Microsoft

February Americas Partner Insider Call

Helane Cohen
Americas Communications Strategy Lead

Partner Audience: All
#Event #ModernWork #Security #GoToMarket

in Helane Cohen | LinkedIn

Agenda

Topic	Speaker
Welcome, Polls & Insider Scoop	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS
The Future of Modern Work Accelerate your CSP business with Copilot for M365	Marie Quigg SMB Go to Market Lead, Microsoft Americas, GPS
Closing	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS

Join the Microsoft Americas Partner Insider Community

Register for our monthly
Partner Insider Call!

[Microsoft Events -
Americas Partner Insider
Call |March Edition](#)

Mark Your Calendar:
March 6, 2024 @ 10:00 AM PT

TOPIC:
*Ultimate Partner guide to navigating the Microsoft ecosystem and
understanding the massive opportunity – Marketplace, SMC & AI.
w/ Vince Menzione CEO of Ultimate Partner*

If you missed any calls before January 2024!!
https://aka.ms/AmericasPartnerInsiderCall

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[Monthly Microsoft AI Cloud Partner Program Newsletter](#)

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[Microsoft Americas Partner Community](#)
View our bi-weekly informative posts about resources, tools and upcoming activities.

Partner Blogs

Date	Published Blog Link
1/17	Americas Partner Enablement News: January 2024 Issue | Microsoft
1/17	January 2024 Hot Sheet – Partner Training Schedule | Microsoft
1/18	Showcase the value of Azure migration with Solution Assessments and Evaluations | Microsoft
1/24	Help your customers secure their cloud workloads | Microsoft

Communications Taxonomy

Americas Email
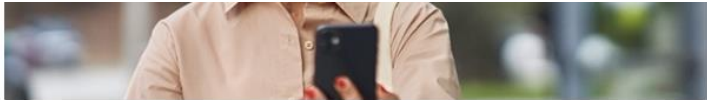
Partner Audience: All Partners
#AllRoles #ProgramOfferUpdate #UnderstandingBenefits

April 12, 2023

Dear Helane,

What does the Microsoft Cloud Partner Program mean for you?
The Microsoft Cloud Partner Program is focused on simplifying partner programs, delivering greater customer value, investing in your growth in new ways, and recognizing how you deliver customer value.

The **Microsoft Cloud Partner Program Playbook** was developed to ensure we're providing simplicity and clarity. The Playbook will help you navigate the Microsoft Cloud

Announcement / One Pagers (Top Corner)

Plan, build and grow your technical capabilities and accelerate sales

#AllPartners #GrowSkills #DoingBizwMicrosoft #Tech #Sales

Partner organizations receive technical & business enabler guidance from a Microsoft **Partner Technical Consultant (PTC)** through personalized, one-to-one consultations to plan, build and publish Microsoft cloud services or applications and accelerate the closure of sales opportunities.

Plan your business with Microsoft
Get help assessing your organization's technical capabilities to uncover key opportunities that can help you grow your business.

Build a service or application
From envisioning to publishing, our consultants will advise and support you.

Technical assistance for sellers
Help to create demos and proofs of concepts and remove sales blockers to help close more sales opportunities.
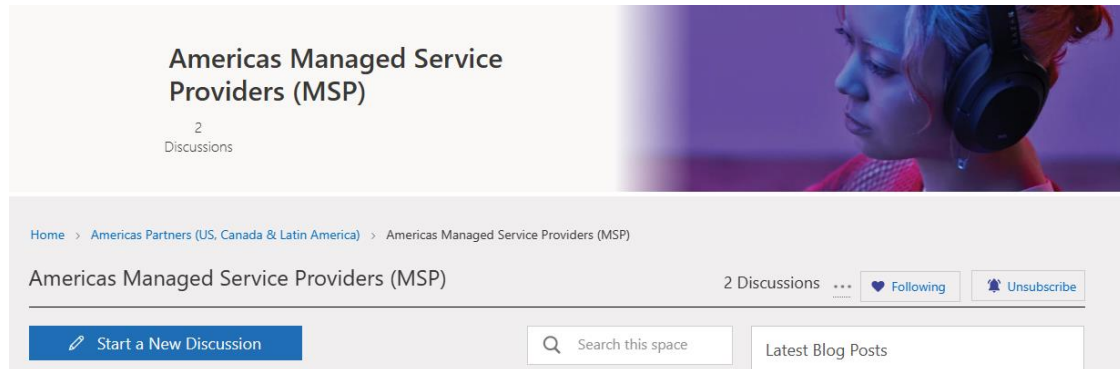
Grow and support your business
Consultants are here to support you in growing and enhancing your solution, even after you've built and sold your service or application.

Get started today at https://aka.ms/tpd. Available to partner organizations with a Microsoft Cloud Partner Program user account and benefits associated with a Solutions Partner designation, legacy competency or Microsoft Action Pack.

Featured Content (Opening slide)

Microsoft
December Americas Partner Insider Call

Helane Cohen
Americas Communications Strategy Lead

Partner Audience: All
#Event #ModernWork #Security #GoToMarket

Helane Cohen | LinkedIn

Pinned by admin   Unpin

Michelle Mercer Baldwin (hashtag ■) • 1st
Creative Corporate Communications Strategist | Brand & Voice Expert | Writ...
2h

#QuestionForGroup

What would you like to see more of?
The author can see how you vote. Learn more

Trainings

In-person events

Newsletters

32 votes • 1w left

3   2 comments

Helane Cohen • You
Director USGPS Scale Communications / StrengthsFinder Facilit...
1mo •

It's time to get inspired 🌎 Microsoft Inspire will be back on July 18-19! As part of #MSInspire, we also recognize the finalists and winners of our annual #MSPartner of the Year Awards—and nominations are now OPEN! 🏆 🎉 Get more details: https://lnkd.in/gi7Z2itF

#AllPartners #AllRoles #Event #GrowYourBusiness

Announcing Microsoft Inspire 2023 dates and Microsoft Partner of the Year Awards nominations
blogs.partner.microsoft.com • 2 min read

Marilia Teixeira and 12 others   4 comments

👍 Like   💬 Comment

MSP Community Events

Join the Conversation

Join the Americas Managed Service Provider Community Hub to engage with Microsoft and continue the conversation with the MSP partner community

Join the MSP Microsoft Community Hub

Register for "How to quickly and safely migrate your clients to Azure with Microsoft and Datto"

Join Henrik Gutle, Microsoft's Azure GTM Lead for Americas for a discussion on Azure migration with Datto.

Register for the on-demand webinar

Partner Of the Year Awards

Microsoft Partner of the Year Awards

Partner Ad

Showcase your achievements and celebrate your success!

2024 Microsoft Partner of the Year Awards

Microsoft

NOMINATE TODAY

The Microsoft Partner of the Year Awards acknowledge outstanding successes and innovations by partners across our global ecosystem - recognizing achievements in categories spanning solutions areas, industries and across cloud to edge technologies.

These successes enable digital transformation, showcase entrepreneurial spirit, and deliver impactful solutions to customers. Recognition and celebration around **Microsoft Inspire**.

Nominations accepted from **Wednesday February 7, 2024, until Wednesday April 3, 2024**.

Connect with your partner(s) to let them know the nomination window is open and encourage them to submit an entry at https://aka.ms/POTYA.
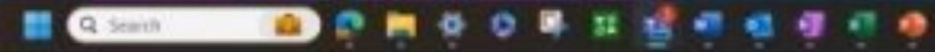
Microsoft Copilot

	Copilot	Copilot for Microsoft 365	Copilot for Sales	Copilot for Service
	Free	$30	$50	$50
Foundational Capabilities	●	●	●	●
Web grounding	●	●	●	●
Commercial Data Protection	●	●	●	●
Enterprise-Grade Data Protection		●	●	●
Graph Grounding		●	●	●
Microsoft 365 Apps		●	●	●
Copilot Studio		●	●	●
Role Specific capabilities			●	●

The age of Copilot
has arrived.

Copilot for Microsoft 365 is transforming work

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

64%

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

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads

68%

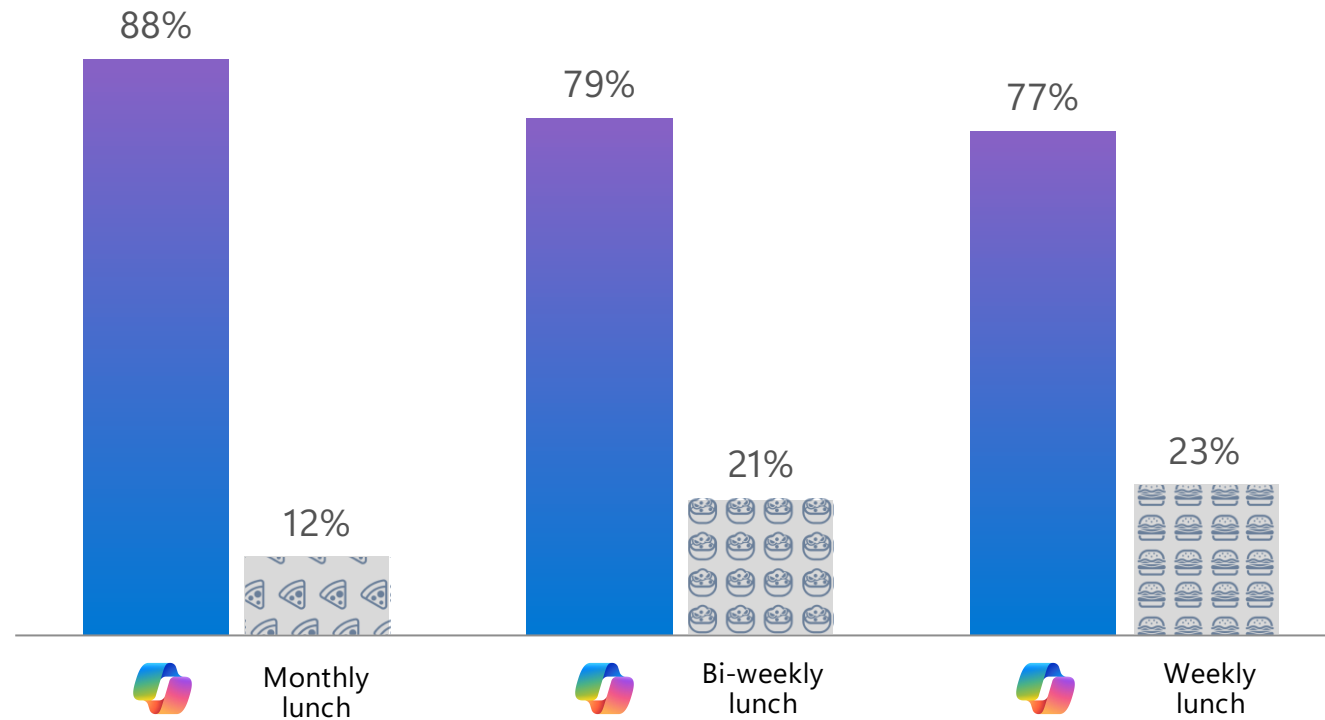said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

Is Copilot worth more than a free lunch?

If offered the choice, users overwhelmingly said they would pick Copilot

88% 12% 79% 21% 77% 23%

Monthly lunch   Bi-weekly lunch   Weekly lunch

The opportunity to lead the AI transformation is ours

190M

addressable seats

Microsoft 365 Copilot is your AI assistant at work

Microsoft 365 Copilot combines the power of **large language models** with **your organization's data** – all in the flow of work – to turn your words into the most powerful productivity tool on the planet.

Microsoft 365 Copilot works alongside **Microsoft 365 Apps** to provide **real-time intelligent assistance**, enabling users to enhance their creativity, productivity and skills.

Built on Microsoft's comprehensive approach to:

Security + **Compliance** + **Privacy** + **Responsible AI**

Designed for the needs of the workplace

Grounded in your business data

Microsoft 365 Copilot has real-time access to both your *content and context* in the Microsoft Graph.

Comprehensive security, compliance, & privacy

Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365.

Architected to protect data

Your data doesn't leave the compliance boundary and isn't used to train the foundation model.

Individual user & admin always in control

Users decide what to use, modify, or discard.

Designed to integrate new skills

As Copilot learns about processes, it can perform more sophisticated tasks and queries.

The Copilot System

Copilot for Microsoft 365

Generally Available

Included at $30 per user, per month
For customers of all sizes using BS, BP, OE3, OE5, ME3, ME5
Via EA, CSP* & Direct

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

Three steps for partners to Get AI Ready

1
Product Knowledge

LLMs
Syntax
Prompts

2
Technical Requirements

Prerequisite SKUs
Billing & Terms
Max Licenses

3
Adoption

For IT
For Users
Company Education

CSP product, pitch & deal readiness

1 Product

- Read the product blog
- Learn how Copilot works on the Microsoft YouTube and about the Copilot System
- Complete the Get started with Copilot for Microsoft 365 Training
- Join the Copilot Masters Partner Bootcamp on Jan 24th OR register for a future on-demand session
- Understand the partner opportunity Copilot for Microsoft 365 partner opportunity deck for CSP partners

2 Pitch & Usage

- Review the AI powered organization using the SMB early value deck
- Review the SMB customer pitch deck
- Learn about prompts using the Copilot for Microsoft 365 prompt guide
- Teach yourself to do demos using the SMB demo scripts and files and Copilot for Microsoft 365 demos playlist
- Learn how to run the Copilot for Microsoft 365 optimization assessment
- Review the Copilot Adoption Kit to support customer deployment

3 Technical

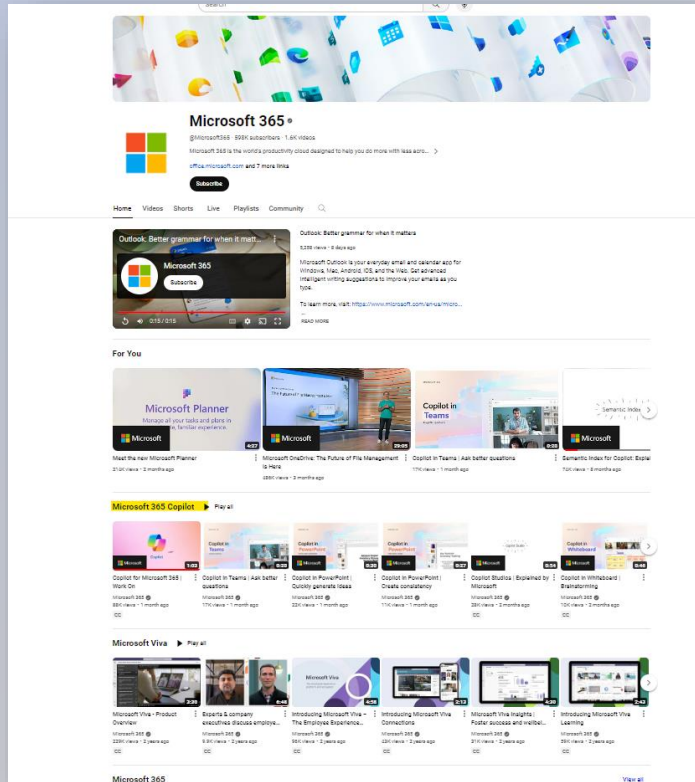- Join a CSP Copilot Masters Technical Bootcamp on February 7th and 8th OR register for a future on-demand session
- Learn how the Stack and Semantic Index works
- Learn about customer licensing and technical requirements

4 Transactions

- Review the Copilot for Microsoft 365 partner FAQ
- Review the CSP transaction guide
- Review the CSP pricelist review and SKU details

Top Recommendations

Microsoft 365 YouTube

Prompt Guide

Copilot Lab

Transaction specifics

✓ **Licensing**

› Microsoft 365 base license including Office 365 E3/E5, Microsoft 365 E3/E5, Microsoft 365 Business Standard, and Business Premium

› Base license can be on any billing commitment. Annual Commitment | Annual Bill option is not required for Microsoft 365 base licenses

✓ **Maximum Purchases**

› No minimum seat requirements

› Max seats are = to base license seats ie if you have 300 MBP SKUs you can buy up to 300 Copilot licenses

✓ **Billing**

› Microsoft Copilot for Microsoft 365 is available exclusively on "Annual Commitment | Annual Billing" subscriptions

› Coterminous billing is available. CSP customers can align the end date of their Copilot for M365 subscription (Annual Commit | Annual Bill) to any of their eligible pre-requisite subscriptions

› If base license is purchased on Annual Commitment | Annual Billing and coterminous Charges to partners will be prorated if the original term is reduced via coterminous setting. After the first term of setting up coterminous end dates, both subscriptions will renew into the full term

Understand common customer objections

› **Price:** Why is Copilot $30?

› **Security:** How do I prevent data leaks? How is Microsoft using my data?

› **Readiness:** How do I prepare my organizations tech stack? How do I prepare my employees? Will Microsoft help me prepare?

› **Copywrite / Originality:** Does Microsoft take ownership of work created with Copilot? Who is the creator if copilot is used?

✓ **Resources:** *Data Security, Privacy & Copywrite in Copilot for Microsoft 365:* **Copilot for Microsoft 365 technical overview presentation**
Partner FAQ: **Copilot for Microsoft 365 partner FAQ**

Execute the CSP Copilot Sales Journey for SMBs

Customer Targets: *Existing Microsoft 365 customers currently using Office 365 E3/E5, Microsoft 365 E3/E5, Microsoft 365 Business Standard, and Business Premium*

Existing On-Prem, Office and/or Business Basics customer who need foundational productivity before deploying Copilot for Microsoft 365

Listen & Consult

1. Identify high propensity targets using the Copilot cohort in the **Cohort Tool**

2. Use **Sales Advisor** to view suggested customer targets with propensity to buy Copilot for Microsoft 365 and 90-day view of upcoming renewals

3. Launch demand gen efforts using **UPDATED** campaigns in a box

PMC Campaign

4. Use the to customer assets to prospect targets

Get AI- Ready Email Template
SMB customer data sheet
SMB Customer Email
LinkedIn / Infographics

Inspire & Design

5. Deliver the **SMB Customer Pitch Deck** & use the **Click-through Demos** (CDX under Secure Productivity)

6. Invite customers to an **SMB Get Copilot Ready Briefing**

7. Use the **Optimization Assessment** to evaluate customers AI readiness

8. Over come objections and demonstrate the Copilot Business Value using the **SMB early value deck**

9. **Close the deal** and drive prerequisite SKU upsell using in-market **CSP promotions**

Realize Value

10. Execute MSP services OR Work with IT to configure Copilot with using the **Licensing and technical requirements**

11. Use the **Microsoft Copilot Adoption Kit** to enable deployment

12. Invite users to attend a **Copilot Lab** and share the **Quick Start Guide with Prompts**

Optimize

13. Use **Sales Advisor** to build and scale your customer lifecycle management (CLM) practice through data-driven decisions based on the health and interests of your customers

✓ **Resources:** *Learn & Build Strategy:* **The AI-Powered Future of Work**

Top resources to bookmark!

1 [The AI-Powered Future of Work](#)
Three step guide to operationalize Copilot for Microsoft 365 via CSP
Links to (*almost!*) every key resources

2 [CSP Get AI Ready](#)
Link to complete CSP go to market strategy (Secure Productivity & Copilot)
Links to CSP Copilot Masters, Copilot Briefings and general market offers

Copilot for Microsoft 365

1

Security foundation

2

AI at work

3

Culture shift

The AI-powered business

01

📝 **Foundational productivity**

Get AI-ready checklist

✓

Empower employees with secure, AI-powered tools

Introduce employees to secure generative AI with Microsoft Copilot with commercial data protection to prepare them for the future workplace.

✓

Standardize onto Microsoft 365

Enrich your Copilot for Microsoft 365 experience by getting your data into the Microsoft 365 Cloud.

✓

Organize sensitive business data

Protect internal data from accidental leakage. Ensure users have the right access to the right internal content.

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

Note: Not all features/products shown.

Security and Compliance controls for Copilot for Microsoft 365

Baseline security

Copilot +
Office 365 E3

Multi-factor Authentication
with security defaults

Manual sensitivity labels
for Copilot generated content
(Office only)

Core security controls

Copilot +
Microsoft 365 E3

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

Manual sensitivity labels
for **non-Microsoft** documents
(e.g., pdf)

Endpoint management
capabilities

Best in class security controls

Copilot +
Microsoft 365 E5

User/session risk
and access control

Automatic sensitivity labels
for **non-Microsoft** documents
(e.g., pdf)

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

Microsoft 365 Copilot | Winning Customers

Customer on
Microsoft 365 E3
Microsoft 365 E5
Office 365 E3
Office 365 E5
Microsoft Business Premium
Microsoft Business Standard

Yes?

Lead with Copilot
Address technical readiness gap

Copilot uses information available to users within the MS Graph. To retrieve their business data, users will need to deploy and adopt Microsoft 365 first.

Enable Copilot Center of Excellence
Leverage deployment and adoption resources

Copilot ready

No?

Lead with Secure Productivity + Copilot

Deploy Microsoft 365 E3/E5/ BS/BP/Office 365 E3/E5
Drive usage & pitch Copilot (Pitch the Secure Productivity story with downloadable assets)

Microsoft 365 is foundational to being AI ready. Although Copilot will be a difference license, customers will need to be on Microsoft 365 E3/E5 as a base license.

Leverage the Microsoft 365 E3 offers and promos

Technical requirements and recommendations

- ✓ Microsoft 365 E3/E5 or Office 365 E3/E5 or Business Standard/Premium are licensing prerequisites.

- ✓ AAD - based account is required[1].

- ✓ Several features require users to have a OneDrive account.

- ✓ Copilot in Word, Excel, and PowerPoint: first available in the web versions at https://microsoft365.com and now expand to desktop

- ✓ For Outlook: Users need to be using the new Outlook for Windows (which is publicly called "the new Outlook for Windows" and it is currently in Preview. Users can load the new Outlook by toggling or Outlook Mobile. Getting started with the new Outlook for Windows – Microsoft Support.

- ✓ For Teams: Users need to be using Teams desktop client or the web app. Both current and the new versions of Teams supported.

- ✓ For Loop: Tenants must have Loop enabled. Learn more how to enable Loop. *(only required if customer want to use Copilot in Loop)*

- ✓ The richness of the cross-app experience will depend on the data sources indexed by Microsoft 365. Tenants with the richest data in Microsoft 365 (Exchange, OneDrive, SharePoint, Teams) will get the best results.

- ✓ **aka.ms/M365CopilotAdmin** / **Licensing and technical requirements**

Some Copilot experiences require a websocket connection from the device where the Microsoft 365 app is running to a Microsoft service.

Drive usage with the Copilot Adoption Kit

Support for IT Admins
The most up-to-date information on policies, privacy and data protection, and more

End User Adoption
Find user training deck, tip sheets, and more

Download the Adoption Kit

Quick recap!

1. **Copilot for Microsoft 365 is your AI assistant at work** using **large language models** with your organization's data alongside Microsoft 365 Apps to provide **real-time intelligent assistance**

2. **Copilot for Microsoft 365 is GA for customers of all size** using BS, BP, OE3, OE5, ME3, ME5 via EA, **CSP** & Direct transactions

3. **To get yourself ready to sell Copilot for Microsoft 365 access Microsoft partner readiness assets** here and here

4. To get customers ready **ensure they have a baseline license, the right technical implementations and have a plan to drive usage/prompt training with users**

5. **Don't forget Copilot for Microsoft 365 is via annual/ annual only** and **max licenses = the customers total prerequisite** SKU count

6. You can **execute the CSP Copilot Sales Journey for SMBs with your customers** starting today! And be aware of common objections – **price, security, readiness, copywrite/originality**

How can you get started?

- ✓ Review the **readiness suggestions listed on slide 12** and get better acquainted with the art of prompting with [Copilot Lab](#)

- ✓ **Find your Copilot cohort in Cloud Ascent** today to identify targets

- ✓ Use the **Copilot Briefing, Optimization Assessment and Copilot Adoption Kit to close deals** and run the SMB Sales Play Journey

- ✓ **Review technical documents** to ensure proper deployment and migration