How to Position Copilot for Microsoft 365

MICROSOFT PITCH GUIDE

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Lead the AI transformation conversation and convert AI excitement into demand for Copilot for Microsoft 365

We're living through a momentous platform shift. Across your customer base and beyond, IT leaders want to know how to capture the opportunity that AI presents in the workplace—while safeguarding employees, business, and data.

In fact, according to a recent Work Trend Index report, seventy percent of employees are open to delegating some of their work to AI to lessen their workloads. Generative AI technology is here to stay and the opportunity to **lead the AI transformation** conversation is now.

Use this guide to **drive innovation and supercharge productivity** with Copilot for Microsoft 365.

$190M

addressable seats

Employees and leaders are ready to embrace AI

In fact, 87% of leaders believe AI will give their organization a competitive edge. As technology advisors, you work with business and IT leaders every day. You know that, as employees look for the tools and services that will help them compete through AI, they still need to:

- Reduce costs and save time by automating routine business processes
- Improve relationships with customers, partners, and suppliers
- Get access to better information for reporting and decision-making
- Protect sensitive data and IT infrastructure from cyber attacks
- Attract and retain skilled employees to drive sustained growth

AI-powered tools represent an enormous opportunity to empower employees to focus on what matters most —growing the business

87%

of organizations believe AI will give them a competitive edge.*

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Empower your customers and grow your business with the power of AI

Focus on what matters most with Copilot

Copilot for Microsoft 365 is **available as a $30 add-on** to existing eligible subscriptions including: Microsoft 365 Business Standard, Business Premium, E3, E5 or Office 365 E3 or E5.

Supercharged productivity: Unlock faster access to data and knowledge across your organization.

Unleash creativity: Amplify ingenuity and innovation with generative AI tools that can turn your ideas into masterpieces.

Uplevel Skill: Accelerate learning. Be better at what you're good at and master what you've yet to learn

Save time: Let Copilot summarize actions for you. Saving just 2.5 hours/month yields an ROI of 180%

AppDirect

Workday efficiencies with Copilot

Copilot is the new way to search... and much more

70%

of Copilot users said they were **more productive** and 68% said it **improved the quality of their work**

KEY BENEFITS

Employees and teams can leverage Copilot to help them complete tasks like summarizing PDFs quickly, drafting emails more efficiently, and getting answers to complex questions more with ease.

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

- **Draft emails and social content:** Use it as your ghost writer on call to draft emails, 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 interests and get consolidated key points from the internet for you.

- **Get answers for specific, complex questions** that require multiple data points or a degree of analysis

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Product Overview & Scenarios

Microsoft Copilot for Microsoft 365 (Copilot for M365) is a powerful productivity tool that combines the power of large language models with your data in the Microsoft Graph and the Microsoft 365 apps and is accessed through natural language.

Natural Language

Large Language Models + Microsoft Graph - Your Data - + Microsoft 365 Apps + The Internet

Copilot for Microsoft 365 lets you focus on what matters most - growing your business - by enabling you to **be more productive and creative**, in less time so you can reach your business' greatest potential, all with our commitment to security and responsibility.

"Stay focused on what matters most"

- Get up to speed and complete tasks in no time with integrated cross-application intelligence working across all your data.
- Quickly pull together information from multiple sources using Microsoft

"Get caught up on meetings"

- Easily track discussions and suggested action items in real time.
- Produce conversation summaries with citations to keep you up to speed and organized.
- Quickly catch up on meetings you miss.

"Never start a reply from scratch"

- Create impactful communications to customers by leveraging coaching tips to help you hit just the right note.
- Clear your inbox in minutes, not hours, by summarizing long messages and generate suggest action items and replies.

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Copilot Market & Target Audience Positioning

Take your business' productivity to the next level

The platform shift to AI is well underway. Just as customers turned to Microsoft for their transition to remote and flexible work needs, business leaders are now looking for help understanding how this new era of AI will change work yet again.

According to a recent report from McKinsey & Company, **generative AI represents a massive market opportunity** with the potential to add trillions of dollars in value to the global economy and will deliver the most value to organizations **in the areas of customer operations, marketing and sales, software engineering, and R&D**

Our target audience includes small and medium businesses (SMBs) with a focus on tech-forward customers. We are seeing SMBs rapidly adopting AI to help **reduce costs, increase revenues, and facilitate decision making**.

Digital natives (built from the start with modern technology with data intensity) are excellent candidates for Copilot for M365.

Get to Know your Customers and Understand their Needs

Customer Profile	Customer is not M365 Copilot Ready	Customer is 365 Copilot Ready
Customer Needs	• Interested in AI -powered productivity but lacks prerequisite • Needs to prepare Microsoft 365 environment for Copilot tools	• New to Copilot for Microsoft 365 or ready to purchase • Looking to adopt generative AI quickly but lacks resources
Solution Play	➔ Assess tenant to verify technical prerequisites and review best practices for data protection.	➔ Upskill with Copilot for M365 end-user training, adoption readiness, and deployment guides
	Copilot Readiness Assessment	**Copilot Activation & Training**

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Technology advisors who help clients adopt & manage new technologies will increase their share of IT spending

Preparing customers for the era of AI

Before starting on the path to AI, it's important every organization pause and think through five important questions.

What are your goals for using AI?

What are the pain points within your organization that can be addressed with AI?

What are your current AI capabilities?

Does your organization have a data strategy in place?

Do you have the necessary infrastructure and resources to support AI initiatives?

How to handle blockers and objections

✕ What makes Copilot for Microsoft 365 different?

Microsoft 365 Apps, the Microsoft Graph and the Semantic Index for Copilot enable an unprecedented expressiveness for search, chat and copilots leveraging Microsoft 365 data. This **sophisticated map of your organizational content delivers relevant, actionable responses to prompts** in a secured, complaint, privacy-preserving way. Customers with the richest data in Microsoft 365 (Exchange, OneDrive, SharePoint, and Teams) will get the best results.

✓ What about security? How is my company data protected?

Your data is your data. **Customer data is not used to train the OpenAI foundation models.** Copilot for Microsoft 365 relies heavily on Microsoft security, compliance, and privacy features. The underlying permissions model and access controls may help ensure that customer data won't unintentionally leak between Microsoft 365 users, groups, and tenants. For example, Conditional Access policies based on identity, device, location, and network can be used.

$ Is Copilot really worth it?

AI-powered productivity will be a learned skill. To get the best response, it's **important to know how to frame and phrase your Copilot prompts**. Prompts are how you ask Microsoft 365 Copilot to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant. Training and adoption will be key to unlocking the power and potential of generative AI.

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Copilot for Microsoft 365 Readiness Briefing

Ready to be more creative, and productive?

It's time to harness the power of AI

AppDirect – the #1 marketplace for business technology services – is offering a **Free Copilot for Microsoft 365 Readiness Assessment for new customers.**

Drive innovation and business transformation for your customers with Copilot for Microsoft 365 services by AppDirect.

Tap into the growing demand for generative AI by offering **a free customer-focused Envision Session with a Microsoft Solution Specialist**.

Find out how Copilot for Microsoft 365 can help in a 90-minute briefing featuring a live demo and real-life scenarios.

HOW DOES IT WORK?

1. Complete the Copilot Readiness Briefing sign-up form

2. Work with an AppDirect cloud expert to conduct Copilot for Microsoft 365 technical and security assessment.

3. After the review, AppDirect will deliver the Microsoft 365 Copilot deployment and readiness checklist.

4. Review best practices on data governance, security permissions, and content management.

5. Discuss recommended next steps and plan for Copilot activation.

Thank You

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