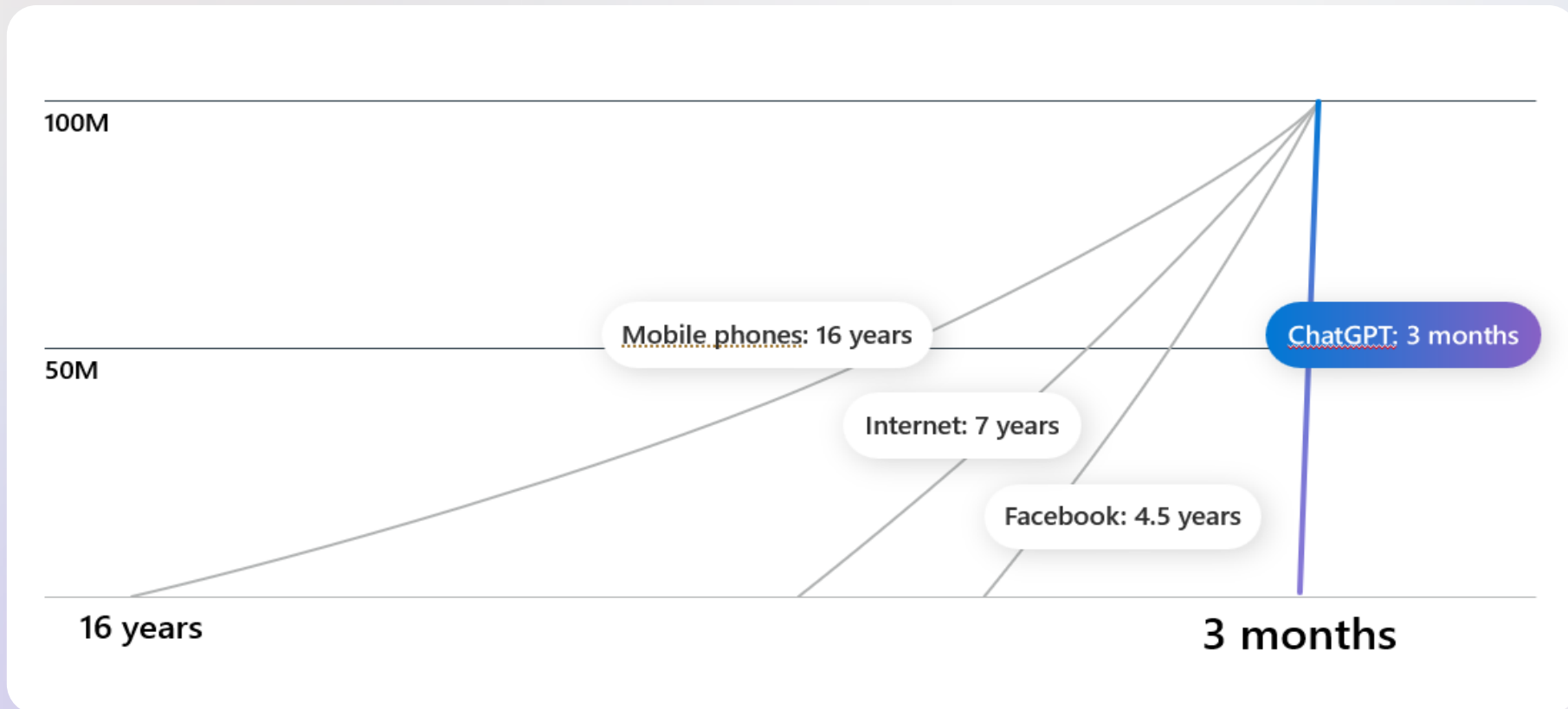


Copilot for Microsoft 365

AI technology and impact

The AI technology is here

Time to reach 100M users





87%

of organizations believe AI will
give them a competitive edge

The pace of work is outpacing our ability to keep up

AI-powered tools represent an enormous opportunity

64%

of people have struggled with finding time and energy to get their work done.

3x

Amount by which time spent in Microsoft Teams meetings and calls has increased per week since February 2020.

70%

Share of people who would delegate as much as possible to AI to lessen their workloads.

2x

Likelihood of a leader to say AI will provide value by boosting productivity vs. cutting headcount.

What has been announced

Now available for customers of all sizes

Channel	»»	Copilot for Microsoft 365 is available
Pre-reqs	»»	BB, BS, BP, OE3, OE5, ME3, ME5
Order size	»»	No min order size

**available as a per user per year license, with upfront payment option only*

Copilot for Microsoft 365



Your AI assistant at work



Copilot for Microsoft 365

Natural Language



Large Language
Models

+



Microsoft Graph
- Your Data -

+



The
Internet

+



Microsoft 365
Apps



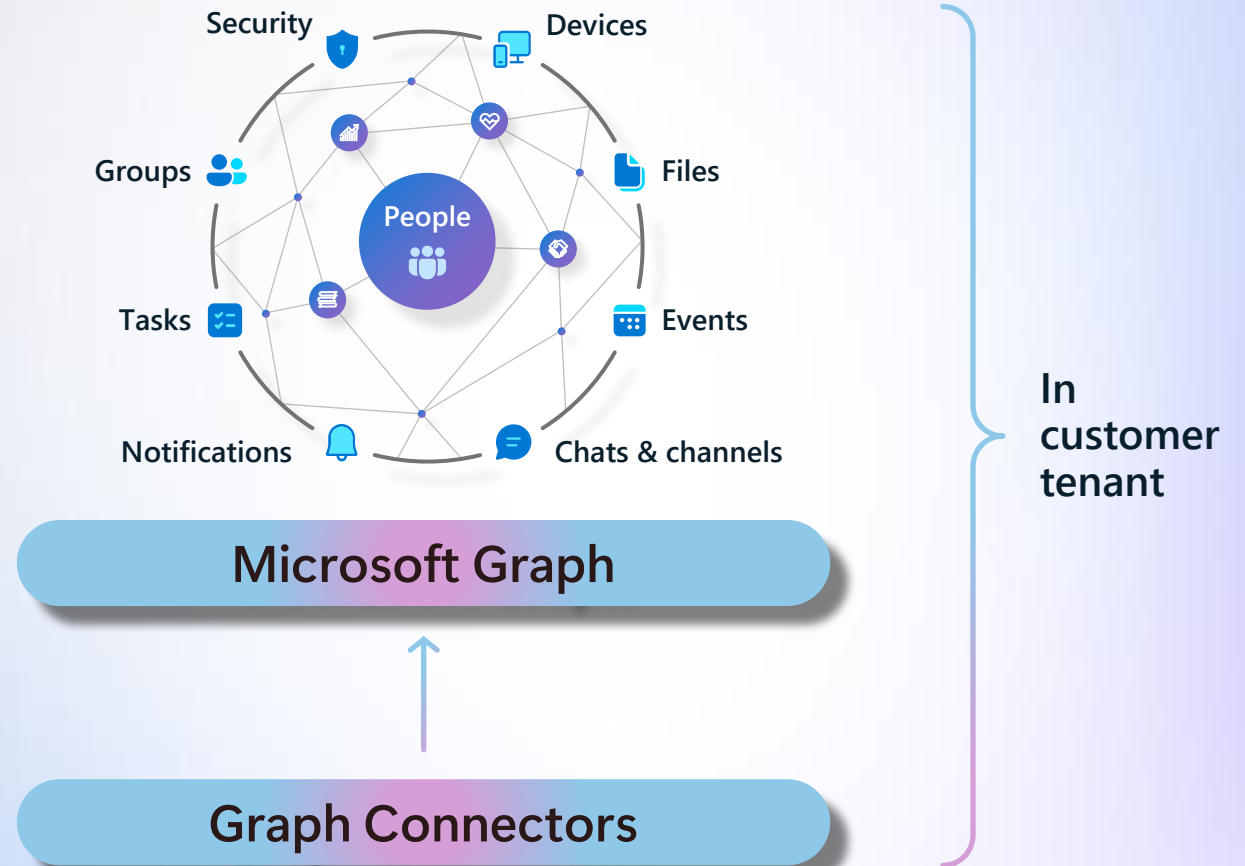
Copilot for Microsoft 365

Access to your business content **and** context



Microsoft Graph

- Line-of-business and 3rd party data
- Security and permissions
- Search schema, filters and eDiscovery





Semantic Index for Copilot



Requirements for Semantic Index for Copilot

Microsoft Graph



Ground Copilot
in **your data**

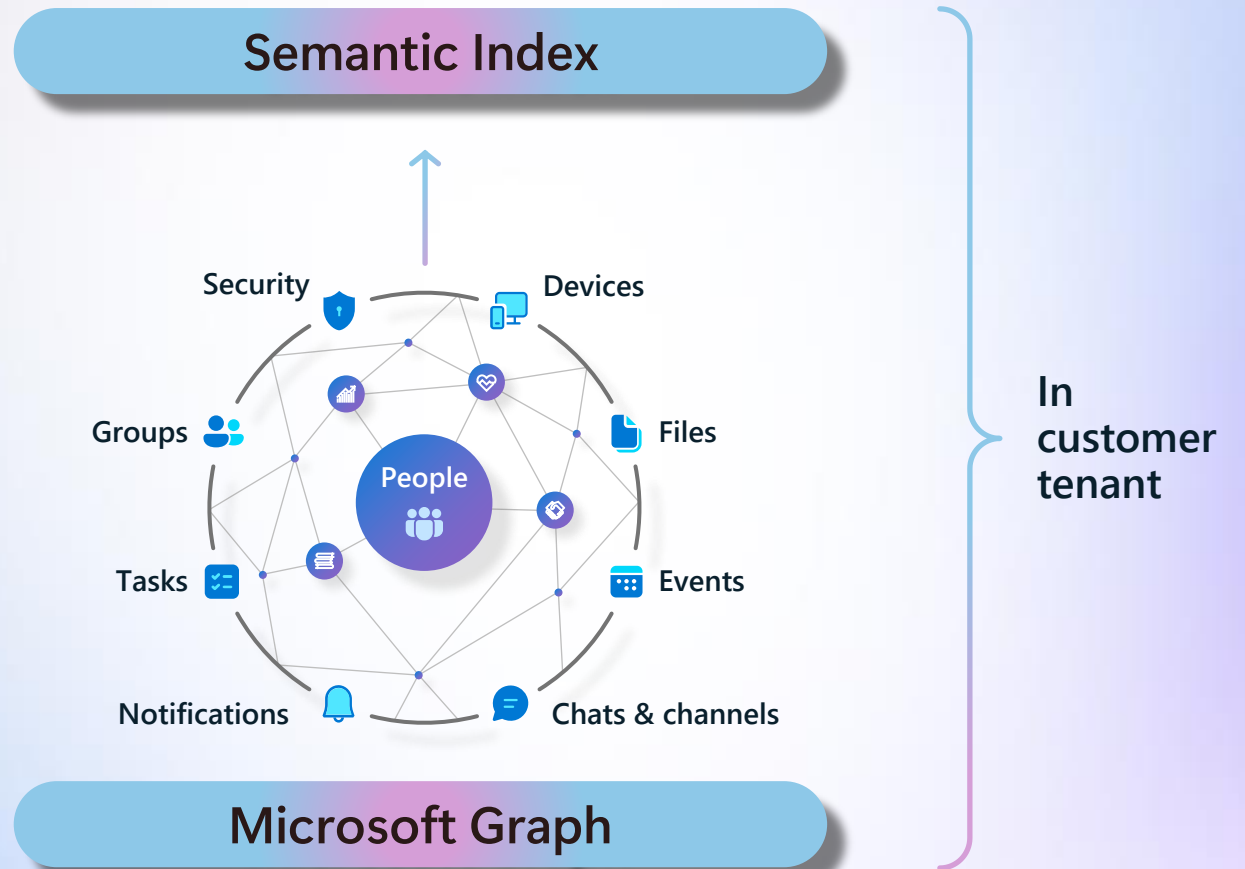
Enforce **security**
& **permissions**
at runtime

Customer's **data**
- **not used** for
training

Power **Semantic**
Index for Copilot

Semantic Index

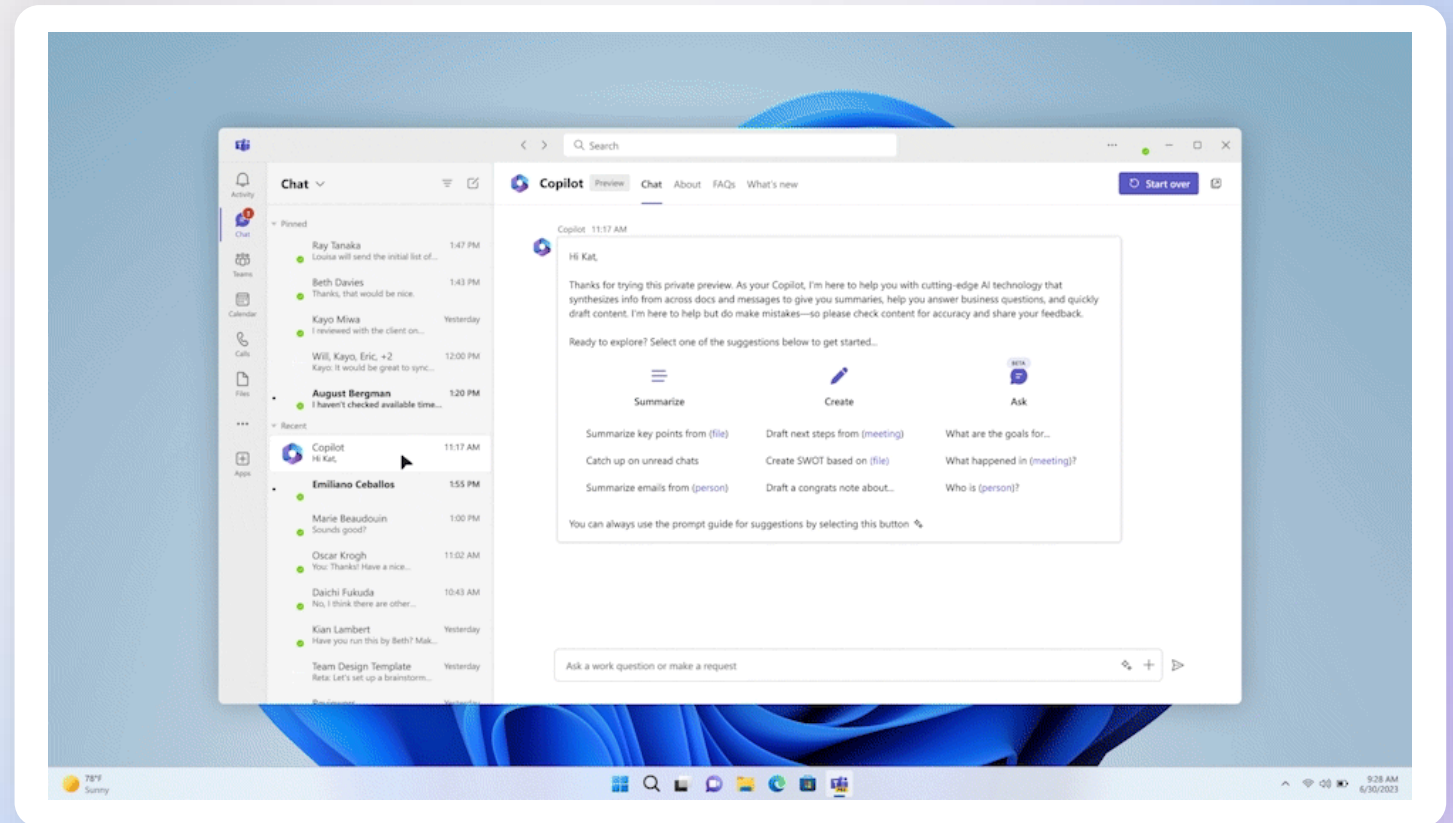
- Tenant-wide and user-scoped vector indices
- User and tenant signals & relationships
- Semantics and similarities around content and users
- Ranking and relevance
- Security and permissions
- Across documents, chats, emails, people, projects, meetings, & more



Semantic Index for Copilot for Microsoft 365

To help every customer get AI-ready, we're rolling out Semantic Index for Copilot:

- The Semantic Index for Copilot creates a sophisticated map of your and your organizational data – identifying relationships and making important connections.
- It uses that conceptual understanding to determine your intent and help you find what you need
- The Semantic Index for Copilot enables Copilot for Microsoft 365 to deliver relevant, actionable responses to prompts – and do so in a secure, compliant, privacy-preserving way.





Security and Compliance controls for Copilot for Microsoft 365

Essential security controls



Copilot + M365 Business Standard

Multi-factor Authentication
with security defaults

Device-based access & security controls
for M365 resources

Basic content and keyword search
for Copilot generated data

Comprehensive security controls



Copilot + Microsoft 365 Business Premium

Everything in M365 Business Standard, plus:

Conditional Access policies based on identity, device,
location, & network

Terms of use policies to accept before getting access

Restrict saving business data and files to approved
applications only

Protect sensitive M365 data from exfiltration and
improper use (files & emails only)

eDiscovery, litigation hold and retention policies



Copilot for Microsoft 365

Embedded across Microsoft 365 apps



Understanding the AI Options



Microsoft Copilot

Copilot

Free

Copilot for Microsoft 365

\$

Foundational Capabilities



Web grounding



Commercial Data Protection



Enterprise-Grade Data Protection



Graph Grounding



Microsoft 365 Apps



Copilot Studio

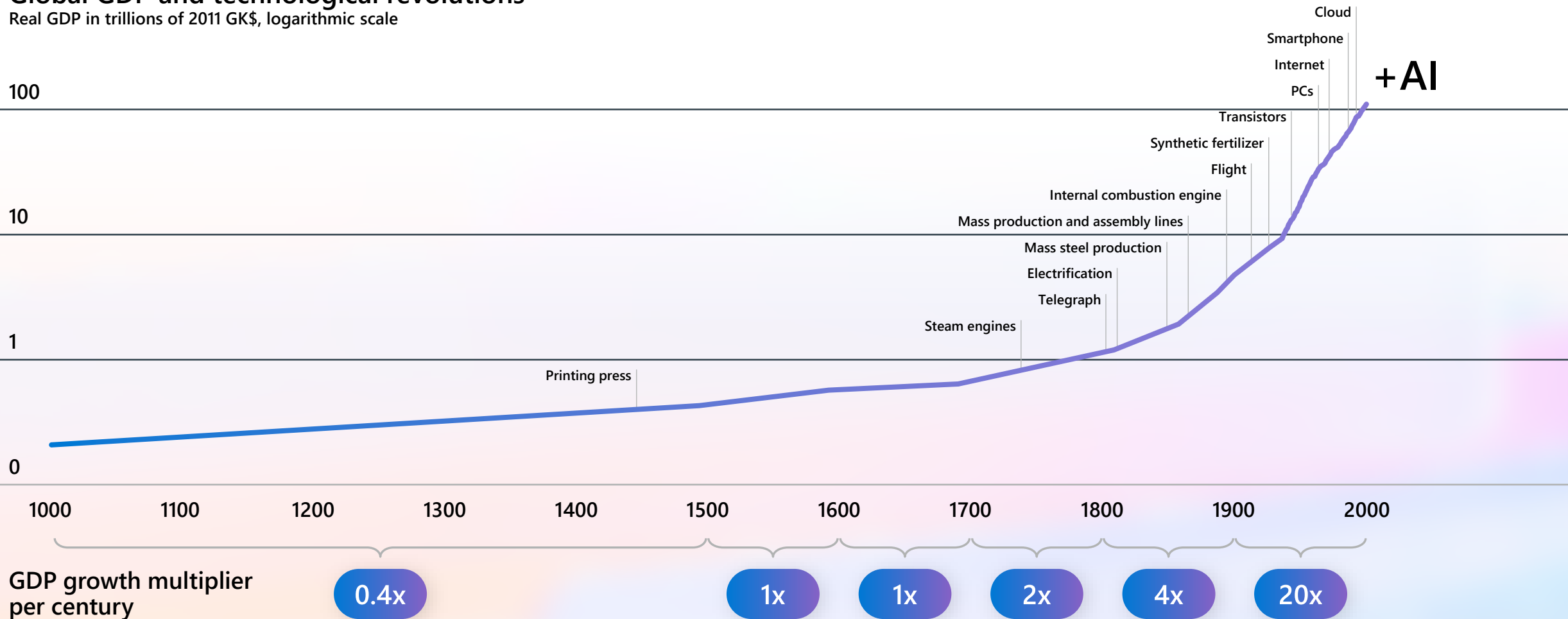


*Only available billed annually per user per year, no minimum licenses required.

And the impact is **real**

Global GDP and technological revolutions

Real GDP in trillions of 2011 GK\$, logarithmic scale



Microsoft Approach

Copilot business value



All Up
Value



Value by
Workflow



Value by Role/
Function

Copilot business value: sample metrics

All Up Value

Productivity / Efficiency / Fulfillment / Creativity

- X% more productive
- X% more satisfying work
- X% able to focus on more fulfilling work
- Save X hours per day for more important work
- Spend X% less time in meetings, processing email
- Less time on repetitive or mundane tasks
- Stay in the flow
- Be more creative

"Worth It"

- X% would not want to go back to working without Copilot
- Disappointed if had to give it up
- Influence choice of employer

Value by Workflow

Microsoft Copilot

- Less time searching for information
- Complete tasks faster
- Stay on top of my inbox
- Focus on more important work

Effective Meetings [Teams]

- More efficient meetings
- Easier to catch up on what I missed
- Easier to take next action
- Attend fewer meetings

Email Processing [Outlook]

- Less time processing email
- Saves time drafting quick replies

Content Writing [Word]

- Generate a good first draft faster
- Jump start the creative process

Visual Content Creation [PowerPoint]

- Create visually appealing presentations faster
- Create content I couldn't have on my own
- Less intimidated creating visual content

Data Analysis [Excel]

- Analyze data faster
- Help me turn data into insights

Search [Bing Chat]

- Speed and accuracy

Value by Role/Function

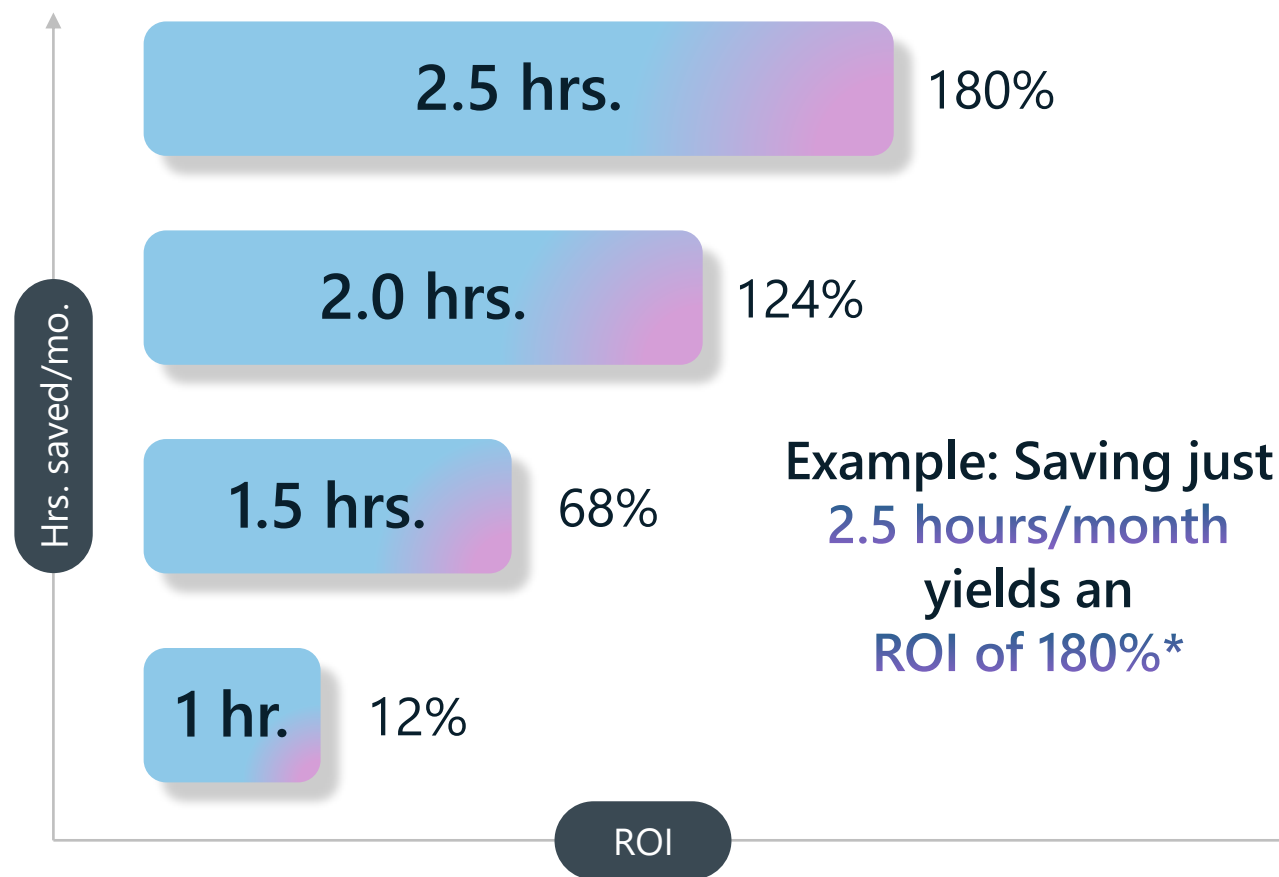
1. By Persona

- **IC:** Content creation, project management, less time on mundane tasks, etc.
- **Manager:** More time for team development, etc.
- **BDM:** Make decisions faster; focus on top priorities, grow business

2. By Role/Function: Sales, Finance, HR, etc.

- **Sales (Example Metrics):**
 - X% more customer interactions
 - Created X% more opportunities
 - Created customer proposals X% faster
 - Discovered and shared X% more sales content
 - Closed deals X% faster

How much time can people save with Copilot for Microsoft 365?





10
hours saved per month

Impact by Workflow



Effective meetings

- Quickly catch up on meetings you missed
- Summarize a meeting and identify next steps
- Run a more effective meeting



Data analysis

- Get answers from across all your data
- Instantly uncover key insights
- Create powerful and professional visualizations



Content creation

- Jumpstart creativity, and write and edit like a pro
- Quickly catch up on the key points of a document or presentation
- Create documents, presentations, charts, and tables



Email processing

- Draft email replies instantly
- Personalize the tone and length even on the go
- Quickly summarize a long email thread

Impact by Function



HR

- Communicate policies and draft job descriptions
- Create stunning training materials
- Easily respond to job applicants' or employees' emails



Marketing

- Identify relevant market trends and segments
- Create the first draft for a project
- Summarize campaign results with powerful visuals



Sales

- Have better sales conversations and close more deals
- Create sales presentations and proposals
- Analyze sales data from previous quarters



IT

- Create a project plan for a product roll-out
- Stay up to date on various project calls and chats
- Identify patterns in data and solve issues faster



Finance

- Simplify financial reporting and planning
- Identify performance improvements
- Report metrics using professional charts

Time savings are just the beginning

Copilot for Microsoft 365 can help you...



Increase employee
satisfaction & wellbeing



Improve the quality
of work



Reduce
digital debt

Feedback across SMBs

Faster. Better. Easier.

The logo for Flowww, featuring the word "Flowww" in a blue, rounded, sans-serif font with a small white starburst effect above the second 'w'.

“

I do believe that there isn't a single job position in the company that won't benefit in some way from Copilot being available to them.”

– Alex Wood, Senior Cloud Engineer

The logo for DLT Apps, featuring a blue 3D cube icon to the left of the text "DLT Apps" in a bold, sans-serif font.

“

I no longer need to spend time consolidating meeting notes, Copilot does it for me. I'm saving at least 10 minutes of time with each meeting.”

– Mahesh Patil, CTO of DLT Apps

The logo for 90 PGE | OpenOcean STUDIO, featuring the text "90 PGE" in a bold, sans-serif font, followed by a vertical line, then a blue circular icon with a white dot in the center, and finally the text "OpenOcean STUDIO" in a bold, sans-serif font.

“

I'm really impressed with how Copilot works in Outlook. I had it generate several emails for me, and it did a really great job. All I had to do was add my own details and they were ready to send.”

– Paul Birkin, Chief Operating Officer

3 steps to build a successful CSP Copilot for Microsoft 365 practice

01

Get customers AI ready

Lead with Business Premium

Envision value, and drive customer intent with the SMB Briefings

Execute an AI evaluation

Define the customer journey and Copilot adoption timeline

02

Sell and deploy Copilot

Attach Copilot

Standardize customers on Microsoft 365

Consolidate and restrict data

Apply security policies to protect and encrypt data

Configure automatic data labeling to ensure confidentiality classifications

03

Adoption and services

Offer managed services

Offer Copilot services with security, compliance and productivity

Drive Copilot optimization and adoption with the Copilot Dashboard

Drive end user adoption and extend to Copilot Studio to enable LOB scenarios

Microsoft 365 Lighthouse

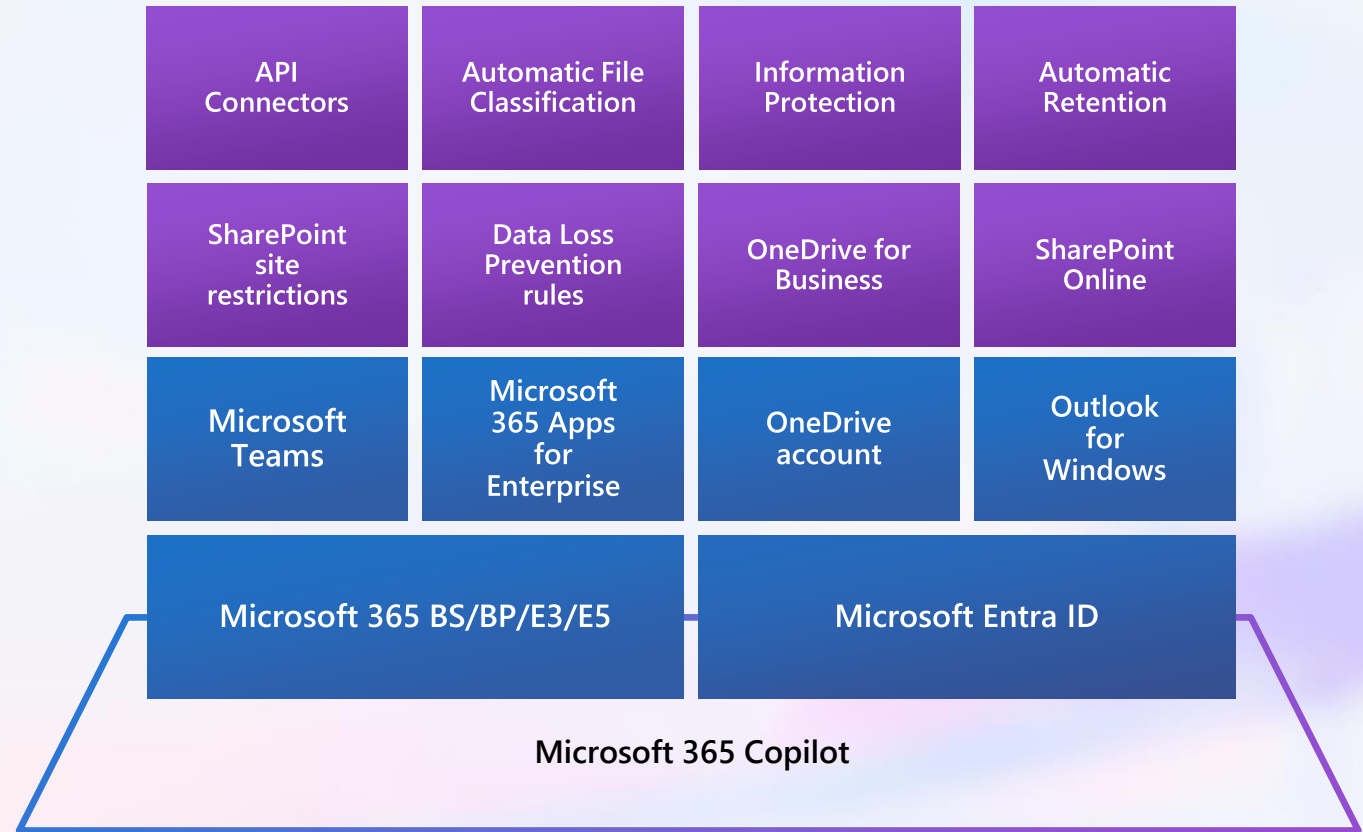
Multi-customer management and AI driven customer targeting



Get AI Ready services



The Copilot and Business Premium Get AI Ready building Blocks





Prepare customers for Copilot for Microsoft 365 with an AI Evaluation

Execute a Copilot AI Evaluation to define your customers journey to Copilot for Microsoft 365, including the 3 key steps:

Assess the customer's readiness for Copilot for Microsoft 365

- ✓ Foundational productivity readiness
- ✓ Data readiness
- ✓ Security readiness

Microsoft 365 Business Premium

Comprehensive security and productivity solution, designed for businesses with 1-300 employees



Collaborate in
real time



Enable secure access
and protect identity



Defend against
cyberthreats and data loss



Easily secure and
manage devices

"Having a best-in-class platform like Microsoft 365 addresses multiple challenges in one go, something that was missing earlier. Today, I can say that we have all the tools in place for significantly improving business productivity and collaboration while providing a much higher level of security."

—[Praveen Vashishta, Chairman and CEO at Howden India](#)

Layered security with Office and Teams



Collaborate in real time

Video Conferencing
Group Chat
Easy access to files,
Co-authoring
Phone system (Business
Voice add-on)
App integrations



Enable secure access and protect identity

MFA
Conditional Access
App Proxy
Dynamic Groups
Azure Virtual Desktop



Defend against cyberthreats and data loss

Microsoft Defender for
Office 365
Azure Information Protection
Office 365 DLP
Cloud App Discovery
Microsoft Defender for
Business



Easily secure and manage devices

Intune Device Management
Intune Mobile App
Management
Autopilot

Business Premium partner case: Zelly on building managed services with Microsoft 365 Business Premium



When we sell services with Business Premium, we position packages that are **2x–3x** the Business Premium license, and that is our main profitability and revenue driver.”

—Zelly Security Technical Lead



Zelly's security services principles



Improve
customer
baseline



Monitor
and protect



Identify
threats



Act and
report

Build offer-based on customer needs

Clear packaging options

Hire and skill the right people

How the Copilot for Microsoft 365 experience improves with Business Premium

Information protection to encrypt data at rest and in transit

Data classification ensuring the right level of confidentiality is kept on business data

Multi-customer management with Microsoft 365 Lighthouse enabling scalable CSP services

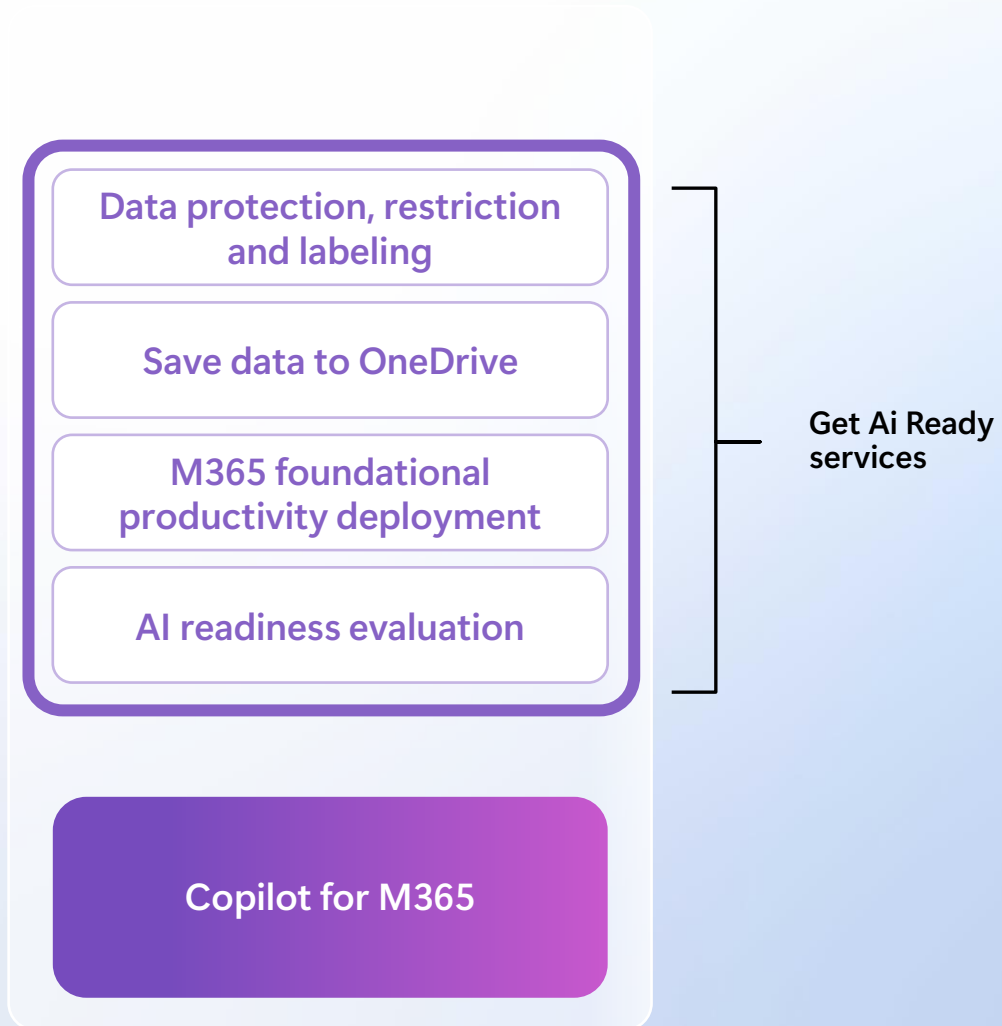
Additional partner profitability opportunity with security and management managed services



We have started to prepare each customer to consider reviewing how they have organized their sensitive business data. We also expect Copilot for 365 to accelerate the move from traditional SMB file shares to storage of documents in Microsoft 365. "

- Nigel Mulholland, Nitec

Copilot brings additional CSP revenue and profitability opportunities



Driving Copilot user adoption

Key Copilot for Microsoft 365 usage steps

01

Define a vision and identify how M365 Copilot will be used for key customer roles

02

Send a Copilot for M365 usage guide Email post customer purchase to help users to get started, and offer 1:Many customer end user training using the sales scenario deck

03

Copilot Lab @Chanda

[Microsoft Copilot for Microsoft 365 documentation | Microsoft Learn](#)
[Microsoft 365 SMB Storybook - Copilot Live Demo - All Documents \(sharepoint.com\)](#)

Available today



Microsoft Copilot Dashboard

Introducing



Copilot Studio

Connect to data

Create and orchestrate
sophisticated logic

IT manageability
& control

Next steps to start building your practice

Build product knowledge

01

[Review](#) the service description, key technical documentation and licensing resources.

Sales & technical training

02

Attend the [CSP Masters sales bootcamp](#) to learn how to build a successful CSP practice and land your first sale.

Attend the [technical bootcamp](#) to learn how to deploy and manage your first customer.

GTM & targeting strategy

03

Develop your GTM strategy leveraging the [Secure Productivity solution play](#).

Target high propensity customers with [Sales Advisor](#) AI driven insights.

Drive customer intent

04

Execute [SMB Briefings](#) focusing on the 2 key scenarios:

1. Upsell existing customers to Business Premium
2. Attach Copilot for Microsoft 365

Renewal management made easy with M365 Lighthouse

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

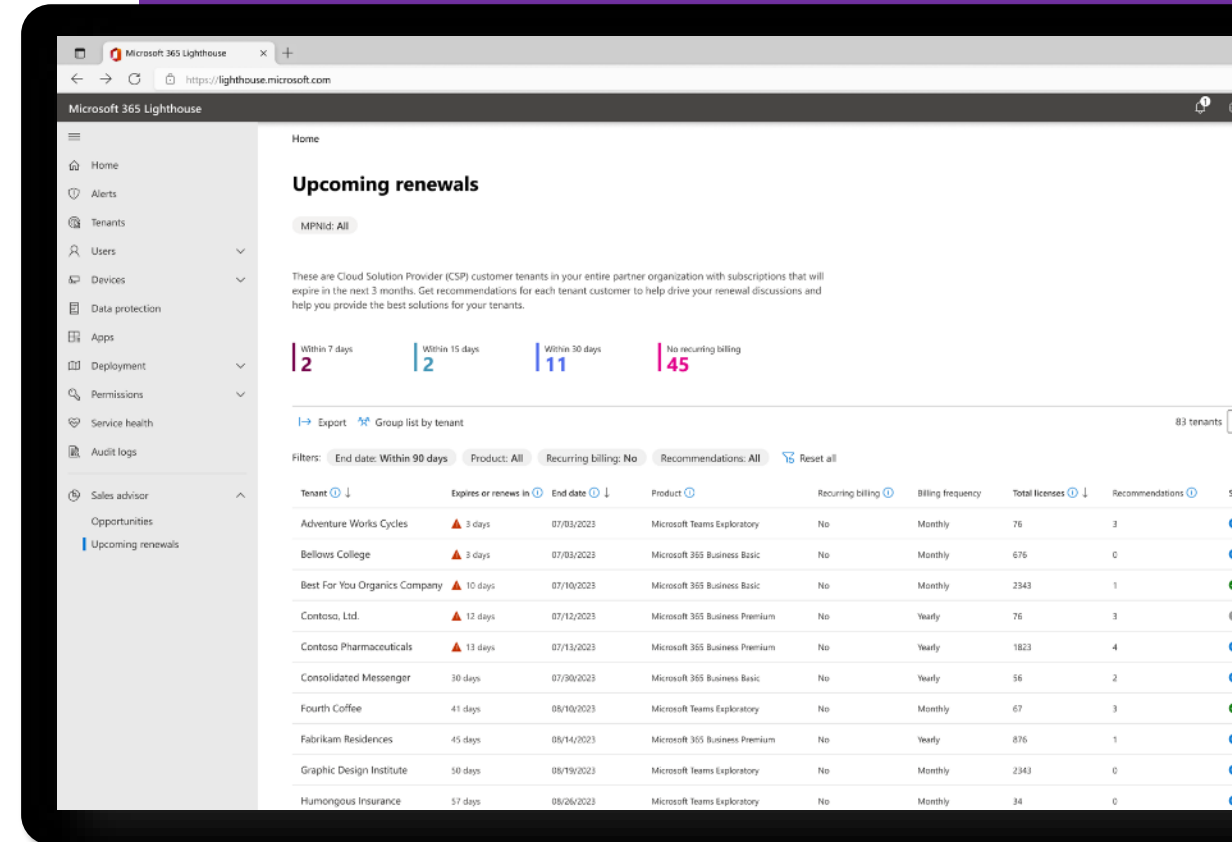
With Sales Advisor you can:

Quickly & easily track subscriptions approaching expiration within the next 30, 60 and 90 days

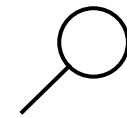
Prioritize customer outreach by sorting or filtering on expiration, seat size, product or auto-renew status

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

45%+ of Q3 subscription renewals surfaced to more than 11K onboarded partners at GA



Additional resources



Build your AI business

Get ready

Partner readiness

First, get your customers excited using [Get AI Ready Partner BOM](#)

Join [CSP Masters Program](#) for upskilling

Be the expert for AI: [M365 Copilot Hub for Partners](#)

Pre-sales

Target customers

Build your target list for dark-to-cloud with [Cloud Ascent](#)

Address renewal and upsell opportunities with [Sales Advisor](#)

Generate interest and create intent

Invite your customers to attend [SMB Briefings](#)

Showcase the value of [Copilot for Microsoft 365](#)

Deep dive your customer's security posture with a [Solution Assessment](#) or with the [Get AI Ready Technical Checklist](#)

Transaction

Accelerate sales

Transact renewals and drive premium upsell to optimize customers for Copilot

Attach Copilot for Microsoft 365

Leverage [M365 Business Premium promo](#) to offer 15% discount new-to-Microsoft Cloud customers

Post-sales

Expand offer and build relationship

Offer your security [managed services](#) on top of M365 Business Premium

Create a CLM and Security practice leveraging [M365 Lighthouse and Sales Advisor](#)

Be an advisor for [change management](#) and drive end-user adoption with the [Copilot Adoption Kit](#)

Resources



Define your strategy

Leverage these resources to develop your Copilot for Microsoft 365 practice.

- Read the latest [Work Trend Index](#) AI trends and research
- Learn more about the [Microsoft family of Copilot products](#)
- Review partner [Microsoft 365 Copilot services and solution opportunities](#)
- Attend the 1/18 H2 Acceleration Moment event ([AM](#) and [PM](#) registration options)



Engage to develop skills

Empower your sales, pre-sales and technical teams to build their skills and capabilities and learn how to build a Copilot for M365 practice

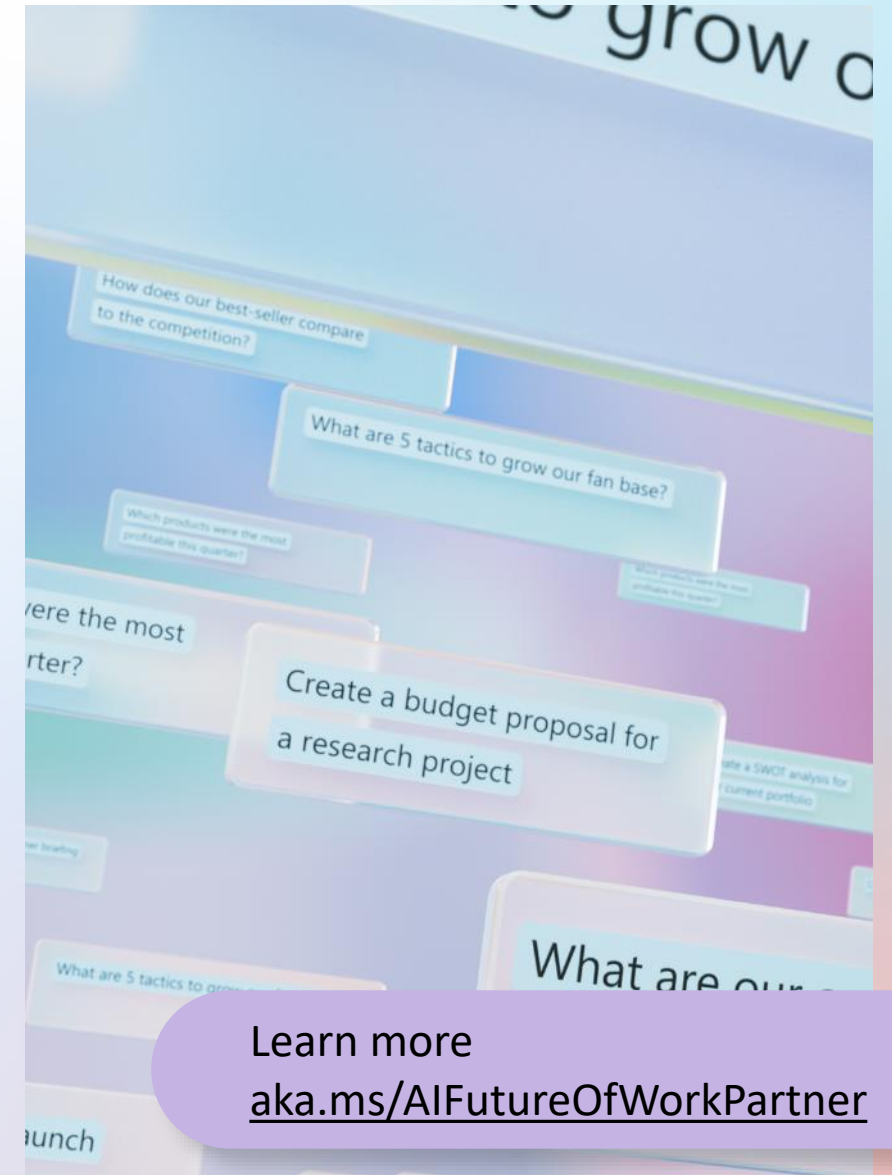
- Participate in the [Copilot for M365 sales and pre-sales bootcamp](#)
- Register for the [CSP Masters Go to market, sales and pre & post sales technical Bootcamps](#)



Operationalize and go to market

Set your strategy in motion and accelerate your GTM efforts.

- Use the [Offer Development Guide](#) to build your Copilot offers
- Drive customer intent with [SMB Briefings](#) and [Copilot Workshop content](#)
- Create packaged offers using the [Microsoft 365 Copilot Selling Guide](#)



Plugin types

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

Teams Message Extensions

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



Power Platform Connectors

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



Open AI Plugins

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



Existing Investments

New