



# Copilot for Microsoft 365

## Your path to value

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# Digital debt is costing us innovation

64%

of employees don't have enough time or energy to do their job

57%

of employees' time is spent communicating - in meetings, email, and chat

43%

of employees' time is spent creating - in documents, spreadsheets, and presentations



**87% of organizations**  
believe AI will give them a competitive edge

# Early Access Program survey results

## All Up Value

- 70% are more productive
- 68% improved the quality of their work
- 37% feel more fulfilled at work
- 71% spend less time on mundane tasks

## Value by Workflow

- 64% spend less time processing email
- 75% spend less time searching for information in their files
- 84% find it easier to take action after a meeting
- 3.8x faster at catching up on missed meetings
- 85% get to a good first draft faster

## Value by Role / Function

- 79% reduced their administrative workload
- 68% keep their CRM up to date with less effort
- 67% spend more time with their customers
- 64% better personalize customer engagements

## How much is Copilot worth to users?

- 77% choose Copilot over free lunch
- 77% would not want to go back to working without Copilot
- 30% access to Copilot would influence my choice of employer

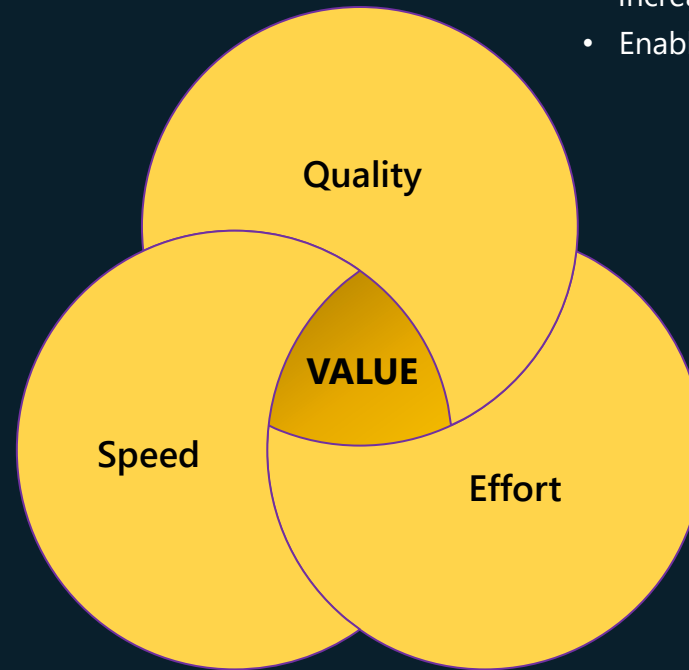
# Defining Copilot in Microsoft 365 Value



- Improve quality of content produced
- Increase creativity
- Enable less experienced/ skilled workers to achieve success



- Complete tasks faster
- Engage in higher value activities
- Increase output
- Optimize processes



- Reduce mundane tasks
- Improve wellbeing and engagement
- Increase job satisfaction through improved results

# Improving Workflows



## Meetings

Quickly catch up on meetings you missed

Summarize a meeting and identify next steps

Run a more effective meeting



## Search

Get answers from across all your data

Uncover key insights

Quickly summarize email and chat threads

Quickly catch up on the key points of a document or presentation



## Content creation

Jumpstart creativity, and write and edit like a pro

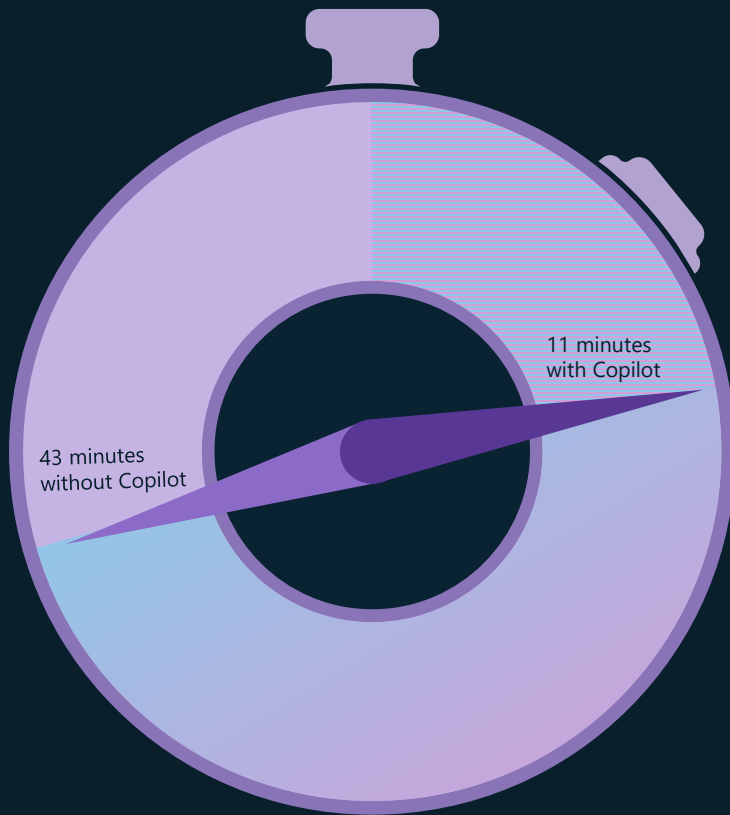
Create documents, presentations, charts, and tables

Draft email and chat replies instantly

Create powerful and professional visualizations

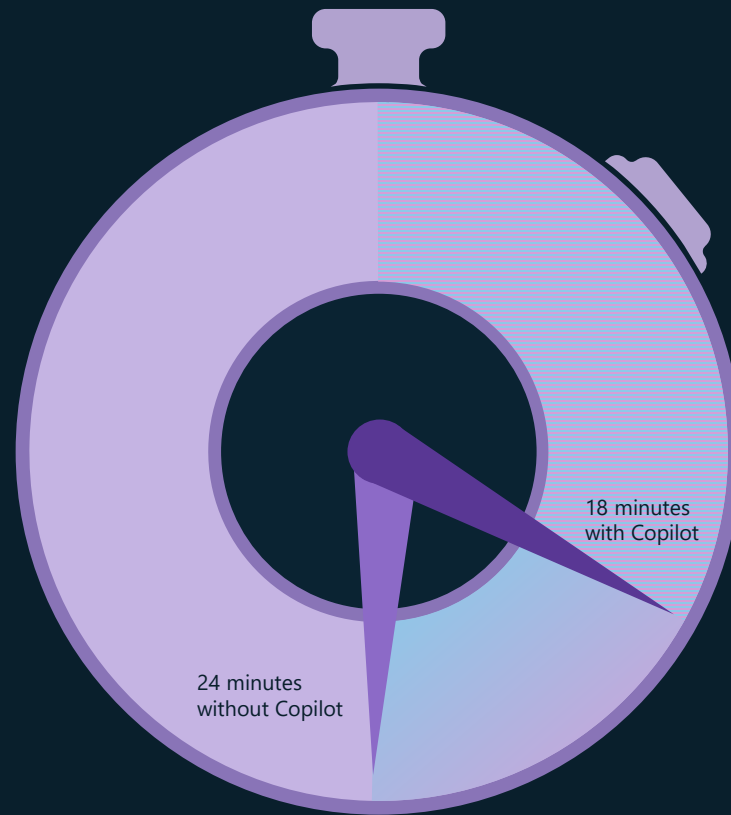
# Key Metrics from the Work Trend Index

Summarize a missed meeting



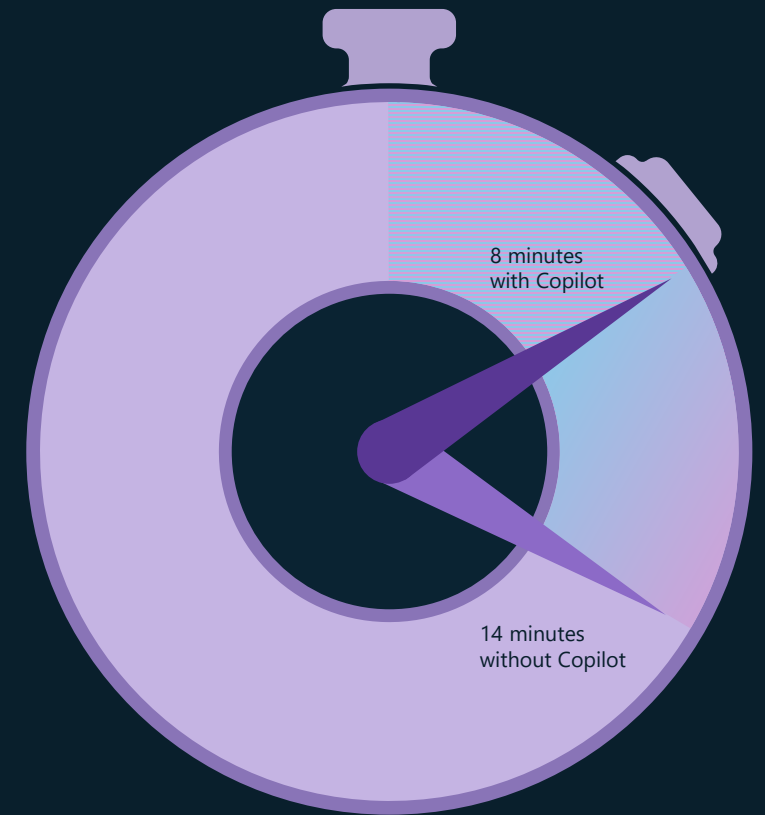
Time Saved  
32 minutes

Search for information



Time Saved  
6 minutes

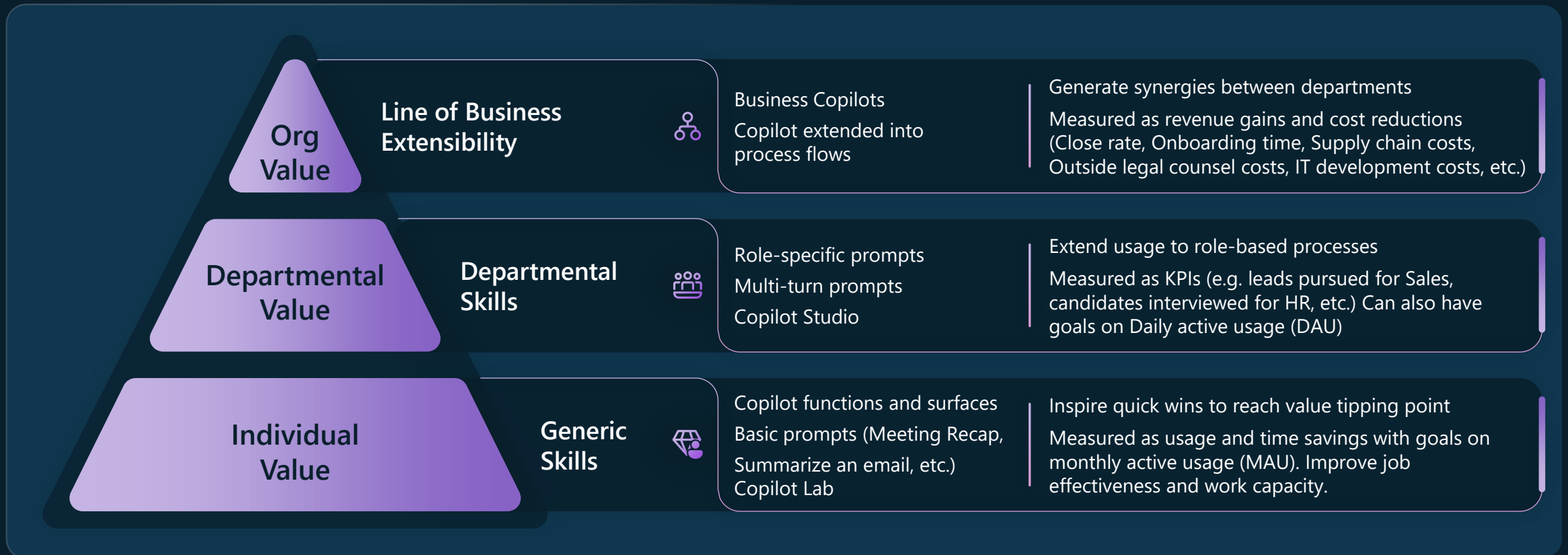
Write a first draft



Time Saved  
6 minutes

# Copilot for Microsoft 365 Value Journey

Grow value from a base of solid usage and individual capacity gains by optimizing departmental processes and impacting the metrics that are important to your organization.







# Impact by Function

[Jump to the Scenario Library for more detailed Use Cases](#)

## HR

Communicate policies and draft job descriptions

Create stunning training materials

Easily respond to job applicants' or employees' emails

## Marketing

Identify relevant market trends and segments

Create the first draft for a project

Summarize campaign results with powerful visuals

## Sales

Have better sales conversations and close more deals

Create sales presentations and proposals

Analyze sales data from previous quarters

## IT

Create a project plan for a product roll-out

Stay up to date on various project calls and chats

Identify patterns in data and solve issues faster

## Finance

Simplify financial reporting and planning

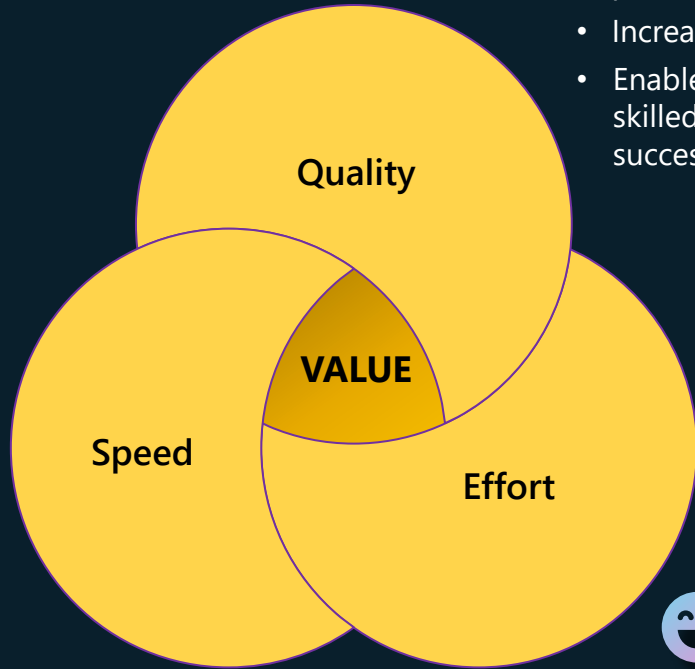
Identify performance improvements

Report metrics using professional charts

# Defining Copilot in Microsoft 365 Value



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Return on Investment/  
Return on Experience



Accelerate Growth



Cost Savings



Cost Avoidance



Employee Retention



# Copilot in Microsoft 365 Adoption

# Accelerate Copilot Adoption with Viva

## Copilot Onboarding



Use [Viva Insights](#) reports and [Microsoft Copilot Dashboard](#) to identify ideal pilot groups.



Use [Skills in Viva](#) to assess current readiness and assign [Viva Learning](#) path on Generative AI based on proficiency level.



Use [Viva Pulse](#) to get feedback and insights before Copilot/AI roll out to capture productivity obstacles & create baseline key metrics.



Use [Viva Goals](#) to unite Copilot users around shared adoption goals and measure progress.

## Copilot Enablement



Create & drive actionable plans from [Viva Insights](#) reports to remove productivity barriers and obstacles.



Use [Viva Amplify](#) to run iterative AI campaigns on Copilot launch, use cases, trainings & support for different user groups.

## Copilot Adoption & Value Realization



Use [Viva Engage](#) to share progress, learnings and activities in communities. Curate knowledge base via Topics & Answers in communities.



Use [Viva Learning](#) to deliver bite-sized trainings on AI, Copilot and lessons learned in flow of work.



Use [Microsoft Copilot Dashboard](#) powered by Viva to understand adoption rate, productivity gains and ROI for Copilot users



Use [Viva Glint](#) to get feedback, insights and user sentiment after Copilot/ AI roll out

Leverage Viva apps to identify core business scenarios & pain points to resolve with AI Transformation

Leverage Viva apps to drive AI /Copilot for Microsoft 365 Adoption and change management

Leverage Viva apps to measure effectiveness, productivity gains and ROI of AI Adoption

# Copilot for Microsoft 365 + Viva drive performance

AI-powered assistance to transform the employee experience

- Accelerates day-to-day **employee productivity** (calendar, inbox, tasks, projects)
- Delivers inline **task management** (e.g. update my profile) and **information retrieval** (e.g. document review, meeting notes)
- Works alongside you **within the Microsoft 365 apps** and in a **standalone experience** to help you navigate any task
- **Generative AI** based on your unique prompts

- Boosts **employee engagement and performance** (OKRs, learning content, skills)
- Guides employees, managers and HR leaders through **moments that matter** like onboarding, team health or career growth.
- Enables you with deeper insights and experiences through the **Microsoft Viva apps**
- **Elevated prompt context** via pre-configured prompt library



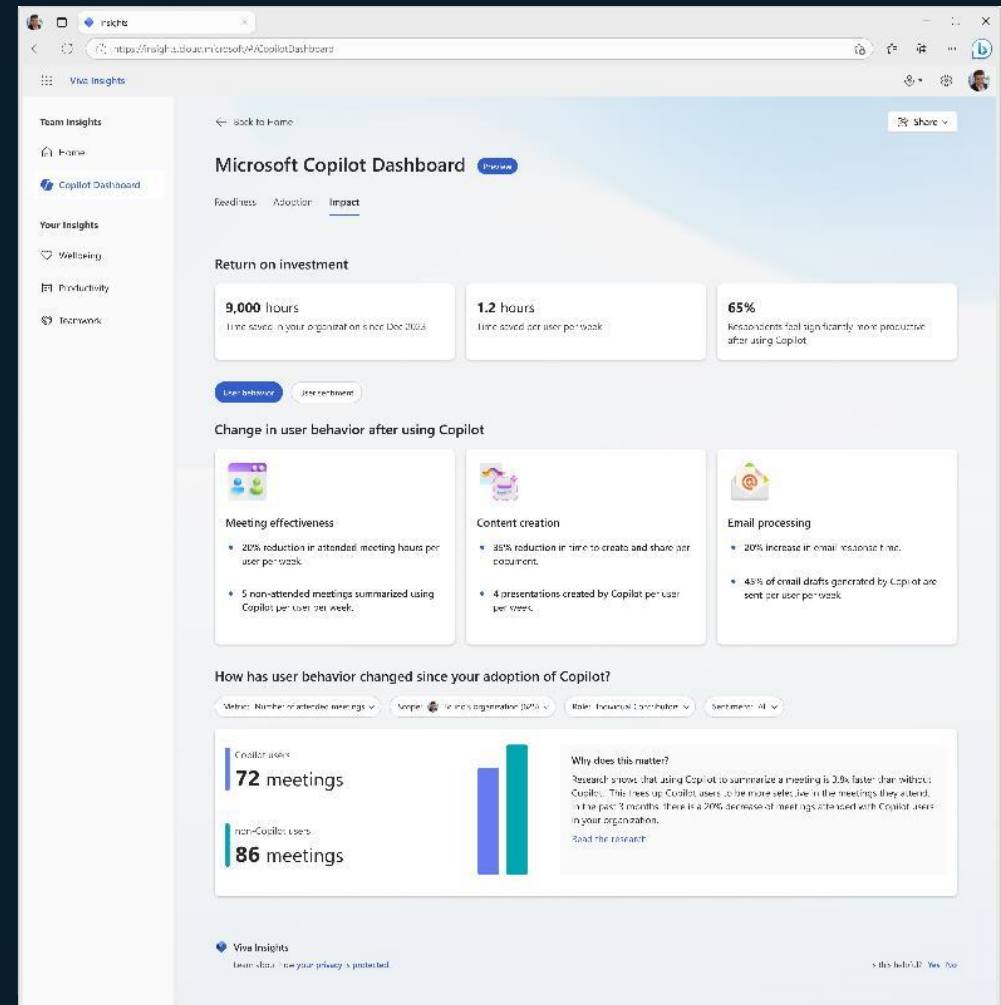
Copilot for Microsoft 365



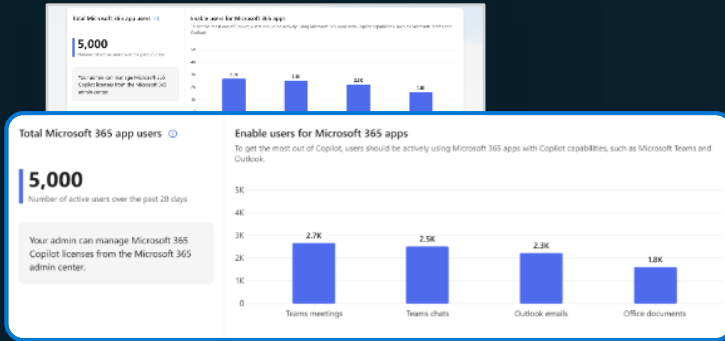
Enhanced with Viva

# Microsoft Copilot Dashboard

Enable IT and business leaders to plan their AI readiness, drive adoption, and measure the impact of their Microsoft Copilot investment

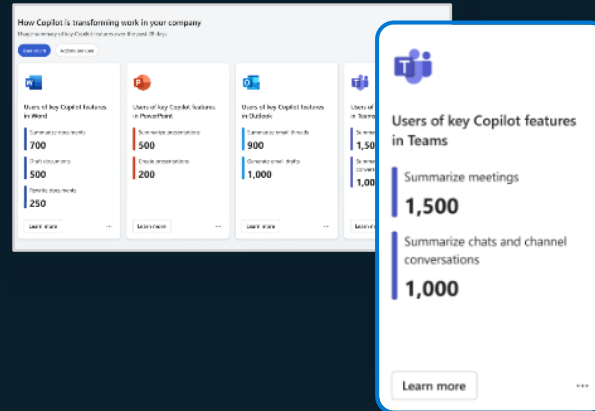


# Microsoft Copilot Dashboard metrics



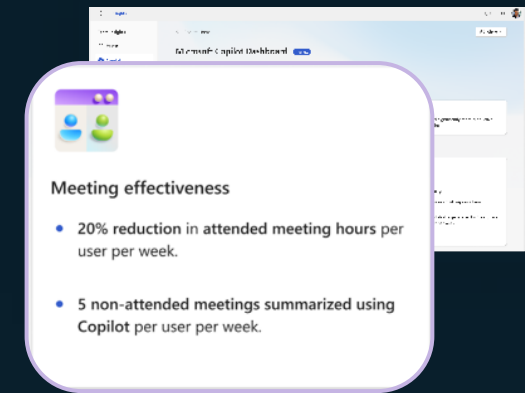
## Readiness

*How many people in my organization are ready to start using Microsoft Copilot?*



## Adoption

*How many people are using Copilot and in what ways?*



## Impact

*How can Copilot transform work in my organization?*

- All metrics are tenant-level aggregates unless indicated otherwise in the table above
- Reports will be expanded and iterated upon incrementally based on user feedback, research and data availability

# 5 essential steps to nail your adoption and success!!

Get your data house in order

The magic of Copilot lies in its ability to reason over all your organization's data and content

Be intentional about your roll-out

Becoming an AI-powered organization doesn't happen overnight. It requires a unique strategy

Identify champions to lead the way

Enthusiastic advocates can drive AI adoption. Find champions who understand the technology and can inspire others

Prioritize skilling

Equip your workforce with the necessary skills to leverage AI effectively

Help people build new habits

AI transforms workflows. Encourage employees to adapt by emphasizing the benefits



# Accelerate your AI journey with our Copilot Success Kit

Our [Copilot Success Kit](#), [Scenario Library](#), implementation framework, and how-to resources are designed to streamline and accelerate your time to value with Copilot for Microsoft 365 skills. The guidance integrates many resources to empower you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools. Download the full kit or just the resources you need based on your phase of implementation.

↓ [Download the full success kit](#)

[Build your skills at our AI Learning Hub >](#)



## Top resources

[Implementation overview >](#)

[User Enablement Guide >](#)

[Technical Readiness Guide >](#)

[Accelerate with Viva >](#)

[Scenario Library >](#)

[User Experience Strategy >](#)



The opportunity is yours to  
lead the AI transformation



THANK YOU.

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Peter Lippert  
Technology Specialist  
Teams & Copilot




# Microsoft Copilot empowering your business



## Unlock Productivity across your organization

Persona	Copilot	Scenario	Availability	Blogs	Demo/Video
 Knowledge Workers	Microsoft Copilot	I want to introduce my entire organization to generative AI without putting my company data at risk—allowing employees to get answers, summarize documents, or generate images and text in Windows, Edge, Bing, and the Copilot mobile app	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot for Microsoft 365	I want to bring Copilot to my entire organization to use AI-powered chat with secure access to organizational graphs and access Copilot across all M365 apps.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot for Dynamics 365 Project Operations	I want to rapidly create new project plans for new engagements in minutes, instead of hours, simply by describing details of the project using natural language.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot for Dynamics 365 Finance	I want collections managers to have quick access to credit and payment history so they can prioritize and personalize customer communication, helping to increase successful collection rates and proactively keep customers in good standing.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot for Dynamics 365 Supply Chain	I want to efficiently handle changes to purchase orders at scale and assess the impact and risk to help optimize procurement decisions.	Public Preview	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Microsoft Viva	I want to accelerate workforce insights and actionable OKR development, automate processes, and boost employee engagement with next-generation AI	Limited Preview		
 Customer Service	Microsoft Copilot for Service	I want to modernize my contact center to enhance service experiences and boost agency productivity.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Dynamics 365 Customer Service	I want to level up my customer care by generating contextual responses to customer questions and quick access to case resolution expertise with AI assistance.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Dynamics 365 Field Service	I want to help frontline service workers spend less time on repetitive tasks and more time focused on customers by using AI to prepopulate data in work orders.	Generally Available	<a href="#">LINK</a> ; <a href="#">LINK</a>	<a href="#">LINK</a> ; <a href="#">LINK</a>
 Sales	Copilot in Dynamics 365 Customer Insights	I want to use generative AI to generate insights about customers and curate highly personalized, targeted customer segments using natural language dialogue.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a> ; <a href="#">LINK</a>
	Microsoft Copilot for Sales	I want to transform the way sellers work by automating and simplifying tasks, personalized customer interactions, and maintain selling focus.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a> ; Guided: <a href="#">LINK</a>
 Data Professionals	Copilot in Dynamics 365 Sales	I want to help sellers prioritize ROI-generating tasks by reducing mundane work with AI assistance for email replies, meeting prep, and information tracking.	Generally Available	<a href="#">LINK</a>	
	Copilot in Microsoft Fabric	I want an AI assistant to help my data professionals analyze and visualize data using natural language.	Public Preview	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Power BI	I want to use AI to illuminate hidden patterns, opportunities, and anomalies in my data.	Public Preview	<a href="#">LINK</a>	<a href="#">LINK</a>

## Safeguard your business

Persona	Copilot	Scenario	Availability	Blogs	Demo/Video
 Security Analysts	Microsoft Copilot for Security	I want a generative AI-powered security solution that helps increase the efficiency and capabilities of defenders to improve security outcomes at machine speed and scale.	Early Access Program	<a href="#">LINK</a>	<a href="#">LINK</a>

## Build and extend your AI capabilities

Persona	Copilot	Scenario	Availability	Blogs	Demo/Video
 IT Professionals	Microsoft Copilot for Azure	I want to use generative AI to help users gain new insights into their workloads, unlock untapped Azure functionality, and orchestrate tasks across cloud & edge.	Public Preview	<a href="#">LINK</a>	
	Microsoft Copilot Studio	I want to gain greater control and efficiency by authoring responses to predictable scenarios within Copilot for Microsoft 365 and/or create custom Copilots and GPTs by incorporating my data and plugins.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Power Apps	I want to build enterprise-grade applications faster and more easily with generative AI.	Public Preview	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Power Automate	I want to build, edit, and extend workflows using natural language and get help from AI powered chat.	Public Preview	<a href="#">LINK</a>	<a href="#">LINK</a>
	Copilot in Power Pages	I want to revolutionize my web development experience by leveraging AI to generate text, build detailed forms, and chatbots—all in a matter of minutes.	Private Preview	<a href="#">LINK</a>	<a href="#">LINK</a>
 Developers	GitHub Copilot	I want to provide my developers contextualized assistance throughout the software development cycle in several languages.	Generally Available	<a href="#">LINK</a>	<a href="#">LINK</a>
	GitHub Copilot X	I want to enhance GitHub Copilot with a more personalized experience by bringing in chat and voice interfaces, pull request support, and the ability to get answers on documents.	Private Preview	<a href="#">LINK</a>	<a href="#">LINK</a>
	Build your own copilot with Azure AI Studio	I want to build, evaluate, and deploy my AI solutions securely and responsibly all within one space.	Public Preview	<a href="#">LINK</a>	<a href="#">LINK</a>