Microsoft

April
Americas Partner
Insider Call

Develop. Sell. Grow.

Agenda

Topic	Speaker
Welcome, Poll & Insider Scoop	Charis Brooks Partner Activation Lead, Americas GPS GTM
Meet the Partners!	Lori Borg VP, Microsoft Americas GTM Strategy
Digital Journey Initiative on LevelUp	Keith Mazzuco Partner Marketing Director, Global Partner Solutions
No Better Time Update	Arun Subramanian Partner Marketing Director, Global Partner Solutions
Getting Started with M365 Copilot Chat + Agents	Shivani Ranganathan Partner Go to Market
Understanding How to Sell & Position Pay as you Go Agents – Value Envisioning Tool	Mike Mercandino Director, Modern Work Time Zone Lead-Americas
Wrap Up and CTA	Charis Brooks Partner Activation Lead, Americas GPS GTM

Join the Microsoft Partner Insider Calls

Register for our monthly
Partner Insider Call!
Microsoft Events - Americas Partner
Insider Call | May Edition

Mark Your Calendar:

Copilot Series
May 7, 2025 @ 10:00 AM PT

NEW!! **Biz App Edition**
May 8, 2025 @ 11:00 AM PT
Americas Partner Insider Call | BizApps May Edition

If you missed any calls before April 2025!!
Americas Partner Insider CallAMERICAS Partner One

Join our next event

Empowering Partners: Trust and Security in the AI world
April 24, 2025 @ 11:00 AM PT
Register here!

Speakers

Mark Richman
Senior Director of Product Management

Nina Harding
CVP, Americas Global Partner Solutions at Microsoft

Lori Borg
Microsoft Go-to-Market Executive

Dennis Garcia
Microsoft Assistant General Counsel

Lara Rubbelke
Chief Technology Officer- Microsoft Americas

Tony Surma
CTO, Microsoft Americas Global Partner Solutions

Charis Brooks
Partner Activation Lead, Americas GPS GTM at Microsoft

Matthew Palm
Chief of Staff - Americas Services Partners

Microsoft Partner and Customer Charity Event – Denver, CO

Join us for Microsoft Scramble for Sight

Presented by RE/MAX in support of the Foundation Fighting Blindness

July 22nd: Microsoft Partners Scramble for Sight (Microsoft, Partners & Clients Only)

July 22nd: Concert Featuring "That Eighties Band" Celebrating 25th Anniversary

July 23rd: Classic Microsoft Scramble for Sight

July 23rd: Dinner, Program and Auction

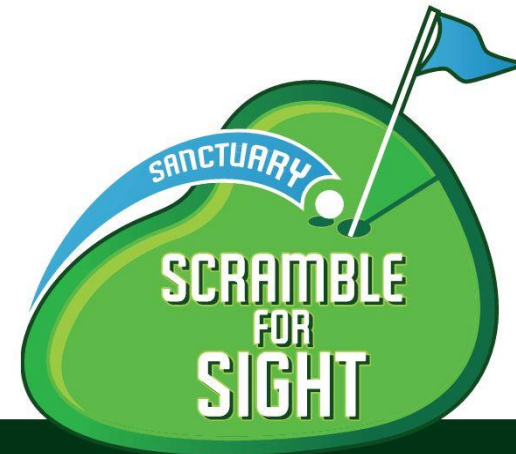Help us celebrate our 25th anniversary at the exclusive Sanctuary Golf Club!

Scan to Donate Auction Items!

The Foundation Fighting Blindness is a 501(c)(3) organization. EIN 23-7135845.

Contact Us: Info@ScrambleForSight.org | Scott Burt, Scramble for Sight Co-Chair

Visit ScrambleForSight.org

LevelUp for Partners
skillupwithlevelup.com

<u>LevelUp sponsored by Microsoft</u> (skillupwithlevelup.com) provides partner learners access to high-value sales, pre-sales and technical skilling content anchored on all our Microsoft Cloud Solution Areas and GTM Solution Plays. LevelUp is a self-directed, self-paced interactive learning management system that includes assessments and badges for course completions.

Organizational and Learner Benefits

- Access to an extensive catalog of high-value on-demand Microsoft Cloud skilling courses
- Guided learning paths anchored on Microsoft GTM Solution Plays – sales, pre-sales, technical
- Sales skilling to enable Microsoft partner sellers to build mindshare & sell more effectively
- Pre-sales skilling to enable Microsoft partner tech sellers to convert mindshare into customer projects
- Project Ready skilling with hands-on-labs to improve delivery team deployment capability
- Exam-style assessments to gauge role type discipline competency across the Microsoft Cloud
- Offline support with bidirectional email integration and built-in chat function
- Partner orgs have flexibility to purchase seat capacity to scale up to meet their immediate skilling needs

Pre-Sales

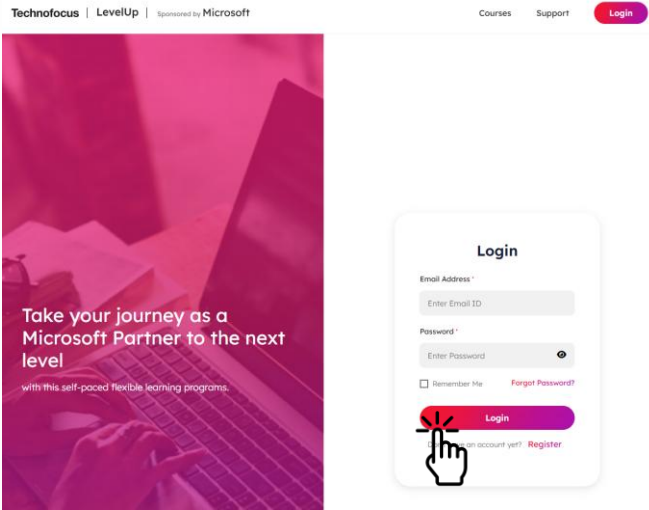Drive pipeline

Sales

Improve POC and RP capability

Technical

Improve deployment capability

LevelUp Skilling Digital Journeys For Partners

Curated Learning path & resources tailored to your needs

1

Create an Account or Login To LevelUp

2

Answer Learning Assessment Questions to define learning goals, solution area focus & needs

Solution Area

Azure

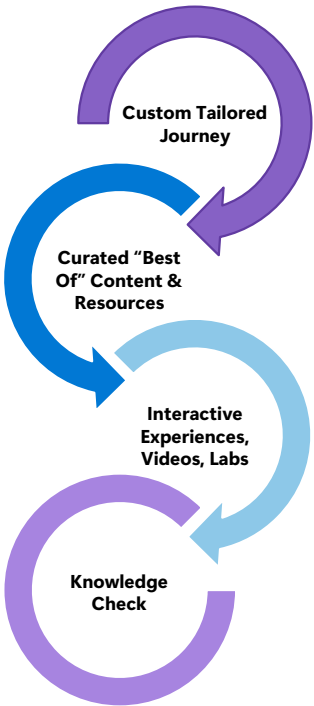Security

Modern Work

Assessment Focus Area

Migrate	Cybersecurity
Copilots	Data Analytics
AI Design Wins	Cloud & AI Security
M365	Teams

Training & Resource Needs

Partner Onboarding	Go-To-Market
Sales	Technical
Customer Success	

3

Curated & Tailored Self-Paced Learning Journey based on your learning needs & assessment inputs

Custom Tailored Journey

Curated "Best Of" Content & Resources

Interactive Experiences, Videos, Labs

Knowledge Check

LevelUp Skilling Digital Journeys For Partners
Curated Learning path & resources tailored to your needs

Get Started on your Skilling Digital Journey Today

- [Partner Onboarding](#) (use access code: GUBQ-QFRB)
- [Microsoft Security Copilot](#)
- [Drive Business Transformation with Microsoft Copilot 365](#)
- [Innovate with Azure AI Platform](#)
- [Drive Windows in the Cloud with Windows 365 Cloud Endpoints](#)
- [Modern Security Operations](#)
- [Data Security for AI](#)
- [Migrate to Azure](#)
  - ✓ Migrate to Azure –Linux
  - ✓ Migrate to Azure –AVS
  - ✓ Migrate to Azure -SAP on Azure
  - ✓ Migrate to Azure –AVD
  - ✓ Migrate to Azure -Azure Local
  - ✓ Migrate to Azure -Oracle Database@Azure
  - ✓ Adaptive Cloud

Coming Soon: Microsoft Teams, Cloud Security, Accelerate Data Analytics Journey with Microsoft Fabric

No Better Time: MW+S CSP Updates & Trainings

UPDATES

5% Price Increase on Monthly billing for Annual Subscription	**PC UX Changes** 1. **EAs to CSP Renewals with Teams** 2. **AI Automation for cancellation & refund of services**	**Copilot Vision & Value** MCI engagement reopens (Jumpstart partners)	**Secure Productivity Proof of Value** MCI engagement with higher payouts (Jumpstart partners)	**BP + E5 Security Add-on** **O365 & EMS E3** **+** **E5 Security or E5 Compliance Add-ons**	**Promos** M365 E3: Ends 30 Jun M365 E5: Ends 30 Jun **M365 Copilot: 30 Jun** ⭐
From April 1, 2025	From April 1, 2025	From April 1, 2025	From April 1, 2025	Now	Varied

TRAININGS

|				
Microsoft AI Skills Fest (50 days of AI learning)	**Unlock Microsoft Security Sales with New Opportunities in CSP**	**Microsoft AI Agents Day for Partners**	**Accelerate CSP Growth with Enterprise Customers & new Copilot value**	**Microsoft 365 Copilot, Copilot Chat and agents (Level Up)** Day 1: Sales Bootcamp Day 2: Technical Bootcamp Day 3: Technical Bootcamp
Starts April 8th	Apr 16-17	April 23-24	May 6, 2025	On Demand

The opportunity is here – and so is the market

Channel new work patterns into increased revenue

75% of people are already using AI at work

46% of them started using it less than 6 months ago
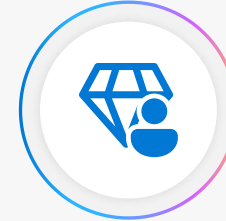
46%

75%
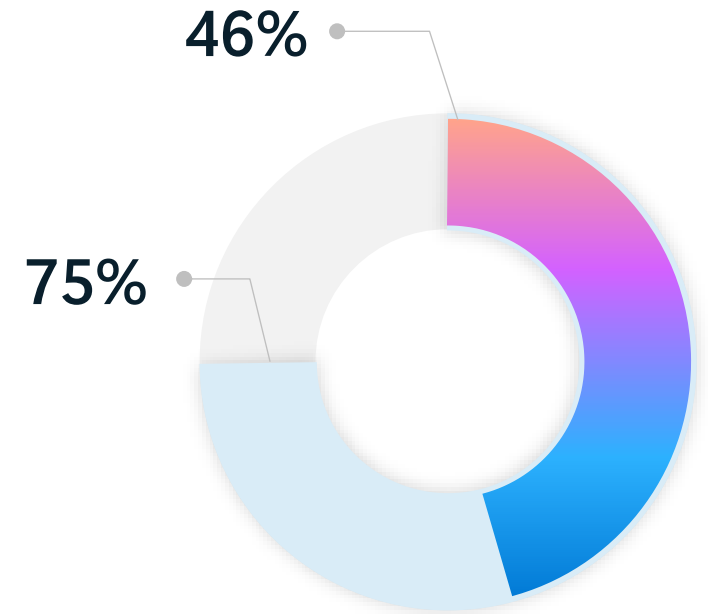
This is our moment

Lead AI transformation when you empower your customers to
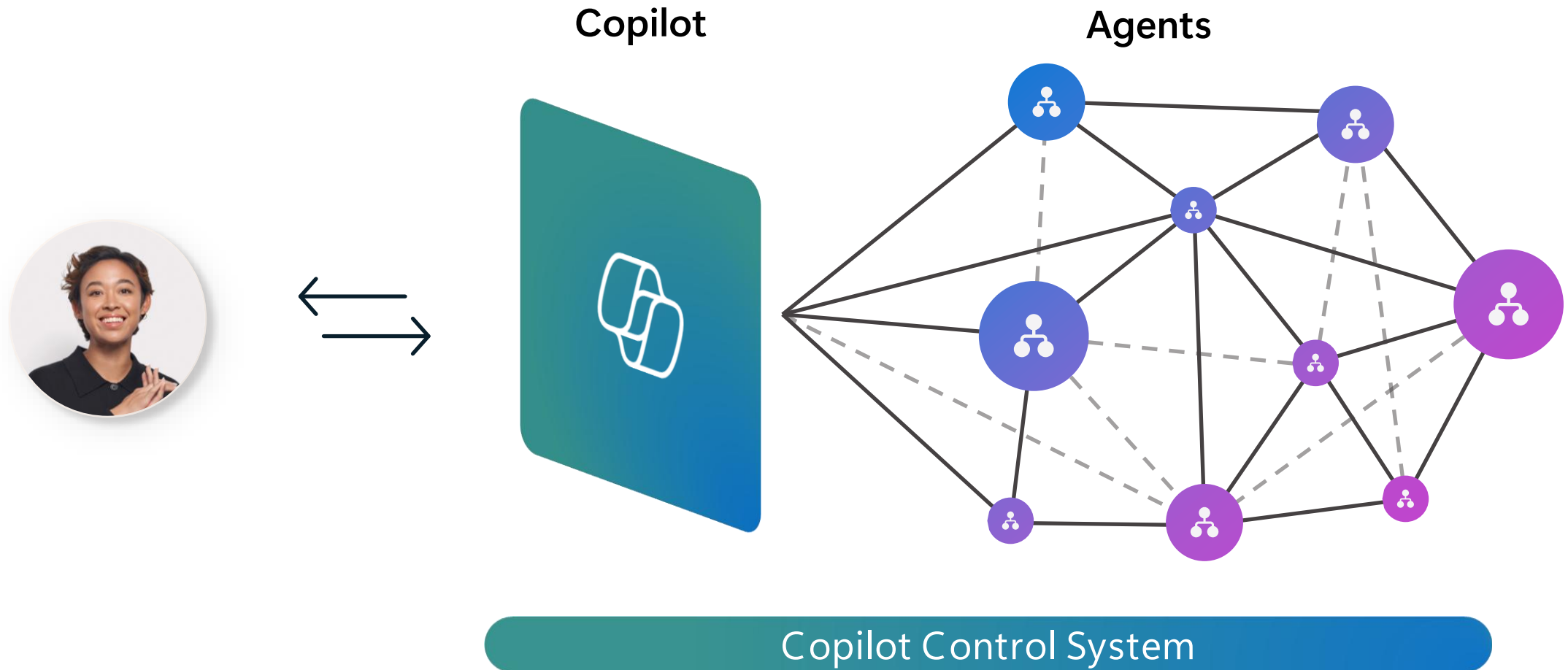
Drive growth

Manage costs

Deliver value

Copilot is the **UI for AI**

Copilot

Agents

Copilot Control System

Go to market in CSP with Copilot

Hero motion

Microsoft 365 Copilot
Acquire new customers and drive continuous upsell from Copilot Chat
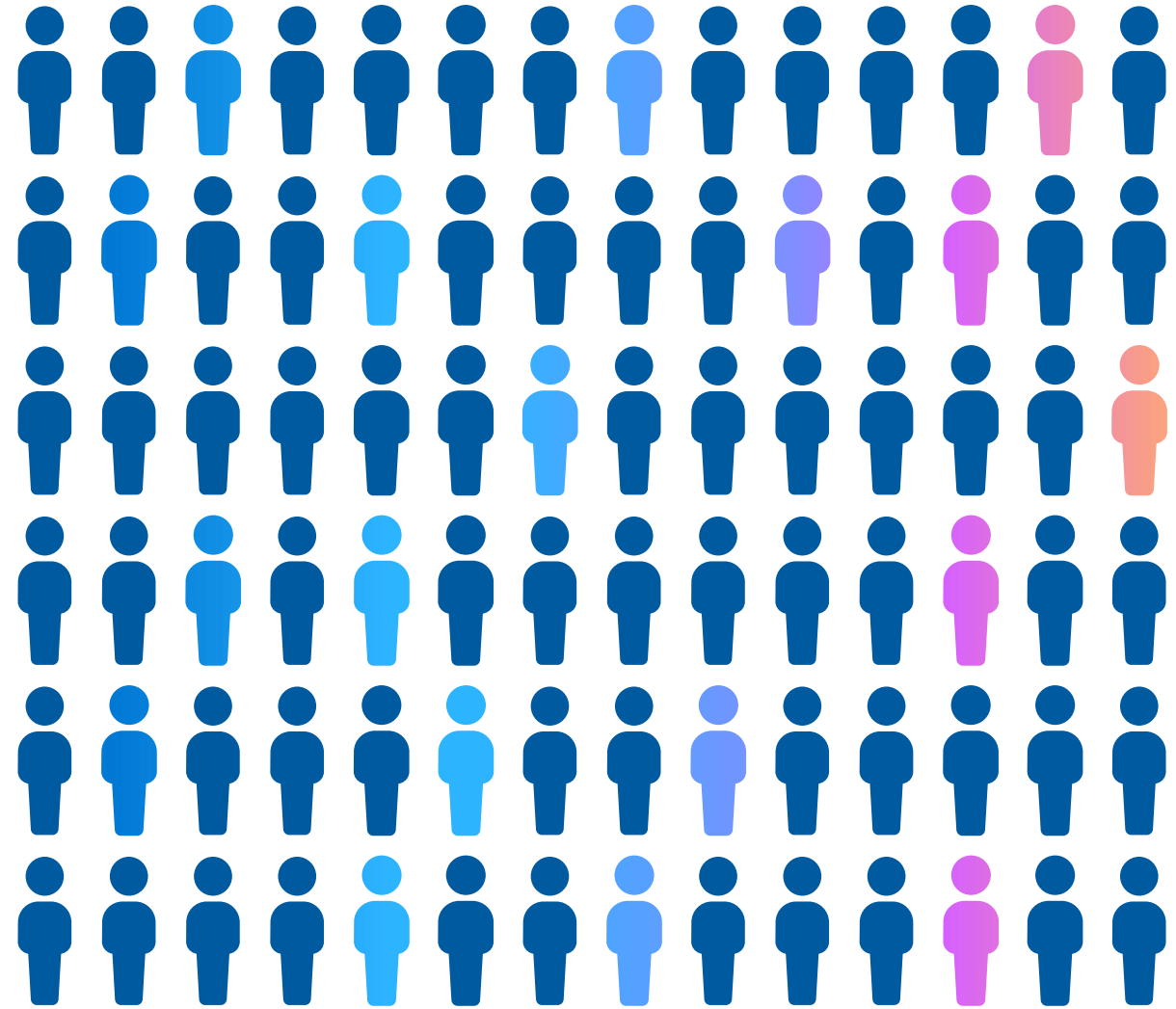
Microsoft 365 Copilot Chat
Acquire new customers and drive organization wide AI adoption with M365 Copilot customers

+

Agents
Attach to M365 Copilot and Copilot Chat customers

Your Organization

M365 Copilot   Copilot Chat

Go to market with Copilot in CSP

1

Get customers AI ready

Assess customer's use cases, technical readiness and security posture and deploy M365 Premium SKUs

2

Onboard and engage

Build packaged offers and position M365 Copilot as the hero motion, drive organization wide AI adoption with Copilot Chat and build and deploy agents. Execute end user training
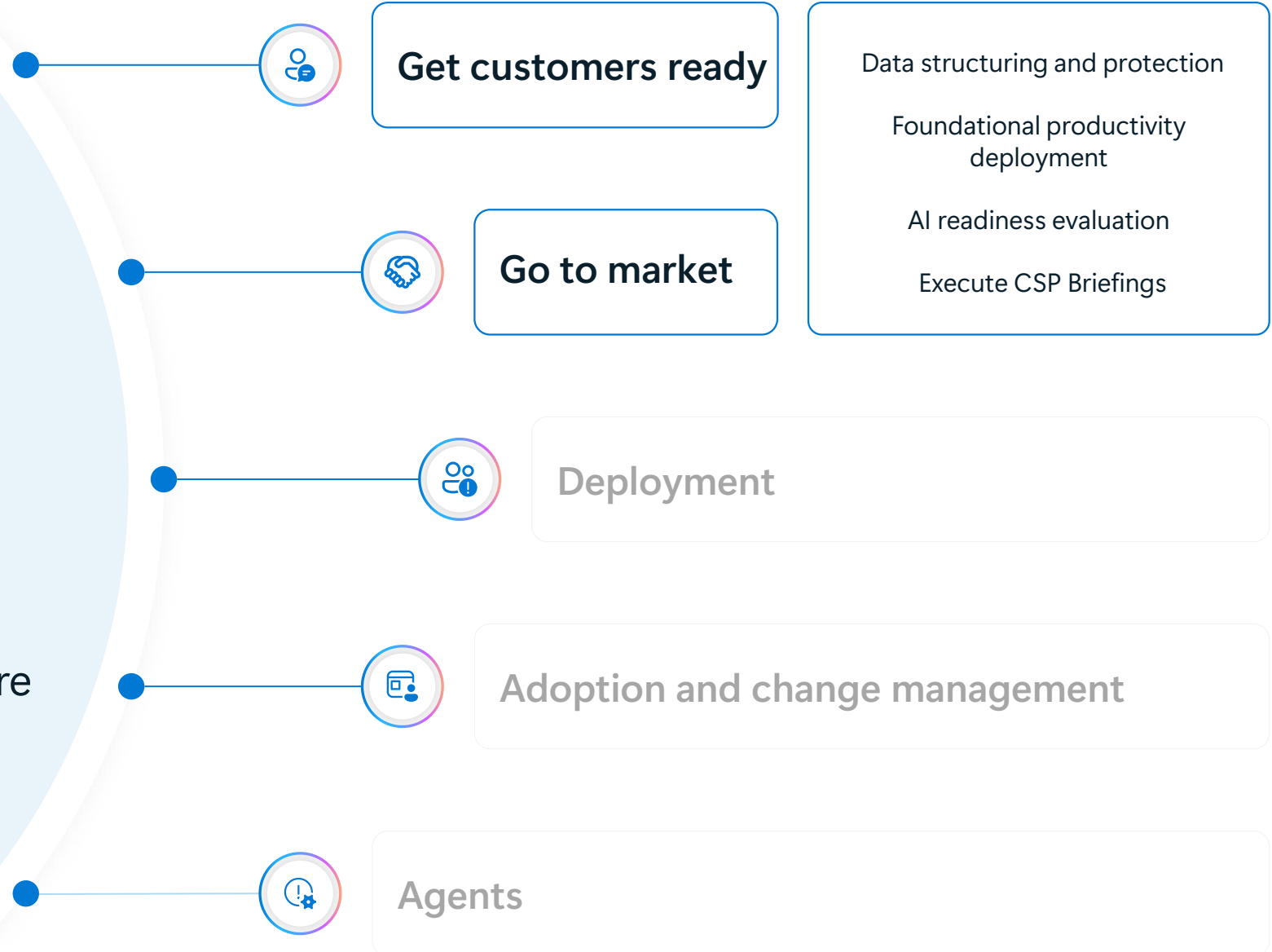
3

Deliver impact

Provide ongoing managed services and drive continuous M365 upsell from Copilot Chat

Service opportunities begin before the pitch

Offer new services for Copilot preparation when customers are in the "get AI-ready" phase

Get customers ready

Go to market

- Data structuring and protection
- Foundational productivity deployment
- AI readiness evaluation
- Execute CSP Briefings

Deployment

Adoption and change management

Agents

Copilot service opportunities are extensible – just like Copilot

Extend attach services from deployment, to adoption, and beyond

Advisory

Readiness

Adoption and change management

- Deployment services
- User adoption and training

Attach agents

- Agent attach

Sell ongoing managed services

- Ongoing managed services

Getting Started with AI Requires both Usage & Selling

For partners, AI is a two-pronged process where partners learn to use Copilot and learn to sell at the same time.

Learn how to **use Microsoft 365** Copilot and develop a daily habit.

Microsoft 365 Copilot Partner Guidance

Learn to sell with trainings and bootcamps. Understand Copilot GTM strategy, data security, and how to identify M365 Business Premium customers.
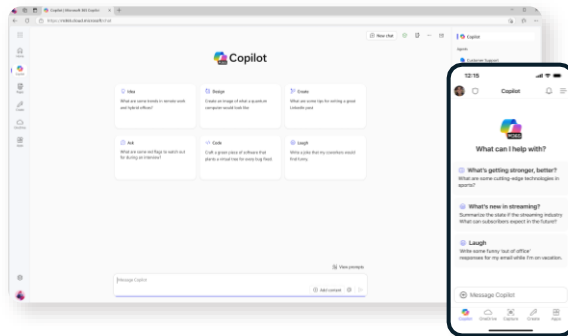
Use Copilot Chat on the go

Download the Microsoft 365 Copilot mobile app and sign in with your work or school account to access Copilot Chat
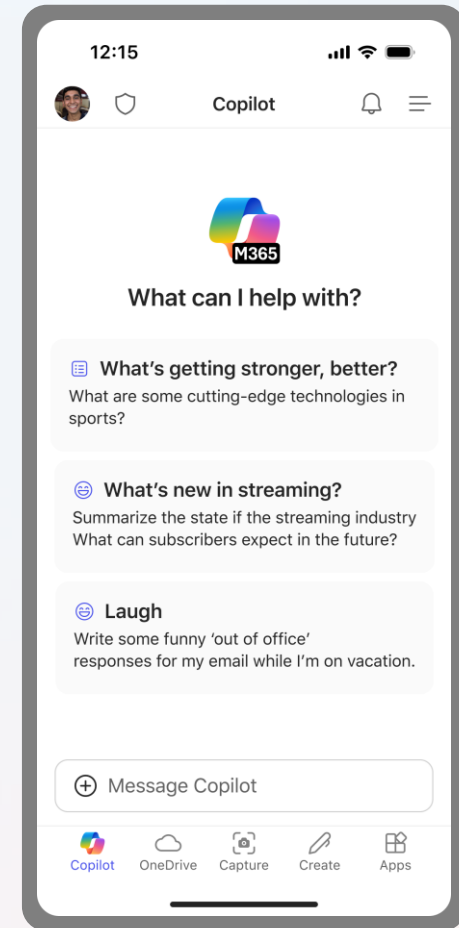
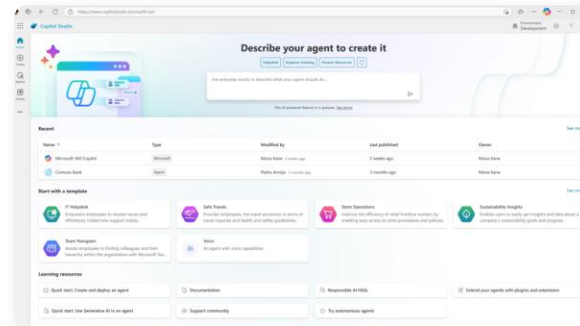# Microsoft 365 Copilot Chat

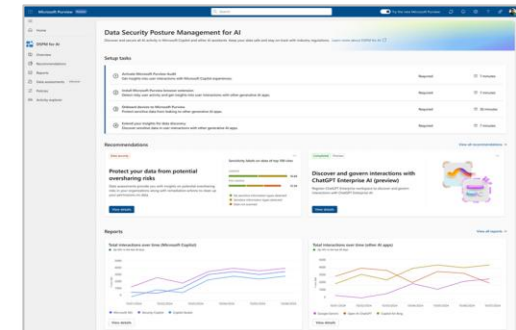## Chat
Free, secure AI chat –
powered by GPT-4o and web grounded

\+

Agents
Integrated into the chat experience and
paid for on a consumption basis

\+

IT Controls
Enterprise Data Protection
and agent management

Sign in with your work account

1 Navigate to M365Copilot.com on your preferred browser on your device to get to Copilot Chat.

2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon 🛡 next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.
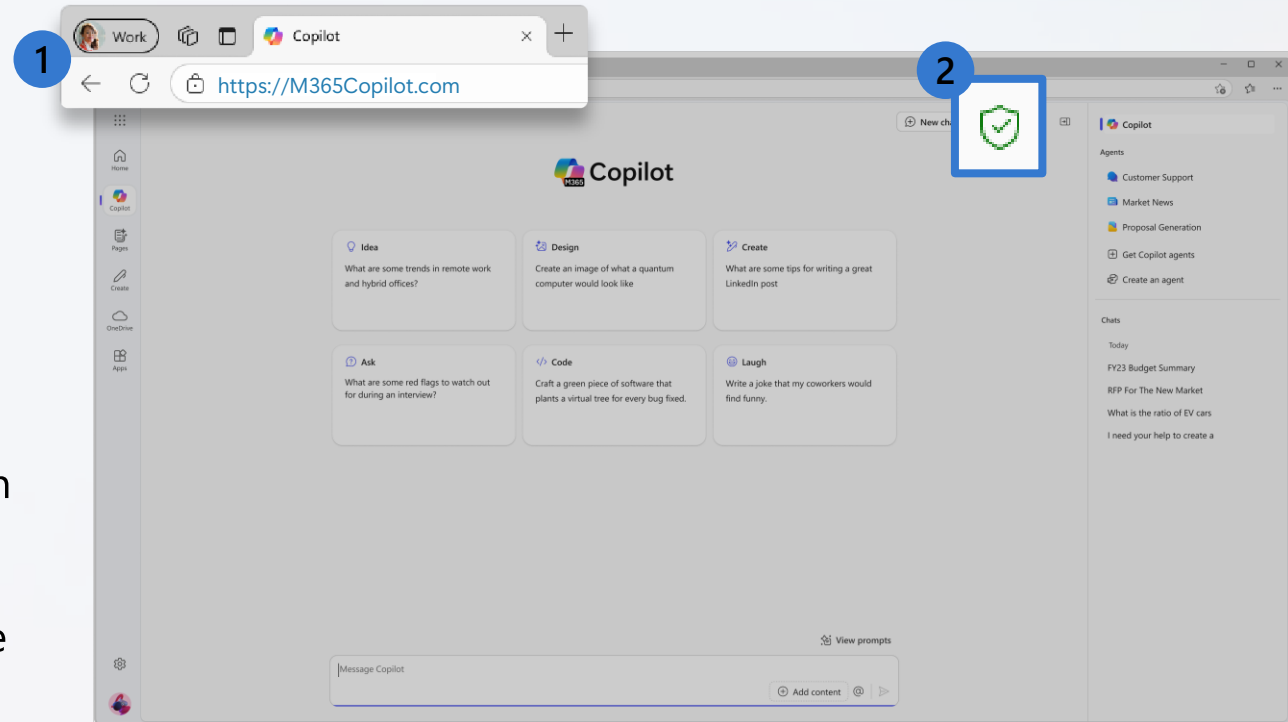
⚠️ If you are not signed in with your work account, Enterprise Data Protection does not apply.

How to chat in 3 steps

1. Enter your prompt

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.

Message Copilot
⊕ Add content @ ⊳

2. Check sources

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer.

Vet these sources and validate your answers.

Learn more ∨ | 1 microsoft.com | 2 contoso.com

3. Continue the conversation

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail." You can also select suggested prompts.

What is a "prompt?"

Prompts are how you have a conversation with Copilot

Use plain but clear language and provide context like you would with an assistant.

Enter your first prompt in the text box at the bottom of your screen, like *"Draft a cold call email to a customer."*
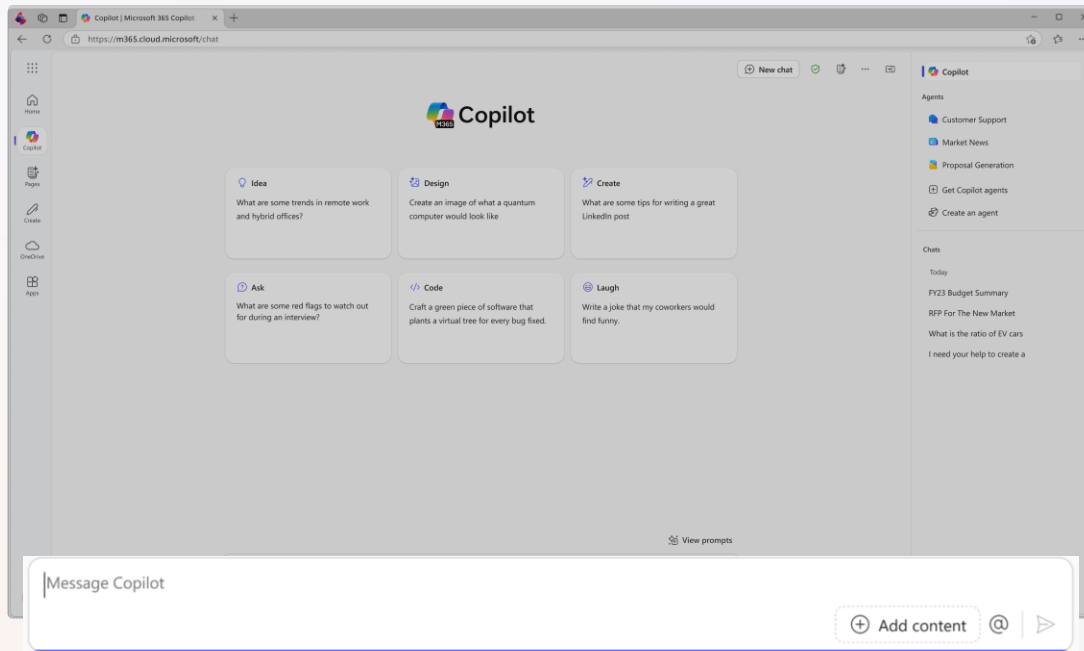
Get started by entering your prompt in the text box

What makes an effective prompt?

Less Effective

× **Vague**

× Just a few words

× No context on preferred output

Example: *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.

More Effective

✓ **Specific and detailed**

✓ In full sentences, with instructions

✓ States the tone, purpose, preferred format, etc.

Example: *I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.*

But there are no 'wrong' prompts because **natural, conversational language is welcome**. Experiment away!

Discover and share Copilot prompts

Copilot Prompt Gallery (formerly known as Copilot Lab) helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others
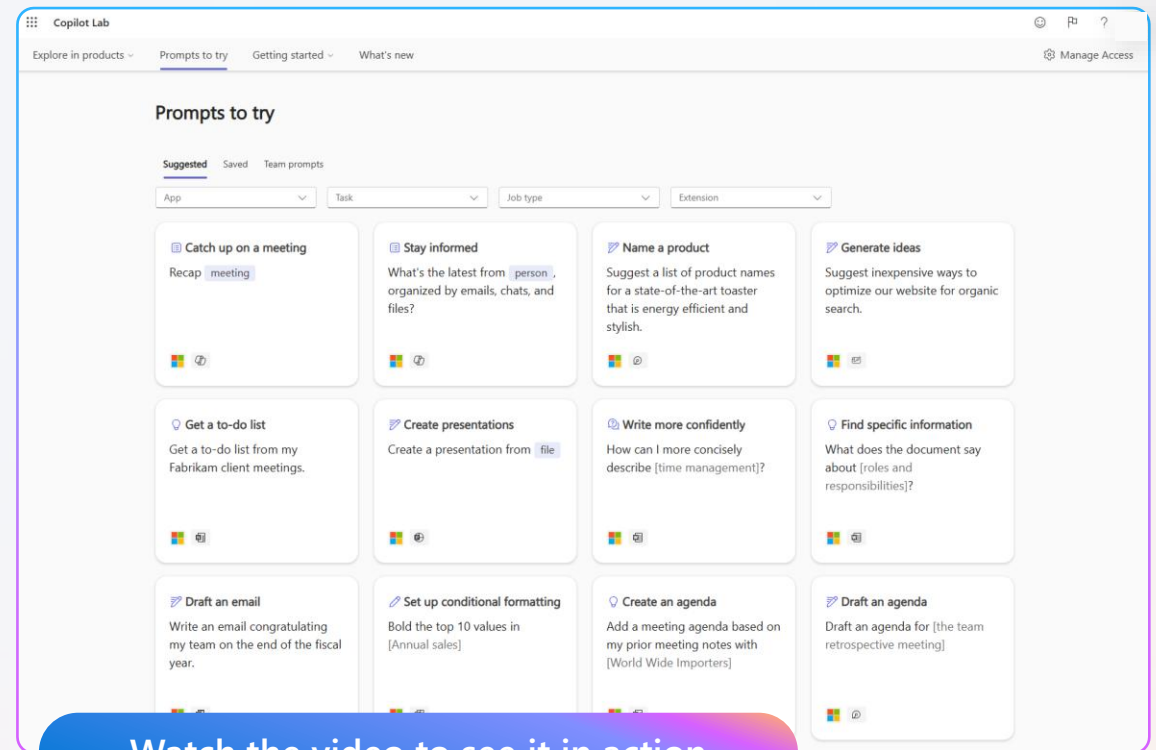
[Watch the video to see it in action]

Copilot **Business Process**

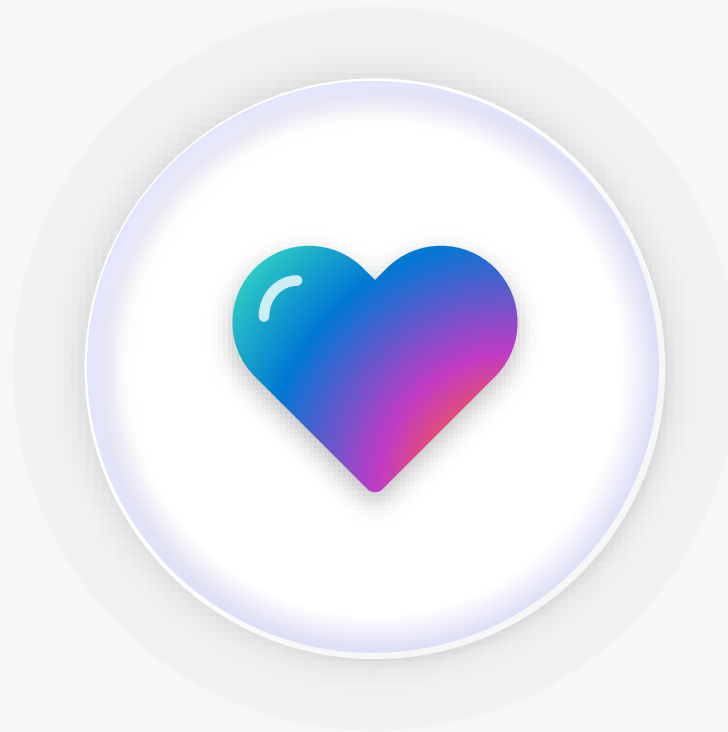# Automate tasks and processes with agents

Agents use AI to make Copilot Chat even more personalized and intelligent for your daily work. Agents automate repetitive tasks and processes – think of them like apps for Copilot. Copilot Chat comes with a set of agent templates to get started with, or you can create custom agents for your own needs[1].

Get started with agent templates by selecting "Get agents" in the right-side pane of Copilot Chat. Search for a specific template or browse the library.

Agents from Microsoft to try today:

Prompt coach	Idea coach	Writing coach	Career coach	Learning coach
Create effective Copilot prompts	Get brainstorming assistance	Refine your writing	Get personalized career advice and action plans	Learn about topics and refine your skills

Besides the agents from Microsoft, your organization may have created agents for you to use as well. You can view these in the "Built for your org" section in the agent library.

[1]Agent creation is only available if your organization admin has enabled this capability.

Automate tasks and processes with agents

Create a custom agent by selecting "Create an agent" in the right-side pane of Copilot Chat[1]. Describe what you'd like your agent to do or select "Configure" to further customize it. Creating an agent allows you to connect Copilot Chat to your organization's shared data[2] to further unlock productivity – for example, you can connect the agent to a team SharePoint site and ask the agent questions about team documents.

Top ways to use custom agents:

Automate contract reviews	Assist new hires with onboarding	Review resumes	Retrieve research materials	Get answers about company policies
Create an agent to identify key clauses, ensure compliance with legal standards, assess potential risk, explain clauses, and summarize lengthy contracts.	Create an agent to greet new team members, assist them with technical issues, answer questions, and provide helpful resources.	Create an agent to analyze resumes stored in a SharePoint library, compare them with job criteria, score candidates, and answer questions about candidates.	Create an agent that connects to a SharePoint link with research documents so you can quickly find relevant information.	Create an agent to get answers about company policies such as time off, remote work, benefits, workplace conduct, and health and safety.

[1]Agent creation is only available if your organization admin has enabled this capability.
[2]Shared data includes SharePoint files and data from your organization's Microsoft Graph connectors. Learn more about Microsoft Graph connectors.

Go to market with agents in CSP

$

Build an agent getting started offer

Build fixed price "Getting started offer" to acquire customers

$$

Offer managed services

Offer monthly managed services to grow profitability

$$$

Expand with additional scenarios and advanced features

Expand with additional use cases and features and embed in your M365 Copilot offer
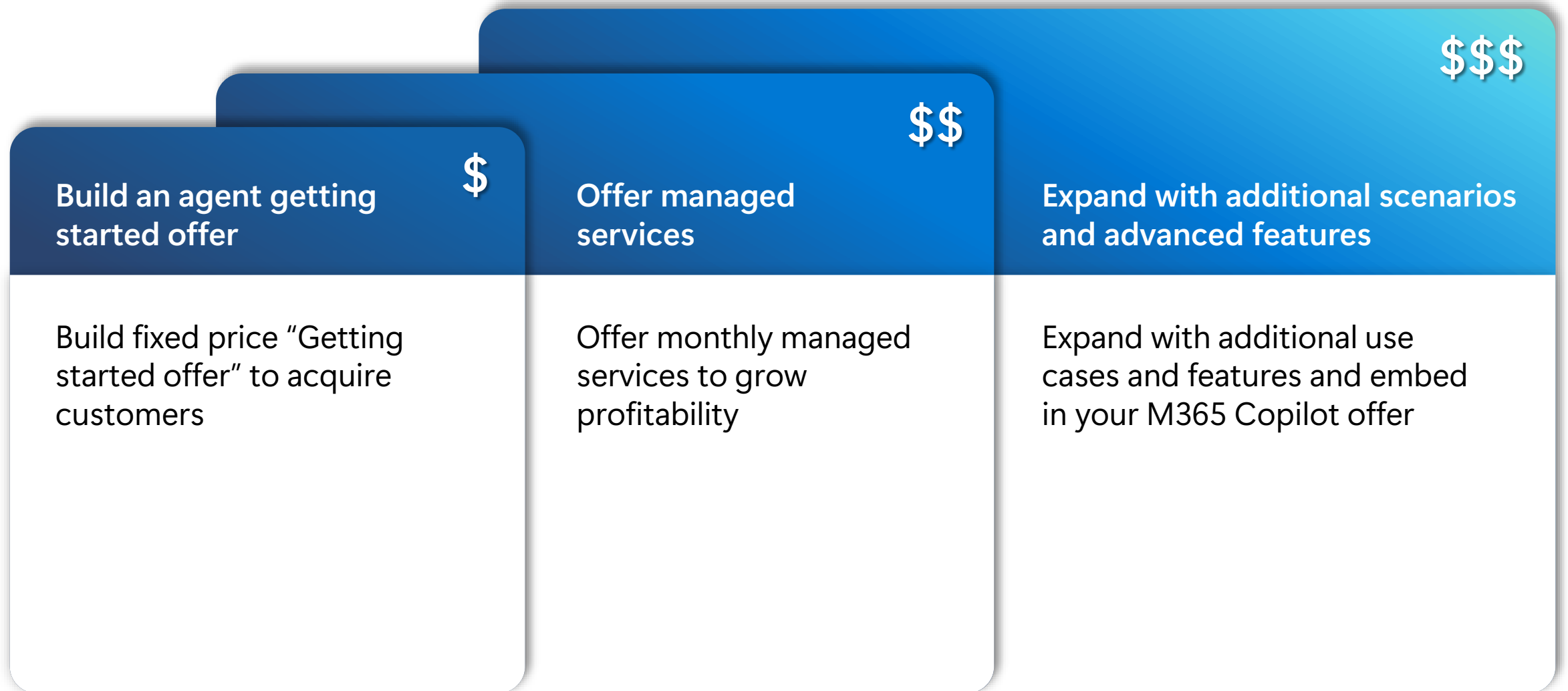
Sales Guidance

Microsoft 365 Copilot is our leading product, Copilot Chat will broaden coverage

1 Lead with M365 Copilot — For as many users as viable in the account

2 Position Copilot Chat — For wall-to-wall coverage of Copilot for all users

3 Drive Agent experiences — In all cases, drive agent experiences on both M365 Copilot and Copilot Chat

Drive business transformation with Copilot

Listen & Consult	Inspire & Design	Empower & Achieve	Realize Value	Manage & Optimize
Introduce the AI opportunity	**Secure initial pilot-sized purchase**	**Sell licenses and create adoption plan**	**Technical enablement at scale**	**License expansion**

Listen & Consult	Inspire & Design	Empower & Achieve	Realize Value	Manage & Optimize
1. Build and launch a demand gen campaign using Campaign in a Box OR 1. Use Digital Marketing on Demand to automate marketing campaigns 2. Launch a digital webinar using the Copilot Pitch deck. Use Cloud Ascent Copilot Cohort to identify target and invite set of customers 3. Identify specific target accounts using M365 Lighthouse—Copilot Insights. (coming soon) 4. Follow up and land Copilot with customers and create demand generation using the resources below. Make sure to send to webinar attendees, also! – Proactive proposal – OFT – Webinar (pitch deck)	1. Identify target accounts using M365 Lighthouse—Copilot Insights. (coming soon) 2. Deliver Copilot Briefings (co-op funded) to high/medium propensity customers to build intent **Briefings Outcomes:** 1. Land product value with customer pitch deck 2. Demo what's possible in Copilot 3. Handle any objections and answer customer questions 4. Secure Pilot/POC for at least one department (or 10+ seats) 5. Land plan for adoption and build joint customer plan using the Copilot Success Kit	• Help customer understand Copilot business value with Microsoft 365 Copilot Measuring Business Value Deck • Help customer get AI-ready (data, pre-requisite products, security policy). Use the Microsoft 365 Copilot SMB Optimization Assessment, or web version, or enable Restricted SharePoint Search • Deliver a pilot with at least a single department (Sales, Marketing, HR, Finance, Legal, and other information worker roles are best to start with) • Deploy Copilot (with commercial data protection) to rest of company • Build plan for Copilot adoption	• Work with customer to action findings from assessment and configure Copilot with the MAC Setup Guide and enable end-user comms to stay updated on new features and tips • Ensure positive user experience with the Customer Success Kit and enable high-value scenarios • Conduct Copilot Immersion Experience training by role persona. Introduce users to Copilot Lab and Scenario Library • Share the Microsoft to-customer webinars and learning path • Use Copilot Dashboard to measure success and customer ROI • Drive account to pre-defined partner + customer success criteria. If account is unhealthy, review action plan with customer and bring account to healthy by identifying roles who will find more value with Copilot	• Regularly review health and proactively optimize to increases usage and ensure business health • Identify optimization, expansion, and attach opportunities and identify the next set of Copilot scenarios: – Upgrade to Microsoft 365 Business Premium, E3, or E5 – Expand to next department – Customize Copilot with extensions or Build your own Copilot through Copilot Studio Customer Copilots – Additional partner services such as change management., readiness, etc. • Once account reaches partner + customer success criteria, activate expansion motion – Go back motion to drive expansion department wide, the next department, or company-wide rollout

Activate Copilot Studio subscription to enable Microsoft 365 Copilot Chat

Copilot Studio usage burns "messages"

Agents use different amounts of messages based on their complexity, frequency of use, and the specific features they use

Burn rate parity across message pack and metered offering (Rate card in next slide)

Leverage your existing Azure commitments (MACC)

New!

Message packs

- ✓ Tenant-wide message packs
- ✓ 25,000 messages/month
- ✓ $200 per pack/month

Pay-as-you-go

- ✓ New PAYG meter
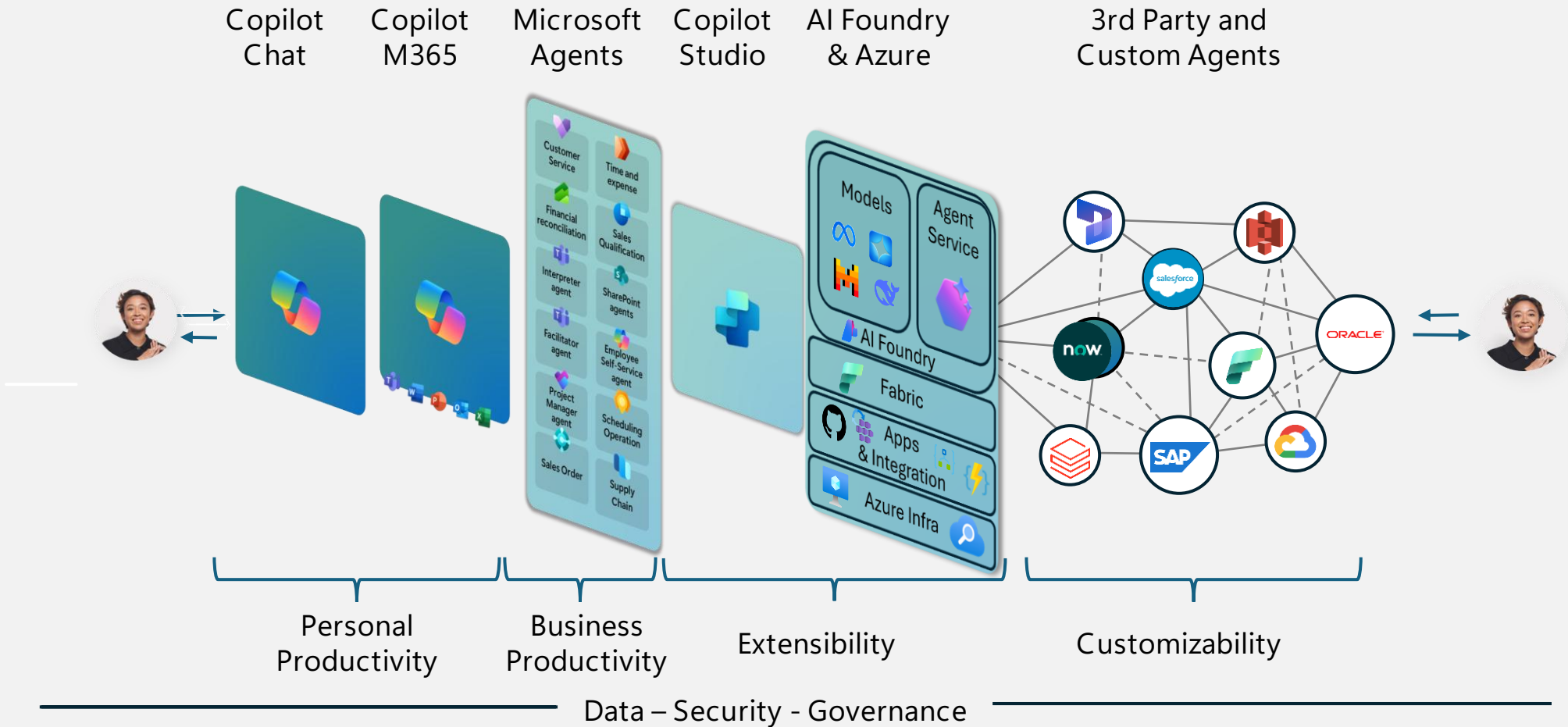- ✓ $0.01/message
- ✓ Can decrement MACC

* Customers can also purchase messages through the Copilot Studio meter in Microsoft Azure.

Flexible purchase and deployment options

● = Included | ▲ = Included – Metered

	Microsoft 365 Copilot Chat — Free + Consumption	Microsoft 365 Copilot — 30/user/month
Chat		
Copilot Chat – Web grounded (powered by GPT 4o)	●	●
Copilot Chat – Work grounded (shared tenant Graph data, 3rd party data via graph connectors, personal data)		●
Copilot Pages	●	●
File upload[1]	●	●
Code Interpreter[1]	●	●
Image generation[1]	●	●
Agents[2]		
Create agents powered by Copilot Studio[3], including SharePoint agents	●	●
Discover and pin agents	●	●
Use agents grounded on web data	●	●
Use agents grounded in work data (work data in your tenant's Microsoft Graph and 3rd party data via graph connectors)	▲	●
Use agents that act independently and autonomous actions	▲	▲
Personal assistant		
Copilot reasons over personal work data (i.e. Outlook, OneDrive, meeting transcripts)		●
Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		●
Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)		●
Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		●
Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		●
Copilot in PowerPoint (Narrative Builder, presentation translation, generate company branded slides or images)		●
Copilot Actions		In preview
		In preview
Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)	●	●
Copilot Control System		
Enterprise Data Protection (EDP)	●	●
IT management controls	●	●
Agent management		●
SharePoint Advanced Management		●
Copilot Analytics to measure usage and adoption[4]		●
Pre-built reports and advanced analytics to measure ROI		●

1. Limits apply.   2. Applies to employee-facing agents only.   3. Learn more about the full capabilities of Copilot Studio here.   4. Basic reporting in Microsoft Admin Center available for Copilot Chat.

# Agentic Organization Blueprint

Copilot Chat · Copilot M365 · Microsoft Agents · Copilot Studio · AI Foundry & Azure · 3rd Party and Custom Agents

Personal Productivity · Business Productivity · Extensibility · Customizability

Data – Security - Governance

What Success Looks Like

Winning sockets today, will allow us to drive monetization tomorrow

Current state

% of user population

Shadow AI   *+chatbots*
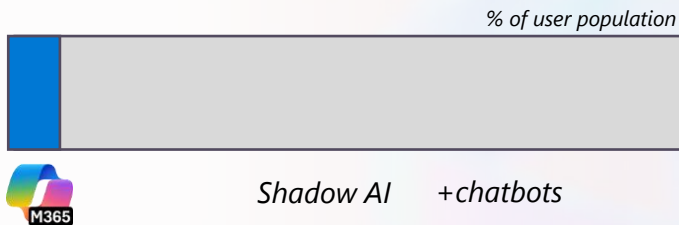
- Customers buying M365 Copilot in smaller batches to prove value; often restricted to "premium" users due to affordability
- **Partner services potentially stalling after pilot**
- Widespread adoption of homegrown AI chat solutions
- Fragmented AI landscape with significant shadow IT

Short-term ambition

% of user population

Shadow AI   *+chatbots*

- Drive wall to wall coverage with combination of M365 Copilot and Copilot Chat.
- Land Copilot Chat as the instant value, compliant AI solution that addresses shadow IT and lack of standardization
- **Partners placing sockets of UIs to a compliant & secure AI Tools and Copilots to fuel services work across Security, ACM, & Business Process Transformation.**

Medium-term ambition

% of user population

+chatbots
Shadow AI
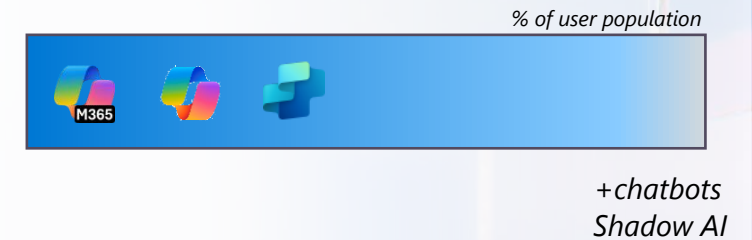
- Increase services monetization with org-wide business transformation work via **Agents**
- Grow the share of M365 Copilot seats
- Create **new partner services business models** to support the Era of Agentic AI across managed services, etc.

Stay Connected

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

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

Partner type	Partner role	Message type	Solution area	Partner stage	Industry
#AllPartners	#AllRoles	#PartnerProgram	#CrossSolution	#NewToMSFT	#AllIndustry
#ISV	#Exec	#Event	#ModernWork	#UnderstandBenefits	#StateAndLocalGov
#CSP	#Tech	#News	#BizApps	#LearnSolutionAreas	#Retail
#Services	#SalesAndMarketing	#Deadline	#Azure	#GrowSkills	#EDU
#Telco	#SupportAnd Operations	#ProgramOfferUpdate	#Security	#GoToMarket	#MFG
#GSS	#ProfServices	#WinFormula	#Surface	#GeneratePipeline	#HealthcareAnd LifeSciences
#MSP	#Developer	#BestPractice		#AccelerateDeals	#FinancialSvcs
	#AllianceMgr	#DoingBizwMSFT		#GrowYourBiz	#Energy
		#SuccessStory			

Additional
#QuestionForGroup   #MeetTheTeam   #InsiderCall   #MSFTAmericasPartner

Microsoft

Thank You
¡Muchas gracias!
Obrigado!
Merci!