Unlocking Your Business' Full Potential with Microsoft 365 Copilot

Over the last several years, growing businesses report that work has accelerated faster than their employees' ability to keep up. According to Microsoft's 2024 Work Trend Index Annual Report, 68% of employees people say they struggle with the pace and volume of work, while 71% of small and medium-sized businesses (SMBs) lack the energy to complete their work effectively. Compounding these challenges, 80% of employees are bringing their own AI tools to work—often without proper security measures—creating potential risks for sensitive business data[1].

Microsoft 365 Copilot boosts productivity and creativity, helping you unlock more value and opportunity for your business. As your AI assistant for work, it automates business processes across functions, including sales, marketing, human resources (HR), legal, finance, and customer service. As a result, you and your team can focus on building your business and scaling securely while staying in control of your business data.

The Power of Microsoft 365 Copilot

Microsoft 365 Copilot is more than just an AI tool—it's an intelligent assistant embedded within the Microsoft 365 applications teams use daily, including Outlook, Teams, Word, and Excel. Unlike unsecured consumer AI solutions, Copilot is designed for business environments, ensuring data privacy and compliance while automating repetitive tasks and accelerating decision-making.

What the SMB users have to say:

62% say that Microsoft 365 Copilot helps them achieve a good first draft quicker.

63% use it to summarize content—from emails and slides, to data and chats.

76% say that Microsoft 365 Copilot meets or exceeds their expectations.

Copilot Chat & AI Agents: Customizable AI for Business Needs

Copilot Chat

Businesses need the opportunity to test different AI use cases before fully investing in solutions that may not fit their needs. Microsoft understands this and has now released Copilot Chat to give every organization the opportunity to test next-generation AI for specific business use cases.

Copilot Chat is a free and secure AI chat solution that gives your employees at your growing business a standardized AI experience as you implement transformational strategies.

IT controls, including enterprise data protection and agent management.

Provide your employees with foundational AI functionality and opportunities to familiarize themselves with prompting best practices as you identify additional scenarios where Copilot can improve processes for your organization.

Users have access to:

Free, secure AI chat powered by GPT-4o so they can complete market research, draft documents, prepare for meetings, upload files, and collaborate across teams.

Agents that are accessible right in the chat. Using natural language, users can easily create agents that automate repetitive tasks and business processes.

Agents

Using prebuilt agents or creating agents with Copilot Studio is another way that you can reimagine critical business processes that support your employees, teams, and entire organization.

With agents, users can:

Automate workflows like submitting expenses, hiring processes, and updating benefits information.

Complete tasks by prompting agents using connectors, workflows, custom topics, and AI prompts.

Additionally, agents do not require users to be technical experts. Agents can be securely created and published directly in the Microsoft 365 apps your employees use the most often with access only given to specific users or groups.
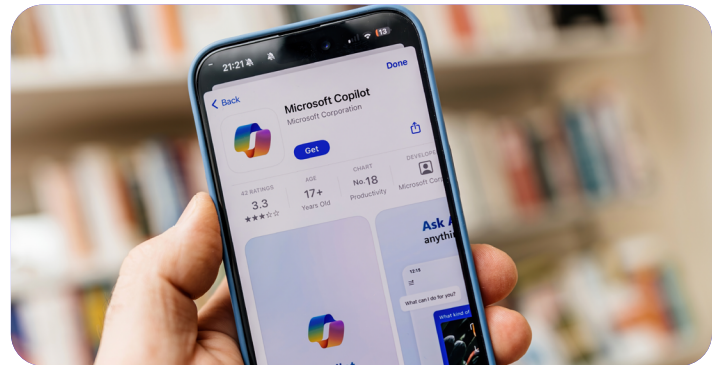
Top Copilot Prompts to Explore

As you prepare your organization to embrace AI innovation, you can encourage your team to build their AI skills with Copilot Chat without anchoring it in your business' data at copilot.microsoft.com. Here are the top ten ways your employees can develop their foundational Copilot skills.

1. Create a to-do list
Input your tasks into Copilot and let it create a prioritized to-do list.

2. Draft email
Personalize the tone and length.

3. Tell me about a topic or project
Provide insights and analysis from web sources to get up to speed quickly.

4. Help me write…
Jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

5. Revise this content
When you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

6. Create a presentation
Develop a designed presentation with speaker notes in just a few clicks.

7. Summarize a document
Get right down to business by summarizing long documents and focusing on the relevant sections.

8. Give me some ideas for…
Boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

9. What did they say…
When you vaguely remember someone mentioning a topic, have Copilot do the research

10. Translate a message
With business becoming increasingly international, it's important to be able to read or write messages in other languages.
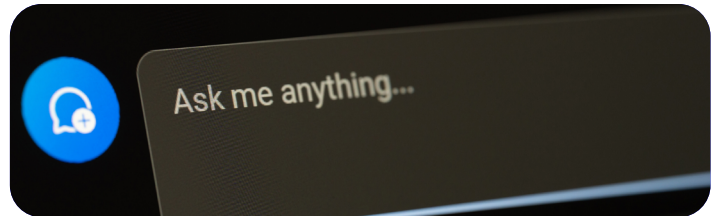
Top Copilot Use Cases

Businesses across industries are already seeing measurable results with Microsoft 365 Copilot. By integrating Copilot into daily workflows, they boost efficiency and foster innovation, allowing employees to focus on strategic initiatives rather than repetitive tasks. Let's take a closer look at how Copilot enhances each department:

Sales

Sellers at agile businesses need the ability to focus on building their pipelines and closing deals to support business growth. On average, sales reps spend an average of 440 hours annually trying to find the right content to share with their prospects and customers[2]. To free up this time, they need a solution that can streamline manual tasks and provide better insights to push deals over the finish line.

Microsoft 365 Copilot and Copilot Chat work alongside sales teams to handle administrative and repetitive tasks, from conducting industry research to creating personalized proposals. As a result, sales professionals save time and focus on building stronger relationships, enhancing their pipeline, and closing deals.

Copilot empowers them to:

Create more opportunities: Better prepare for discovery sessions with an agent that drafts tailored questions and content.

Improve win/close rate: Give the customer your full attention in the meeting while Copilot takes notes. Prompt Copilot to use those notes to focus on the most important information and create targeted offers when drafting the proposal.

Increase deal size: Use Copilot to generate charts and presentation content using the customer's data to help close more high-value deals.

Improve customer retention: Maintain strong customer relationships post-sales by using Copilot to generate personalized communications, share customer data with service departments, and perform sentiment analysis to address issues quickly.

The outcome: Increased revenue with more sales closed.

Marketing

Marketing teams handle multiple responsibilities while trying to hit aggressive goals to support company growth. Microsoft 365 Copilot streamlines developing strategic marketing plans, collaborating with other teams, and composing copy so marketers can focus on turning ideas into qualified revenue opportunities.

This enables marketers to:

Increase leads generated: Use Copilot to perform market research, discover trends, and identify the markets with the most opportunities to target with tailored competitive offerings and content.

Reduce agency spend: Optimize budget spending, bringing previously outsourced work in-house by quickly generating high-quality, tailored content with Copilot.

Improve customer retention: Support customers post-sale with Copilot-generated content that speaks to their industry, users, and goals as they use the product.

Enhance employee retention: Reduce the risk of employee burnout and frustrations by using Copilot to streamline time-consuming and repetitive tasks.

The outcome: Improved employee creative capacity.

Human Resources

HR managers at growth-stage businesses are often tasked with handling recruitment, employee orientation, managing payroll and benefits, providing training and guidance, and resolving disputes. They also need to support current staff for higher employee retention rates. Copilot assists your HR team by providing simplified access to data, improving talent quality, increasing employee satisfaction, and enhancing key performance indicators.

With copilot, HR can:

Reduce employee orientation time: Shorten the learning curve for new employees by using Copilot to generate training guides, enhance company handbooks, and send regular check-ins.

Improve issue resolution time: Copilot enables HR managers to respond to issues faster, improving employee satisfaction rates and keeping employees focused on their work.

Increase support handled by agents: Reduce how much time HR employees spend responding to support tickets and common questions by creating self-service options with agents in Copilot Chat.

Increase employee retention: Reduce the complexities of everyday tasks and improve internal communications to foster a strong company culture to support employee retention.

The outcome: Improved time-to-hire and employee retention.
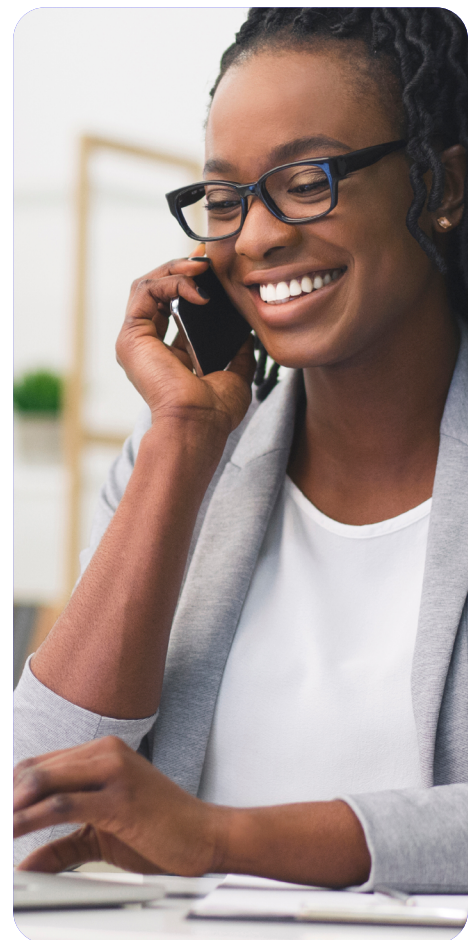
Customer Service

Delivering high-quality customer service is essential for businesses looking to establish customer loyalty. This starts with customer service reps having a simple tool that provides them with access to the customer, product, and service information they need. However, 43% of customer service reps report being overwhelmed by the number of systems and tools needed to complete their work.[3]

With Copilot embedded directly into customer service reps' desktops, they can spend less time searching for answers and more time collaborating across departments, enabling them to:

Improve service quality and customer satisfaction scores: Increase customer satisfaction by using Copilot to provide real-time AI assistance for faster issue resolution, generate personalized email responses based on past customer interactions and data, analyze customer feedback, and allow reps to focus on delivering high-quality engagements.

Reduce average resolution time: Customer service reps can use agents in Copilot Chat to quickly find answers, pull customer information, and draft responses, reducing the time it takes to resolve issues and, in turn, improving customer satisfaction rates.

Optimize the number of calls handled by human agents: Develop customer self-service agents for customers using natural language search or automated call systems. These solutions can decrease the number of calls that require a human agent.

The outcome: Simplified customer and employee experiences

Copilot: Bringing Unprecedented Value to Your Entire Business

The Tech Selector can unify your data and get your business AI-ready so you can get the most of your investments across all your business segments. Microsoft 365 Copilot and Copilot Chat are integrated into the apps your team uses daily to combine the most advanced AI models with your business data to provide intelligent, real-time support through agents. As a result, you can boost business efficiency and improve employee productivity and creativity to drive meaningful business impacts.

At The Tech Selector, we empower businesses to adopt AI with confidence. As a certified Microsoft partner, we specialize in secure, strategic implementations of Microsoft 365 Copilot—helping you automate workflows, protect data, and unlock productivity.
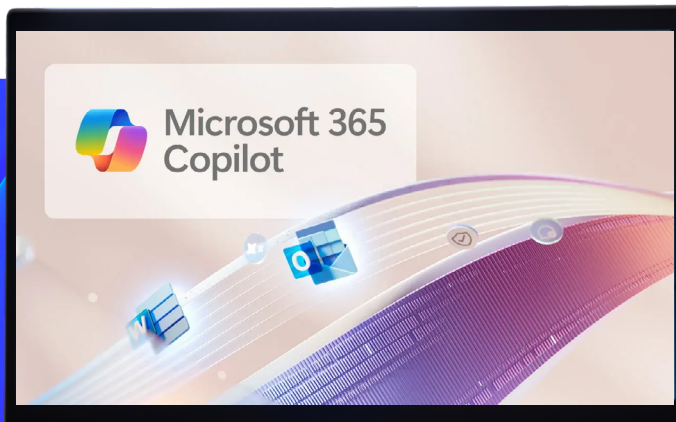
Contact us today to schedule your Microsoft 365 Copilot assessment and begin your AI transformation journey.