

Partner Readiness Series Copilot for Breakfast



Be a partner for Al revolution: elevate your customers experiences with Copilot for M365

Copilot for Breakfast

Setting the scene

Copilot for Breakfast is a Microsoft series of partner webinars meant to enable Microsoft CSP partners discover more on Copilot for M365.

- May 31st In the first session of this series, you will learn how to embrace Copilot for M365 in your organizations and get the best out of it.
- June 7th In the second session of this series, you will learn how to best position Copilot for M365 with your customers, addressing their very specific needs.

Copilot for Breakfast

Session 2

Your Hosts Today



Mette Kahl Small & Medium Business Sales Lead



Arianna Riccardi Copilot for M365 Go to Market Manager



Giorgio Cifani
Partner Technology Strategist,
Italy



Jeevantika Lingalwar Partner Solution Architect, Ireland



Ulrike Hedlund CEO, Storyals

Al is now, what are you waiting for? Embrace the change with Copilot for M365

Agenda June 7, 2024

- Introduction: why are we here today?
- · Copilot for Microsoft 365: licensing options
- WTI results & Partner opportunity with Copilot
- Partners' Best practices (how to demo Copilot)
- · Message: Be customer zero and adoption guidance
- · Guest Speaker: Storyals, CEO Ulrika Hedlund
- Useful Resources for customers



Arianna Riccardi Copilot for M365 Go to Market Manager

Copilot for Microsoft 365 Licensing Options



Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



+



+



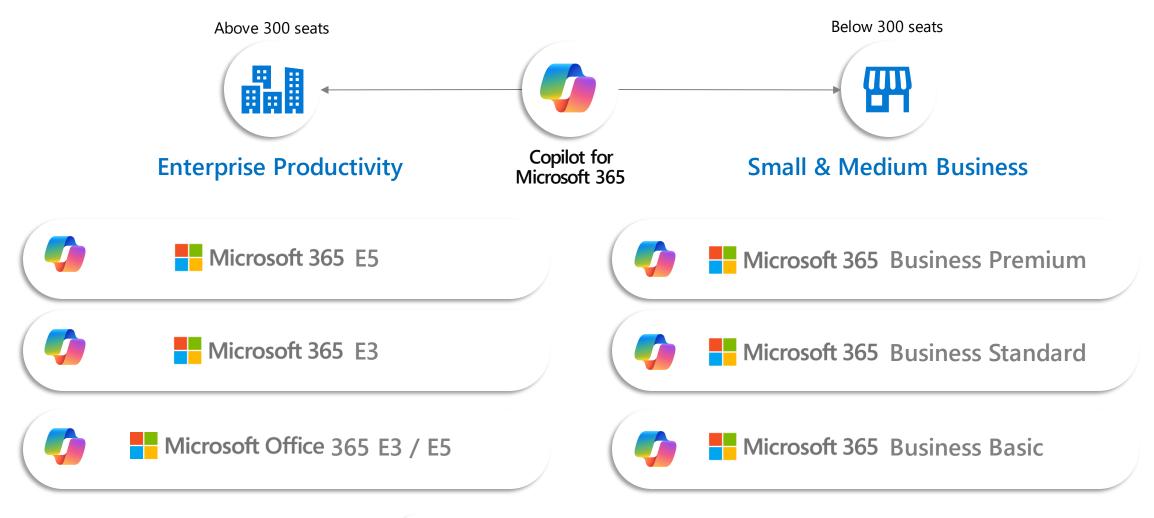
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Large Language Models Microsoft Graph
- Your Data -

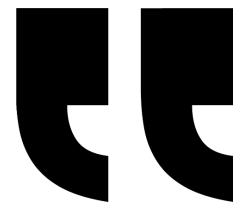
Microsoft 365 Apps The Web

Gen AI-Powered Productivity & Collaboration









A Copilot on every desk, every device and across every role is core to Microsoft's mission to empower every person and every organization on the planet to achieve more.

Judson Althoff
Executive Vice President and Chief Commercial Officer



Copilot for Microsoft 365

Built on Microsoft's comprehensive approach



+



+



+



Security

Compliance

Privacy

Responsible Al

Secure and govern Copilot with Microsoft Security





Security

+



Compliance

+



Privacy





Responsible AI



Secure access

Manage organization-wide search with Restricted SharePoint Search controls

Restrict or block risky access with conditional access

Control the use of Copilot on devices with device and application management



Protect sensitive data

Protect access to sensitive data in Copilot interactions with sensitivity labeling

Keep confidential information within your business with **DLP policies**

Understand user activities and detect risky access to Copilot with audit logging



Govern Copilot usage

Retain and log Copilot interactions with retention and deletion policies

Find information on Copilot interactions with search and export capabilities

Manage cases and apply legal hold to investigate security and compliance incidents

Security and compliance controls for Copilot for Microsoft 365



Small & Medium Business



Foundational security controls

Microsoft 365 Business Basic or Business Standard + Copilot for M365

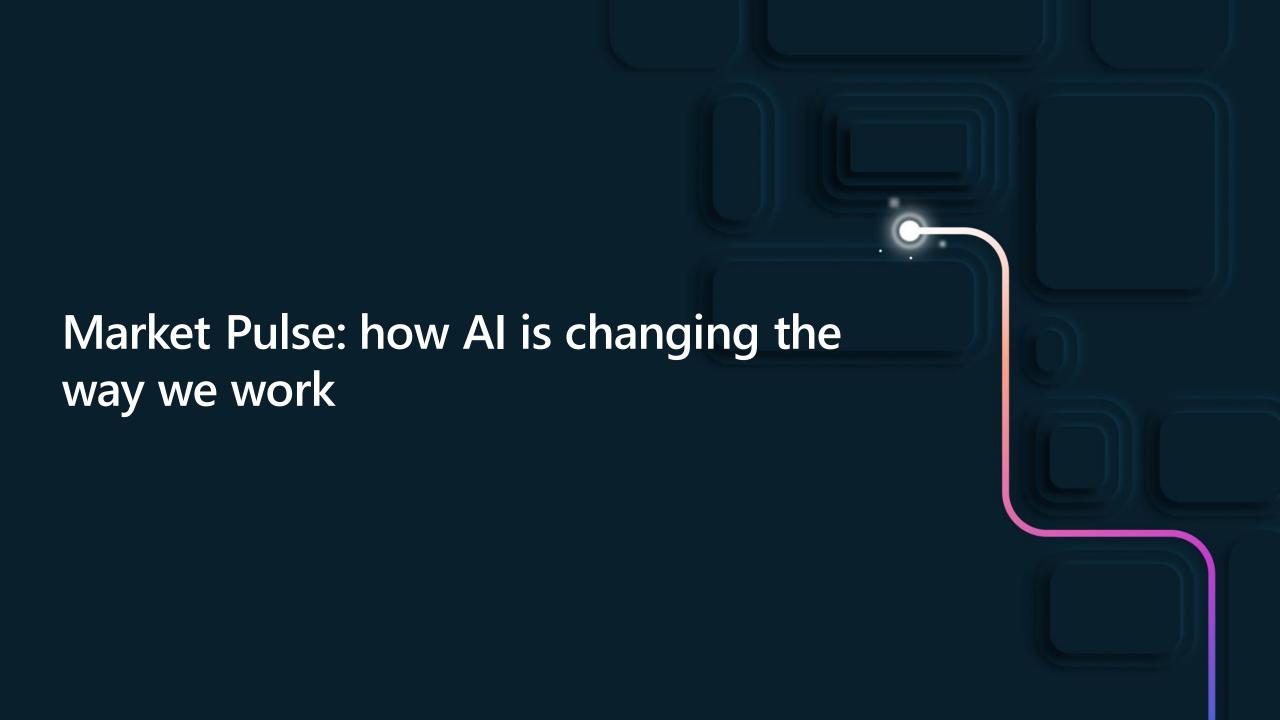
- Multi-factor authentication (MFA) to securely authenticate to M365 applications to use Copilot
- > Search for and export results for Copilot prompts and interactions
- Audit logs for Copilot interactions
- Retention or deletion policies for Copilot interactions on any generated content



Comprehensive security controls

Microsoft 365 Business Premium+ Copilot for Microsoft 365

- MFA with Conditional Access controls based on identity, device, location, and network
- Search, export, eDiscovery case management, and legal hold for Copilot prompts and interactions
- Audit logs for Copilot interactions
- Retention or deletion policies for Copilot interactions on any generated content
- Manual sensitivity and retention labels for content that can be processed by Copilot in files and emails
- Data loss prevention policies to help protect sensitive data generated by Copilot in files and emails



Copilot for Microsoft 365 is transforming work

60%

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

64%

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

70%

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



68%

said Copilot improved the quality of their work

70%

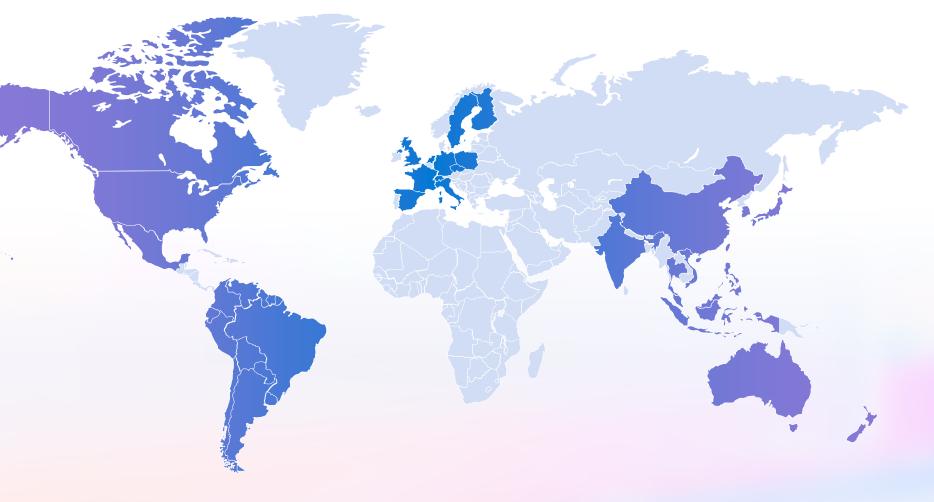
said Copilot made them more productive

77%

said they didn't want to give Copilot up

Work Trend Index 2024

http://aka.ms/wti24







Labor, hiring trends from **LinkedIn**



Productivity patterns of **Microsoft 365**

Debuting 2024 **SMB WTI Infographic**

2024 Work Trend Index



Key Insights from the market

Al is here.

78% of small and medium-sized business workers across the world are already using Al tools.

2 Security 80% of SMB users are bringing their own AI tools to work.

Adoption

61% of these leaders also say their company lacks a vision and plan to implement AI.

2024 Work Trend Index



Key Opportunities for Partners

1 Al is here.

Become a trusted Al Advisor for your customers!

2 Security

Get your customers optimized for Copilot with M365 Business Premium / M365 E5

3 Adoption

Guide the change of culture in the company and help employees to be ready to embrace it!

2024 Work Trend Index



Be a Customer Zero

Adopt Copilot for your company, identify the key use cases and assess the ROI.

1 Al is here.

Become a trusted Al Advisor for your customers!

2 Security

Get your customers optimized for Copilot with M365 Business Premium / M365 E5

3 Adoption

Guide the change of culture in the company and help employees to be ready to embrace it!



Copilot for Microsoft 365

Three-phase approach to business progress

1 Phase



12 Phase



13 Phase



Readiness

- Review your security and data settings
- Be intentional with seat assignments
- Create an Al council
- Prepare employees for a new way of working

Adoption

- Create a Copilot user community
- Identify Copilot champions and early adopters
- Make ongoing training a standard

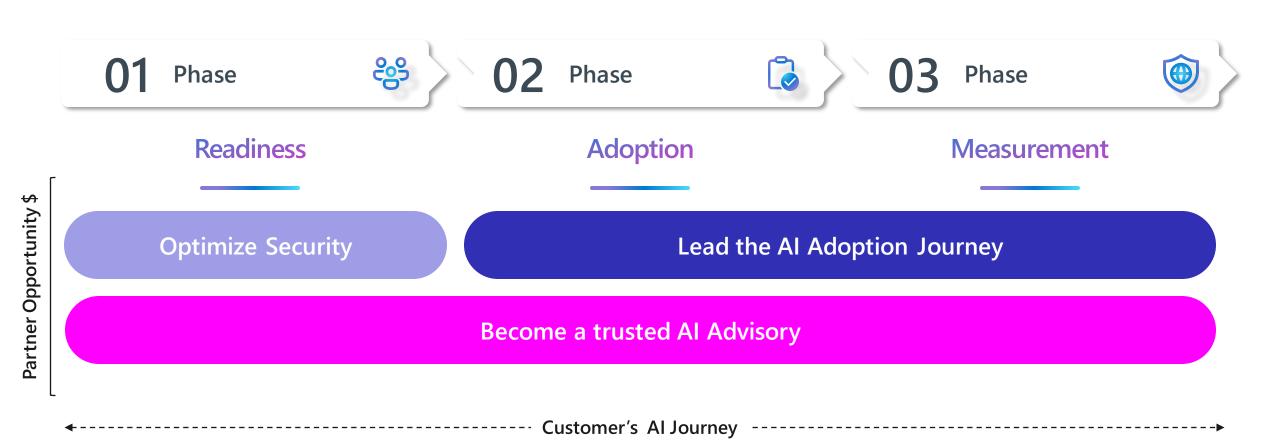
Measurement

- Quantify impact with the Microsoft Copilot Dashboard
- Meet with your AI council regularly
- Publicly celebrate successes



Copilot for Microsoft 365

Three-phase approach to business progress





Jeevantika Lingalwar Partner Solution Architect, Ireland

Partner's Best Practices (How to Demo Copilot)



Speaking with the CEO

Selling on Outcomes

Designing more profitable Offers



Best Practices

Changing Customer Relationships



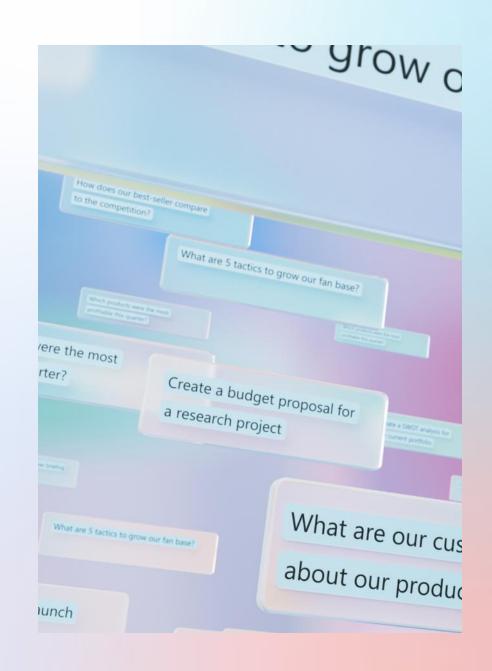
Copilot for Microsoft 365 is a transformation project.

It is not a technology project.

Copilot is about embracing an Al-based Communication and Collaborative Partner.

It is not just the next version of Microsoft 365.

And not just a license to upsell.



Your Opportunity is bigger than a product

Sell Copilot for Microsoft 365 services as a recurring offering.

- Help your customers continuously reap full AI benefits
- Become a trusted advisor to the CEO+
- Strengthen customer relationships
- Protect your customer base
- Create a different customer lifetime value metric
- Increase revenue and profit

Opportunity to establish trust from the very beginning

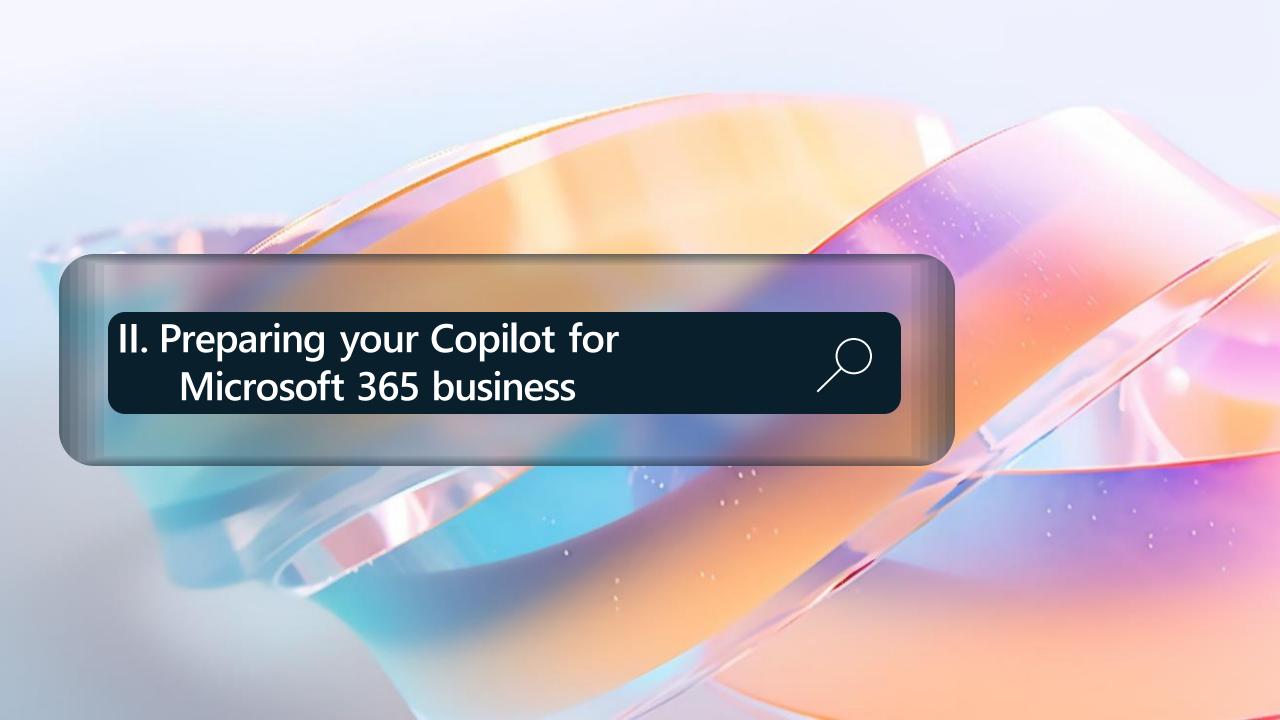
Eliminate early barriers

Microsoft Cloud Runs on trust

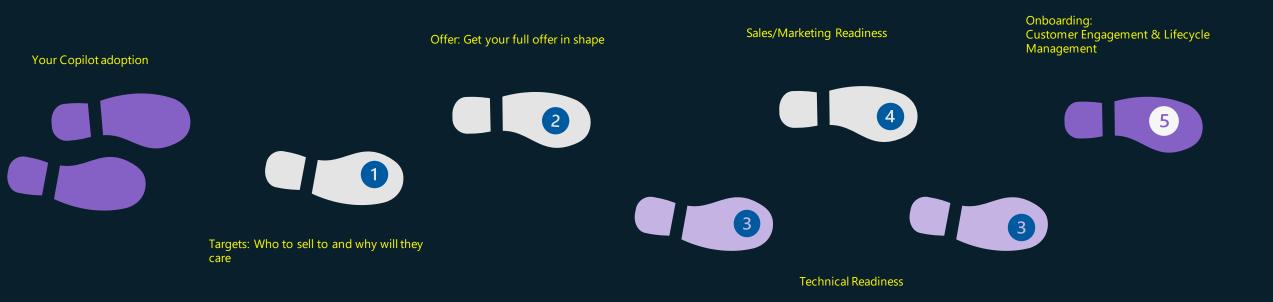
Your data is your data

Your data is not used to train the foundation AI models

Your data is protected by the most comprehensive enterprise compliance and security controls



Your Journey Selling Copilot for Microsoft 365 to your customers and prospects



Your Copilot for Microsoft 365 adoption

Start with your journey to get your entire company familiar with Copilot for Microsoft 365

Step "Zero"



Self-Enablement first

- Enable Copilot for Microsoft 365 use within your organisation after performing security health and document management assessments
- ☐ Start using Best Practice e.g. use **Teams meeting summaries** and share them w/ customers after calls
- Collect and document your own use cases where you see quick wins and impact in your daily life
- ☐ Learn 'prompting' and build a library of useful prompts. Share
- Let your customers know you are using Copilot for Microsoft 365. Give them updates



Target: Who to sell to and why will they care

Knowing your right target audience is very important

- ☐ Do we know which customers I should start with first?
- ☐ Do we know the right contacts at our customers?
- ☐ Do we know the challenges of our customers?
- ☐ Do we know how they do their business?



Your Offer: Get your <u>full</u> offer in shape

Your offer should cover all necessary stages of pre assessment, implementation and managing the required adoption and change management process. And to stay with the customer as their 'guide' on their journey with Copilot for Microsoft 365 and farther into Al.

- ☐ Is my offer based on a business outcome?
- What is our differentiator?
- Do we cover adoption/change management as part of our service?
- ☐ Can we manage to implement Copilot for Microsoft 365 to be driving strong value for customers?
- ☐ Can we offer a Managed Copilot for Microsoft 365 Service?



Build technical expertise for Copilot for Microsoft 365

- ☐ Check for Security expertise (or build)
- ☐ Check for Information Protection & Governance expertise
- ☐ Check for Adoption/Change Management expertise

Everyone will be competing with you for Copilot for Microsoft 365 business.

Most will sound to customers just like everyone else.

Your Difference will be identified in your Portfolio, Capabilities, Approach and Experience.

If you do not have this identified, you can not articulate it.

If you do not have this identified,

Ask for help.

Sell the OUTCOME, not the product.

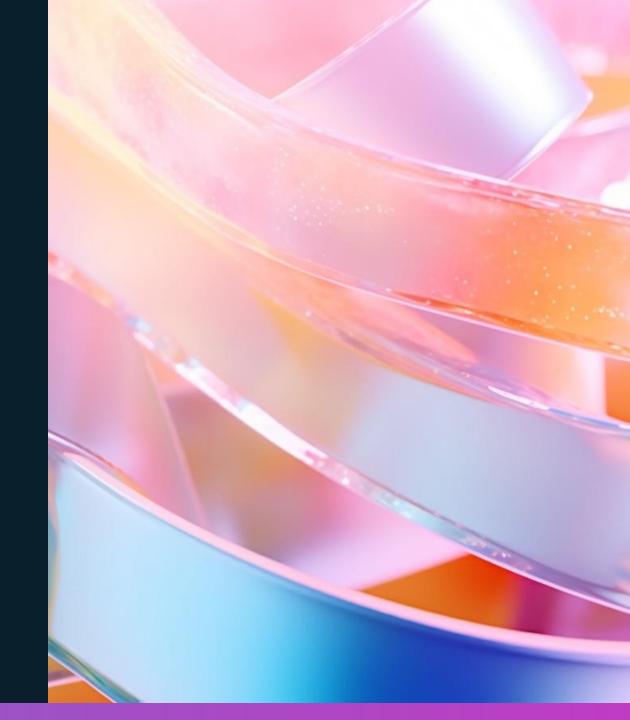




Onboarding: Customer Engagement & Lifecycle Management

Sell and stay connected

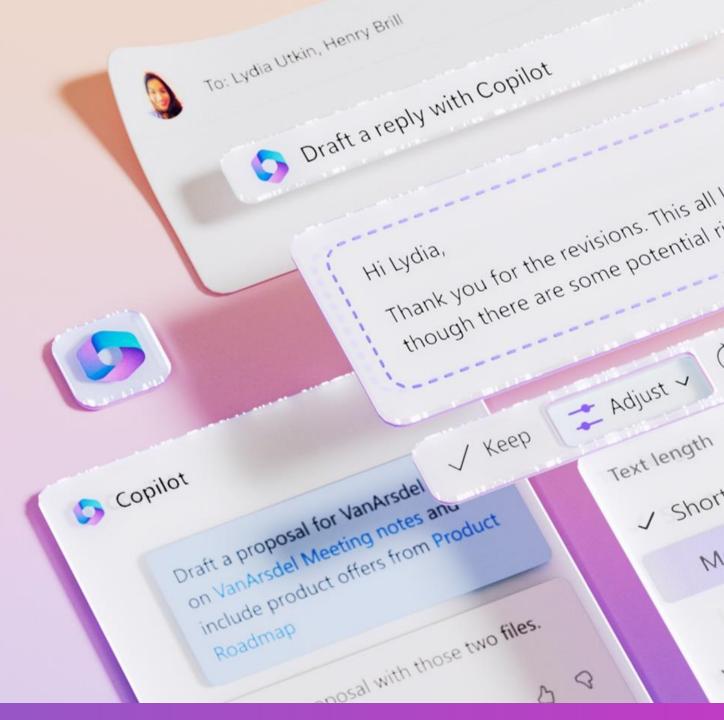
- It is a journey
- Be an advisor showing value of Copilot
- Identify new areas for expansion
- Build and execute your CLM muscle





Smashing Demos

Seeing is believing. Knowing some short but effective demos and scenarios that will instantly win a customer's interest is key for selling Copilot for Microsoft 365.







Use <u>prebuilt Copilot guided click-through simulations</u> available from the Get Copilot Ready SMB Briefing.

Use <u>SMB demo scripts and files</u> to run your own live Copilot demos.

Use Microsoft 365 E3 Copilot demos (CDX Secure Productivity content):

- <u>Unleash Creativity guided demo</u>
- <u>Unlock Productivity guided demo</u>
- <u>Uplevel Skills guided demo</u>

Use Microsoft 365 BP Copilot demos (CDX Secure Productivity content):

- <u>Unleash Creativity guided demo</u>
- Unlock Productivity guided demo
- <u>Uplevel Skills guided demo</u>

Leverage Copilot for Work | Microsoft 365 video demos.

Instructions for guided simulation demos

These guided click-through simulations were built to support the Copilot for Microsoft 365 CSP Briefing and are optimized for a two-screen experience. These are not videos.

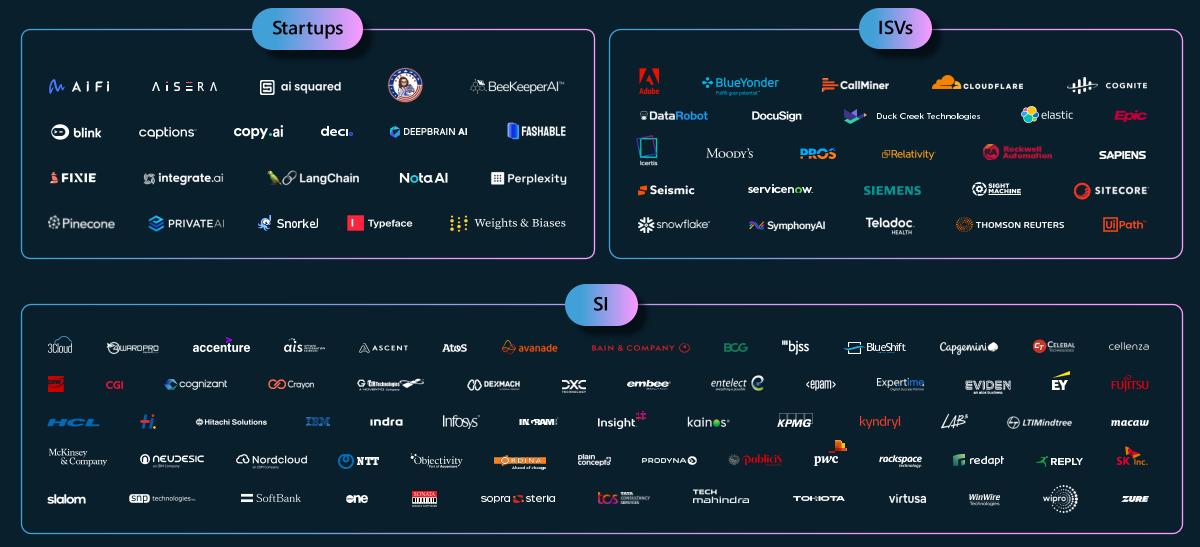
Initiate these guided click through simulations by clicking on links below to highlight Copilot in key apps:

- Copilot in Teams Meetings
- · Copilot in Outlook
- · Copilot in Word
- · Copilot in PowerPoint
- · Copilot in Excel
- · Copilot in Teams chat
- Copilot in Whiteboard
- · Just enough access Introduction
- Just enough access example of sensitivity blocking access
- · Just enough access sensitivity labeling admin process

Best practices for a successful demo

- To start in a Presenter view for a demo, press **Alt + P**.
- In the upper right of the initial screen, **click Launch demo** to create a separate customer screen.
- The seller screen will show you demo guidance such as flashing click beacons and suggested speaker notes.
- The customer screen will contain a simulation of the Microsoft products being showcased in the demo (but with no flashing beacons or other guidance.)
- Click anywhere within the newly launched customer screen and Press F11 to make it full screen for the best viewing experience.
- If the view of the Customer Screen does not fill the screen as expected, **Refresh the browser window** (via right-click, etc.)
- Keep the presenter screen active in an unshared window to follow the demo guidance as desired.

Partner with Microsoft partners



A copilot for every Microsoft Cloud experience



Copilot for Dynamics 365

Copilot to assist roles within each line of business applications.



Copilot for Power Platform

Use natural language to accelerate the development of apps, automations and pages.



Copilot for Microsoft 365

Copilot assistant to accelerate productivity with Microsoft 365 apps and chat with your data



Copilot for Security

Receive tailored insights that empower your team to defend.



Copilot for Windows

Get answers and inspirations from across the web, supports creativity and collaboration, and helps you focus on the task



Copilot for GitHub

Increase developer productivity by helping you write code faster with less work.



Giorgio CifaniPartner Technology Strategist
Italy

Be Customer Zero. Adoption Guidance



Get Ready

Build your strategy, identify you high value stakeholders and define hero scenario





Create a Pilot

Identify a minimum of 5+ users to showcase what's possible

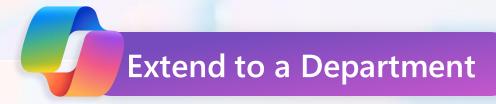












Identify a department to expand to focus on a set of scenarios



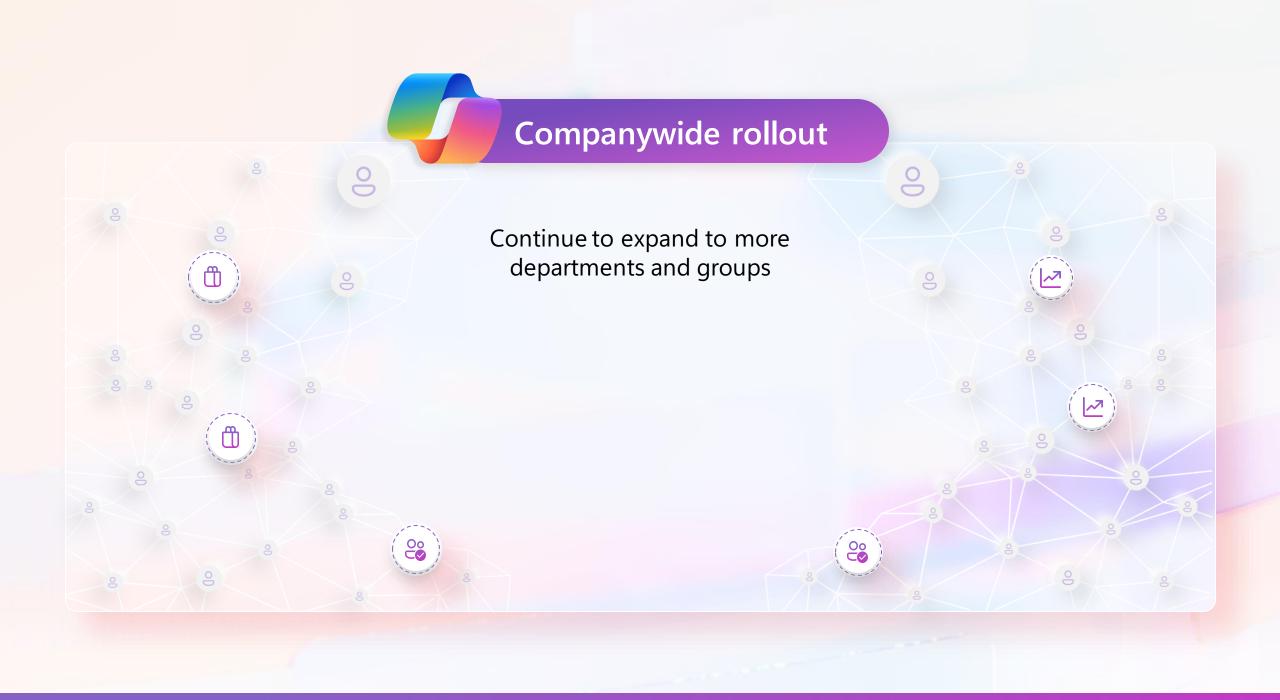
Marketing



HR



Sales



Use Copilot as an inspiration for a proper adoption plan!

5 June 2024 at 19:06

I am the person in charge to land Copilot for Microsoft 365 in a small company of 60 employees. Help me identify personas in 3 different departments - Marketing, HR and Sales - that could get real value out of Copilot. Describe 3 scenario each where a significant time saving is possible. Add the prompt used for each

Certainly, Giorgio. Here are personas and scenarios for each department where Copilot for Microsoft 365 can significantly save time:

Marketing Department:

- 1. Persona: Content Creator Scenario: Quickly generating engaging content for campaigns. Prompt: "Create a catchy tagline for our new eco-friendly product line."
- 2. Persona: Product Marketing Manager Scenario: Summarizing market research to identify trends. Prompt: "Summarize the key findings from the latest market research on consumer behavior towards sustainable
- 3. Persona: Pricing Analyst Scenario: Analyzing competitor pricing strategies and providing recommendations. Prompt: "Compare our pricing with the top three competitors and suggest adjustments for our premium range."

Human Resources (HR) Department:

- 1. Persona: Talent Acquisition Specialist Scenario: Streamlining the recruitment process by creating job descriptions and screening resumes. Prompt: "Draft a job description for a senior software engineer with a focus on AI and machine learning skills."
- 2. Persona: HR Compliance Officer Scenario: Keeping up with the latest regulations and ensuring company policies are updated. Prompt: "Update our employee handbook to reflect the latest remote work policies."
- 3. Persona: Employee Development Manager Scenario: Developing personalized training programs for employees. Prompt: "Create a training plan for employees to enhance their digital collaboration skills using Microsoft 365 tools."

Sales Department:

- 1. Persona: Sales Representative Scenario: Generating custom sales proposals for potential clients. Prompt: "Generate a tailored sales proposal for a client interested in our cloud storage solutions."
- 2. Persona: Account Manager Scenario: Keeping track of customer interactions and summarizing key action items. Prompt: "Summarize the main points and action items from the last meeting with our top client."
- 3. Persona: Sales Analyst Scenario: Analyzing sales data to identify trends and opportunities. Prompt: "Analyze the sales data from the past quarter and identify the top-performing products and reasons for their success."

These scenarios leverage Copilot's ability to assist with content creation, data analysis, and administrative tasks, helping each department focus on higher-value activities and strategic initiatives.

Copy

■ 1 of 30 responses Al-generated content may be incorrect 💍 🖓



5 June 2024 at 19:09

Great! Now suggest steps to land the above messages to personas in different departments following Change Management best practices (e.g. nominating champs). Suggest also the right timing for each step.

To land the messages effectively to personas in different departments following Change Management best practices, here are the suggested steps along with the right timing for each:

Step 1: Identify and Nominate Change Champions

- · Timing: Immediately after the decision to implement Copilot for Microsoft 365.
- Action: Select individuals from Marketing, HR, and Sales who are influential, tech-savvy, and enthusiastic about change. These champions will be pivotal in driving adoption within their departments.

Step 2: Develop a Communication Plan

- · Timing: 1-2 weeks after nominating champions.
- · Action: Create a structured communication plan that outlines the key messages, channels, and frequency of communications. This plan should be tailored to address the unique needs and concerns of each department 1.

Step 3: Conduct Stakeholder Analysis and Interviews

- . Timing: Concurrent with Step 2.
- · Action: Understand the impact of Copilot on different roles within the departments by conducting interviews and analyzing stakeholders. This will help in customizing the communication and training materials 1.

Step 4: Create Personas and Journey Maps

- Timing: 2-4 weeks after Step 2.
- · Action: Develop personas for the most impacted stakeholder groups and create journey maps to visualize how they will experience the change. This helps in building empathy and designing a tailored change approach for each audience 1.

Step 5: Plan Targeted Training and Workshops

- Timing: 1-2 weeks after Step 4.
- · Action: Organize training sessions and workshops that are specific to the roles and needs of the personas identified. This could include hands-on sessions with Copilot and discussions on best practices (2).

Step 6: Execute the Communication Plan

- . Timing: Start at least 4-6 weeks before the rollout of Copilot.
- · Action: Begin executing the communication plan, ensuring that messages are released in a sequence that first addresses the 'why' and 'what', then focuses on the 'how' the change impacts the personas 1.

Step 7: Monitor and Collect Feedback

- Timing: From the start of communication execution and ongoing.
- Action: Establish feedback mechanisms to monitor the effectiveness of the change management activities. Use surveys, interviews, and usage metrics to gather insights and make necessary adjustments 2.

Step 8: Reinforce and Sustain the Change

- Timing: Ongoing after the rollout of Copilot.
- · Action: Continue to support the personas with follow-up communications, advanced training, and

Build your strategy, identify you high value stakeholders and define hero scenario

Start with 5-10 users to showcase what's possible with Copilot for Microsoft 365 Expand to users within an entire department and focus on a set of tailored scenarios

Build on initial success by expanding to additional users or departments



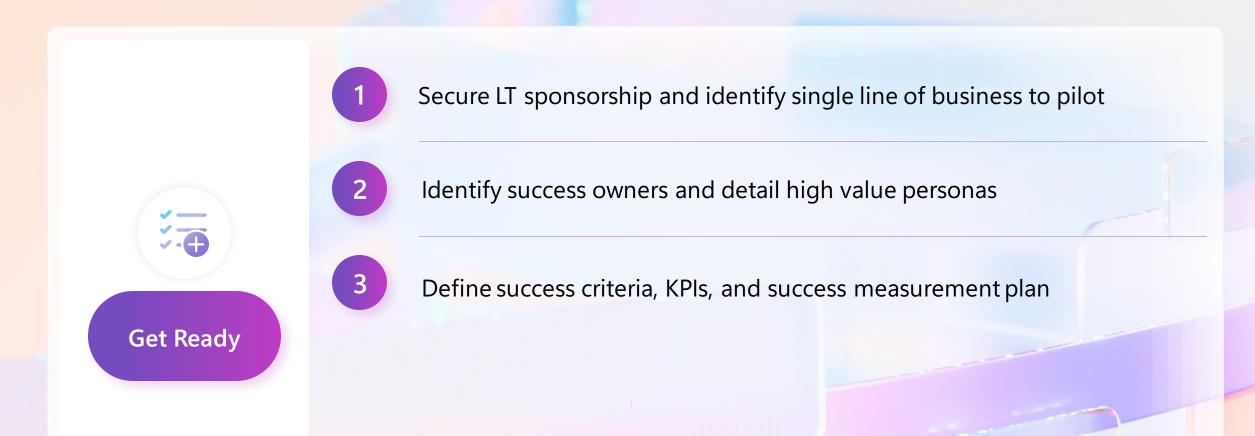
04. Scale to Organization

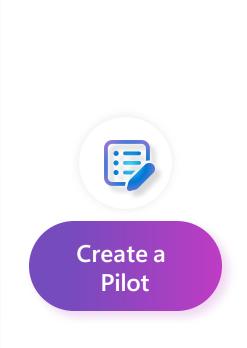


03. Expand to a Department

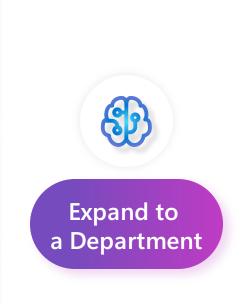
02. Create a Pilot

01. Get ready





- Launch a pilot for 5+ users and help them get started
- Prepare and deploy Copilot for M365
 - Discover, label, and protect data
 - Migrate data to Microsoft 365
 - Implement Identify and Access Management
 - Configure Copilot and assign licenses
- 3 Drive Adoption
 - Identify Copilot Champions (decisions makers)
 - Build and execute adoption plan
 - Deliver adoption training and materials on Copilot for Microsoft 365



- 1 Review success measures and gather and amplify success stories
- Create deployment and adoption plan jointly with customer
- Rollout Copilot licenses to the rest of the department
- Tailor Copilot for the specific department leveraging Copilot Studio



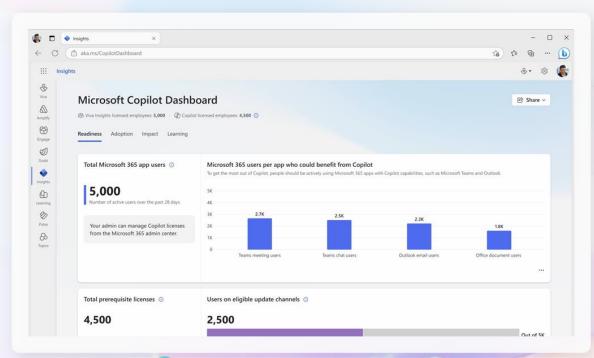
Measure the impact of your Copilot investment

With the Microsoft Copilot Dashboard powered by Viva, business decision makers and IT leaders can plan their Al readiness, drive adoption and measure the impact of their Copilot investment.

- Plan for Copilot readiness across Microsoft 365 and track by app
- Evaluate Copilot adoption across apps and by feature
- Analyze the potential impact of Copilot across meetings, email, chat, and documents
- View employee sentiment about the value and benefits of Copilot
- Learn about the latest research and findings about Al

Viva for Measurement

+ With a Microsoft Viva license (available as add-on), get advanced analytics across behavioral, collaboration and sentiment data to measure how Copilot has impacted work patterns



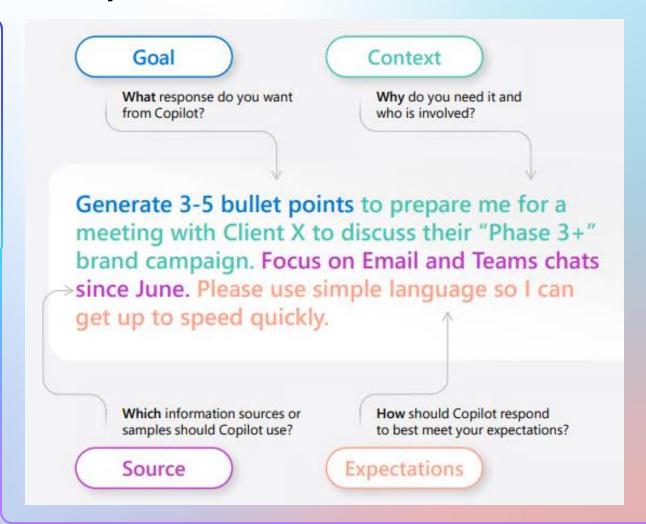


Microsoft Copilot Dashboard

aka.ms/CopilotDashboard

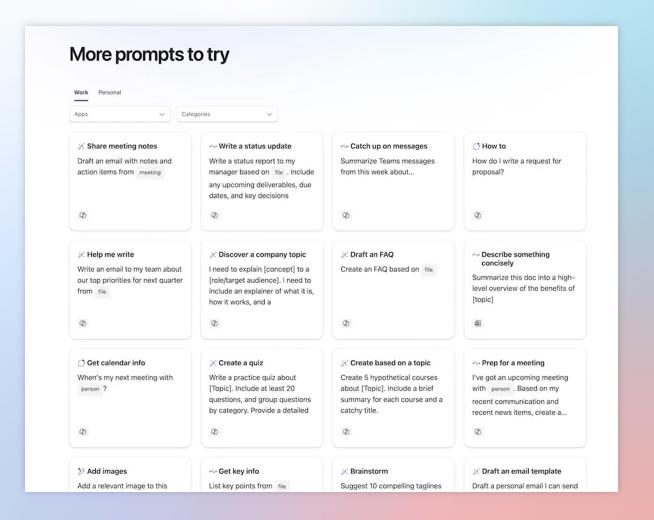
Teach users how to use prompts with Copilot for Microsoft 365

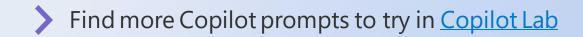
Use prompts to create, summarize, edit or transform. It's like having a conversation with Copilot.



Copilot Lab

- A collection of prompts that can be used to explore and experiment with Copilot
- Learn the art and science of prompt Engineering in an easy way
- Provides latest information and resources
- Evolves and adapts as AI becomes more advanced





How to get started

1	Skill your people on delivering the best Copilot demo	https://aka.ms/CopilotClickThroughDemoGuide
2	Build your Copilot for Microsoft 365 Pilot Offering	https://aka.ms/CSPCopilotAdoption
3	Leverage the H2 renewal opportunity to get customers Al-ready	https://aka.ms/CSPCopilot
4	Start using Microsoft 365 Lighthouse to: a. Manage your upcoming renewals and optimize growth b. Identify high propensity customers to engage with	https://lighthouse.microsoft.com



Ulrika Hedlund CEO Storyals

Learnings from Microsoft partner: Storyals

Ulrika Hedlund:

Swedish EdTech Entrepreneur and CEO and founder of Storyals

 M.Sc. in Electrical Engineering from the Royal Institute of Technology in Stockholm & Executive MBA from London Business School

Microsoft

Course author, blogger and frequent public speaker

Microsoft Regional Director





How we help:

Storyals offers a modern training solution, designed to continuously

INSPIRE, MOTIVATE and EDUCATE

organizations on new digital ways of working through video-based storytelling





Typical adoption curve:





How can we help you?

1. Provide a solution for your customers' users to succeed with (and love 🤯)

Microsoft 365 Copilot

- 2. Make more money
- 3. Get happier customers
- 4. Strengthen your Microsoft offering





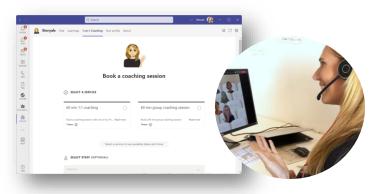
Storyals Copilot Kick-start Program.





- ✓ A Digital Academy with on-demand, story-based courses on working smarter with Microsoft 365 and Copilot for Microsoft 365
- ✓ Continuously updated to keep up to date with changes in the tools
- ✓ Easily accessible from customers' own Microsoft 365 environment





- ✓ Training plan and program coordination
- ✓ Live, instructor-led coaching sessions on Copilot to actively drive change
- ✓ Weekly Copilot tips in a dedicated channel in Teams



Story-based courses for office workers:



Find new digital ways of working

- Quick overview of Microsoft 365
- Highlights to get people excited
- Using Microsoft 365 across devices



Lead engaging meetings online

- Best practices for online meetings
- Conducting workshops online
- Overview of various meeting tools



Tell powerful stories

- Creating impactful presentations
- Sharing stories with Sway
- Using Forms to gather input



Connect and communicate

- Best practices using chat
- Working together remotely
- Conducting rich meetings online



Work smarter with documents

- Benefits of cloud-based documents
- Accessing files via OneDrive
- Sharing documents in SharePoint



Get organized

- Getting started with a digital notebook
- Using OneNote across devices
- Capturing ideas and digitizing paper



Enhance teamwork

- Benefits of working in virtual teams
- Co-authoring documents online
- Using modern apps to collaborate



Take control of your inbox

- Email management best practices
- Using Outlook across devices
- Managing tasks using To-do



Stay safe in your digital workplace

- Introduction to security risks
- Best practices for password setup
- Using multifactor authentication



Explore new possibilities with Copilot

- Understanding of what Copilot is
- Getting started with Copilot
- Guidance of responsible use of Al



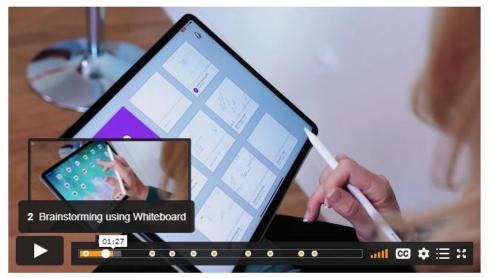
Unleash your superpowers

- Introduction to Al and Copilot
- Using Copilot across the M365 apps
- Best practices for better results

Designed to optimize learning:

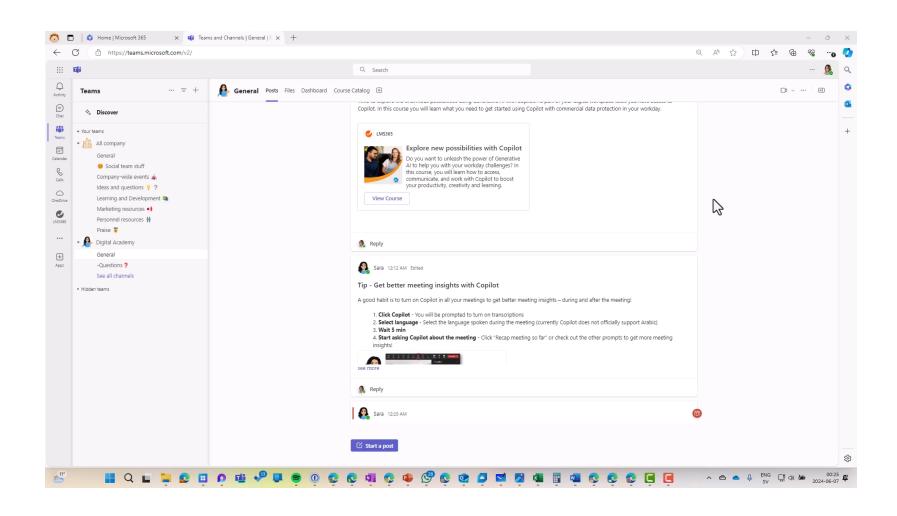
Storyals courses are designed to optimize learning. Storytelling with real-life scenarios, makes the learning experience joyful. Subtitles are added to increase comprehension and chapters help users navigate.





Additional languages available on request

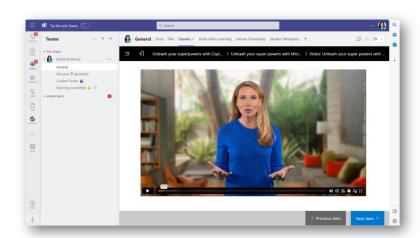
Digital Academy in Teams:

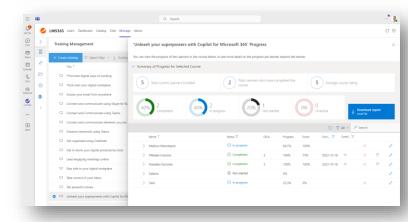


Tracking and guaranteed results:

The "Digital Academy" is installed in your customers' Microsoft 365 environment making learning accessible - right from within the digital workplace.

- ✓ World-class learning on how to work smarter with Microsoft 365
- ✓ Engaging, story-based courses that show real-life best practices
- ✓ Quizzes to test knowledge
- Certificates to acknowledge and encourage
- ✓ Continuously updated learning content
- ✓ Cost-effective and scalable



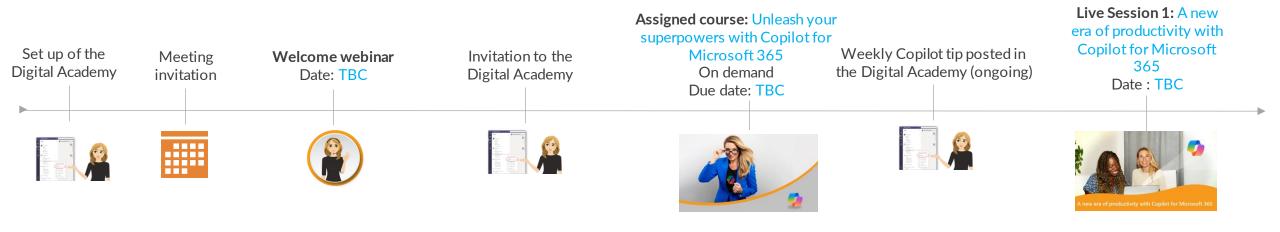


This is how it works:

- 1. You sell the Copilot Kick-start program to your customer
- 2. You make a reseller contribution fee
- 3. Your customer gets trained on how to use Copilot



Copilot Kickstart Program.



Live Session 2: Boost creativity with Copilot for Microsoft 365 Date: TBC Live Session 3: Explore new insights with Copilot for Microsoft 365 Date: TBC Live Session 4: Enhance collaboration with Copilot for Microsoft 365 Date: TBC

Program and Copilot evaluation Automatic Copilot Program
Certificate
Automatic on
completion





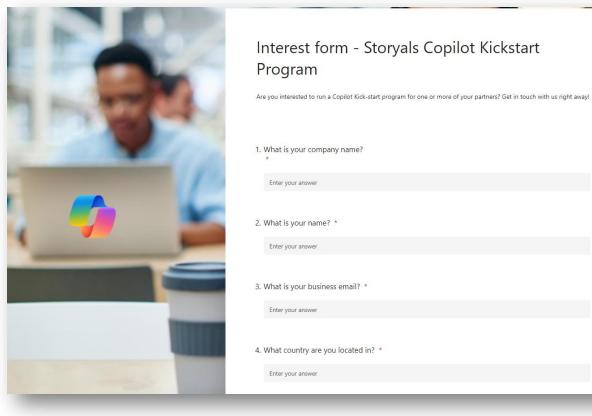




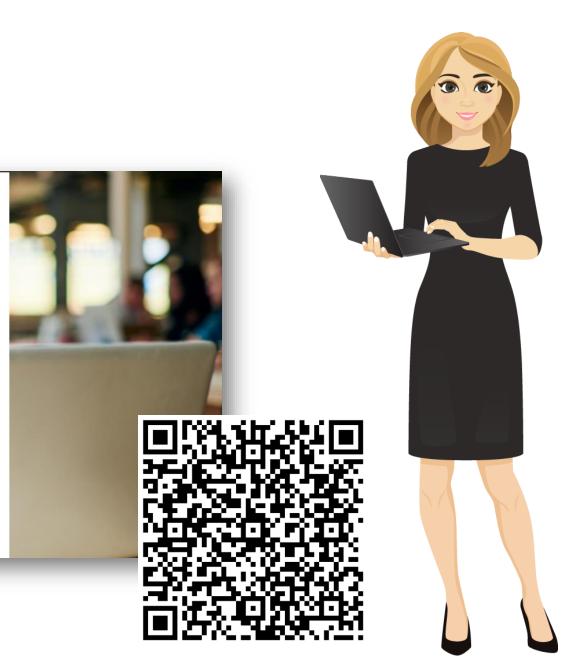




Interest form:







The modern way to drive digital upskilling:





Questions?

www.storyals.com hello@storyals.com



Mette Kahl Small & Medium Business Sales Lead

Useful Resources

Learn more



"How to" resources for Copilot for Microsoft 365

Your Path to Value with Copilot for Microsoft 365

Microsoft Copilot Adoption Site

Copilot Success Kit

Copilot Scenario Library



Microsoft Inside Track articles on our internal deployment

Deploying Copilot for Microsoft 365 in four chapters

Deploying Copilot for Microsoft 365 at Microsoft

Getting the Most Out of Generative AI at Microsoft with Good Governance

Get Microsoft's tips for partnering with your works councils

Copilot for M365 Demo

Experiences for Partners



- All personas & content: aka.ms/CopilotImmersionCSPLed
- Full list of demos: aka.ms/CopilotImmersion/DemosList
- Sales persona: <u>aka.ms/CopilotImmersion/Sales</u>
- Marketing persona: aka.ms/CopilotImmersion/Marketing
- HR persona: <u>aka.ms/CopilotImmersion/HR</u>
- CSP briefings: <u>aka.ms/CopilotCSPBriefingKit</u>

Copilot for Breakfast

Setting the scene

Copilot for Breakfast is a Microsoft series of partner webinars meant to enable Microsoft CSP partners discover more on Copilot for M365.

- May 31st In the first session of this series, you will learn how to embrace Copilot for M365 in your organizations and get the best out of it.
- June 7th In the **second session** of this series, you will learn how to best position Copilot for M365 with your customers, addressing their very specific needs.