



AI for All

Customer Service with Microsoft 365 Copilot



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Welcome

Welcome to a new world of work where Artificial Intelligence makes the difference: Our e-book series introduces you to the world of Microsoft 365 Copilot and shows how AI can revolutionize your work. Look forward to exciting insights, practical exercise scenarios, and everything you need to know to minimize routine tasks with AI and enhance your customer service skills. Learn how Microsoft 365 Copilot supports request analysis, feedback processing, and strengthened customer interaction – always with a clear focus on data protection and security. Ready to get started? Your guide to the future of customer service awaits you!

Copilot for All – Introduction of Microsoft 365 Copilot Chat



It is undeniable:
As humans we strive for tasks that excite us, foster our creativity, and produce results that fill us with pride. The expansion of Microsoft 365 with **Copilot Chat** is a groundbreaking step that leads us precisely in this direction. With our new tool, the claim “AI for All” is not just a vision but a tangible reality. **Microsoft 365 Copilot Chat** brings artificial intelligence to where it has the most impact: in our daily work – paving the way to the future.

Create Routines ...

Consisting of the three core areas – **Copilot Chat, Agents, and Security** – the free tool for Microsoft 365 subscribers offers comprehensive support that sustainably changes everyday work. Users can look forward to everyday tasks – such as monitoring email inboxes or automating workflows – being completed more efficiently, faster, and smarter.

Thanks to the integration of **GPT-4o** and the ability to create agents without prior knowledge, AI becomes accessible to everyone. Whether summarizing documents, analyzing data, or providing step-by-step instructions – **Copilot Chat** and the individually created agents ensure maximum efficiency. The three areas complement each other perfectly to offer companies a tailor-made solution: from intelligent collaboration to automated processes to state-of-the-art data security.

... in a Secure Environment

The Copilot Control System places data protection and security at the center of Microsoft 365 Copilot. With features like **Enterprise Data Protection (EDP)**, company data is effectively protected, while IT departments retain full control over access, usage, and lifecycle of Copilot and the agents. Supplemented by detailed reports for analysis and optimization of usage, the system offers maximum transparency and efficiency. These comprehensive control mechanisms make **Microsoft 365 Copilot** a reliable solution for companies that want to use AI technologies safely and responsibly.

With AI to a Modern Customer Service Strategy

With AI to a Modern Customer Service Strategy

In a world full of alternatives, customer satisfaction is the key to success. Satisfied customers not only remain loyal but also purchase more frequently and recommend the company to others – a true competitive advantage. Furthermore, customer satisfaction strengthens the brand image. Positive experiences are shared publicly, while negative reactions are minimized. However, excellent customer service requires time, sufficient skilled personnel, and consistently applied strategies.

Skilled Labor Shortage? Microsoft 365 Copilot as an Opportunity in Customer Service

The shortage of skilled workers affects many industries, including customer service. Fewer staff often means longer wait times and less time for personalized attention – factors that significantly hinder quality service.

This is where Microsoft 365 Copilot comes into play: The AI assistant takes over routine tasks like standard inquiries or scheduling appointments, relieving employees. The best part? Microsoft 365 Copilot is available 24/7, ensuring that customers receive quick responses. This allows teams to focus on

what truly matters: solving complex issues and building genuine connections with customers. With Microsoft 365 Copilot, you can quickly analyze inquiries, efficiently process feedback, and create clear, helpful responses. This AI-powered assistance enables precise fulfillment of customer needs and strengthens personal interactions. As a result, problems are not only solved faster, but long-term relationships and trust are also built.



Microsoft Work Trend Index: AI by the Numbers

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AI is the Future - and According to the Work Trend Index 2024, It Knows No Age

Microsoft's 2024 Work Trend Index* clearly highlights one thing: Opinions on AI are still divided, although a clear trend is emerging. While some are hesitant and show apprehension, there are already **power users** who can't – and don't want to – imagine a (work) life without AI. Interestingly, it's **not just Gen Z** leading the charge.

Between the Fear of Being Replaced and the Concern of Not Finding Skilled Workers

The differences could hardly be greater. On one side, many employees worry that AI might replace their jobs. On the other side, there are business leaders urgently seeking staff and fearing they won't be able to fill open positions – especially in customer service. This is where it becomes critical, as quick problem-solving and personal attention are particularly needed in customer service.

The good news: AI tools like Microsoft 365 Copilot don't replace employees. Instead, Microsoft's assistant tool takes over routine tasks, freeing up more time for what truly matters: solving complex issues and building genuine connections with customers. This way, AI not only helps address the shortage of skilled workers but also elevates customer service to a whole new level. And this is where **the true strength of Microsoft 365 Copilot** shines: it combines efficiency with human empathy, enabling a completely new, personalized way to engage with customers.



*<https://www.microsoft.com/en-us/worklab/work-trend-index/ai-at-work-is-here-now-comes-the-hard-part#section2>

Positive Customer Experiences with Microsoft 365 Copilot

Across all channels, more effective and personalized service: that's the goal.

Microsoft 365 Copilot revolutionizes customer service by not only increasing efficiency but also building lasting connections with customers. With Microsoft 365 Copilot, problems are resolved faster, repeat inquiries are avoided, and seamless customer experiences are ensured throughout the entire service journey. Through

personalized approaches based on comprehensive CRM data, customers are not only more satisfied – they also remain loyal in the long term.

The figures from the Work Trend Index clearly show: With AI in use, companies can not only work more efficiently but also successfully tackle the challenges of skilled labor shortages – leading to satisfied customers and relieved teams.

Companies that strategically use AI to drive growth, manage costs efficiently, and provide real value to their customers gain a significant competitive edge.

57%

of customer service leaders are concerned that the skills shortage could make it difficult to fill key roles.

49%

of power users use AI to handle customer inquiries better, faster, and more professionally.

10%

of customer service professionals added new AI skills to their LinkedIn profiles in 2023, ranking them 9th.



“

AI has the potential to drive operational excellence, enhance customer engagement, and **create value throughout the entire customer journey**. It is one of the most valuable tools for companies to offer a consistent and unique customer experience, build sustainable relationships, and significantly improve customer service.

”



Mala Anand,
Corporate Vice President, Customer Experience
and Success at Microsoft

Measurable Success: Key Performance Indicators

Measurable Success: Key Performance Indicators

Imagine you want to improve your fitness and decide to go to the gym regularly. Your goal after three months: better endurance. How do you measure your progress? A good Key Performance Indicator (KPI) is the time you can run without stopping. If you start with five minutes and reach 20 minutes after three months, you can clearly see that you’ve made progress: The KPI – in this case, the running time – shows you whether your training strategy is working.

KPIs help measure the success of processes, projects, or strategies.

They provide guidance on whether you’re moving in the right direction and enable success measurement.

Clarity, visible successes, early problem detection, and efficiency – all of this is relevant.

Customer Service KPIs – With the Support of Microsoft 365 Copilot

To help you clearly understand the benefits Microsoft 365 Copilot offers, the focus of its goals, and how each KPI makes this **success tangible**, we’ve outlined the key points for you in a clear manner. This way, you can see at a glance how Copilot can contribute to making your processes more efficient and delivering measurable results.

Goal	Area	Scenario	KPI
Quick Response	Support	Create Response Templates	Reduce Response Time
	Customer Service	Develop Chatbot Content	Strengthen Customer Loyalty
	Customer Service	Analyzing Customer Inquiries	Reduce Processing Time
Customer Satisfaction	Customer Satisfaction	Sentiment Analysis	Increase Customer Satisfaction
	Customer Service	Responding to Customer Complaints	Response Time

Data Protection as a Foundation: Your Data, Our Promise

Data Protection as a Foundation: Your Data, Our Promise

Imagine working with Microsoft 365 Copilot – your personal AI assistant that revolutionizes your workday. You've developed a new routine that saves a lot of time and opens up new possibilities. But during a conversation with a client, a question arises: "... that sounds great, but what about data protection?"

- **Your organization's data and security are protected.** Security and privacy are integrated into every phase of the design and implementation of Azure OpenAI Service and Microsoft 365 Copilot. As with all our products, we provide a strong foundation for privacy and security and offer additional safeguards that you can choose to activate. As external threats evolve, we will continue to develop our solutions and offerings to ensure top-tier privacy and security in Azure OpenAI Service and Microsoft 365 Copilot, and we will remain transparent about our approach.
- **Our products and solutions continue to comply with global data protection regulations.** The AI products and solutions you use from Microsoft remain in compliance with all current global data protection regulations. As we shape the future of AI together, including the implementation of the EU AI Act and other laws worldwide, businesses can be confident that Microsoft maintains transparency in its privacy and security practices. We adhere to laws governing AI worldwide and support this with clear contractual commitments.
- **Your organization's data is not used to train foundation models.** Microsoft's generative AI solutions, including Azure OpenAI services and Copilot services and features, do not use your organization's data to train base models without your permission. Your data is not accessible to OpenAI and is not used to train OpenAI models.

Effective Prompts: How It Works

Effective Prompts: How It Works

1. Establish a Clear Context

Provide Microsoft 365 Copilot with precise information so it understands the context and delivers more accurate responses.

2. Avoid Vague Phrasing

Ensure your inputs are specific and clear. If information is missing, refine your request and ask for details directly.

3. Maintain Courtesy

Communicate in a friendly and professional manner. This encourages precise and cooperative responses.

4. Show Curiosity

Ask for additional aspects or information that could enrich your analysis.

5. Review and Deepen

Refine your prompts to achieve more detailed results and tackle complex topics.

6. Experiment with Different Styles

Experiment with different styles (creative, balanced, or precise) to tailor the responses to your needs.

Example:

Goal

How can Copilot assist you?

"I need a list of 3-5 bullet points to prepare for ..."

+

Context

What do you need this for and who is involved?

"... for an upcoming meeting with [client], which will focus on their current status and next goals."

+

Expectations

What tone should Copilot use for this?

"Respond in a friendly yet assertive tone..."

+

Source

What information or examples should Copilot use as a source?

"... and focus on emails and Teams chats with [people] from the past two weeks."

Practicing with Microsoft 365 Copilot: Scenarios in Customer Service

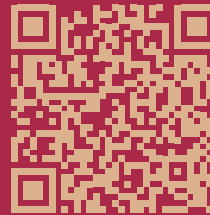
Practicing with Microsoft 365 Copilot: Scenarios in Customer Service

In this chapter, you'll learn how to use Microsoft 365 Copilot in customer service.

Six scenarios provide step-by-step guidance on how Microsoft 365 Copilot can make your work more effective. Alongside **theoretical insights**, we offer **practical exercises** and all the necessary **materials** to try out the scenarios yourself and apply them to your own strategies.

Try It Out: Downloadable Practice Files

Would you like to try the use case yourself? Great! With our prepared documents, you can simulate scenarios and experience Microsoft 365 Copilot in action. Just scan the QR code or click the link.



[Download Now](#)

Scenario 1:

Creating Response Templates from FAQ for Support

Scenario 2:

Evolving Chatbot Content in Loop

Scenario 3:

Analyzing and Developing Customer Inquiries

Scenario 4:

Conducting Sentiment Analysis on Feedback

Scenario 5:

Receiving Answers with Microsoft 365 Copilot Agent

Scenario 6:

Responding to a Customer Complaint in Outlook



Scenario 1: Creating Response Templates from FAQ for Support

Without AI: Delayed, Labor-intensive, Inefficient

With AI: Solution-Oriented, Pragmatic, Data-Driven

In many companies, support staff manually handle customer inquiries. They search through existing documentation, FAQs, or past emails to find suitable responses. This process can be time-consuming and lead to inconsistent answers, as employees individually search for information. In today's digital world, it's crucial to respond quickly and consistently to customer inquiries to enhance customer satisfaction. This is where Microsoft 365 Copilot in Word can help by automatically generating response templates, thereby optimizing the support process.

Laura works in customer support at TechHelp Solutions and is responsible for answering inquiries collected daily through a forms survey. With the help of Microsoft 365 Copilot in Word, Laura wants to quickly respond to frequently asked questions without having to write new answers from scratch each time. This also ensures that the content is consistent, professional, and tailored to the needs of the customers.

Initial Situation: Laura has exported the first customer support inquiries from the Forms survey of the past few days into an Excel file. Now, she wants to use Microsoft 365 Copilot in Word to generate suitable responses to the most common inquiries, thereby speeding up the handling of support requests. She hopes to reduce processing time while improving the quality and consistency of the responses. With the generated templates, she aims not only to save time but also to enhance the customer experience.

Task	Response Templates
Area	Customer Service Support
Required Apps	(Microsoft Forms) Microsoft Word
Level	Copilot Beginner
Benefits	Quick Responses Data-Driven Answers Enhance Professionalism

**Required Document:**

Simply download the file **IT-SupportRequests_TechSolutions.xlsx** for practice.

Note: The corresponding document must be stored in your **OneDrive**. Ideally, you have opened it at least once so that it appears in the list of **recently used files**.

1. Export the Forms Query as an Excel File

Export frequently asked questions and customer inputs from Forms into an Excel file. This typically includes the question, the category, and possibly additional information such as the preferred communication channel. Upload the file to OneDrive or SharePoint and copy the link to it.

2. Open Word

Open Microsoft Word and start a new document. Enable the Copilot Chat by clicking the icon in the top right of the ribbon. Paste the copied link and send it.

3. Formulate Your Prompt

Microsoft 365 Copilot recognizes the contents of the file and provides a brief summary. Now, enter a prompt like the following: *"Can you please identify the five most common requests?"*

Can you please identify the five most common requests? [IT-SupportRequests_.xlsx](#)



Based on the content of the IT-SupportRequests file, the five most common requests are:

1. **Hardware Issues:** This category appears frequently, with users seeking help to fix various hardware-related problems.
2. **Password and Account Recovery:** Many users need assistance with recovering passwords or accounts.
3. **Backup Recovery:** Users often face issues with backup recovery and seek help to resolve these problems.
4. **Update Issues:** There are several requests related to handling update issues.
5. **User Rights Management:** Users frequently ask for assistance with managing user rights.

4. Let Copilot Generate the Overview

Microsoft 365 Copilot now generates the five most common requests from the document. Below the response, the AI assistant also suggests relevant questions. Clicking on *"Please find solutions for these requests"* is recommended.

5.

Copy the
Answers

Now, Microsoft 365 Copilot generates suitable responses and solutions for the requests. Since you already like the responses, copy them into the document's text field.

6.

Visualize the
Result as a Table

To further organize the content, highlight the entire text and then select the '*Visualize as Table*' option. This will automatically display the Microsoft 365 Copilot content in a compact and clearly structured table format.

SPX Desktop for disk imaging and reliable local backups	
Update Issues	Windows Update Troubleshooter
Run the automated troubleshooter to fix common update problems	
General Troubleshooting	
Verify internet connection, clear update cache, update third-party drivers, and free up disk space	
User Rights Management	Access Rights Management Tools
Use software like ManageEngine AD360, SolarWinds Access Rights Manager, or Apache Directory for effective access control	

Best Practices

Conduct regular access reviews, implement the least privilege principle, and enforce multi-factor authentication

< 1 of 1 > Visualize as Table AI-generated content may be incorrect

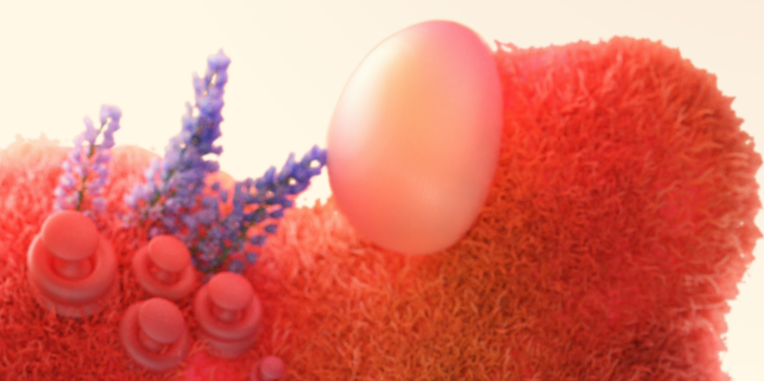
✓ Keep it ↺ 🗑

What do you want Copilot to change? →

7.

Save the
Document

Save the document to your OneDrive or another location. It can later be updated with current data to continuously gather further requests and appropriate responses.





Scenario 2: Evolving Chatbot Content in Loop

Without AI: Manual, Resource-Intensive, Time-Consuming

With AI: Fast, Data-Driven, Collaborative

Chatbots on your own website are an excellent way to show customers that you are accessible through various channels. They can quickly and professionally handle standard inquiries or questions on specific topics, leaving customers with a positive impression. To achieve this, it's important to regularly update and carefully maintain the chatbot's content to ensure it remains relevant and accurate. A well-maintained chatbot not only demonstrates competence but also builds trust in the brand.

To address inquiries more quickly, Laura's teammate Nico wants to integrate a chatbot on *TechHelp Solutions'* website. Based on the most common user queries, he plans to gradually build the content. Accordingly, he needs an initial brainstorming session to gather ideas with his team and outline the next steps – and what could be better suited for this than Microsoft Loop?

Initial Situation: Laura has shared the Word document with Nico containing the most common inquiries. Based on this document, he wants to create chatbot content for TechHelp Solutions' website. To develop the content efficiently and collaboratively, he decides to use Microsoft Loop. This allows him to gather ideas with his team and gradually optimize the content. Using Microsoft 365 Copilot is particularly beneficial here, as the AI-powered assistant can suggest content and clarify the process.

Task	Develop Chatbot Content
Area	Customer Services
Required Apps	Microsoft Loop
Level	Copilot Beginner
Benefits	Quick Response Capability Customer Engagement Enhanced Professionalism

**Required Document:**

Simply download the file Most Common Support Queries and Answers TechHelp Solutions.docx for practice.

Note: The corresponding document must be stored in your **OneDrive**. Ideally, you have opened it at least once so that it appears in the list of **recently used files**.

1. Open Microsoft Loop

Open Microsoft Loop via the link <https://loop.cloud.microsoft/> and create a new workspace with a suitable name like "Chatbot TechHelp Solutions." Give the page a title to make it easier to find later and to facilitate collaboration with team members.

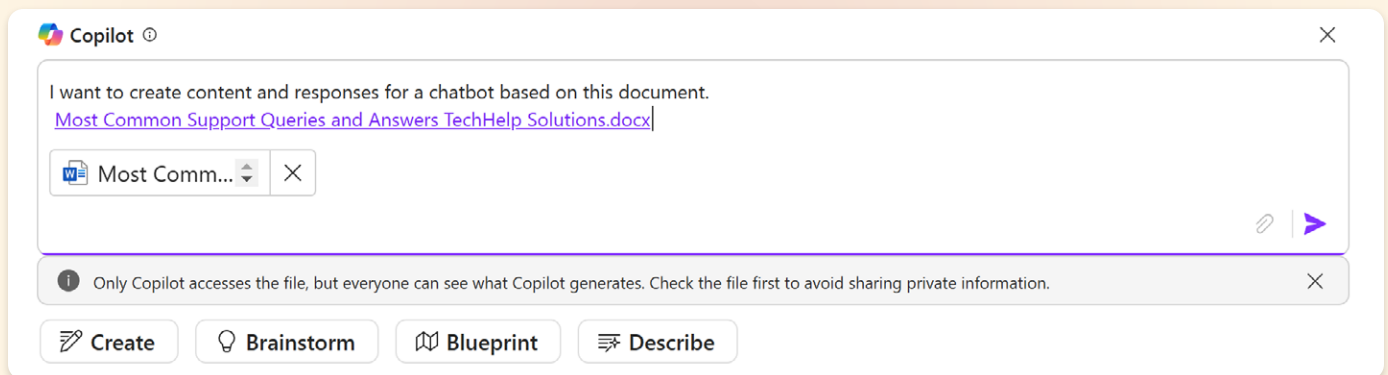
2. Attach the File

Attach your document using the paperclip 'File References'.

3. Formulate Your Prompt

Enter a prompt to assist with task completion. For example: *"I want to create content and responses for a chatbot based on this document."* Microsoft 365 Copilot indicates that the file is accessed to generate content, but team members do not have direct access to the document.

Since the contents of the document are unproblematic, submit the prompt.

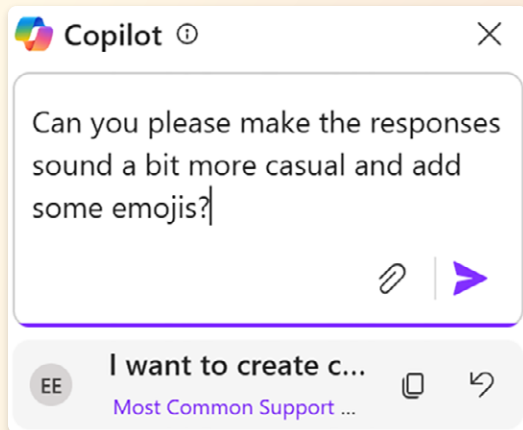


4. Have the Content Rewritten

Since you maintain a personal and casual relationship with your customers, you can ask Microsoft 365 Copilot to adjust the content to a friendlier and more approachable tone. This is particularly helpful for ensuring an authentic and consistent brand presence through the chatbot that reflects your brand's customer communication.

5. Formulate a Prompt

Rewrite with Microsoft 365 Copilot: *"Can you please make the responses sound a bit more casual and add some emojis?"*



6. Let the Answers Be Generated

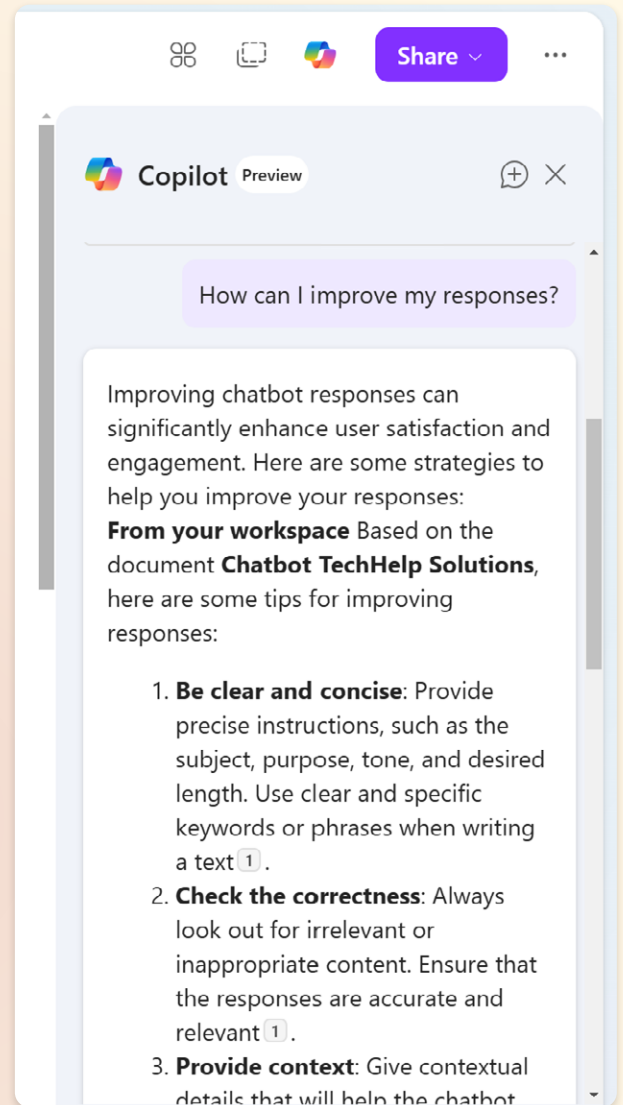
Microsoft 365 Copilot refines the chatbot's responses to match your desired style and adapts them to your requirements (such as adding emojis).

7. Communicate via Copilot Chat

Through Copilot Chat (located at the top right in the menu, right next to the “Share” button), you can now ask questions related to the generated content. The content is not directly adjusted; instead, suggestions are communicated through the chat. An appropriate prompt for this could be: *“How can I improve my responses?”*

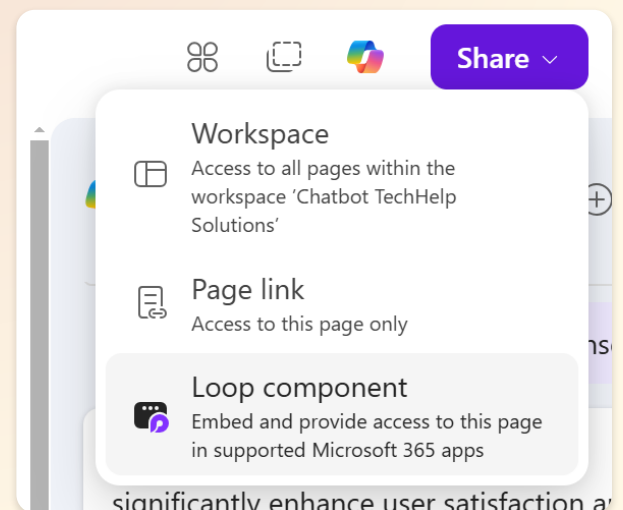
8. Review the Content

Review the generated suggestions to see if there is room for improvement in your responses.



9. Share the Content with Your Team

When you're done with your work, you can share the content with your team. Choose a method that fits your workflow: If you work closely with your team in Microsoft Teams, sharing as a Loop component is a suitable option.



significantly enhance user satisfaction a





Scenario 3: Analyzing and Developing Customer Inquiries

Without AI: Error-Prone, Manual, Time-Consuming

With AI: Fast, Precise, Professional

In an era of increasing customer inquiries and ever-growing expectations for quick, precise responses, many companies face a significant challenge. Without the use of AI, analyzing and improving customer inquiries is often laborious and manual: Teams sift through support tickets, chat logs, or emails to identify recurring questions or issues. This approach quickly reaches its limits—it is time-consuming, error-prone, and often confusing. Important patterns can easily go

unnoticed, and responses are not always consistent. These are numerous reasons to rely on Microsoft 365 Copilot.

Moolz Clothing receives hundreds of inquiries daily through various channels such as email, chat, and phone. Now, Melanie is set to take on the role of Team Lead in Customer Service Management to analyze customer inquiries and identify new patterns early, aiming to enhance overall customer support.

Initial Situation: Melanie is tasked with analyzing customer inquiries and developing a strategy to sustainably improve the customer experience. In recent weeks, as a team leader, she has received numerous messages from colleagues on this topic, and several meetings have been held to gather initial ideas and insights. To efficiently evaluate the available information and save valuable time, Melanie plans to use Copilot.

Task	Analyzing Customer Inquiries
Area	Customer Service Management
Required Apps	Microsoft Teams
Level	Copilot Beginner
Benefits	Quick Results Precise Development Actionable Insights and Sorting

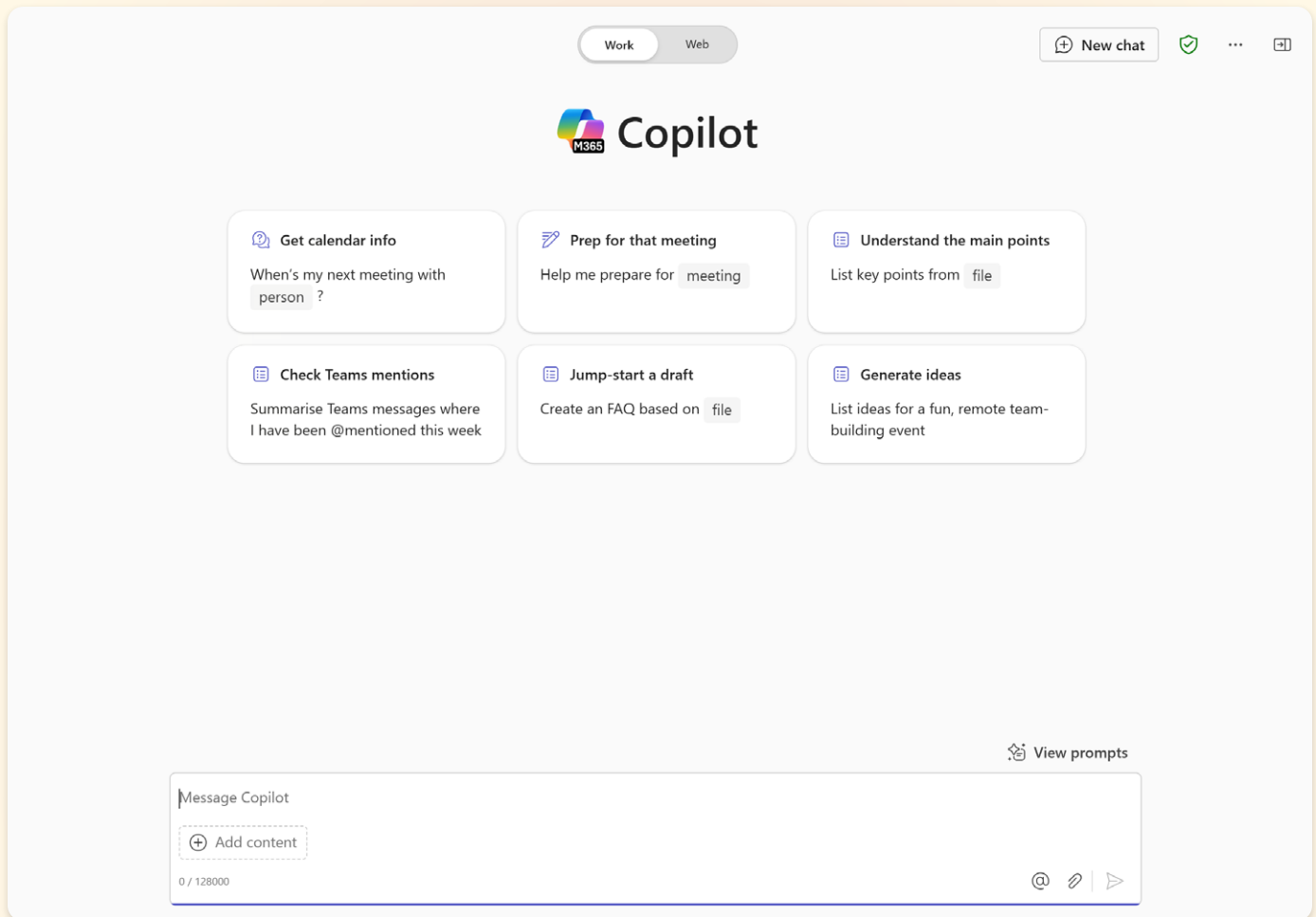
Required Document:

No files needed, simply work in your environment and tailor the scenario to your needs.



1. Launch Microsoft Teams

Start Microsoft Teams in the browser via the link <https://teams.microsoft.com/> or as an app.



2. Launch Microsoft 365 Copilot

Click on Copilot in the left menu bar or add the AI assistant through 'Apps' if it is not visible in the bar. An overview with pre-made prompts will open. Since you want to search for relevant content in your work environment, the slider should be set to 'Work.'

3. Formulate Your Prompt: Search Documents

Now you can enter your prompt. The following prompt ensures that all documents on the desired topic are searched: *"Please show me documents on the topic [Improving Customer Service] as rows in a table. Please include the date of last modification, the file name, a one-sentence summary, and the authors of the file as columns. Sort them by last modified."* Replace the topic as needed.

4. Generate a Table

Microsoft 365 Copilot now creates a table containing all the desired information. Along with the appropriate, linked files, you also receive the respective contact. Review the contents. By the way, when you hover over the file, Microsoft 365 Copilot offers additional options like *'List Key Points'* and more.

5. Select Questions

Select questions that provide a deeper insight into the content. In our scenario, the question *"Are there documents specifically addressing customer satisfaction?"* arises. Click on the question and submit the prompt.

The screenshot shows the Microsoft 365 Copilot interface. At the top, there are three prompts in rounded rectangular boxes: "Can you provide more details on the first document?", "Are there any documents authored by someone other than", and "Can you filter the documents to show only those modified in the last month?". To the right of these prompts is a "View prompts" button with a document icon. Below the prompts is a large text input area labeled "Message Copilot". Inside this area, there is a dashed box with a plus icon and the text "Add content". At the bottom left of the input area, it says "0 / 128000". At the bottom right, there are icons for @, a link, and a send button (a right-pointing triangle).

6. Formulate Additional Prompts: Browse More Channels

With the following prompts, you can search for more information in your work environment. All responses include references that allow you to directly access the respective message, file, etc., with a click.

"What about messages in chats on this topic?"

"Are there emails on this topic?"

"Are there presentations or reports on this topic?"

7. Formulate Additional Prompts: Summary and Actions

At this point, you have gathered all the relevant content. Therefore, it makes sense to generate a brief overview of the insights: *"Can you please summarize all the important information that can lead to improvements in the area of customer inquiries?"* Based on this prompt, you can subsequently ask Microsoft 365 Copilot to develop appropriate actions and strategies: *"Can you please provide specific actions or strategies?"*

8. Save the Content

Secure created content and actions further by editing them in Pages and/or inserting them into a Word document, for example. This way, you can revisit them later or collaborate with team members.

handled promptly and accurately.

These strategies and tools can help improve the handling of customer inquiries, leading to better customer satisfaction and more efficient service operations. Let me know if you need more details on any of these points!



Edit in Pages

Copy



AI-generated content may be incorrect





Scenario 4: Conducting Sentiment Analysis on Feedback

Without AI: Inconsistent, Time-Consuming, Inaccurate

With AI: Clear, Organized, Fast

Customer feedback provides valuable insights into the strengths and weaknesses of products, services, or processes. By strategically analyzing and implementing feedback, companies can optimize their offerings, enhance customer satisfaction, and build long-term customer relationships. However, manual evaluation is laborious: employees must handle large volumes of data, filter for relevance, manage responses, and ensure measurability—all over the long term.

Two months ago, *Moolz Clothing* launched a special pair of thermal jeans. The jeans gained significant popularity on social media, leading to a noticeable increase in online store traffic. This popularity is also reflected in customer reviews. To prepare for next year's planning, Melanie, as the team lead, wants to analyze customer sentiment.

Initial Situation: Reviews for the popular thermal jeans were collected by Melanie's team members through a Forms survey. This allowed all new reviews to be centrally gathered and supplemented with additional notes if needed. Now, this Forms survey is to be evaluated with regard to annual planning. Melanie decides to use Microsoft 365 Copilot for the analysis to efficiently and purposefully prepare the results.

Task	Analyze Feedback
Area	Customer Service
Required Apps	Microsoft Forms Microsoft Excel
Level	Copilot Beginner
Benefits	Professional Results Data-Driven Planning Quick Response

**Required Document:**

No file needed. You can create all relevant content with Microsoft apps.

1. Create a Forms Survey

Open Microsoft Forms via the link <https://forms.office.com/> and click on the 'New Form' button.

2. Let Microsoft 365 Copilot Create a Draft

Click on 'Draft with Copilot' to enter your prompt for the new form.



3. Formulate Your Prompt

"Please create a customer satisfaction survey. It's about a new product, thermal jeans in our shop. There should be an option for image upload, a star rating, and a recommendation, as well as a text field for more detailed reports."

4. Keep the Draft As Is

If the draft meets your expectations, you can leave it as is. Otherwise, you have the option to adjust the tone of the questions and texts to match your company's customer communication style.

 Remove the questions you don't want ✕

Customer Satisfaction Survey - Thermal Jeans
We value your feedback on our new product, thermal jeans. Please take a moment to complete this survey and help us improve. 

1. Upload an image of you wearing the thermal jeans
(Upload file) 

2. Please rate the thermal jeans
     

3. Would you recommend our thermal jeans to others?
☐ Yes 
☐ No

4. Please provide more detailed feedback
(Enter your answer) 

< 1 of 1 >  Edit prompt

AI-generated content may be incorrect  

✓ Keep it



Add more details for Copilot to fine tune the draft.

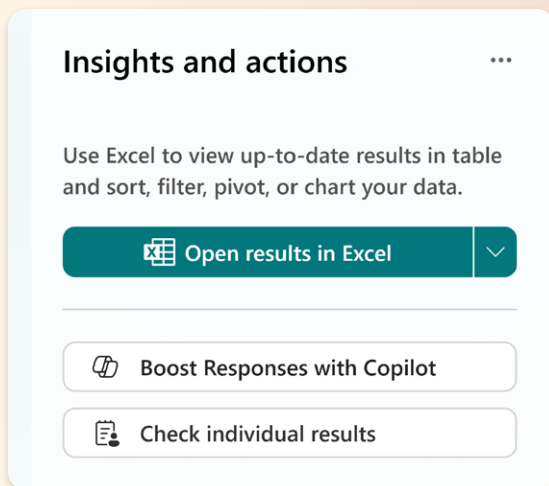


5. Share the Form

Collect responses to your form by sharing the survey link, for example. **Note:** If file uploads are possible, they must be shared with people outside your organization.

6. Remind Your Customers

Remind your customers about the survey: Under the *'Insights and Actions'* section, you can encourage responses with Microsoft 365 Copilot. Then, Forms sends a reminder via email with appropriate text.



7. Have the Responses Evaluated

Click on *'Show Answers'* to evaluate the responses from your feedback form. Click on the Excel file.

8. Open Excel

Forms makes it easy to neatly display all responses containing customer feedback in an Excel spreadsheet. Click on the Copilot icon in the ribbon at the top right to open the input field.

9. Use Pre-made Prompts

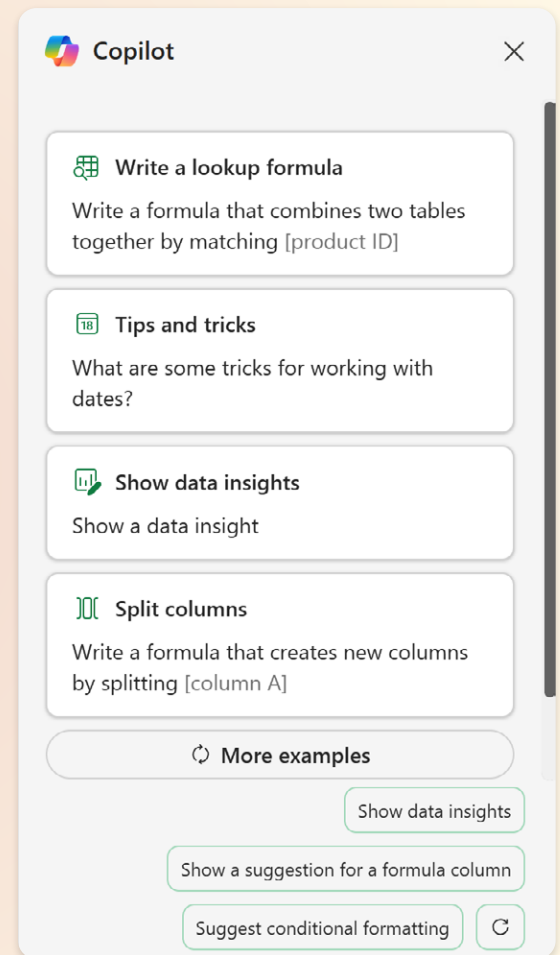
Through prompts like *"Show data insights"* or *"Can I see more insights?"* you can receive summarized information about the survey.

10. Formulate Additional Prompts: Recommendations

Once you've extracted all the key insights from the survey, you can ask Microsoft 365 Copilot to make a recommendation: *"What recommendation would you give for a new product based on the survey?"* and *"Do you think the customers are satisfied?"*

11. Add the Information to the Sheet

Add all relevant information to a new sheet. Finally, save the file.





Scenario 5: Receiving Answers with Copilot Agent

Without AI: Resource-Intensive, Slow, Manual

With AI: Automated, Unified, Professional

Products that go viral online often sell out quickly and generate enormous demand. This frequently leads to a multitude of additional customer inquiries about topics like quality, availability, and other product details-triggering a chain of subsequent events. To ensure customer satisfaction and maintain interest even when products are temporarily unavailable, it is crucial to respond to customer inquiries quickly, accurately, and comprehensively. The use of AI can make a decisive difference in this process.

Moolz Clothing receives numerous inquiries daily through various channels about the popular thermal jeans. To respond more quickly, Mike wants to provide standardized answers. The most frequently asked questions have already been collected, and now the answers need to be formulated in the company's typical style.

Initial Situation: Mike received a Word document containing the most frequently asked customer questions about thermal jeans. These questions were collected by the team over the past few weeks and have already been provided with appropriate answers. Based on this document, Mike plans to create a catalog of authentic responses for Moolz Clothing. It makes sense to develop an agent in the Copilot Studio for this purpose. This agent can use the information from the document to automatically generate responses that are ready to send with just a few clicks or prompts. Quick, easy, and absolutely professional.

Task	Respond with Copilot Agent
Area	Cross-Functional Customer Service
Required Apps	Microsoft Teams Copilot Studio
Level	Copilot Advanced
Benefits	Quick Feedback Consistent Statements Enhanced Professionalism



Required Documents:
To carry out the scenario with us, simply download the file **FAQ_Thermo_Jeans_Moolz_Clothing.docx**. Upload it to OneDrive.

1.

Open Microsoft Teams

Open Microsoft Teams as an app or in the browser at <https://teams.microsoft.com/> and click on Copilot in the left sidebar.

Copilot

Agents

Visual Creator

Get agents

Create an agent

2. Create a Copilot Agent

Now the Copilot interface is displayed. Click on 'Create Agent' on the right side. This will open Copilot Studio. Here, you can create a Copilot agent tailored to your needs, personalized to meet specific operational requirements. This agent can then be integrated into Teams, SharePoint, and other apps.

The screenshot shows the Copilot Studio interface for creating a new agent. The top bar includes the Copilot Studio logo, the path 'Meine Agents > FAQ Bot', a status indicator 'Automatisch gespeicherter Entwurf', and buttons for 'Erstellen', a menu, and a close button. Below the top bar, there are two tabs: 'Beschreiben' (selected) and 'Konfigurieren'. The 'Beschreiben' tab shows the following details:

- Vorlage:** Keine
- Details:** Includes a profile picture icon and an edit icon.
- Bezeichnung:** FAQ Bot (7/30 characters)
- Beschreibung:** Most Important Questions regarding our amazing thermal jeans (60/1.000 characters)
- Anweisungen:** Please answer incoming questions about the thermo jeans using the attached document. Make sure not to provide answers if you cannot find well-founded information. Be nice, casual, and friendly, and formulate the answers in our customer tone (predominantly

On the right side, there is a chat preview window titled 'FAQ Bot' with the description 'Most Important Questions regarding our amazing thermal jeans'. It includes a 'Neuer Chat' button and a text input field with a 'Nachricht eingeben' placeholder and a '0/2000' character count.

KI-generierte Inhalte können falsch sein | Die Copilot Studio-Funktionen in M365 werden vom Copilot Studio-Dienst verarbeitet. Durch die Verwendung dieser Umgebung erklären Sie sich mit diesen [Bestimmungen](#) einverstanden | [Datenschutz](#) und [Cookies](#)

3. Customize the Copilot Agent

Now create a Copilot agent according to your preferences. You can describe the agent or configure it independently. In this scenario, we choose 'Configure'.

Give your agent a name, adjust the icon if necessary, and create a description. In the next step, we'll get to the main point.



4. Enter Instructions

Insert this text in the 'Instructions' section: *"Please answer incoming questions about the thermo jeans using the attached document. Make sure not to provide answers if you cannot find well-founded information. Be nice, casual, and friendly, and formulate the answers in our customer tone (predominantly female, 20–36) and with emojis. Greet the customers with 'Hey Moolzie,' and end the answers with 'Your Moolz Clothing Team.'"* Now attach your file in the "Knowledge" section.

5. Optionally Create Starter Prompts

Enter starter prompts that make it easier for team members to directly generate content. This way, you can specifically guide them towards certain content that is particularly important for you in external communication and perception.

The screenshot displays the Copilot Studio interface for configuring an agent named 'FAQ Bot'. The interface is divided into two main sections: 'Beschreiben' (Describe) and 'Konfigurieren' (Configure). The 'Konfigurieren' section is active, showing a table of starter prompts.

Titel	Nachricht
Sizes	Hey Moolzie, which sizes are ava
Material	Hey Moolzie, what kind of mater
Care instruction	Hey Moolzie, how should I wash
Stock Status	Hey Moolzie, are there thermal je
Return Policy	Hey Moolzie, what is the return p
Price	Hey Moolzie, how much are the

Below the table, there is a button labeled 'Neue hinzufügen' (Add new).

On the right side, there is a preview of the 'FAQ Bot' chat interface. It shows the bot's name, a description, and a list of starter prompts: 'Sizes' (Hey Moolzie, which sizes are available?) and 'Material' (Hey Moolzie, what kind of material is used?). At the bottom, there is a text input field labeled 'Nachricht eingeben' (Enter message) and a '0/2000' character count.

At the bottom of the interface, there is a disclaimer: 'KI-generierte Inhalte können falsch sein | Die Copilot Studio-Funktionen in M365 werden vom Copilot Studio-Dienst verarbeitet. Durch die Verwendung dieser Umgebung erklären Sie sich mit diesen Bestimmungen einverstanden | Datenschutz und Cookies'.

6. Finalize the Copilot Agent

Click the 'Create' button in the top right corner. Copilot Studio will then create your agent, the 'FAQ Bot.' Once the agent is successfully created, you will receive a confirmation. You can then switch directly to the agent.

7. Test the Copilot Agent

Now test your agent by asking it questions. You will receive answers based on the stored document. The agent will remain available until you wish to uninstall it.



FAQ Bot

**Sizes**

Hey Moolzie, which sizes are available?

**Material**

Hey Moolzie, what kind of material is used?

**Care instruction**

Hey Moolzie, how should I wash the pants properly

**Stock Status**

Hey Moolzie, are there thermal jeans in stock in my size?

**Return Policy**

Hey Moolzie, what is the return policy for the thermal jeans?

**Price**

Hey Moolzie, how much are the Thermal Jeans?

Today

Hey Moolzie, are there thermal jeans in stock in my size?

**FAQ Bot**

Hey Ella,

This is FAQ Bot. I'd be happy to help you with that! Could you please provide me with your size so I can check the availability of thermal jeans for you?

Your Moolz Clothing Team 🌟

 **Edit in Pages**

 **Copy**

AI-generated content may be incorrect



Scenario 6: Responding to a Customer Complaint in Outlook

Without AI: Inconsistent, Error-Prone, Careless

With AI: Creative, Consistent, Professional

Customer complaints, like any customer feedback, must be taken very seriously. Even a complaint can lead to customers feeling understood, valued, and connected to the company. A quick response to complaints is particularly important, as it signals that the customer's concerns are a priority. However, in daily operations, timely handling may be overlooked due to other tasks. This can be problematic, as customers who feel unheard may quickly feel misunderstood or unimportant.

Henry is the Customer Experience Manager at *NuHommé*, a luxurious hotel chain that places great emphasis on tailored overnight experiences. The chain specifically targets business travelers and young urban couples who primarily rely on authentic customer reviews. To maintain the chain's professionalism and respond quickly to customer inquiries, Henry's team dedicates significant time to carefully handling requests.

Initial Situation: Henry’s team member Marc forwarded an email in which an overnight guest extensively complained about the condition of the pool and the washrooms at the Munich location. Due to the current shortage of skilled workers and the generally increased number of guests during the holiday season, there are indeed deficiencies in these areas. Henry wants to address the email as quickly as possible so he can continue working on a solution to the problem. For a professional, quick response, he uses Copilot in Outlook.

Task	Customer Complaint in Outlook
Area	Cross-Functional Communication
Required Apps	Microsoft Outlook or Microsoft Word
Level	Copilot Beginner
Benefits	Quick Response
	Enhance Customer Relationships
	Maintain Professionalism



Required Documents:
No separate file or email needed. Just use Copilot in Outlook.

1.

Open Outlook or Word

Open Microsoft Outlook via the app or in the browser at <https://outlook.com/> and open the email you want to reply to.

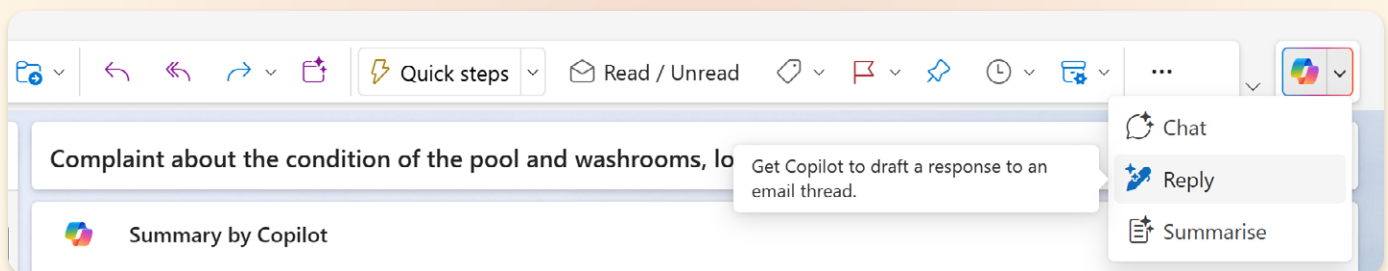
2. Summarize the Content

First, let Microsoft 365 Copilot summarize the content by clicking the appropriate button.

The assistant then generates a clear summary with the key points of the email, ensuring that no aspect of the message is left unaddressed.

3. Open Microsoft 365 Copilot in Chat

Click on the Copilot icon. Now enter your prompt in the input field. *"I want to respond to the complaint email and address all essential points politely and professionally. Please draft a response."*

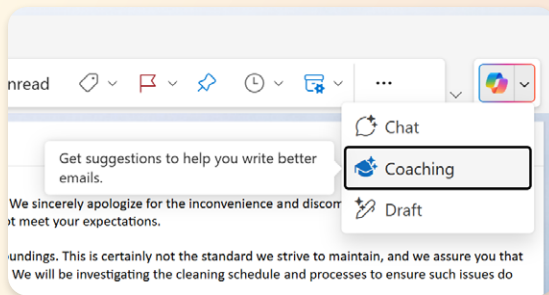


4. Let Copilot Generate a Draft

Microsoft 365 Copilot now generates a first draft for the response email. The content already sounds promising, but you're not yet sure if the text is optimal in its current form. Since you don't have any specific improvement ideas at the moment, first copy the text from the chat window and click 'Reply' on the complaint email. Then paste the text to further review or adjust it.

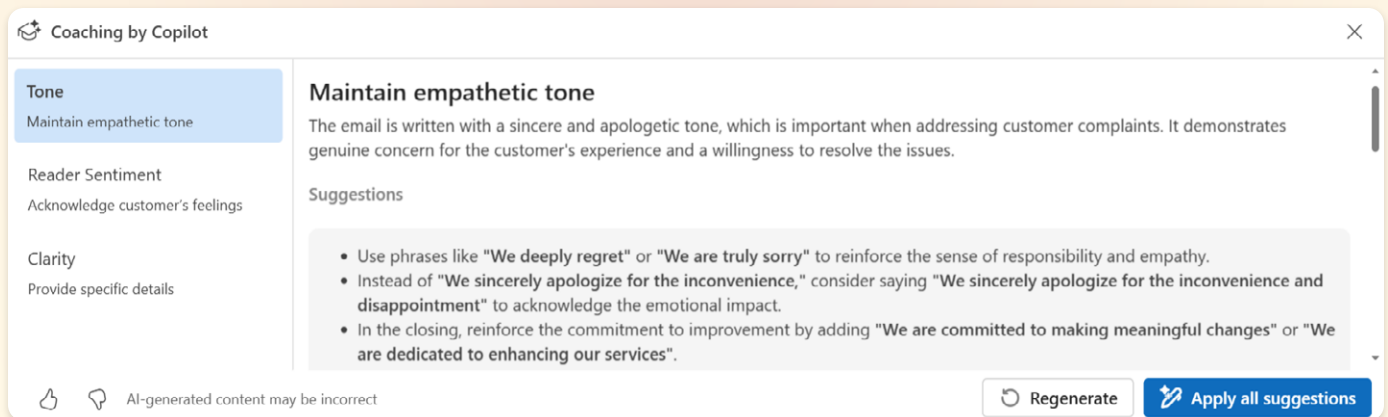
5. Use Coaching with Copilot

Click on 'Coaching with Copilot' to generate tips. Microsoft 365 Copilot analyzes the email and provides specific improvement suggestions. Review these suggestions and adjust the content using 'Adopt All Suggestions.' Alternatively, you can generate new suggestions if the current ones are not fully convincing.



6. Send the Email

Review the email one last time before sending the response afterward.



Automation and Efficiency: Your World Without and With AI

Automation and Efficiency: Your World Without and With AI

Create Response Templates

WITHOUT AI

Creating response templates was time-consuming and often inconsistent. As a result, customers were not always served with the desired efficiency and professionalism.

WITH AI

Microsoft 365 Copilot generates precise and professional response templates in no time, which can be customized individually. This standardizes customer communication.

Sentiment Analysis and Feedback

WITHOUT AI

Customer feedback was rarely analyzed systematically, causing important sentiments or trends to go unnoticed, which made customer retention more challenging.

WITH AI

Microsoft 365 Copilot conducts sentiment analysis and identifies trends in feedback, enabling companies to proactively respond to needs.

Develop Chatbot Content

WITHOUT AI

Updating and customizing chatbot content used to be a lengthy process based on manual analysis, often leaving gaps in customer communication.

WITH AI

Microsoft 365 Copilot analyzes customer interactions and suggests targeted improvements for chatbot content. This leads to continuous optimization of chatbots: For better customer engagement.



Receive Responses with Copilot Agent

WITHOUT AI

Finding suitable solutions for customer inquiries was tedious and time-consuming because information was often stored in a decentralized manner.

WITH AI

Microsoft 365 Copilot quickly suggests suitable solutions based on contextual information, enabling efficient handling of customer inquiries.

Analyzing Customer Inquiries

WITHOUT AI

Manually sorting and processing customer inquiries was time-consuming and led to delays that affected customer satisfaction.

WITH AI

Microsoft 365 Copilot automatically prioritizes and analyzes incoming requests, allowing urgent matters to be addressed more quickly and enabling more efficient workflows.

Responding to Customer Complaints

WITHOUT AI

Handling complaints was time-consuming and often led to dissatisfied customers due to a lack of standardization or overlooked aspects.

WITH AI

Microsoft 365 Copilot generates structured and empathetic responses to complaints, which can be quickly customized and sent to enhance customer satisfaction.

Time for Efficiency: With Microsoft 365 Copilot, No Longer a Dream

Time for Efficiency: With Microsoft 365 Copilot, No Longer a Dream

Quick responses and professional, thoughtful replies: Customers don't need much to feel heard. However, what they do need is crucial: clear and respectful communication. A response that addresses individual concerns and offers solutions builds trust and strengthens the connection to the company. If these expectations are not met, customers may feel overlooked—a feeling that can lead to long-term dissatisfaction. Therefore, it is essential to take their needs seriously and address them with care.

With Microsoft 365 Copilot, customer communication is taken to a new level. Our assistant not only aids in the quick and personalized creation of responses but also offers numerous other features: from analyzing incoming messages and prioritizing requests to generating suggestions for proactive measures. This enables Microsoft 365 Copilot to not only handle customer concerns more efficiently but also help build better long-term relationships with clients.

And all of this is possible today: Don't wait and leave your quality to chance. Start now and set new standards in customer service with Microsoft 365 Copilot.

BEFORE AI

Customer inquiries were handled manually, which was time-consuming and prone to errors. It often took too long to create a response, leading to customer frustration. Proactive measures or improvements in customer service were lacking.

WITH AI

Microsoft 365 Copilot automatically analyzes incoming messages, prioritizes them, and quickly crafts professional, personalized responses. Repetitive tasks like categorizing inquiries or suggesting actions are handled efficiently and accurately, saving valuable time.

Tip: Care for a Little Extra?

Discover Generative AI in Microsoft Dynamics 365!

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Discover Generative AI in Microsoft Dynamics 365!

In this e-book, you've read a lot about Microsoft 365 Copilot as an AI assistant for your customer service and found many use cases that illustrate the benefits in a practical way.

If you now want to take a big step further, we recommend that you take a closer look at the business solutions in the **Microsoft Dynamics 365 product family**. These integrate seamlessly with Microsoft 365 and allow you to take advantage of even more powerful AI capabilities.

With Dynamics 365 solutions, you can address typical challenges that service organizations struggle with every day:

- **Increase the productivity of your relationship managers:** Streamline the work environment with a central service system that brings together all operations, including information from previous transactions
- **Frontline worker support:** Provide key insights into work orders and service history to enable first-time troubleshooting
- **Reporting and analytics for supervisors:** Accelerate decisions to increase customer and employee satisfaction
- **And best of all,** with the **Copilot for Service** extension, you can also integrate generative AI directly into your contact center. This AI-powered Copilot not only responds to requests, but actively diagnoses problems, asks follow-up questions, and gathers information to offer solutions based on a wealth of resources, including internal knowledge bases, existing case data and interaction histories, and information from trusted external websites.
- **Modernize self-service offerings such as chatbots:** Incorporate contextual information to have a "real" conversation and smooth handoffs to service team employees

To do this, Copilot for Service synthesizes vast amounts of data already available in your organization's knowledge sources to provide employees with relevant guidance directly in the work flow – e.g. in Microsoft 365 Teams and Outlook, in a CRM system, or even embedded in third-party agent desktops such as Salesforce, ServiceNow and Zendesk.

From self-service to personalized service to field service, Copilot for Service allows you to completely transform your service delivery by:

- providing connected, personalized customer experiences **instead of disjointed experiences**.
- relying on an **integrated end-to-end** solution that relieves your service teams instead of manual tools and systems.
- optimizing your operations from limited data insights and heterogeneous systems to increased efficiency through proactive insights and automation.

Get Started with Dynamics 365 and Copilot for Service Now:

[Customer Service with Generative AI | Microsoft Dynamics 365](#)

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[AI in Dynamics 365](#)



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