5:00

Microsoft

March Americas Partner Insider Call

Develop. Sell. Grow.

Microsoft

Welcome

Helane Cohen

Americas Scale Comms Strategy Lead

Partner Audience: All
#Event #CrossSolution #GoToMarket

Helane Cohen | LinkedIn

Develop. Sell. Grow.

Agenda

Topic	Speaker
Welcome, Poll & Insider Scoop	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS
No Better Time! Momentum Recap & Promo Updates	Shivani Ranganathan Partner Go to Market
M365 Copilot Chat and the Partner Opportunity with Agents	Ashley Evans Partner Go to Market
Understanding the spectrum of Agents	Robert Gates Principal Partner Solution Architect
Copilot Studio Deep Dive	Tad Thompson Senior Partner Solution Architect
Wrap Up and CTA	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS

Microsoft

Insider Scoop

Join the Microsoft Partner Insider Calls

Register for our monthly Partner Insider Call!

Microsoft Events - Americas Partner Insider Call | April Edition

Mark Your Calendar:

Copilot Series

April 9, 2025 @ 10:00 AM PT

NEW!! Biz App Edition

April 17, 2025 @ 11:00 AM PT

Microsoft Events - Americas Partner Insider Call | BizApps April Edition

If you missed any calls before March 2025!!

Americas Partner Insider CallAMERICAS Partner One

Join our next event

Mark Your Calendar:

Empowering Partners: Trust and Security in the AI world

April 24, 2025 @ 12:00 PM PT

Register here!

Speakers

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

Helane Cohen
America's Scale Communications Strategy Lead 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

Scan to Donate Auction Items!

FOUNDATION FIGHTING BLINDNESS

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

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

SANCTUARY

SANCTUARY SCRAMBLE FOR SIGHT

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

Visit ScrambleForSight.org

aka.ms/noslidesattached

New in FY25

NO SLIDES ATTACHED

AI Stories with Microsoft Partners

We've launched our own Partner Podcast!

Tune in to **meaningful conversations** that combine the **inspiring stories** of partners and the **expertise** of Microsoft leaders.

SIMPLIFY

BUILD COMMUNITY

INSPIRE

Listen, Subscribe...

NoSlidesAttached.com

...& Share!

Repost Comment

EPISODE GUIDE:

Season 1: Copilots

Insight · REPLY VALOREM · epam · BlueVoyant · LANTERN · GigXR

Season 2: Industry is happening now!

territorium · zafin · 3Cloud

Microsoft

No Better Time! Momentum Recap & Promo Updates

Shivani Ranganathan

Partner Go to Market

Jinal Jolly | LinkedIn
Shivani Ranganathan | LinkedIn

Partner Audience: All
#ModernWork #CopilotReadiness #GoToMarket

No Better Time: CSP Offers to empower your customers with Secure AI

[Click here to learn more and access FAQ!]

Upsell to Business Premium

NEW

M365 BP 15% Promo
New to BP customers, up to 300 seats
*North America

January 6th – April 1st

NEW

E5 Security mini bundle is now available as an add-on to Microsoft 365 Business Premium

Upsell to M365 E3

M365 E3 15% Promo
New to M365 E3 customers

+

Compliance Mini Bundle (NEW PROMO)

July 1st – June 30th

Upsell to M365 E5

NEW

M365 E5 15% Promo
New to M365 E5 customers

January 1st – June 30th

+

M365 Copilot + M365 Copilot Chat

Available on Annual Monthly as of Dec 1 , Click here for FAQ

NEW **IURs available**
For select benefits packages

Launching Jan 22nd

EXTENDED **M365 Copilot 15% Promo**
For >10 seats up to max of 300 seats

Sept 1st – April 1st

NEW **M365 E5 Compliance 50% Promo**
PUPM for every seat of Microsoft 365 Copilot

Feb 1st 2025- Feb 1st 2026
can be applied retroactively to customers who have already purchased M365 Copilot but don't have E5 Compliance.

Exciting news for small and medium-sized businesses! Microsoft 365 E5 Security is now offering an add-on option to Microsoft 365 Business Premium.

50% E5 Compliance + M365 Copilot Promotion

- Overview: Partners will receive 50% off the net partner price of M365 E5 Compliance Mini Suite licenses when a customer has purchased an equal or greater amount of M365 Copilot licenses.
- Promo Availability: Feb 1, 2025 to Feb 1, 2026
- Customer Eligibility: Offer is available to both existing and new M365 Copilot customers. Use of M365 E5 Compliance requires one of these prerequisite licenses: M365 E3 or O365 E3 + EMS E3.
- Transact: This promo is available through NCE EA and CSP.

Partner Ready Resources

- Microsoft Security Partners CSP Offers & Promotions
- Global Promo Readiness Guide
- E5 Compliance for M365 Copilot Promo FAQ
- E5 Compliance for M365 Copilot Promo Customer Flyer
- E5 Compliance for M365 Copilot Customer Pitch Deck
- Secure and Govern Microsoft 365 Copilot | Microsoft Security
- Microsoft 365 Copilot blueprint for oversharing | Microsoft Learn
- TRAINING (Mar 11): Secure and Govern Microsoft 365 Copilot with Microsoft Purview technical enablement workshop

E5 Security available for M365 Business Premium!

Microsoft 365 Business Premium delivers core security solutions to SMBs that help safeguard data, defend against cyberthreats, and manage access and devices. With the growing volume of attacks and increased sophistication of threats, there are SMBs that want enhanced cybersecurity protection for their business. We are pleased to announce that Business Premium customers are now able to purchase Microsoft 365 E5 Security as an add-on to further enhance their security.

- Announcement
  - Blog: aka.ms/BusinessPremiumPlusE5SecurityBlog
  - Website: https://aka.ms/SMBsecurity
  - Social:https://www.linkedin.com/feed/update/urn:li:share:7303504697997352960/

Partner – M365 Copilot SMB Business Case Builder

What is the Business Case Builder (BCB)

The SMB BCB helps customers visualize the potential impact Microsoft 365 Copilot can have on their business. It is based on the research and findings from Forrester in the following studies:

- Forrester New Tech Total Economica Impact Report for M365 Copilot
- Forrester New Tech Total Economica Impact Report for M365 Copilot for SMB

The BCB estimates the Return on Investment (ROI) by applying the Forrester reports' statistics to a customer's organization using the user-provided potential number of employees with a Microsoft 365 Copilot license and the selected business goals they want to accomplish with AI.

For more detailed and accurate analysis, customers should contact their trusted partner.

Who is it for?

- Small and Medium sized businesses (organizations with less than 2500 employees)
- Customers who interested in working with a Microsoft Partner
- Microsoft Partners who want to help customers get an initial idea of potential M365 Copilot impact.

What is important for me to know

Points of Emphasis

- The SMB BCB uses data points from Forrester reports and scales them for their businesses
- Customer information entered into the tool is neither saved nor utilized by Microsoft in any way
- The SMB BCB calculates NPV using a discounted cash-flow analysis over 3-years with basic assumptions for discount rate, organization gross margin, and various costs.

Limitations

The BCB reflects projected ROI based on research insights provided by Forrester. **MICROSOFT MAKES NO WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED, ABOUT THE RESULTS WITHIN THIS PRESENTATION.**

The composite organization reflected in the BCB assumes a company of up to 2,500 employees. For larger organizations (>2,500 employees), leverage the full version of the Business Case Builder or engage MSFT account team for in-depth projection analysis.

Next Steps

Questions to ask:

- What are your primary business objectives for considering M365 Copilot?
- How do you envision M365 Copilot enhancing your current workflows and processes?
- What specific tasks or projects do you hope to improve with the help of M365 Copilot?
- Detailed conversation guide & Partner Services Blueprint

Purchasing preference:

- Sell Copilot via CSP or engage MSFT account team
- If prospect is a large customer or wants a more detailed report, leverage the full version of the Business Case Builder

Tell us about your organization

Number of employees *

200

Industry

Select Industry

Estimated annual revenue *

$ 35,000,000

Country *

United States

Primary objective(s) for investing in GenAI? (Select at least 3)

- [x] Increase the efficiency of customer service team
- [x] Increase sales team performance
- [x] Improve marketing campaigns
- [x] Improve employee engagement and retention

Calculate

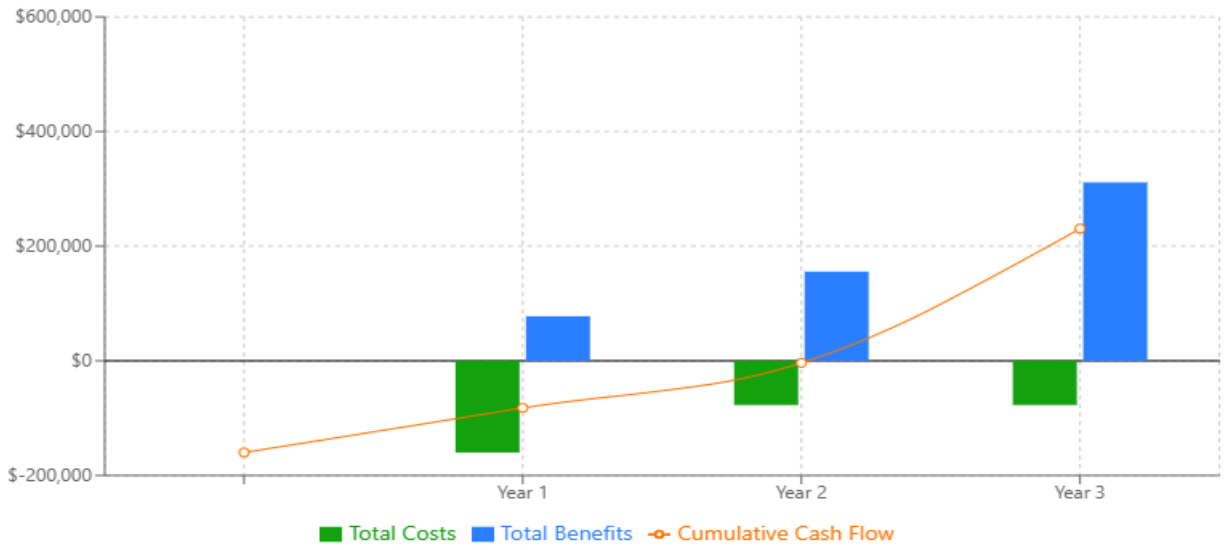
Download Report

Contact me about M365 Copilot

Buy now

Companies have seen

Customer Service	Sales	Marketing	HR
increase in customer retention[1]	increase in sales win rate[2]	more opportunities created[2]	increase in employee retention[2]
3%	2.5%	2.7%	5%



Annual cost savings	Annual revenue Increase	Return on Investment (ROI)	Net Present Value (NPV)
$72.3K	$238.9K	73%	$166.2K

Disclaimer: Results based on multiple studies by Forrester Consulting commissioned by Microsoft. The M365 Copilot Business Case Builder application below uses a combination of assumptions and data points from 3rd party analyst studies of M365 Copilot customers to generate business impact estimates for small and medium sized businesses. Cost savings and financial benefits are illustrative only and only intended for your internal use. Prices may vary by reseller and channel. The results may not be accurate or appropriate for your needs and should not be relied upon as your sole reference. In addition, it should not be used for financial planning or investment analysis. For a more thorough business value assessment, please contact your Microsoft partner. MICROSOFT MAKES NO WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED, ABOUT THE RESULTS WITHIN THIS PRESENTATION.

Self-Service Purchase Options for M365 Copilot

What has been announced:

An expanded **license request feature** and **self-service purchase option** for **Microsoft 365 Copilot** will start rolling out on March 25, 2025. This was previously released on October 7th to Microsoft 365 Business Basic, Standard, and Premium customer, and on **March 25th will roll out to Enterprise customers as well.**

- These features take advantage of in-product messaging to simplify license purchases and requests.
- Allows admins to maintain visibility and control over licensing requests and purchases with the ability to turn it off **(these features are on by default)**.
- Provides further flexibility for customers across segments in how they choose to purchase and empower employees with AI.
- Admins received a message center post about license request and self-service purchase availability for Enterprise and Microsoft 365 E1, E3, E5, Apps for Enterprise, and standalones on **2/25/2025**. *(Other related MC posts include: MC853238 (Updated) M365 admin center: New self-service purchase and trial settings (published August 2024, updated September 2024) and MC886385 Copilot for M365 available for self-service purchase (November 2024).*

Customer Experience:

Users will see two options.
Option One: M365 Copilot Chat users will see the option to request a license directly from their admin (roll out starting March 25). M365 Copilot Chat users will see the option to request a license directly from their admin.
Option Two: M365 Copilot Chat users will see the option to directly purchase Copilot using their own credit card **(roll out starting Mid-April)**.

Partner Call to Action:

- Discuss **managing or disabling self-service purchases** with your customer admins as needed.
- Know that customers can choose to turn off end user purchases at a tenant level before a wider organization purchase is made, to stop any possible duplicate licenses.
- Additionally, end user purchases **could help send demand signals** and provide customers with usage information from their early adopters that could help with broader sales.
- Partner notifications for self-service purchases are available in Lighthouse as of January 2025 and will be available in Partner center (target H2) This post will be updated at a future date when available

Resources

Review the following documents

- October 2024 Partner Center Announcement
- Manage self-service license requests in the Microsoft 365 admin center | Microsoft Learn
- Self-service purchase FAQ

Digital

CloudAscent: Expanding Your Modern Work Customers

When: Tuesday, March 18, 2025, 8:00 – 9:00 AM PST

Where: Online

- **Deep Dive into Cohort Creation:** Discover how Microsoft segments customers into cohorts.
- **Understand Targeting Recommendations:** Master the cohorts and learn how to leverage them with CloudAscent propensity data.
- **Campaign Support:** Explore the assets Microsoft provides to support your campaigns.
- **Interactive Q&A:** Engage with our experts in an interactive Q&A session.
- **Who Should Attend:** Sales Leaders, Sellers, Pre-Sales, Marketing, Alliance Managers.

Register Today!

Microsoft

M365 Copilot Chat and the Partner Opportunity with Agents

Ashley Evans

Partner Go to Market Leader

Ashley Evans | LinkedIn

Partner Audience: All

#ModernWork #CopilotReadiness #GoToMarket

Become an AI-Powered Organization

Equip customers with a Copilot for every employee and agents to scale their impact

Best-in-class AI Assistant

For users & teams ready to supercharge their productivity

M365

Copilot

$30 pupm

- ✓ Secure web grounded chat + enhanced work chat grounded in your business data
- ✓ AI assistant within the Office apps you know and love
- ✓ Enterprise-grade security, privacy, and compliance

Secure AI-Chat for all

For users just getting started with AI

M365

Copilot Chat

Free + Consumption

- ✓ Secure web grounded AI chat to find answers and spark creativity
- ✓ IT management controls

Automate tasks and business processes with agents

The AI Adoption Curve

Access

Provide broad access to AI within budget constraints

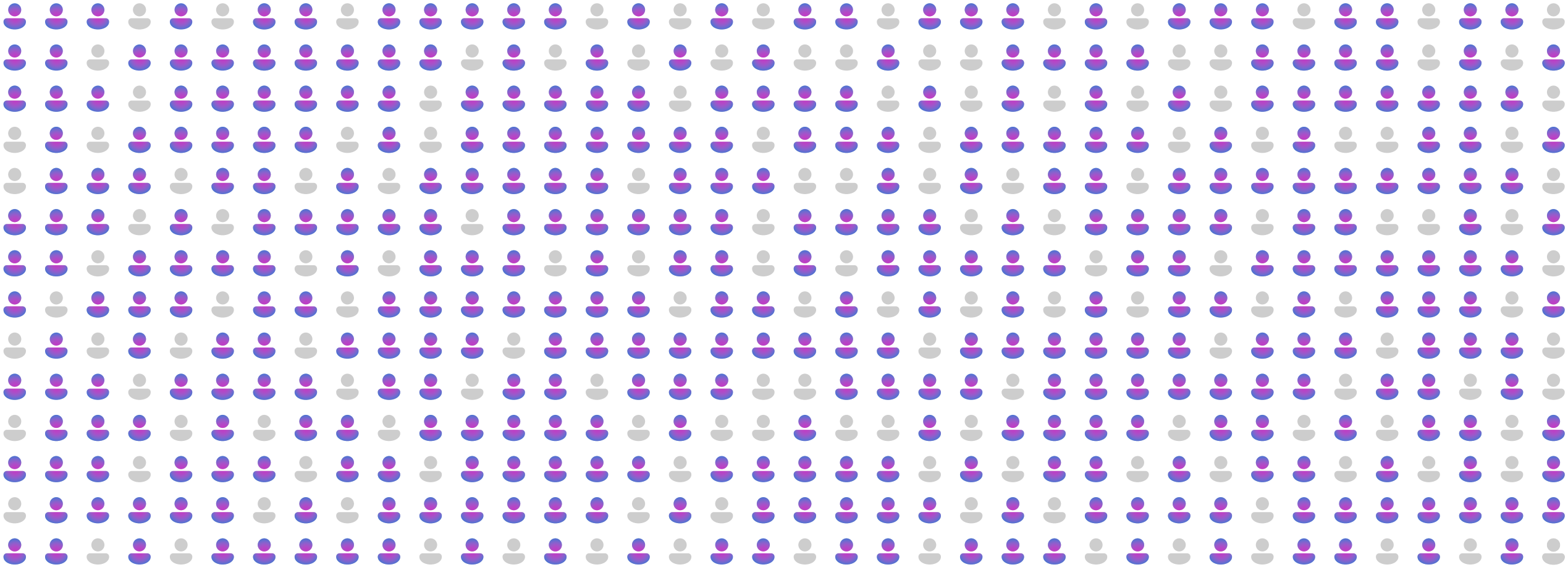
ROI

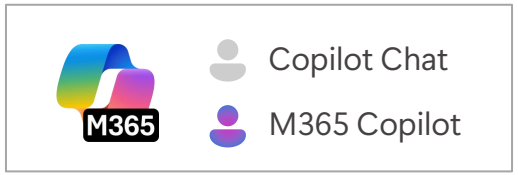
Redesign business process to realize value of AI

Governance

Deliver secure and compliant AI while managing agents

Scaling AI Transformation





What is the Customer Strategy

1	Lead with M365 Copilot	Determine who would benefit the most first.
1	Position Copilot Chat	Stop Shadow AI and provide an approved IT managed one
2	Drive Agent experiences	Start exploring Agents with customers and build your agentic practices

A Practical Example | Start Here

1 Lead with M365 Copilot

HR | IT

1. Internal facing and reduction in presumed risk around data sensitivity
2. Traditionally heavy users of M365
3. Get exploring Agent Capabilities

1 Position Copilot Chat

Sales | Marketing

1. Valuable tool with web-based capabilities based on the role
2. Set up next potential cohort for M365 Copilot
3. Get exploring Agent capabilities

2 Drive Agent experiences

HR

IT

1. Buy	2. Extend	3. Build
Out of Box HR & IT Agents	SharePoint Agents	Self Help & Onboarding Agents

Activate the power of Copilot TODAY

1	2	3	4	5
Position Wall-to-Wall Copilot coverage for all users	Build intent by delivering immersive customer experiences, like demos & prompt-a-thons	Enhance Copilot with Agents experiences to transform business process	Land business value and ROI with healthy usage	Drive upsell and conversion

Immersion | Extensibility | ROI

The Copilot partner opportunity for Cloud Solution Providers (CSP)

Ongoing managed services, adoption, Copilot agents

- Ongoing managed services
- Extensibility and customization
- User adoption & training

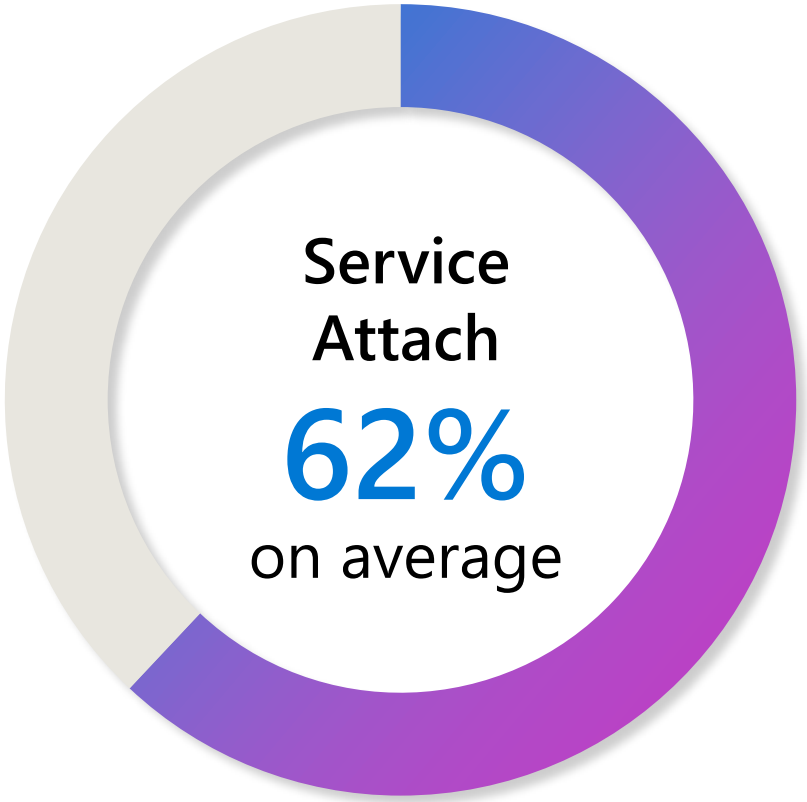
Deployment services

- Deployment

Get AI Ready services

- Data structuring and protection
- Foundational productivity deployment
- AI readiness evaluation

Microsoft 365 Copilot



Potential services revenue for Enterprise customers.
Source: 2024 Modern Work Partner Total Economic Impact™ study, a commissioned study conducted by Forrester Consulting on behalf of Microsoft

Earning incentives on Microsoft 365 Copilot

Microsoft 365 Copilot Chat

Set up Admin on Behalf of in Azure

Earn **15% Partner Earned Credits** on agent consumption

Learn more about Partner Earned Credits (PEC)

Agents CSP partner execution journey

Accelerate Copilot Chat and agents with CSP GTM programs supporting the partner journey

1. Get trained	2. Build your offer	3. Target customers	4. Drive demand	5. Earn incentives
Level Up CSP • Sales bootcamp • Technical bootcamp • Hands on labs bootcamp • In person series	Getting started offer development guidance Agents starter kit	Microsoft 365 Lighthouse sales recommendations	CSP Briefings: • M365 Copilot (MW partners) • Copilot Studio (BizApps partners) Customer ready BOM • Pitch decks • Simulated demos	15% PEC for pay-go incentives for message packs

Microsoft

Understanding the spectrum of Agents

Robert Gates

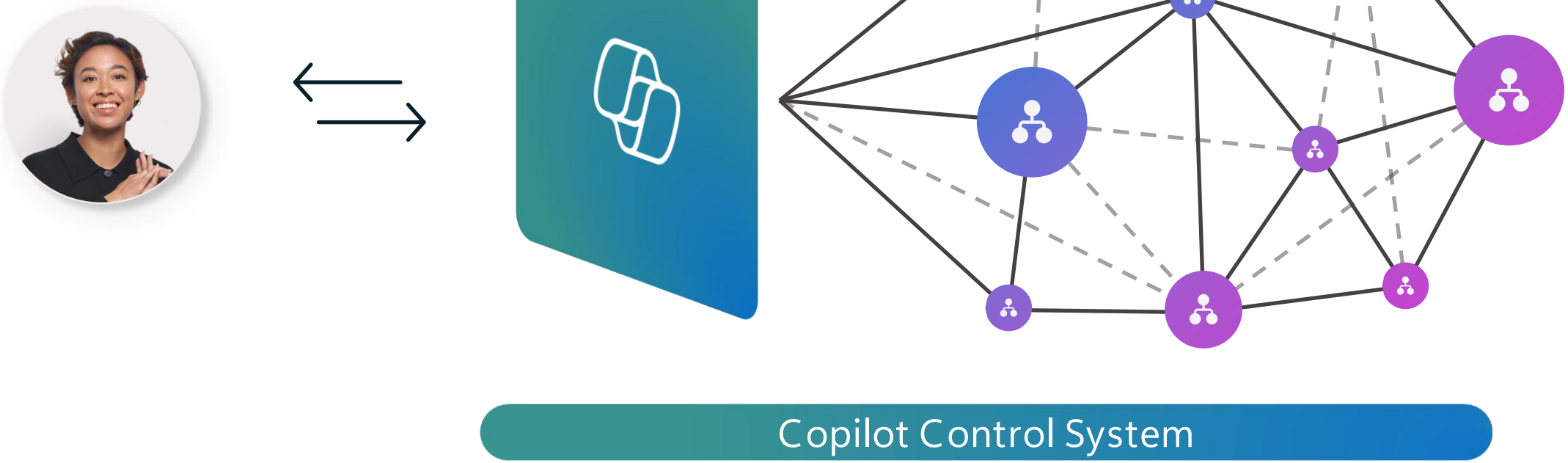
Principal Partner Solution Architect

Robert Gates | LinkedIn

Partner Audience: All

#ModernWork #CopilotReadiness #GoToMarket

Copilot is the UI for AI



What are agents?

Agents uses AI to automate and execute business processes, working alongside or on behalf of a person, team or organization

Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Task

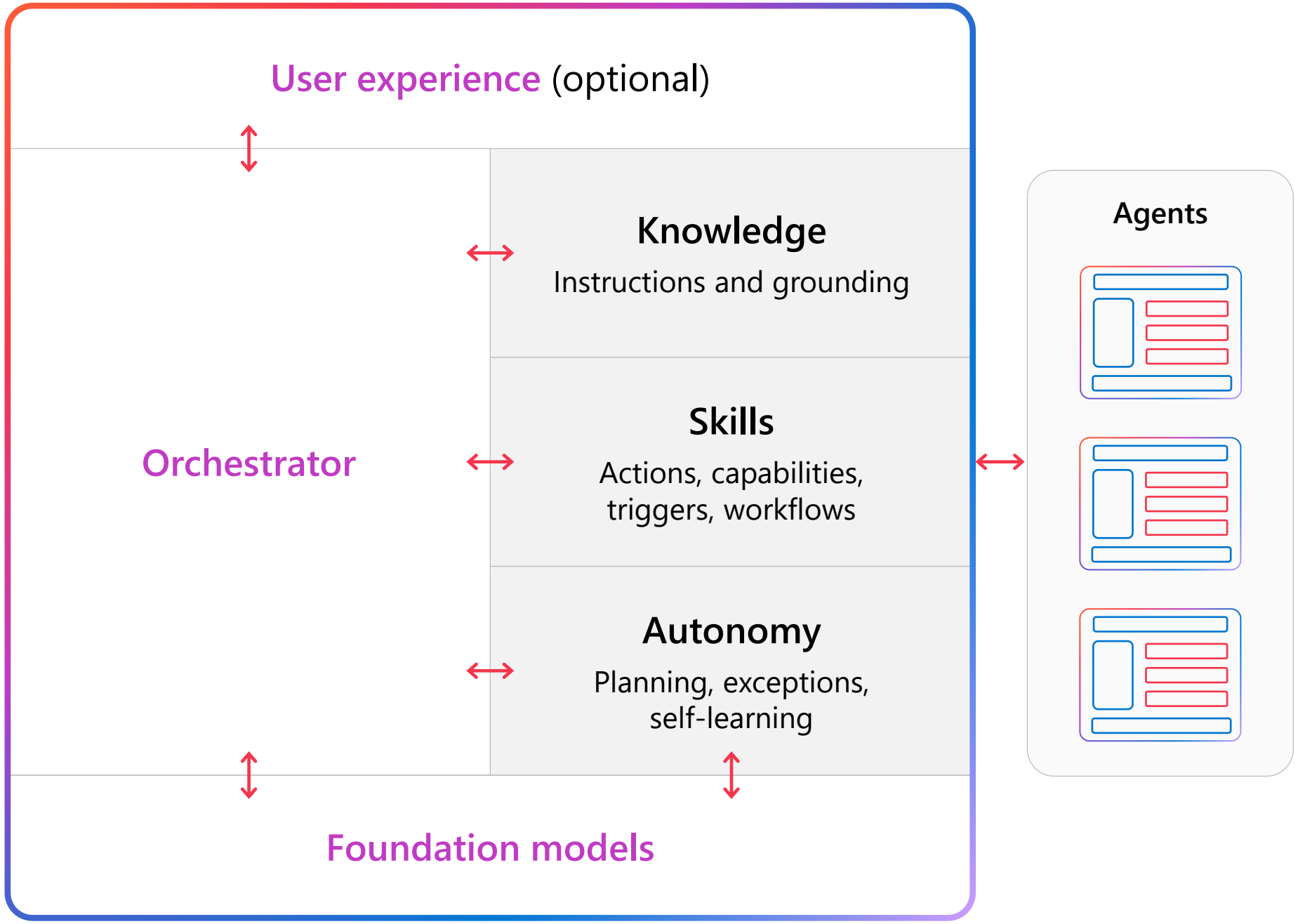
Take actions when asked, automate workflows, and replace repetitive tasks for users

Autonomous

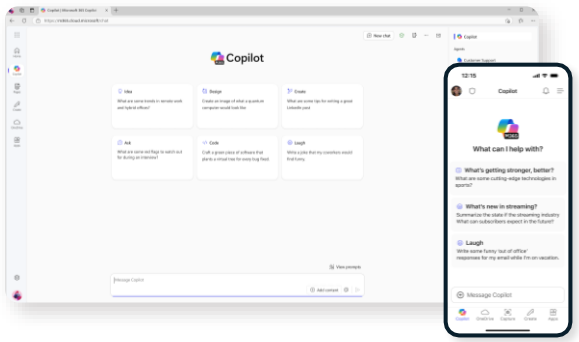
Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Agents vary in levels of complexity and capabilities depending on your need

Agent architecture



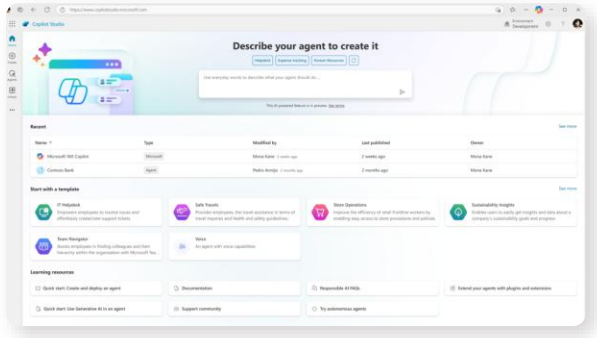
Microsoft 365 Copilot Chat



Chat

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

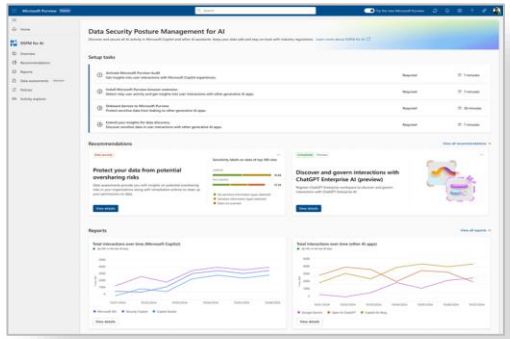
+



Agents

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

+



IT Controls

Enterprise Data Protection
and agent management

Microsoft 365 Copilot

Your AI assistant for work

$30

Copilot Chat

Free, secure AI chat

+

Chat

Work-grounded

Copilot in M365 apps

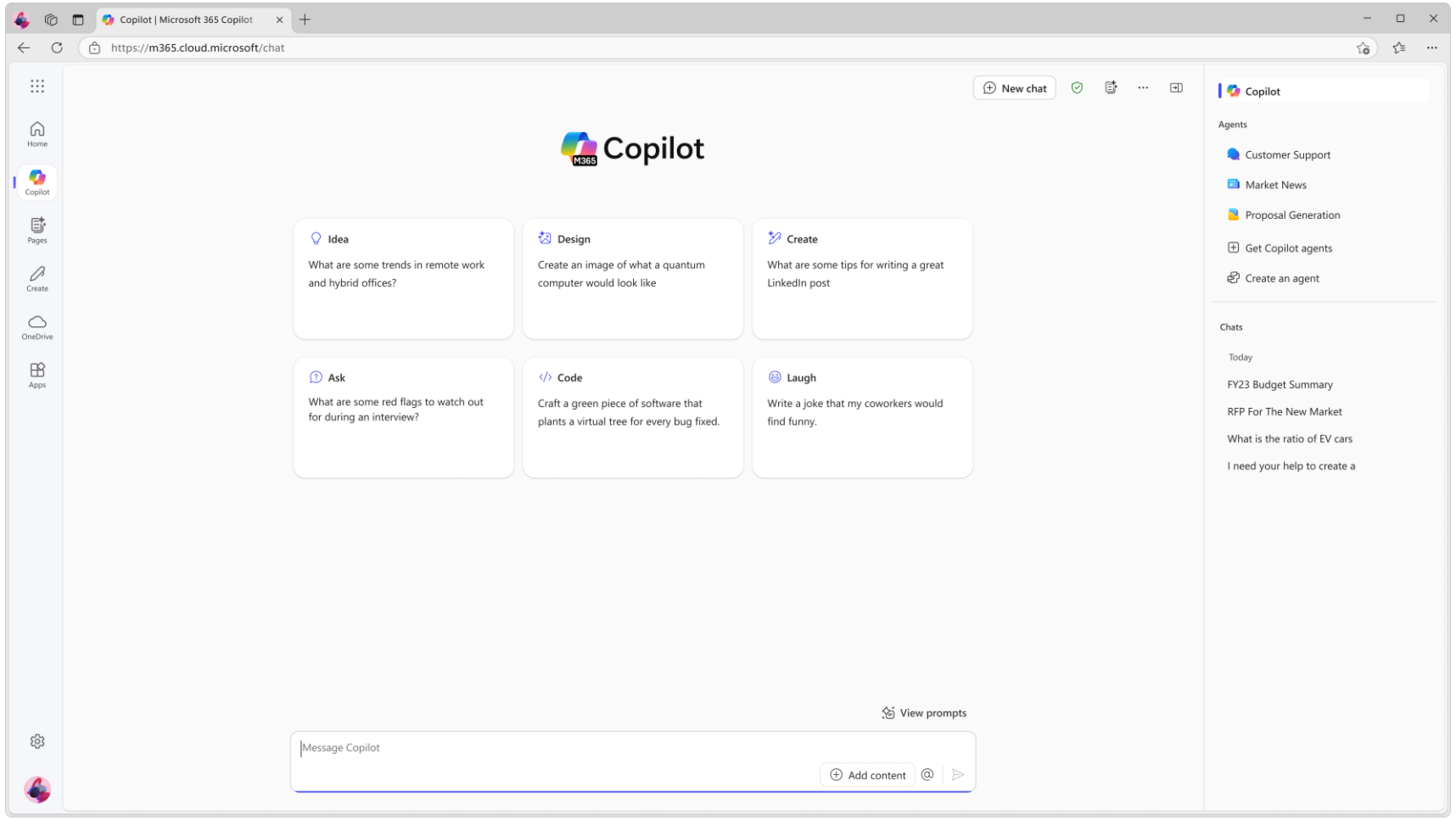
Teams, Outlook, Word, Excel, PowerPoint

Agents

Copilot Control System

Copilot Analytics

Get started from the Microsoft 365 Copilot app



M365copilot.com

3 Essentials for Copilot Success

Leadership

Develop leadership capabilities to leverage AI for business outcomes

- Executive sponsorship
- Align AI to business strategy
- Providing clarity and prioritization
- **Best practice:** AI Council

Human change

Manage the human transformation with robust user enablement programs

- User enablement program
- Communications and community
- Skilling and training
- **Best practice:** Copilot Analytics

Technical readiness

Build and iterate technical skills to deliver on business results

- Secure your data infrastructure
- Policy review
- Optimization assessment
- **Best practice:** Center of Excellence

Responsible AI principles

Key processes by function

Sales	Marketing	Customer Service	Legal	HR	Finance	IT
Customer self-service	Customer insights & strategy	Self-help	Regulatory & compliance management	Employee engagement	Quote to cash	Data management
Lead generation	Demand generation	Support assignment	Contracting	Recruiting	Record to report	Software management & acquisition
Customer engagement	Content creation	Issue diagnosis	Risk management	HR admin & payroll	Tax & treasury	Device refresh
Negotiations & closing	Campaign execution	Problem resolution	Litigation	Compensation & benefits	Planning & analysis	IT operations
Post-sale follow-up & upsell	Predictive analysis	Continuous improvement	Consultation	Learning & development	Risk management & compliance	Network operations
Sales analysis & forecasting	Personalization		Intellectual property	Talent management	Procure to pay	Information security
	Sales enablement & recommendation		Advisory services	HR strategy & planning		Change management & user adoption

Key Agents by function

Sales	Marketing	Customer Service	Legal	HR	Finance	IT
Opportunities pursued	**Leads generated**	**First Call Resolution (FCR) rate**	**Outside counsel spend**	**Employee onboarding time**	**Finance outsourcing spend**	**IT operation costs**
Deal Size	**Agency spend**	**Calls answered by agents**	**Cost per internal review**	**Calls answered by agents**	**Cost per analysis request**	**IT issue/ticket resolution time**
Win rate / Close rate	**Customer retention**	**Issue resolution time**	Compliance rate	**Issue resolution time**	Deal review time	**IT outsourcing costs**
Customer retention	**Employee retention**	**Customer retention**	Contract error rate	Employee retention	Time to close	Product adoption & usage
Average discount size	Cost per lead	Case volume	Number of disputes	Hiring costs per employee	Compliance rate	Application downtime
Upsell / Cross sell rate	Brand value	Time to first response	Dispute win rate	Admin cost per employee	Forecast accuracy	Network/infra reliability score
Cost per lead	Lead conversion rate	Average call time		First call resolution rate	Employee retention	Reduce shadow IT risk
Sales cycles length	Revenue per lead generated	Customer experience (CSAT)		Workforce demographics	Day sales outstanding	NSAT – User Satisfaction
Response rate						

Let us help you build a business case with these KPIs

New out-of-the-box agents at Ignite

Agents in Microsoft 365

Agents in SharePoint	Employee Self-Service Agent	Facilitator	Interpreter	Project Manager
Generally available	Private preview	Public preview	Public preview early 2025	Public preview

Enable enterprise-scale AI

Bring your data estate to Microsoft 365 Copilot

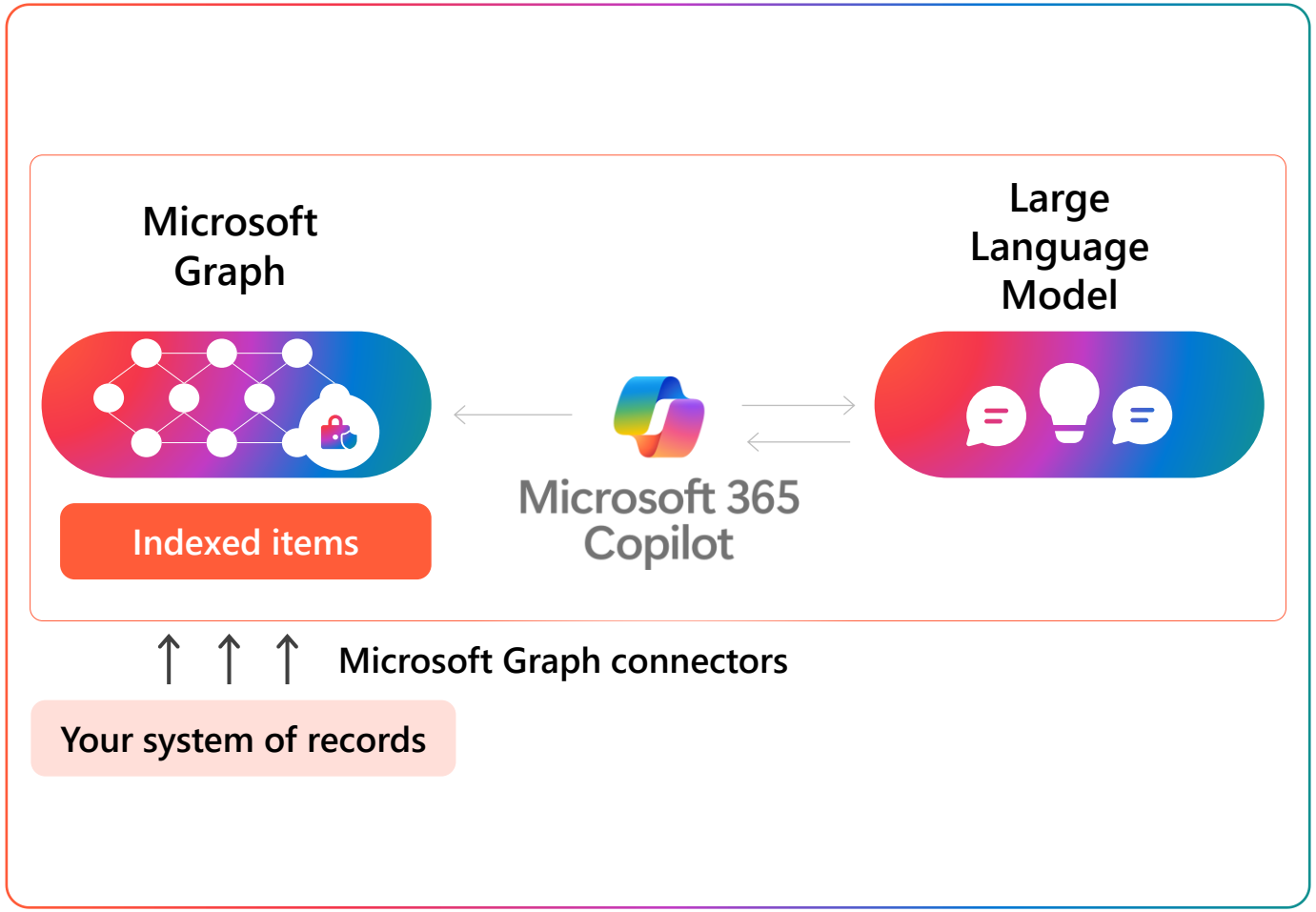
Index data with Graph connectors and ground Copilot's responses in more of your organization's content

Improve Copilot's knowledge by grounding it in your enterprise data to deliver more relevant and contextual results

Create a connected experience by uniting disparate data sources into Microsoft Graph

Enforce access rights with indexed data that respects Microsoft's security and privacy policies

Allow 50 million items indexed per tenant with updated entitlement for Microsoft 365



Redefine business processes and functions with agents

Find agents in the store or build your own

AISERA	Boost productivity with domain-specific LLMs and automate workflows	Harvey.	Offer legal assistance, analysis, and drafting for legal and professional services users	PRIORITY MATRIX	Align teams on shared goals for onboarding, support, and post-sale upsell
Bigtincan™	Enable sales teams to quickly find documents and summarize for more effective meetings	lumapps	Enable employees to understand company goals, streamline their work, and grow	Seismic	Search and summarize content to help win customers
Copilot for Finance	Transform the way finance works and accelerate time to business impact	Meltwater	Provide timely marketing insights	Templafy	Help protect your brand and quickly create compliant high-value business document
Copilot for Sales	Help sellers maximize their sales productivity	monday.com	Use AI for effortless, more efficient work cross-platform	UiPath®	Automate end-to-end enterprise workflows within Copilot conversations
Copilot for Service	Enhance service experiences and boost agent productivity	Moveworks	Give employees easier access to information they need and take actions across enterprise systems	VANTAGECIRCLE	Promote employee recognition by identifying and acknowledging key behaviors
freshworks	Provide rapid, personalized support to handle employee issues with tailored conversations	Mural	Find and summarize murals and templates to save time and improve collaboration	Zoho Desk	Enable customers to manage IT tickets and resolve queries faster

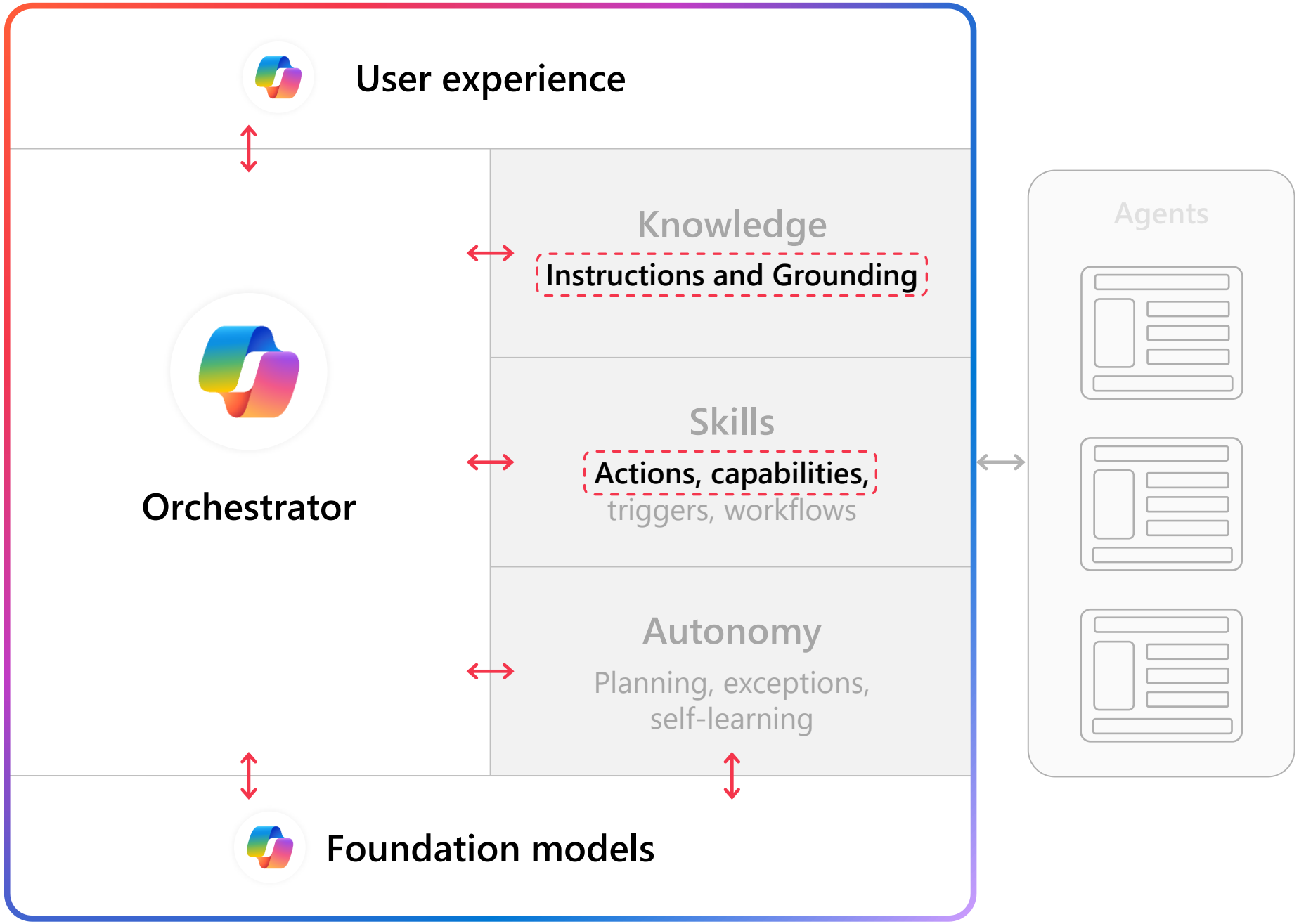
Build & integrate agents on your terms

	Declarative agents *(Generally available)*	Custom engine agents *(coming soon)*
Build with	Copilot Studio (no-code and low-code) Visual Studio Code (code-first)	Copilot Studio (no-code and low-code) Visual Studio Code (code-first)
Agent runtime	Microsoft Copilot	Bring your own orchestrator and foundational models
Deploy across	Microsoft 365 Copilot Microsoft Teams Coming soon SharePoint Coming soon	Microsoft 365 Copilot Microsoft Teams, Web New +10 other channels

Generally available

Declarative agents

Implementation



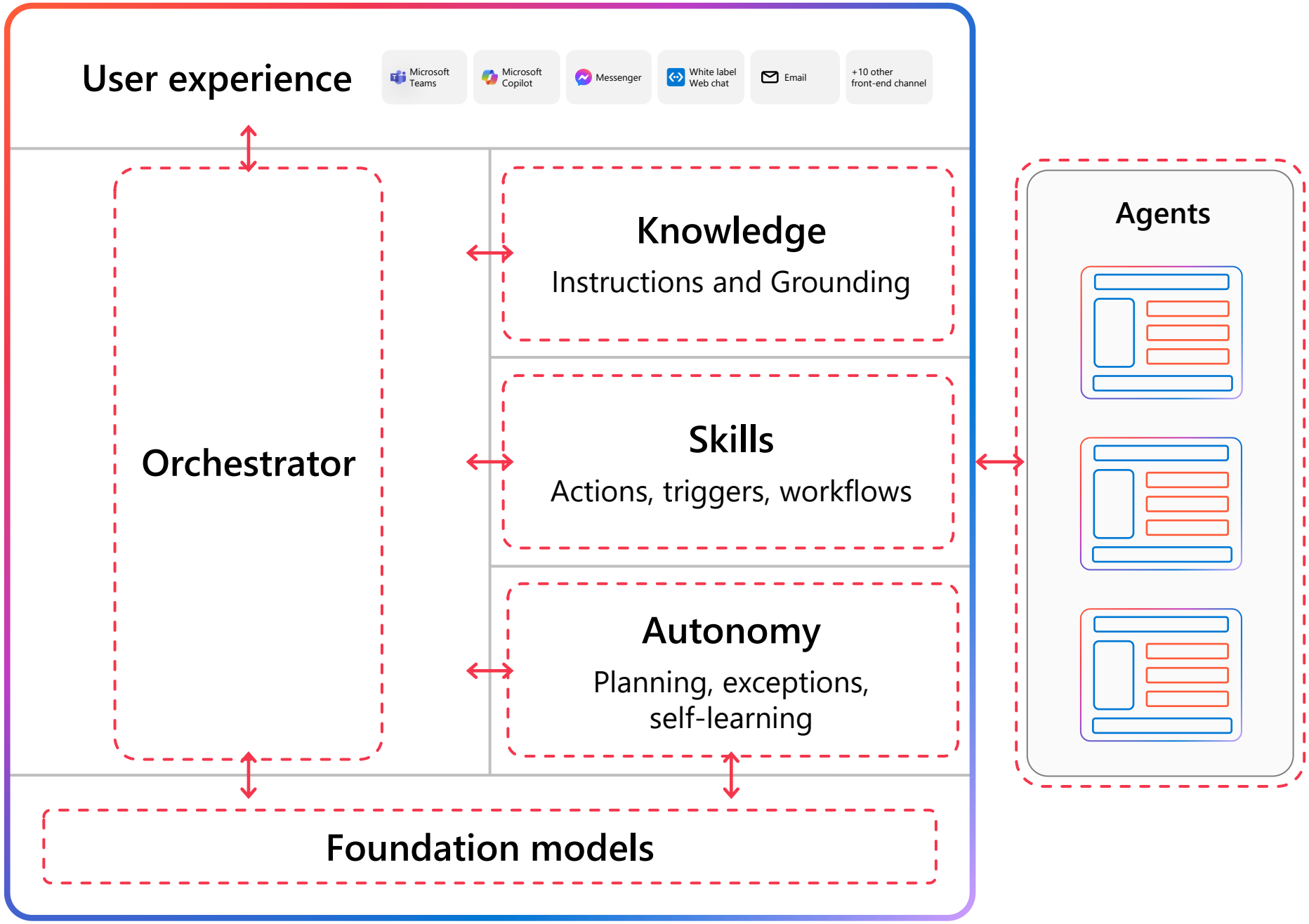
Microsoft provided

Developer provided

Coming soon

Custom engine agents

Implementation



Microsoft provided

Developer provided

	SharePoint	Copilot Studio agent builder in Copilot Chat	Copilot Studio	Teams Toolkit in Visual Studio Code
WHAT YOU CAN BUILD	Knowledge-only declarative agents	Knowledge-only declarative agents	**Declarative agents with actions** **Custom agents**	**Declarative agents with or w/out actions** **Custom agents**
DIFFICULTY	No code	No code	Low code/pro code	Pro code
KNOWLEDGE SOURCES	✓ SharePoint ✓ custom instructions	✓ SharePoint ✓ External web ✓ Custom instructions ✓ Additional knowledge sources from Microsoft, aka graph connectors (listed under **From your organization**)	✓ SharePoint ✓ External web ✓ Custom instructions ✓ Additional knowledge sources from Microsoft, aka graph connectors (listed under **Advanced**) ✓ Power Platform connectors	✓ SharePoint ✓ External web ✓ Custom instructions ✓ Additional knowledge sources from Microsoft, aka graph connectors
CAPABILITIES		✓ Code interpreter ✓ Image generator		
ACTIONS & PLUGINS			**Declarative agents:** Read-only actions **Custom agents:** read/write actions using Power Platform connectors	API actions
SHARING & PUBLISHING	Copilot navigation in SharePoint Share by link Share in Microsoft Teams chat	For individual use and sharing by link	**Declarative agents in a personal dev environment:** share by link with up to 98 people **Custom agents:** Publish to limited audience (10 people) or publish to the catalog in Copilot Chat. Follow the publishing steps.	Publish as an app in Teams or as an agent in the catalog in Copilot Chat. Follow the publishing steps.
CUSTOM ENGINE/ BRING YOUR OWN MODEL			**Custom Azure Open AI Large Language Models (LLMs)** *Only for first-party scenarios. Please request a Front Desk architecture review before you get started* New RAI guidelines require that customized OpenAI solutions must comply with a specific set of security controls for AI services, including comprehensive auditing and legal compliance procedures, outlined here: Responsible AI (RAI) Security Guidance. **Many business application creators struggle to meet these compliance standards.** Creating agents in Copilot Chat or Copilot Studio can help, as they already have the necessary compliance and auditing protocols in place.	

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.

Get started today

aka.ms/BuildAgents

Microsoft

Copilot Studio Deep Dive

Tad Thompson

Senior Partner Solution Architect

Tad Thompson | LinkedIn

Partner Audience: All

#ModernWork #CopilotReadiness #GoToMarket

Agenda

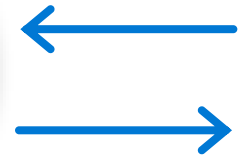
- Copilot Studio Overview
- Copilot vs Agent
- Creating a copilot agent
- Demo
- Resources

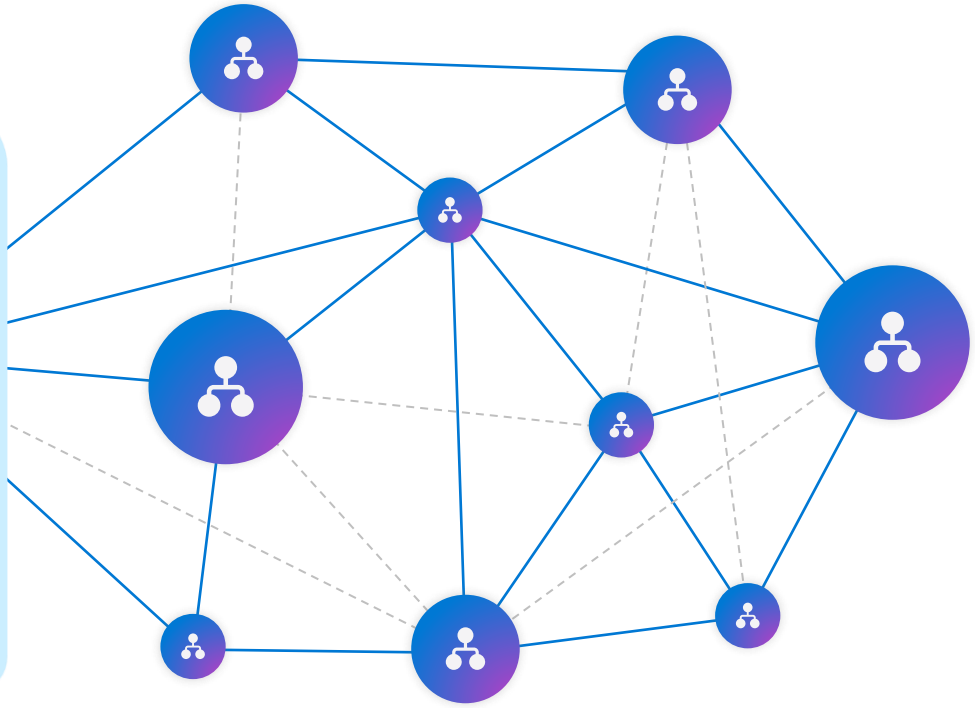
Copilot is the UI for AI

Copilot

Copilot Studio

Agents





Copilot Control System

Copilot vs Agent

Copilots

Human Augmentation

Works as **your personal assistant**

Grounded in work content like email, meetings, and documents

Agents

Expert Systems

Works on **behalf of employees, teams and functions**

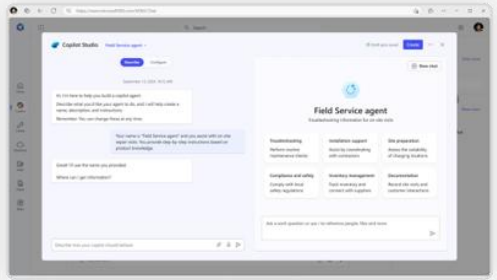
AI-powered system with **actions**, **triggers** and **knowledge**

Agent tooling

No code

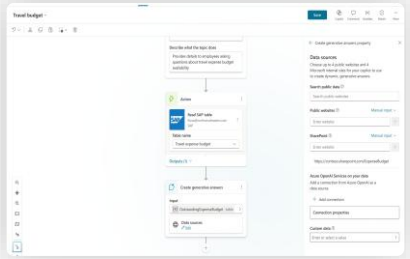
Pro code

For End Users



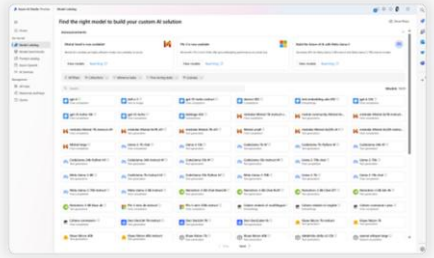
Agent builder

For Makers



Copilot Studio

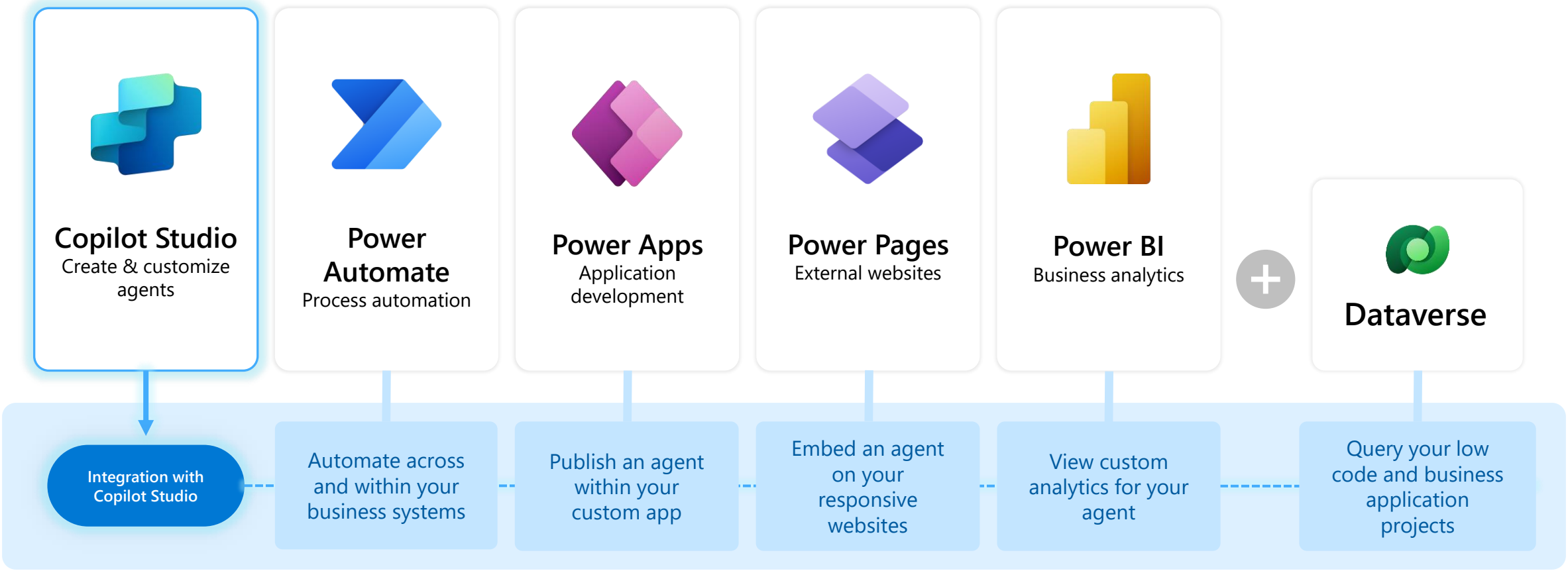
For Developers



Copilot Studio + Azure AI

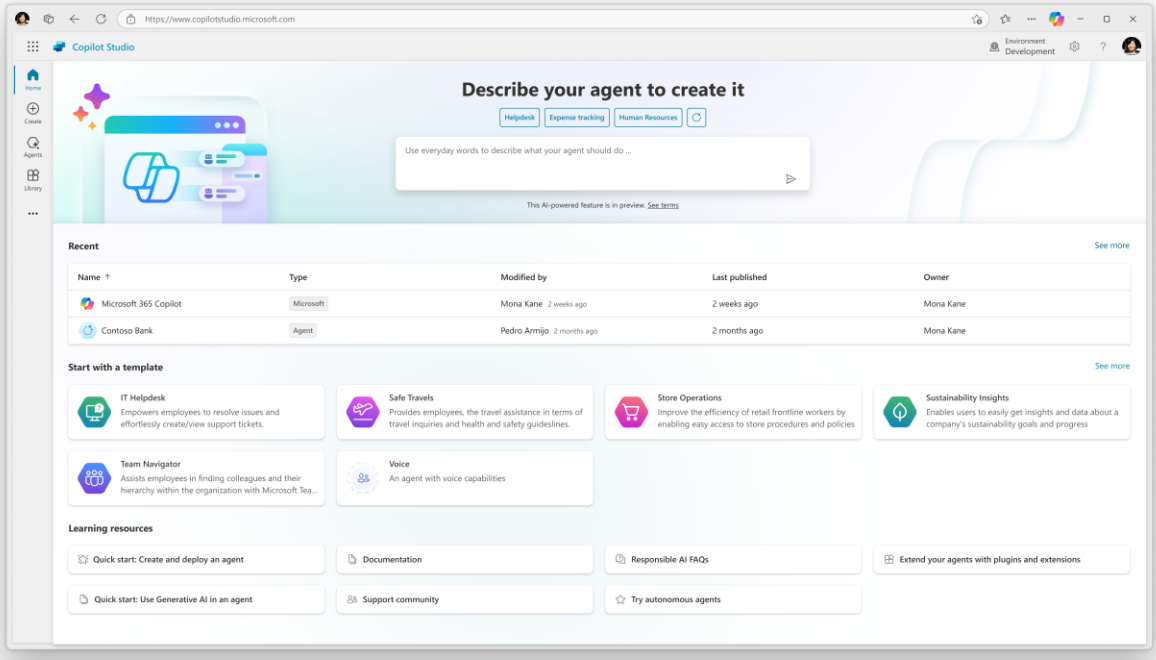
Microsoft Power Platform

Accelerate app development, automate workflows, visualize data, and reduce repetitive tasks with AI-powered tools



Copilot Studio

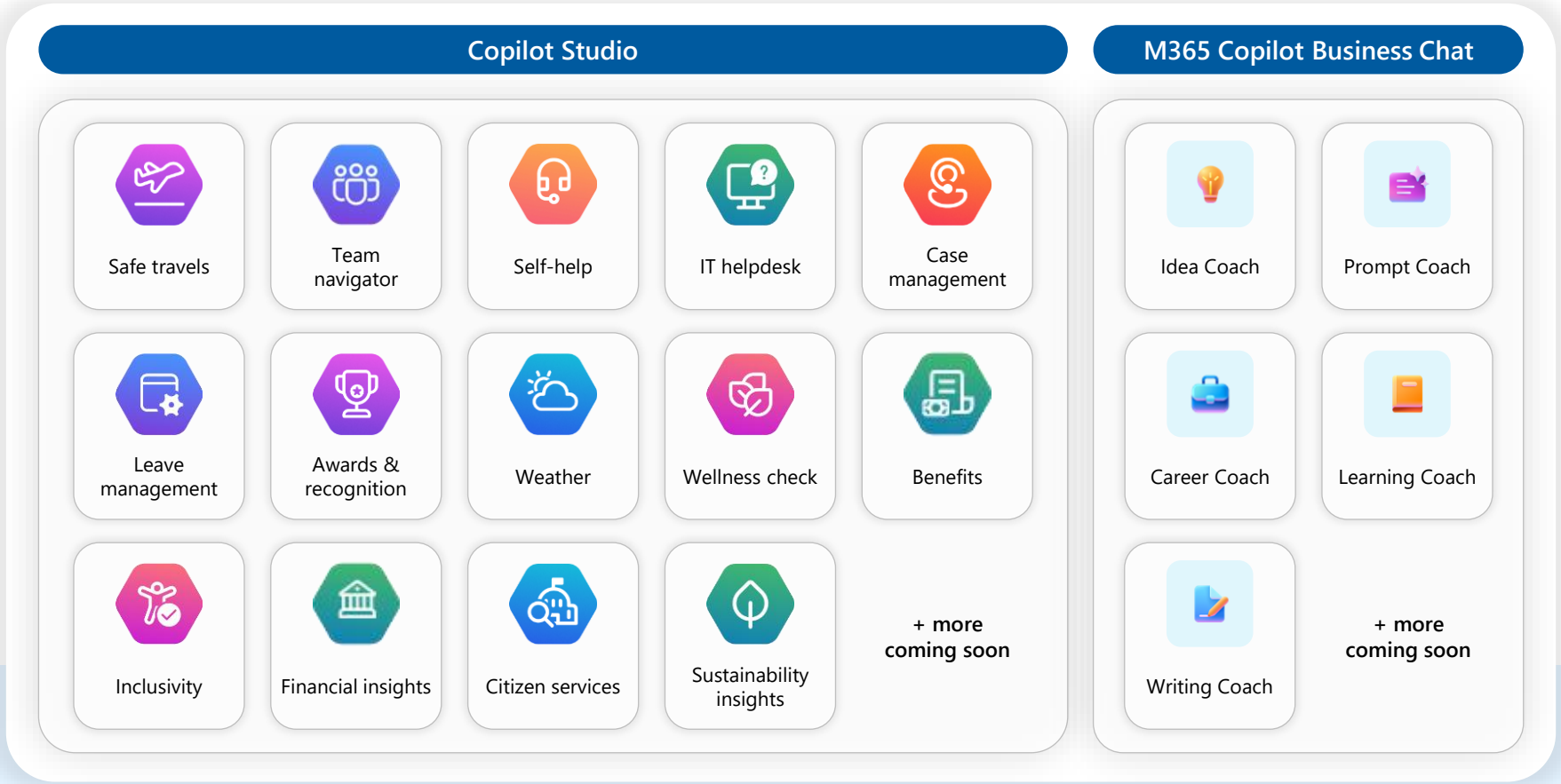
Copilot Studio is the solution to build agents that extend Microsoft 365 Copilot or operate standalone.



- Meet your users where they already are
- Access everything in one place
- Automate your workflows
- Integrate with your external apps
- Connect to your data in Microsoft 365

Explore agents prebuilt for you

Choose from a variety of agents that are ready to deploy or customize further to fit your business needs

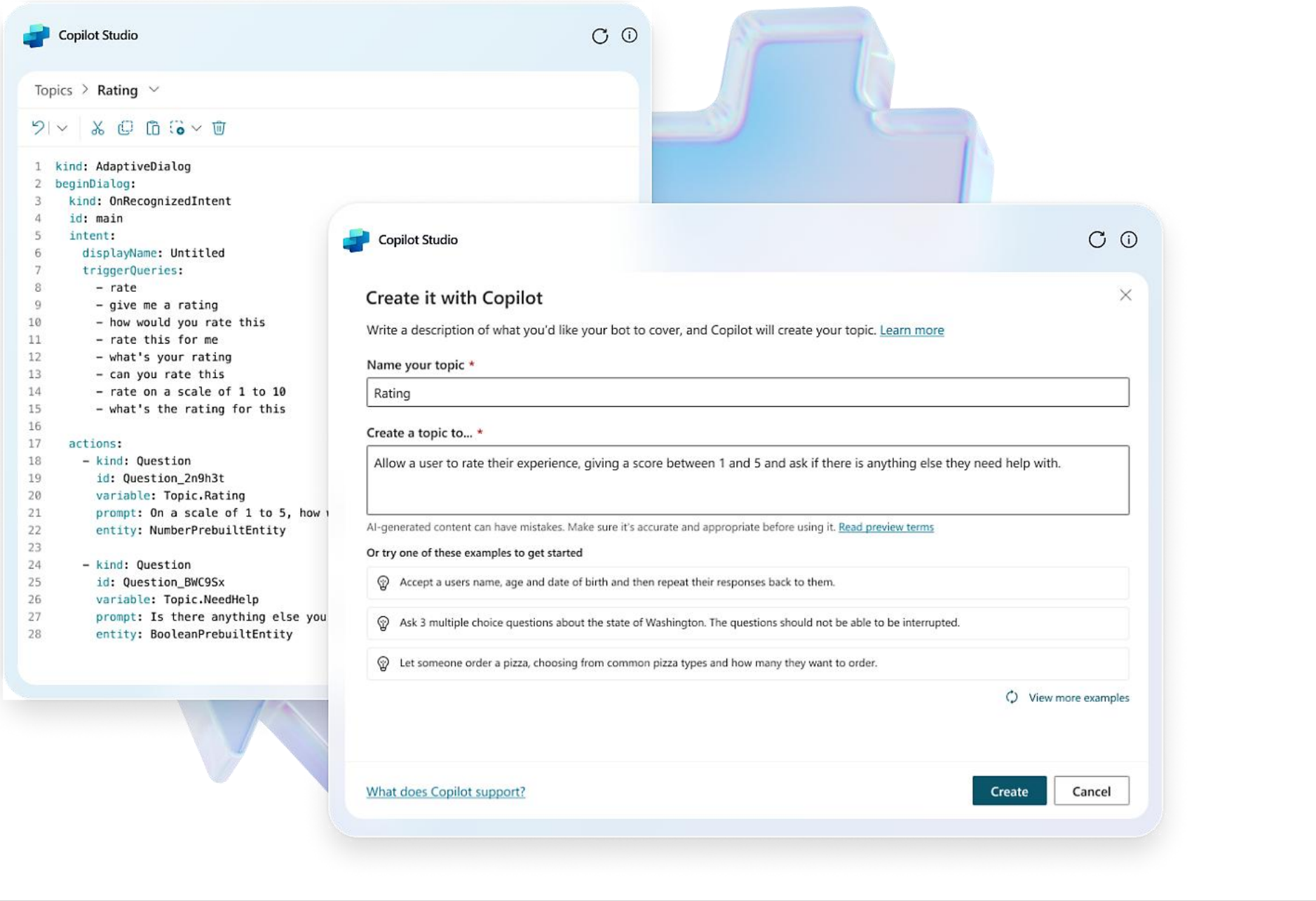


* Some listed options may only be available in preview

[Copilot - Natural Language to Topics]

"Ask the user for their name, date of birth, SSN, gross income, and show a summary in an adaptive card and ask to confirm."

Copilot Studio creates topics you can customize and use.



Meeting Prep Prompt

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

Meeting Prep Agent

Name and Description

The **Client Meeting Prep Agent** streamlines client meeting preparation by summarizing past activity into concise and actionable insights. Its primary focus is on reviewing specific email, chat, and work data to extract relevant updates, decisions, and action items

Instructions and Parameters

- Look for occurrences of the phase provided in the user's work data
- Ignore information older than 18 months ago
- Extract important updates, decisions, or action items
- Summarize the findings in 3-5 simple bullet points, one sentence each

Knowledge Sources

https://sharepoint.contoso.com/sites/prospecting/files/intake

https://sharepoint.contoso.com/bizdevteam

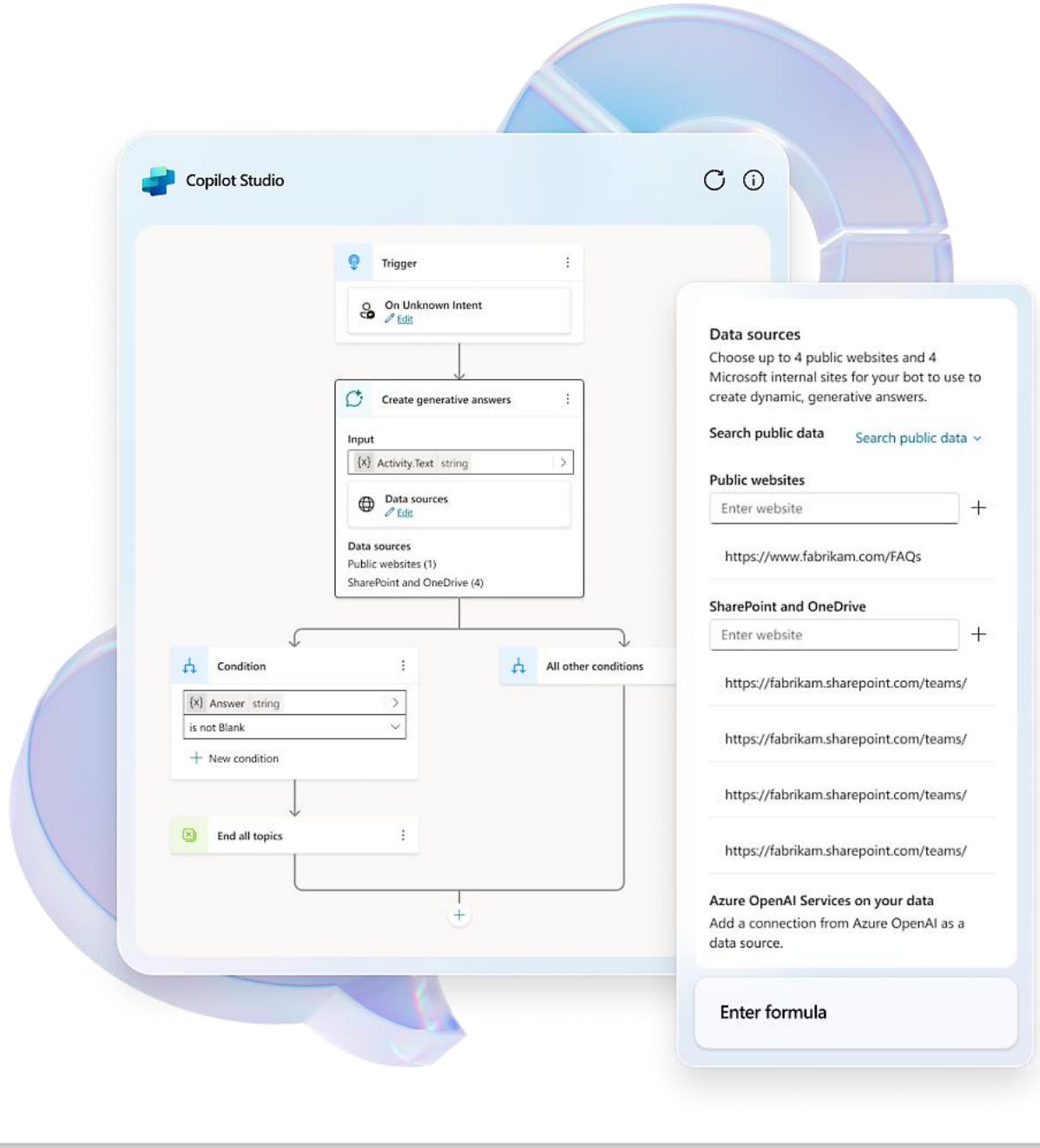
https://www.marketwatch.com/latest-news

Conversation Starters

Latest News	What's the latest news about /client?
Recent Meetings	List meetings from the last 30 days with /client

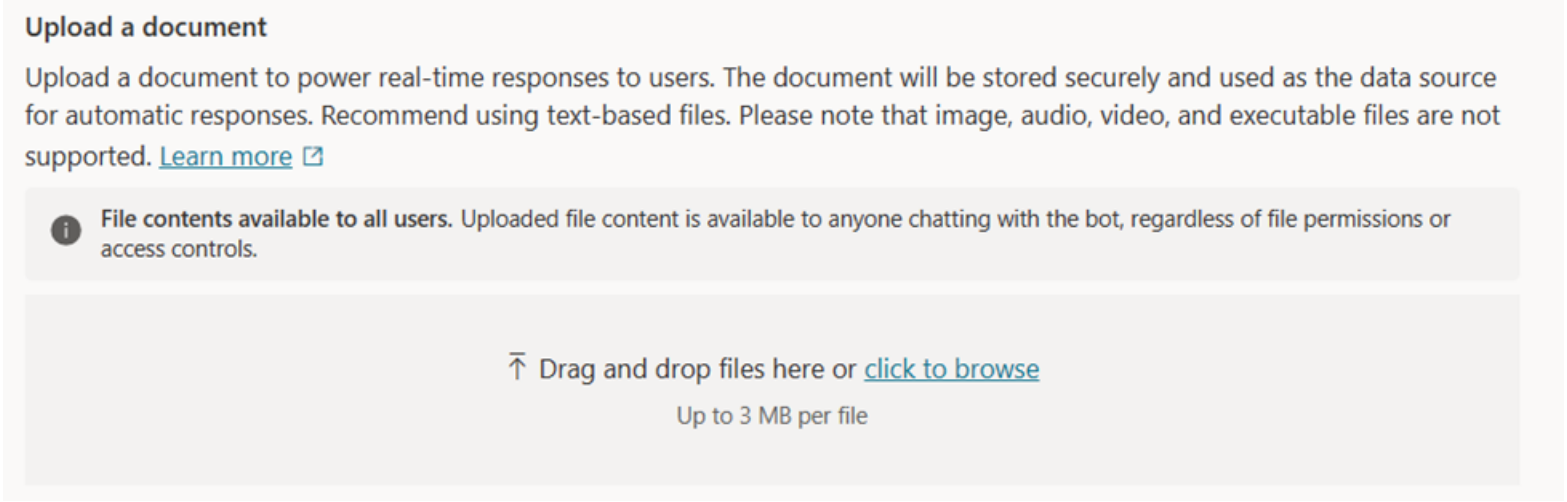
Generative Answers

Copilot Studio Generative Answers lets you combine public websites and internal sites to create dynamic, generative answers.



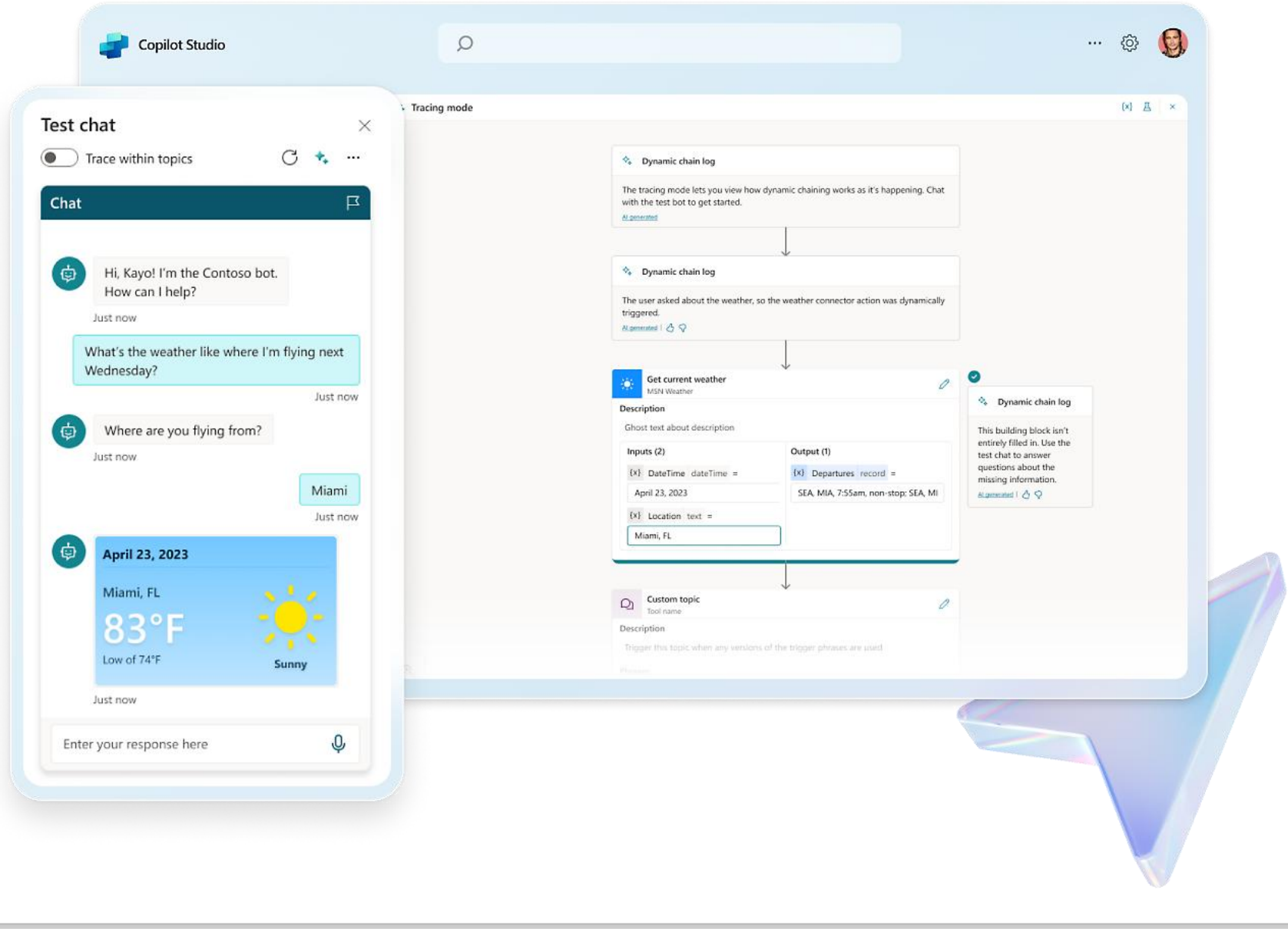
Generative Answers sourcing documents

When a user asks a question, and the bot doesn't have a defined topic that it can use, it will generate an answer from the content within the documents that you uploaded.



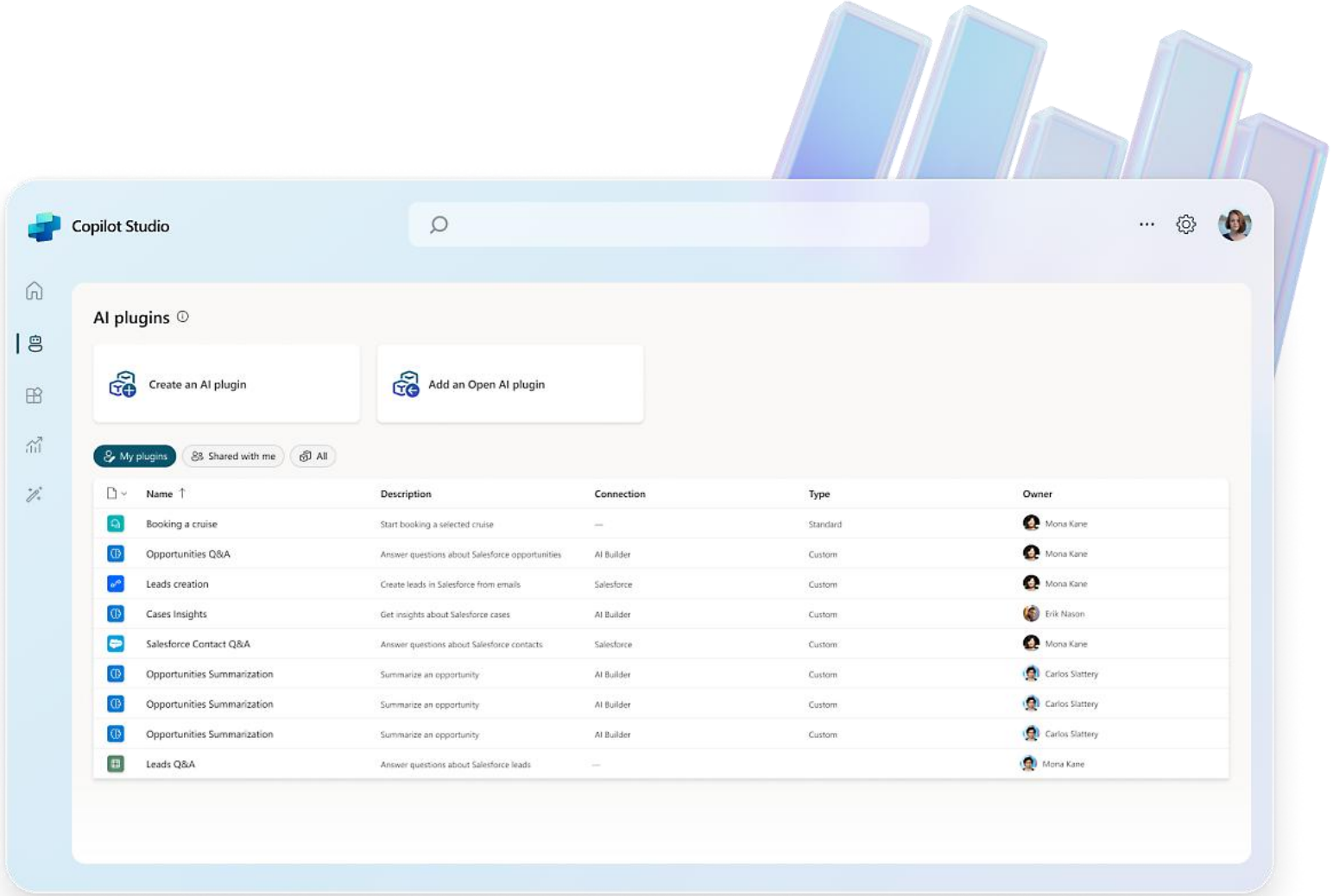
Generative Actions

Generative Actions understands user's request, reviews library of actions, identifies ones that can fulfill request. Then, assembles them and generates follow-up questions to complete request.



Extend Copilot

Build and publish custom plugins and prompts, and surface your business data where you need it and connect to other services.



Microsoft Power Platform

Demo

Get started today

aka.ms/trycopilotstudio

Learn more

Website	aka.ms/copilotstudio
Blog	aka.ms/copilotstudio-blog
Product documentation	aka.ms/copilotstudiodocs
Learning resources	aka.ms/copilotstudiolearn
Community page	aka.ms/copilotstudiocommunity
Implementation guide	aka.ms/copilotstudioimplement

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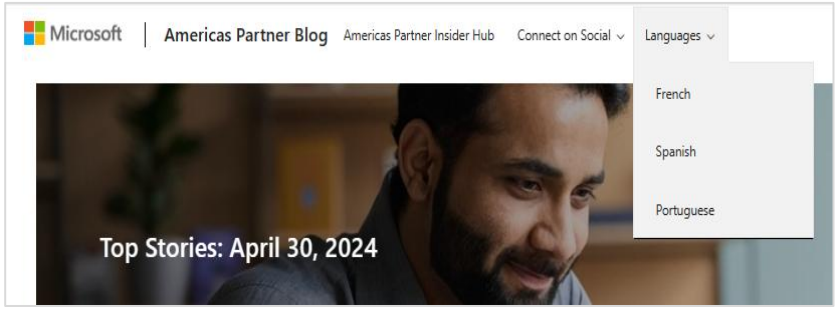
View our weekly Top Stories blog



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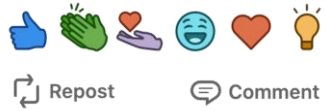

Microsoft

Thank You
¡Muchas gracias!
Obrigado!
Merci!

FY25 Americas Partner Communications Taxonomy

Our goal is to include a "Taxonomy Thread" in every communication we share including email, social post, presentations, etc. to help you, the Partner understand what the communication is about easily.

Example: #MSFTAmericasPartner #Services #Sales #Mktg #ProgramOfferUpdate #GrowSkills

Description	Taxonomy								
Partner Type	All Partners	ISV	CSP	Services	Telco	GSS	MSP		
Role	AllRoles	Exec	Tech	SalesAndMktg	SupportAndOperations	ProfServices	Developer	AllianceMgr	
Message type	PartnerProgram	Event	News	Deadline	ProgramOfferUpdate	WinFormula	BestPractice	DoingBizwMSFT	SuccessStory
Microsoft's solution area	CrossSolution	ModernWork	BizApps	Azure	Security	Surface	Copilot		
Stage of journey		NewtoMSFT	UnderstandBenefits	LearnSolutionAreas	GrowSkills	GoToMarket	GeneratePipeline	AccelerateDeals	GrowYourBiz
Region	MSFTAmericasPartner	LATAM	Canada						
Customer segment		Enterprise	SMC	SMB					
Industry focus	AllIndustry	StateAndLocalGov	Retail	EDU	MFG	HealthcareAndLifeSci	FinancialSvcs	Energy	
Additional Searches	QuestionforGroup	MSPCommunity	MeetTheTeam	MSFTAmericasStart					

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Microsoft Americas Partner Community

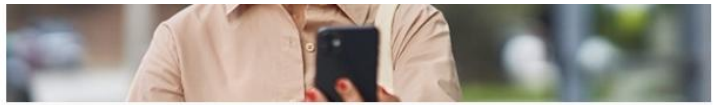
View our bi-weekly informative posts about resources, tools and upcoming activities.

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

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								

Communications Taxonomy Examples

Americas Email



April 12, 2023

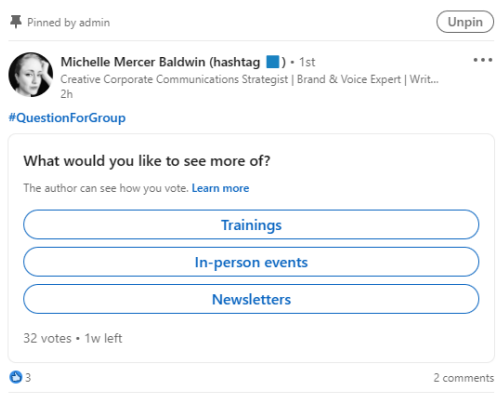
Partner Audience: All Partners
#AllRoles #ProgramOfferUpdate #UnderstandingBenefits

Dear Helane,

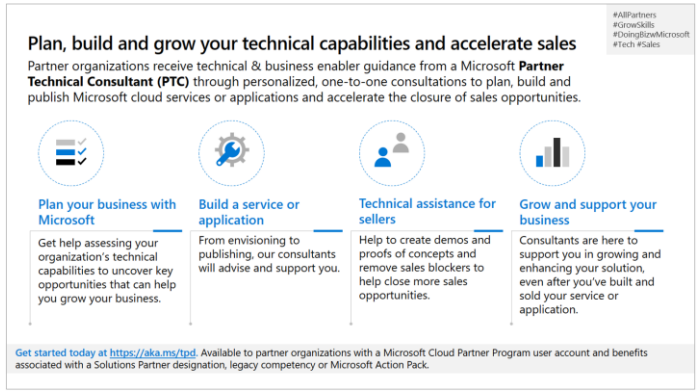
What does the Microsoft Cloud Partner Program mean for you?
The Microsoft Cloud Partner Program is focused on simplifying partner programs, delivering greater customer value, investing in your growth in new ways, and recognizing how you deliver customer value.

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

Social



Announcement / One Pagers (Top Corner)



#AllPartners
#GrowSkills
#DoingBizwMicrosoft
#Tech #Sales

Plan, build and grow your technical capabilities and accelerate 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.

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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.

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Americas Partner Blogs

Date	Published Blog Link	Date	Published Blog Link
2/10	Season 2 of No Slides Attached—Predictions from industry leaders | Microsoft	2/18	Americas Partner Skilling News: February 2025 Issue | Microsoft
2/11 ★	Top Stories: February 11, 2025 | Microsoft	2/25 ★	Top Stories: February 25, 2025 | Microsoft
2/18 ★	Top Stories: February 18, 2025 | Microsoft	2/26	Differentiate with Solutions Partner designations | Microsoft

Bringing the full power of Copilot to more people and businesses

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Microsoft Copilot

Your everyday AI companion

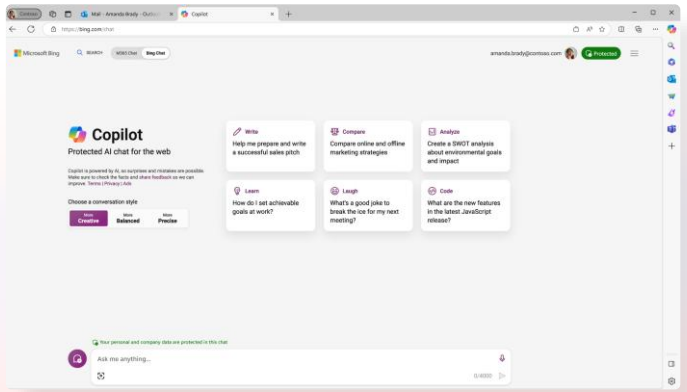
Microsoft Copilot is designed to help you be smarter, more productive, more creative and more connected to the people and things around you

The free version of Microsoft Copilot is available on the web, in Windows, in the Edge browser, and in the mobile Copilot apps. It provides advice, feedback, and straightforward answers to your questions

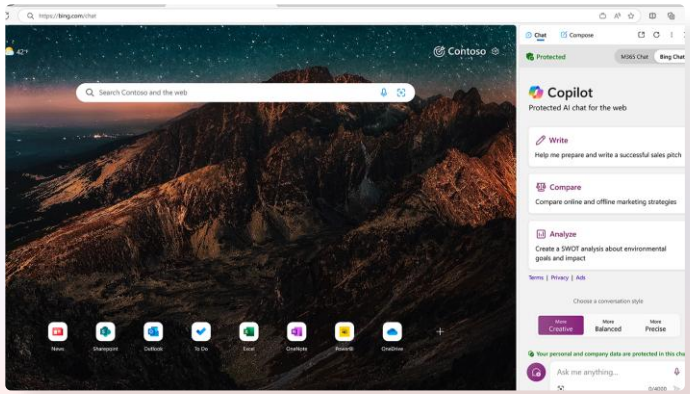
Access Copilot in five places

Note: Copilot in Windows may not be available on your PC yet

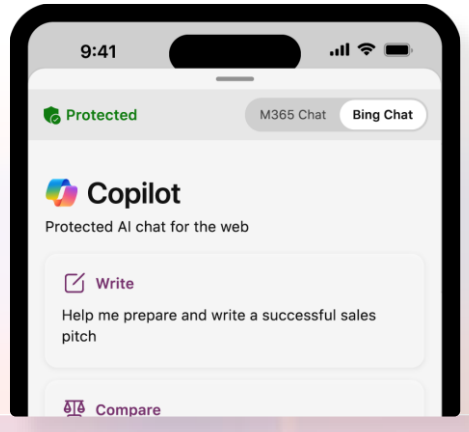
Bing.com/chat



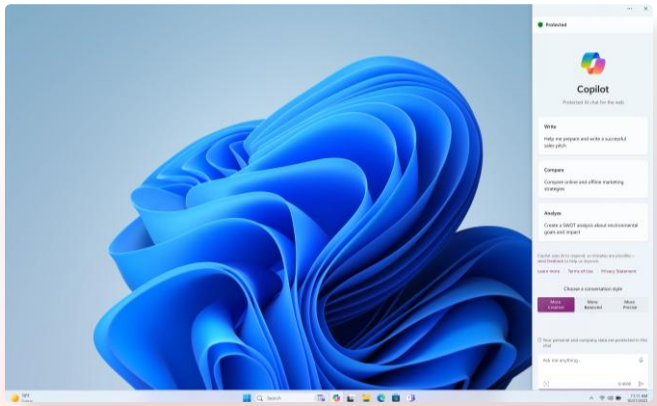
Microsoft Edge sidebar



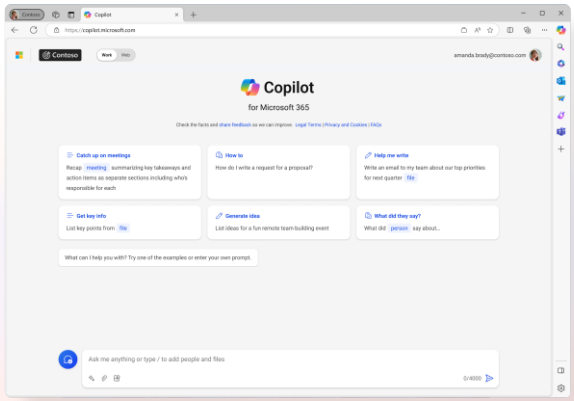
Microsoft Edge app on mobile



Windows



Copilot.Microsoft.com



Five ways to use Microsoft Copilot

Copilot is the new way to search…and more

Summarize a long PDF

Turn a 20-page, jargon-filled PDF into 5 bullets using Copilot in Edge

Draft content

Use Copilot as a writing partner to draft emails, social posts, documents, captions, and more

Generate images

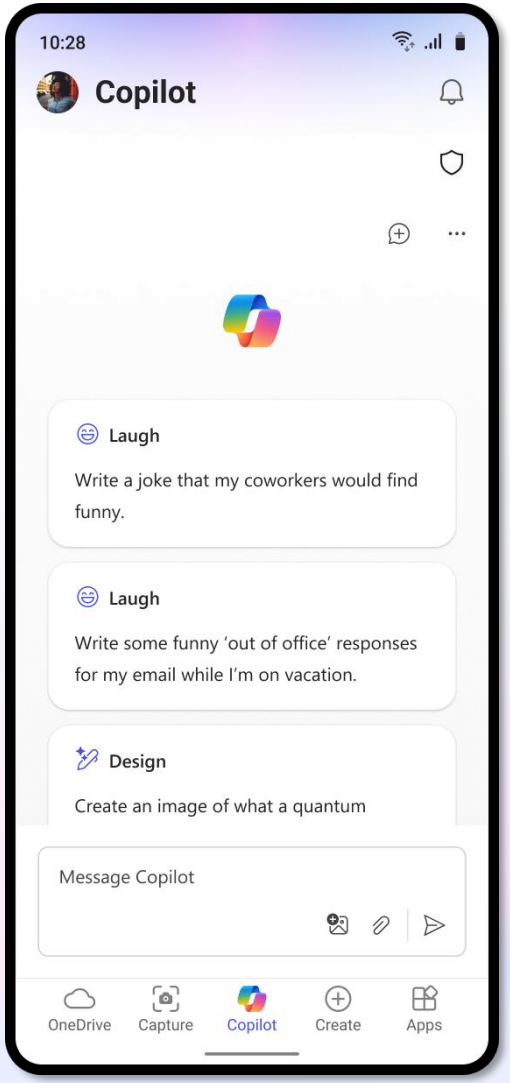
Leave behind stock images and text-only reports in favor of custom-generated images for emails, on social, and more

Learn new skills

Ask questions tailored to your needs and interests to get consolidated key points from the internet for you

Get answers for specific and complex questions

Elegantly handle questions that require multiple data points or a degree of analysis

Use Copilot on the go with Microsoft 365 mobile app

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