Microsoft

Special Edition!

September Americas Partner Insider Call

Develop. Sell. Grow.

Agenda

| Topic	Speaker
Welcome	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS
Opening	Rodel Alejo Dir Partner Mktg Mgmt
Copilot for M365 product announcements	Marie Quigg Director, Americas Modern Work SMB GTM
Copilot promo/offer deep dive	Jinal Jolly Director, Partner Marketing– Modern Work & Copilot
Secure Productivity New Offers & Win Formula	Juliana Llinás Americas Modern Work SMC Programs GTM
Closing	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS

Join the Microsoft Partner Insider Calls

Register for our monthly Partner Insider Call!

[Microsoft Events - Americas Partner Insider Call Oct Edition](#)
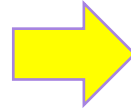
Mark Your Calendar:
October 2, 2024 @ 10:00 AM PT

Skilling Updates & Deep dive Copilot Licensing

If you missed any calls before September 2024!!
[Americas Partner Insider CallLATAM Partner One (microsoft.com)](#)

UI for AI

Wave 2

Microsoft 365
Copilot

Announcing Copilot Wave 2 Innovations

Bringing together web + work + Pages as a new design system for knowledge work

700

Product updates across Copilot & M365 Copilot

2x

Faster responses from Copilot(s)

3x

More satisfying responses for Copilot users

Microsoft 365 Copilot Wave 2 Announcements

Over the last 18 months, we've **turbocharged Copilot** with over 700 updates to deliver **responses that are now 2X faster and 3X more satisfying.** As we dive into Wave 2 of Microsoft 365 Copilot, announced on September 16th, we are thrilled to unveil some groundbreaking product announcements:

1. **BizChat & Copilot Pages:** BizChat is an entirely new work pattern that turns all your organizational content into a rich database of information and insight, enabling you to collaborate with Copilot like a partner. It brings data from the web together with data from your work into Copilot Pages—the new digital artifact for the AI era.

2. **Copilot in M365 Apps:** Our customers tell us Copilot in Teams has changed meetings forever—in fact, it's the number one place they're seeing value. We're excited to do the same thing for advanced data analysis in **Excel**, dynamic storytelling in **PowerPoint**, managing your inbox in **Outlook**, and more.

3. **Copilot Agents & Agent Builder:** Copilot agents, making it easier and faster than ever to automate and execute business processes on your behalf—enabling you to scale your team like never before. Agents are AI assistants designed to automate and execute business processes, working with or for humans**.**

Check out the blog post for more detail on these updates: Microsoft 365 Copilot Wave 2: Pages, Python in Excel, and agents | Microsoft 365 Blog

Wave 2 Microsoft 365 Copilot Product Updates

As we enter **Wave 2 of Microsoft 365 Copilot**, we are thrilled to share some key product updates:

Features and Capabilities		Impact	Availability
Copilot Pages *(Free Chat)*	**Copilot Pages** is a dynamic, persistent canvas in BizChat designed for multiplayer AI collaboration. Pages are the foundation for the new design system for work including creation, sharing, collaborative prompting, and grounding.	Build a group working doc easily pulling in others and adding info	Now
Update to M365 Copilot Apps	Copilot in **Excel GA** has added support for structured data, tables and conditional formatting; expanded access to the formula library; and improved visualization control. Copilot in **Excel with Python** for advanced analysis without needing Python knowledge.	Advanced analysis, Phyton integration, improved functions	Now Public Preview
	Narrative builder for PowerPoint to guide Copilot in creating a deck. **Brand manager** uses your company's branded template and can pull company branded images from your SharePoint organization asset library (OAL).	Content outlines, Standardize brand communications & external materials	Available Sep 2024
	In addition to meeting transcripts, Copilot in **Teams** now includes meeting chats when generating recaps, answering questions, and identifying action items.	Adds insights and actions from chat vs. meeting transcript only	Now
	Enhancements to Copilot in **OneDrive** enable Copilot to reason, summarize, and compare content without opening the files.	Improved responses	Available late Sep 2024
	In addition to Word documents, PowerPoints, PDFs and encrypted documents, Copilot in **Word** can now reference, emails, meetings, and colleagues when drafting content. Jumpstart the creative process with on-canvas suggested prompts and partner with Copilot to iterate on and polish subsections of the document.	Improved responses Jumpstart creativity/ productivity	Coming soon Now
	Prioritize my inbox in **Outlook** quickly analyses your entire inbox and prioritizes your emails based on topics, key words, or people that are important to you; concise summaries make it easy to stay on top of important information.	Supports inbox sorting and prioritizes responses	Public Preview in late 2024
Copilot Agents & Copilot Studio Agent Builder	**Copilot agents** automate and streamline processes. **Agent builder** gives anyone the ability to easily create an agent with specific subject-matter expertise – from a coach to a brainstorm partner to a field-service technician.	Opens agent build to BDMs vs. IT only	Now Public Preview: BizChat in Sep, SharePoint in Oct

How Wave 2 innovations support the marketing function

Real life example of BizChat and M365 Copilot application

01 Use **Copilot BizChat to build me a chart** of the announcements. Turn **chart into a Copilot Pages to share** with colleagues I'm collaborating with *(< 5 min)*
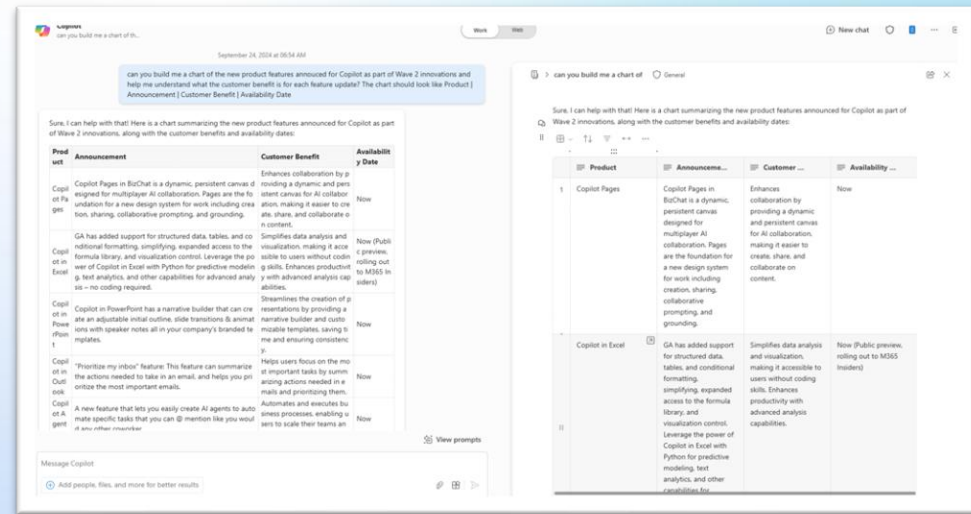
02 **Use Narrative Builder in PowerPoint** to outline my presentation and **leverage Copilot to build my slides** using the template for today *(< 20 min)*
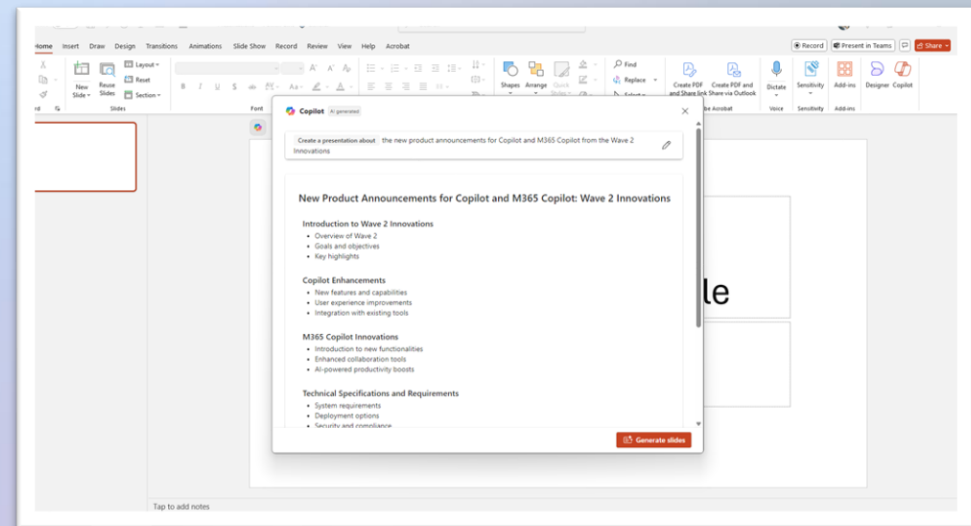
03 Catch up on what I missed while I was working using **Teams recaps, now featuring chat insights,** and **let Outlook prioritize** my inbox so I can action the most important email first *(< 20 min)*

Microsoft 365 Copilot Wave 2 Resources

Updated materials to share product innovations and use announcements to build intent and drive sales

- **[Read the blog](#) , understand how to [realize value](#) and watch the [announcements keynote](#)**

- **Check out [each demo](#) and learn about the [Wave 2 Innovations](#)**

- **Share the product announcements with your customers who are on Microsoft Business Premium, Microsoft E3 and Microsoft E5 who are high Team users (#1 Copilot function) via this email**

- **If you have not downloaded [BizChat](#) *(free Copilot chat!)* do that today and check out these top tips for business users**

Common challenges we've heard from customers:

Uncertainty about where to begin

Desire guidance and direction on best way to get started

Preparing for AI seen as complex

Desire a simplied approach to starting their AI transformation

Concerns about upfront commitment

Would like to to evaluate without long-term commitment

Expanding Copilot to a team

Enhance individual workflow and collaboration
with a team or department

Many customers start with
one or two users

Starting with a team promotes
greater collaboration

Microsoft 365 Copilot
Drive Business Transformation with Copilot

Accelerate M365 Core Suites	**Scale your Copilot GTM**	Cross-sell with Premium value

15% off
Microsoft 365 Copilot

Unlocks

- Get started with a team or department
- Partner as Customer Zero
- Capitalize on customer interest

Details

- Annual Term
- New and existing Copilot for M365 customers with qualified pre-req SKUs
- Min 10 seat, max of 300 seats per eligible customer

Recipe for success

- Partner as Customer Zero
- Create bundle – provide simplicity & confidence
- Functional focus – users / scenarios / success metrics
- Address security and data governance
- Use Co-Term – reduce upfront commitment

Available to All Markets from Sept 1st, 2024 — December 31st, 2024
For more details, please review the Global Promo Readiness Guide https://aka.ms/PromoReadinessGuide

Contoso Consulting

Ready.
Set.
Copilot.

Setup, explore and unlock AI value quickly and confidently

→ Get started today!

$5,000

Unlock what's possible with expert guidance, setup and training – commitment free

Professional guidance to ensure a smooth start to your Copilot journey, from identifying the right users to security recommendations

Training and resources to help you succeed

+ 10 Microsoft 365 Copilot licenses[1]

Suggested price point

15 hours of partner services

Microsoft provided

Minimize initial cost Co-term + promo
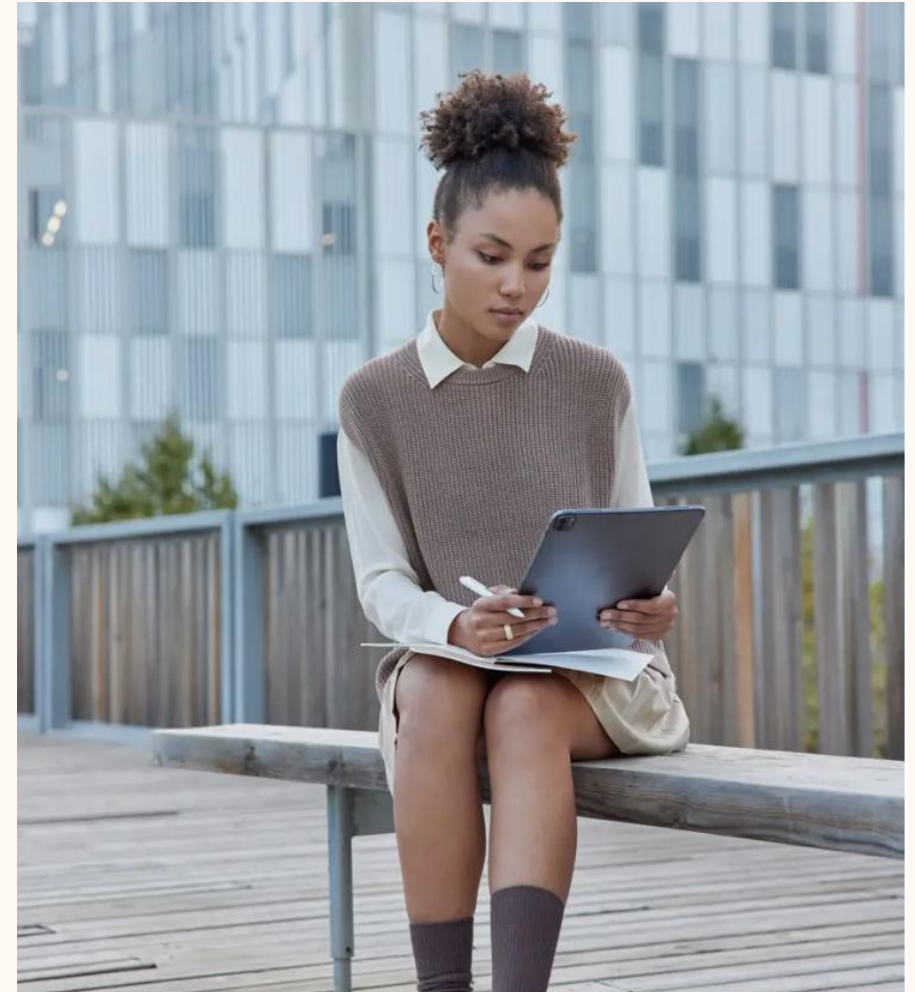
Drive 1:Many Copilot Follow up

Copilot for Microsoft 365 QuickStart Training

Agenda:
- Introduction to Copilot
- Prompting Basics
- Customer Services, Sales, Marketing, Human Resources
- Closing notes with Tips & Tricks

You can ask questions during the entire session using the chat managed by our Copilot professionals

	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
English	Copilot for Microsoft 365 QuickStart Training 16.09.2024 | 9-11:30am | PDT Register now	Copilot for Microsoft 365 QuickStart Training 02.10.2024 | 9-11:30am | PDT Register now	Copilot for Microsoft 365 QuickStart Training 06.11.2024 | 9-11:30am | PDT Register now	Copilot for Microsoft 365 QuickStart Training 04.12.2024 | 9-11:30am | PDT Register now
German	Copilot for Microsoft 365 QuickStart Training 16.09.2024 | 9-11:30am | CEST Register now	Copilot for Microsoft 365 QuickStart Training 02.10.2024 | 9-11:30am | CEST Register now	Copilot for Microsoft 365 QuickStart Training 06.11.2024 | 9-11:30am | CEST Register now	Copilot for Microsoft 365 QuickStart Training 04.12.2024 | 9-11:30am | CEST Register now
French	Copilot for Microsoft 365 QuickStart Training 16.09.2024 | 9-11:30am | CEST Register now	Copilot for Microsoft 365 QuickStart Training 02.10.2024 | 9-11:30am | CEST Register now	Copilot for Microsoft 365 QuickStart Training 06.11.2024 | 9-11:30am | CEST Register now	Copilot for Microsoft 365 QuickStart Training 04.12.2024 | 9-11:30am | CEST Register now
Spanish	Copilot for Microsoft 365 QuickStart Training 16.09.2024 | 9-11:30am | CST Register now	Copilot for Microsoft 365 QuickStart Training 02.10.2024 | 9-11:30am | CST Register now	Copilot for Microsoft 365 QuickStart Training 06.11.2024 | 9-11:30am | CST Register now	Copilot for Microsoft 365 QuickStart Training 04.12.2024 | 9-11:30am | CST Register now

[Microsoft 365 Copilot QuickStart Training](#)

Note: As this experience is hands-on it requires attendees to follow along with their own license, hence **a Copilot license is required**

Overview of recommended services

Plan rollout

Identify scenarios, personas and define success metrics

Assess Readiness

Review and evaluate data and security recommendations

Deploy Copilot

Configure settings, assign licenses and ready end-users

Track progress

Monitor adoption and previously defined metrics

M365 Copilot – CSP Partner Earning Opportunity

Cloud Solution Provider incentives can bring additional profitability to help build your Microsoft business.
Beyond the recurring, high-margin, monthly revenue from managed services, CSP incentives allow you to earn more!

Indirect Resellers

Incentive Structure	Rate	Earning Split/ eligibility
Standard ERP vs CSP Net price (at suggested ERP)	**Determined by IP****	n/a
Core Incentive	3.75%	60% Rebate 40% Co-op
Global Strategic Product Accelerator – Tier 2	7%	
Customer Add Incentive (if applicable)	15%	
Total Margin + Incentive	**25.75%+Margins**	
CSP Briefings	**Upto $1500** (for Market A- US,Canada) (Rate varies for other markets)	Provided Briefings POEs are submitted and attended customer buys 10+ licenses within 60 days

Deal Example – 10 Copilot seats deal (Deal size - $3600)

Incentive Structure	Rate	Earning Split/ eligibility
Standard ERP vs CSP Net price (at suggested ERP)	**Determined by IP**	n/a
Core Incentive at 3.75%	121.5	60% Rebate 40% Co-op
Global Strategic Product Accelerator – Tier 2 at 7%	$226.8	
Customer Add Incentive at 15%	$486	
Total Incentive + Margin	$834.3 + Margins	
CSP Briefings	Upto $1500	Provided Briefings POEs are submitted and attended customer buys 10+ licenses within 60 days
Total Incentives+ Margins	**$2334.3 + Managed Services**	

M365 Copilot 15% promo

MW SMB Win Formula
Drive Business Transformation with Copilot

Seller Execution: Expand existing Microsoft 365 customers using eligible prerequisite SKUs to Copilot for Microsoft 365 users

Business Outcome: Copilot for Microsoft 365 revenue, Copilot for Microsoft 365 Seats

Resources: Modern Work for Partners – Copilot for Microsoft 365

Hero Programs

1. Level Up
2. Cloud Ascent/Cohorts
3. CSP Briefings
4. Copilot 15% Promo
5. End-User Virtual Persona Training
6. M365 Lighthouse and Sales Advisor

Practice Building	Listen & Consult	Inspire & Design	Empower & Achieve	Realize Value	Manage & Optimize
Learn to Sell	**Drive Awareness & Consideration**	**Built Intent**	**Win the Deal**	**Deploy & Drive Usage**	**Expand Seats/Copilots**
Review the partner practice building guide and, at a minimum, start using Copilot	Identify high propensity targets using Cloud Ascent data & solution play cohorts	Build intent through 1:Many Copilot CSP Briefings	Support customers through guided adoption and change management using the Copilot for Microsoft 365 Success Kit & step by step roll out management with the Copilot for Microsoft 365 interactive flipbook for partners	Leverage the Copilot for Microsoft 365 Success Kit & follow the step by step guide in the Copilot for Microsoft 365 interactive flipbook for partners	Target existing high propensity customers with Sales Advisor AI driven insights https://aka.ms/m365lighthouse
Attend a Copilot specific virtual or in-person **Level Up bootcamp**	Drive awareness through digital marketing & seller prospecting using the Campaign in a Box	Accelerate opportunities with a specific 1:Few Multi Customer Briefings		Enable company employees (end users) to get the most out of Copilot for Microsoft 365 using the Quick Start Guide and Top Ten To Try	Regularly review health & proactively optimize to increase usage & ensure business health striving for >40% monthly active usage
Review the Copilot for Microsoft 365 partner opportunity deck for CSP partners & SMB Partner Playbook – Drive Business Transformation with Copilot	Review and leverage the go to market materials for initial customers conversations	Address common customer concerns/objections • SMB early value deck • Securing Copilot for Microsoft 365 in SMB • Copilot for Microsoft 365 technical overview presentation	Offer an applicable accelerate engagement, as eligible	Make it fun with a Launch Day	Identify prerequisite SKU optimization such as upsell to Microsoft Business Premium, expansion of Copilot for Microsoft 365 licensed users and/or identify the next set of Copilot Extensibility scenarios
Learn how to execute a pilot using the Copilot for Microsoft 365 interactive flipbook for partners	Showcase the power of Copilot for Microsoft 365 through CDX demos, the Copilot Immersion Experience and persona-based use cases • Copilot for Microsoft 365 Immersion Experience • Click-through demos • Scenarios Library	Provide customer specific insights with a Copilot Readiness Solution Assessment	Jumpstart Partners: • Drive Business Value conversations with customers using the pre-sales MCI Value Discovery Engagements • Use the Evaluation and Adoption Accelerators to help customers rapidly evaluate Copilot and support the case for expansion	*Managed Partners:* Work through their PDM to schedule a Microsoft led end user training sessions OR	Expand to key departments and focus on a set of tailored scenarios. Build on successes by scaling to additional users or departments
Understand common data security objections		Discuss Restricted SharePoint Search (RSS) as a temporary solution to trial Copilot for M365 while exploring additional data security enhancements	Adoption Factory Partners work with your PDM to leverage FY25 engagement types	Attend a Microsoft led virtual prompts and personas training	Learn more about additional Microsoft Copilots (develop skills section)
Review snackable content for deeper dives on the CSP Copilot for Microsoft 365 page			In-Market Offer: Copilot for Microsoft 365 - 15% off annual term	Help customers test their skills in Copilot Lab	

Partner, Vendor Tele   Partner, Vendor Tele   Partner

Next steps

Get started with Copilot

1 **Get trained**

Attend the CSP Level Up Bootcamp series
http://aka.ms/LevelUpCSPBootcamp

Create your customizable campaign with Campaign in a Box

2 **Engage your customers**

Identify high propensity targets using Cloud Ascent data & solution play cohorts

Land the Copilot value with CSP Briefings
https://aka.ms/CSPBriefings

3 **Close deals and expand**

Leverage the 15% off Copilot for Microsoft 365 promo as a part of your Getting Started customer offer
https://aka.ms/CopilotGettingStarted

Target existing high propensity customers with Sales Advisor AI driven insights
https://aka.ms/m365lighthouse

Secure Productivity Win Formula

👥 **Customer Outcome**	Enable customers' to safely run their businesses from anywhere with a secure, comprehensive, AI-powered cloud solution in a hybrid work scenario.
🤝 **Partner Execution**	Drive deployment and usage in Enterprise; Drive new customer acquisition and upsell BP/ME3 in SMC

Resources: [Practice Development](#) | [Partner GTM](#) | [CSP](#)

Practice Building	Listen & Consult	Inspire & Design	Empower & Achieve	Realize Value	Manage & Optimize
Learn to Sell	**Drive Awareness & Consideration**	**Built Intent**	**Win the Deal**	**Migrate & Deploy**	**Drive Expansion**
Review the [FY25 MW Partner Playbook](#), [FY25 CSP Go-to-Market Playbook](#) & [SMB Partner Playbook – Secure Productivity](#)	Identify high propensity targets using [Cloud Ascent data](#), [SMB Cohort Sales Guide – Secure Productivity](#) and GPS Spark	Build intent through [1:Many CSP Briefings](#) (Coop-able webinars) and with [1:Few Multi Customer Briefing](#)	Support customer pricing with [in-market offers](#) In-Market Offers:	Help eligible customers move to ME3 or ME5 using the [CSP Adoption Accelerator for Microsoft 365 E3 and E5](#) and or the [Microsoft 365 Deployment Offer](#)	Leverage [Sales Advisor](#) for customer lifecycle management and get signals for future growth opportunities
Attend a virtual or in-person [Level Up bootcamp](#) & pass the knowledge test to earn your professional badge	Drive awareness through digital marketing & seller prospecting using the [SMB Campaign in a Box,](#) [SMC/Ent Campaign in a box](#) and [DMC SMB campaign](#), [DMC SMC/ENT campaign](#)	Provide customer specific insights with a [Solution assessment](#) [Overcome objections and compete](#) using upsell guides (accelerate sales section)	• [Microsoft 365 E3 - 15% off annual term](#) • [Microsoft 365 E3 - 10% off 3-year term](#) • [Office 365 E1 Plus - 30% off annual term](#) • [Office 365 E1 - ASEAN: 60% off annual term, LATAM: 40% off annual term](#)		Consider customers to expand to [Copilot for Microsoft 365](#) Secure Productivity [Partner Incentives](#)
Continue your readiness via on demand [Level Up sessions](#)	Review and leverage the [SMB Bill of Materials](#) and the Elevate security [for Copilot with Microsoft 365 E3 customer pitch deck](#) for initial customers discovery conversations	• [Microsoft 365 Exchange Online to Business Premium](#) • [Microsoft 365 Business Standard to Business Premium](#) • [Microsoft 365 Business Basic to Business Premium](#)			
Understand available add-ons & SKU comparisons					

Partner, Vendor Tele — Partner, Vendor Tele — Partner

Get ready to drive deals with Microsoft 365 Promotions

	Offer	Details	Availability	FAQ	Readiness
1	Microsoft 365 E3 15% off annual term	Annual Term | Annual Bill & Monthly Bill For first-time purchase only Max 2,400 seats Valid until 6/30/2025	Worldwide	aka.ms/CSP_M365_E3_PromoFAQ	• Attend the CSP Level Up Bootcamp series aka.ms/LevelUpCSPBootcamp
2	Microsoft 365 E3 10% off 3-year term	3-year term | 3-year Bill & Annual Bill For first-time purchase only Min 100 seats | Max 2,400 seats Valid until 6/30/2025	Latam	aka.ms/CSP_3yr_ME3	• Assess customer productivity and security requirements with CSP Briefings https://aka.ms/CSPBriefings
3	Office 365 E1 LATAM: 40% off annual term	Annual Term | Annual Bill & Monthly Bill For new-to-MS customers + Opt-In T&Cs Min 100 – Max 2,400 seats Latam valid until 12/31/2024	Latam	aka.ms/LATAMOE1Promo aka.ms/OE1_ASEAN_Promo	• Target customers with M365 Lighthouse and CLAS insights https://aka.ms/m365lighthouse
4	Office 365 E1 Plus 30% off annual term	Annual Term | Annual Bill & Monthly Bill For first-time purchase only Min 100 – Max 2,400 seats Valid until 6/30/2025	Latam	aka.ms/CSP_OE1_Plus_FAQ	• New Global Promo Readiness Guide available September 3! https://aka.ms/PromoReadinessGuide

Partner Calls to Action

Take these steps to accelerate your M365 Copilot and Secure Productivity business today!

Get ready
- Leverage the **Level Up** and other readiness resources to learn more about M365.
- Learn about and understand the **Copilot Wave 2 Innovations.** Inform customers to build interest, excitement and realize revenue
- Understand what customers can most benefit of the existing **promotions**.

Set
- Use **Cloud Ascent cohorts** and **M365 Lighthouse** to identity new leads.
- Leverage existing **Campaign in a Box** content to get to market fast.
- Use **CSP Briefings** to create intent.

Sell
- Lead with Microsoft 365 E3 and Microsoft 365 Copilot as the hero pitch.
- Emphasize Microsoft´s security and productivity value vs other vendors.
- Leverage **promotions** to meet the customer where they are.

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View our bi-weekly informative posts about resources, tools and upcoming activities.

Microsoft Americas Partner Community

iii Listed group

Earn an Active Group badge

Use our Taxonomy Keywords to search for content relevant to you and your organization!

Category	Description	Taxonomy								
Partner Type (Always)	Services & solutions the partner commercializes	AllPartners	ISV	CSP	Services	Telco	GSS	MSP		
Partner Role (1)	Partner role	AllRoles	Exec	Tech	SalesAndMktg	SupportAndOperations	ProfServices	Developer	AllianceMgr	
Message Type (2)	Message type	PartnerProgram	Event	News	Deadline	ProgramOfferUpdate	WinFormula	BestPractice	DoingBizwMSFT	SuccessStory
Solution Area (3a)	Microsoft's solution area	CrossSolution	ModernWork	BizApps	Azure	Security	Surface			
Partner Stage (3b)	Stage of journey		NewtoMSFT	UnderstandBenefits	LearnSolutionAreas	GrowSkills	GoToMarket	GeneratePipeline	AccelerateDeals	GrowYourBiz
Microsoft Brand (4)	Regional taxonomy	MSFTAmericasPartner	LATAM	Canada						
Customer Segment	Customer segment		Enterprise	SMC	SMB					
Industry	Industry focus	AllIndustry	StateAndLocalGov	Retail	EDU	MFG	HealthcareAndLifeScience	FinancialSvcs	Energy	
Additional	Additional taxonomy	QuestionforGroup								

Americas Partner Blogs

Now available in French, Spanish, and Portuguese
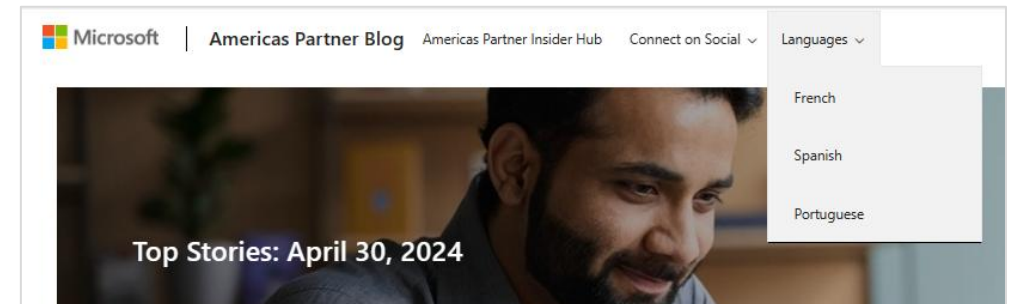
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