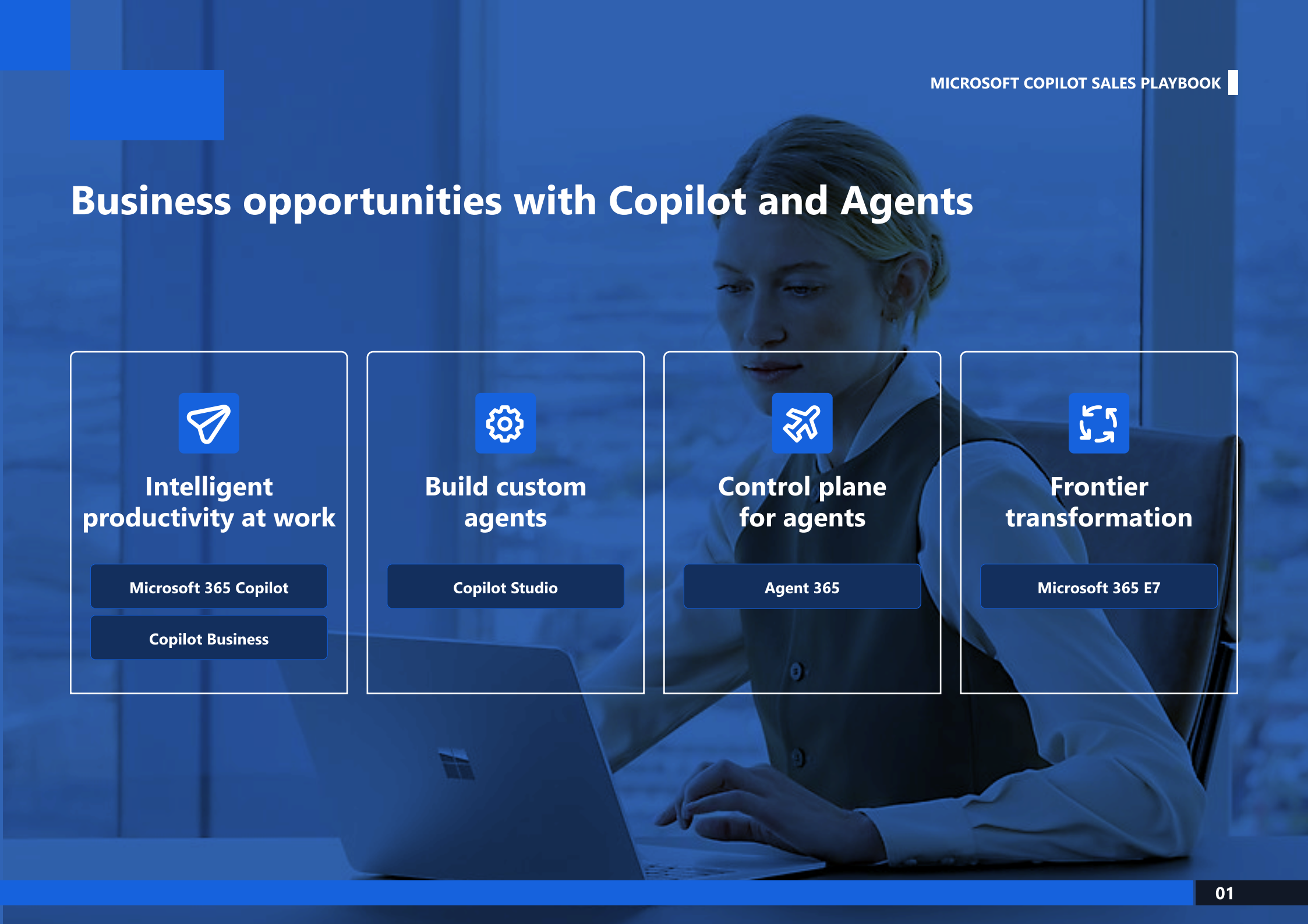


Microsoft Copilot Sales Playbook

INGRAM MICRO

Business opportunities with Copilot and Agents



Intelligent productivity at work

- Microsoft 365 Copilot
- Copilot Business

Build custom agents

- Copilot Studio

Control plane for agents

- Agent 365

Frontier transformation

- Microsoft 365 E7

Drive intelligent productivity for employees

Microsoft 365 Copilot

Copilot Business

Navigate from below:

- Solution overview
- Customer scenarios
- Investments
- Conversation guidance

Why customers choose Copilot?

Copilot is the UI for AI that combines the power of LLM with the web and work data and applications that supercharges productivity, unlocks value, transforms business processes with Agents and inherits existing security, privacy, identity enterprise ready policies.

Powered by Work IQ

Work IQ is the intelligence layer that enables M365 Copilot and agents to know your work inside and out. It connects your context, workflows and relationships to deliver an experience that is built for you.

It includes three (3) components:

1. Data spanning your personal work data like files, emails, and messages, as well as your organizations data
2. Memory from your work profile, custom instructions and saved preferences
3. Inference, i.e. organizational relationships, work patterns, and workflows

Multi-model

1. **OpenAI:** Latest OpenAI models available across Microsoft 365 Copilot.
2. **Anthropic:** Anthropic Claude models available in Researcher, Copilot Chat, and expanding across M365 apps.
3. **Copilot Studio:** Over 11,000 models in the Microsoft Foundry for custom-build agents in Copilot Studio.

Secure and compliant

1. Honors existing Microsoft 365 permissions and policies for data access
2. Data is secure at rest and in transit
3. Your data is not used to train foundational model
4. You are protected against AI security and copyright risk
5. You control your data and your data's location
6. Search queries are abstracted/ de identified from the user's prompt and grounding data

Get proactive overviews of your day

Copilot Chat

Bridge your knowledge sources

Copilot connectors

Prepare for a customer meeting

Researcher

Start your workday hands-free

Voice in Copilot mobile

Interpret multilingual conversations in real time

Interpreter

Where Copilot wows

Get proactive overviews of your day

Facilitator

Automate reminders and tasks

Workflows

Quickly find content

Copilot Search

Jumpstart document drafting

Agent Mode in Word

Quickly onboard onto new roles or projects

Notebooks

The right Copilot SKU for the right customer

For customers with <300 seats and/or Microsoft 365 B-SKUs



Copilot Business

For customers with >300 seats and with the following eligible SKUs:

1. **Microsoft 365:** E-SKUs, F-SKUs, A-SKUs, Apps, and GCC
2. **Office 365:** E-SKUs, A-SKUs, and F-SKUs
3. Microsoft Teams
4. Exchange
5. SharePoint
6. OneDrive
7. Planner and Project
8. Visio



Microsoft 365 Copilot

Reduce buying friction with Copilot Business Bundles (<300 seats only)

Business Basic + Copilot Business

Essential web-based productivity tools and AI in one simple bundle.

- **Do more with less switching.** Copilot can draft emails, summarize chats, and create content without having to manage multiple AI tools.
- **Web access.** Chat with Copilot directly in your web browser across any device for easy access.
- **Built-in security.** Copilot runs in Microsoft's secure cloud, so your prompts and answers stay protected.

Business Standard + Copilot Business

All Microsoft 365 desktop apps and cloud services, now with built-in AI.

- **Create faster.** Use Copilot to write, rewrite, summarize, and build content across Word, Excel, PowerPoint, Outlook, and Teams
- **Keep work flowing.** The Copilot app unifies chat, search, apps, and agents so teams can find, create, and act from one place.
- **Stay secure everywhere.** Copilot uses Microsoft 365's built-in protections like encryption and multi-factor sign-in to keep your data safe online and in app.

Business Premium + Copilot Business

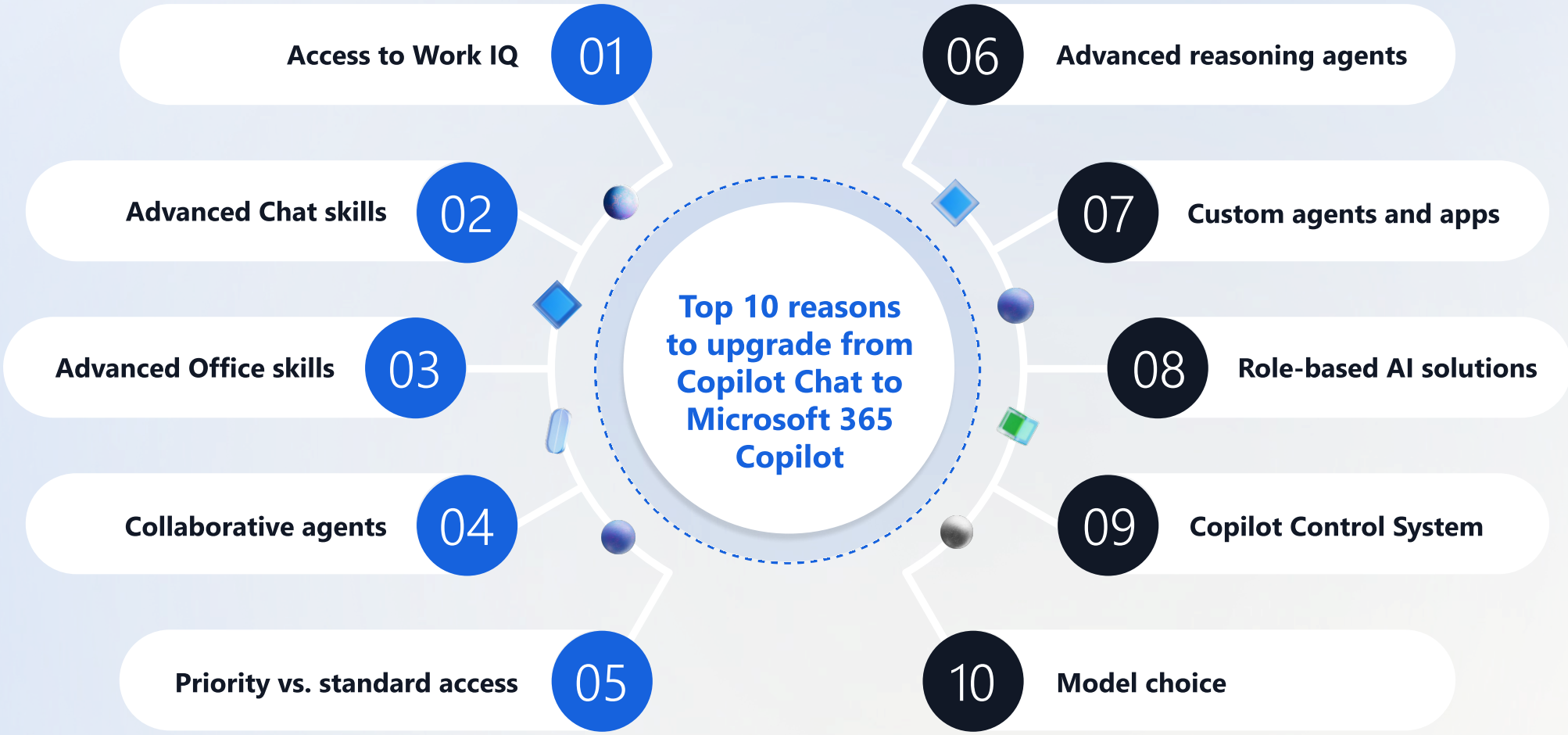
AI-powered productivity and advanced security in one comprehensive solution.

- **Stronger safeguards.** Pair Copilot with Business Premium's advanced security and device management so sensitive work stays protected.
- **Automate busywork.** Let Copilot recap meetings, draft responses, and transform files into usable outputs, so your team can focus on customers.
- **One platform, fewer vendors.** Consolidate tools, reduce toggling, and get built-in security to minimize your administrative load.

Best time to sell

01	**At Microsoft 365 renewal**	Strongest trigger because the budget conversation is already open, customers are reviewing seat mix and value
02	**Right before pricing or packaging updates hit**	Creates urgency without sounding artificial
03	**When promotions or billing flexibility reduce buying friction**	Reduces the commercial barrier and drives urgency
04	**Increase in Copilot Chat usage**	Suggests increase in AI maturity of the organization and path to a more intelligent AI
05	**During a laptop refresh cycle**	Aligns with broader IT modernization and budget planning
06	**New hire**	Drives ease of adoption and helps company position a modern working environment

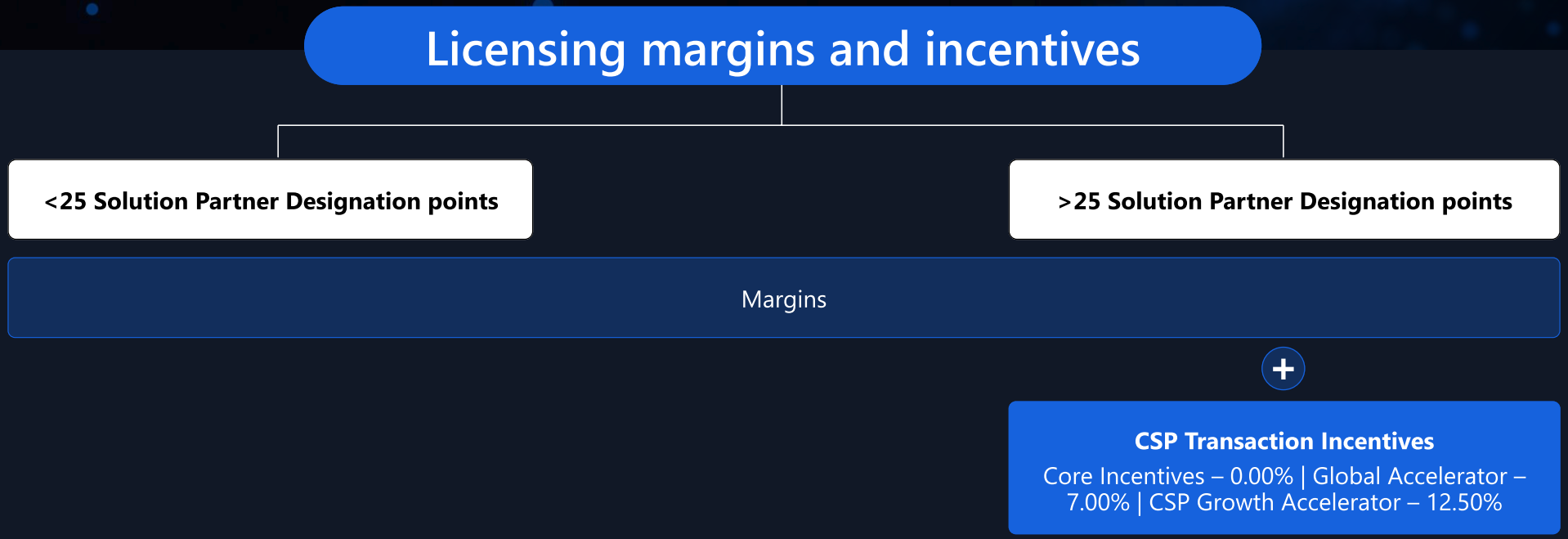
Upgrade from Copilot to M365 Copilot



Turn every renewal into an AI upgrade

		Hero	Fallback
For <300 seats	Microsoft 365 Business Basic	Enhanced Security, with an AI productivity upgrade **Business Premium + Copilot Business + Purview Suite**	Same great plan, with an AI productivity upgrade **Business Standard + Copilot Business**
	Microsoft 365 Business Standard		
	Microsoft 365 Business Premium		**Business Premium + Copilot Business**
For >300 seats	Microsoft 365 E-SKU and Office E-SKUs	Enhanced Security, with an AI and Agents productivity upgrade **Microsoft 365 E7**	Same great plan, with an AI productivity upgrade **Add Microsoft 365 Copilot**
	Other eligible commercial SKUs		
	Non E-SKUs of M365 & Office 365		

Overview of available incentives and programs



Overview of available incentives, programs, and promos

Promos for <300 seats

15% off
1-300 licenses
Microsoft 365 Copilot Business

35% off
10-300 licenses
Microsoft 365 Business Standard + Copilot Business

25% off
10-300 licenses
Microsoft 365 Business Premium + Copilot Business

30% off
10-300 licenses
Microsoft 365 Business Premium + Copilot Business & Purview Suite

50% off
1-300 licenses
Microsoft Purview Suite for Business Premium

	Microsoft 365 Copilot Business	Business Basic & Copilot Business	Business Standard & Copilot Business	Business Premium & Copilot Business	Purview Suite for Business Premium
ERP (per user/month)	**$21**	**$27** ($6 + $21)	**$33.50** ($12.50 + $21)	**$43** ($22 + $21)	**$10**
Promo price	**$18** (~15% off)	N/A	**$22** (~35% off)	**$32** (~25% off)	**$5** (~30% off)
Promo Seats (min/max)	**1 to 300**	N/A	**10 to 300**	**10 to 300**	**10 to 300**
Promo term	December 1, 2025 – June 30, 2026	N/A	December 1, 2025 – June 30, 2026		

Profitability economics for selling Copilot Business Bundle

Bundles can unlock greater profitability and upside

Same budget, more value
With the same budget, leading with bundles gets your customers up to 40% more users covered with Copilot

Earn more per deal
Selling the bundle can generate up to 15% more in total partner earnings in Year 1 despite lower per-unit margins

Maximize year 2 upside
More renewing seats at standard pricing means more margin, more services, and more lifetime value

M365 Business Standard - Partner Economics

	Business Standard & Copilot Business	Business Standard Bundle
Customer Invests	**10 seats @ $30.50** $3,660 annually	**14 seats @ $22** $3,696 annually
Margin	$516 annually	$506 annually
Incentives	$322 annually	$455 annually
Profitability	**$838 Total**	+15% **$961 Total**

https://aka.ms/CSPCopilotBizPartnerEconomics

Figures above should be used as directional guidance. Actual incentive rates are based on partner and product eligibility. Incentives are inclusive of base, strategic product and growth incentives for new seats sold

Overview of available incentives, programs, and promos

Promos for >300 seats

15% off
New Microsoft 365 Copilot customers

20% off
Must purchase a minimum of 100 licenses

30% off
Must purchase a minimum of 300 licenses

40% off
Must purchase a minimum of 1,000 licenses

Available through June 30, 2026

Overview of available incentives and programs

Customer offers and services credit

Enterprise Pre-Sales (Assessment + POV)

Envisioning & POC — Up to $25,000
Needs analysis, roadmap, and POC for M365 Copilot/Agent opportunities.

Enterprise Post-Sales (Deployment)

M365 Copilot Deployment Accelerator — Up to $50,000
Deploys M365 Copilot and drives incremental usage adoption.

Agent Solution Deployment Accelerator — Up to $50,000
Builds & deploys Agent 365/Power Platform agent solutions.

All Copilot engagements require Copilot Specialization, or Copilot Jumpstart Ready+ tier through Dec 31, 2026 (Specialization required from Jan 1, 2027).

Frontier Accelerate for Copilot: Envisioning & POC

Key deliverables

1. Needs analysis & opportunity assessment
2. Solution blueprint and roadmap
3. Business case and POC/pilot build

Supported Scenarios

1. Microsoft 365 E7
2. Microsoft 365 Copilot
3. Agent 365
4. Custom agent opportunities

Partner Eligibility

Copilot Specialization; OR Copilot Jumpstart Ready+ tier (valid Jul 1 – Dec 31, 2026 only; Specialization required from Jan 1, 2027).

Customer Eligibility

Excludes Strategic 500; EDU/Non-Profit ineligible at XXS. Max 4 approved claims, 1 concurrent claim per tenant. Seat thresholds (purchased O365/M365 incl. OE3/OE5/ME3/ME5/G3/G5, BS/BP): XXS 300+, XS 500+, S 1,000+, M 1,500+.

Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft Pre-Sales

Measure and Reward

Pre-sales engagement (needs analysis, roadmap, solution blueprint, business case, POC) to progress Microsoft 365 E7, M365 Copilot, Agent 365, and Agent opportunities.

Engagement size	Seat Threshold	Min. Hours	Partner Payment
XXS	300+	10 hrs	$2,000
XS	500+	20 hrs	$5,000
S	1,000+	40 hrs	$10,000
M	1,500+	100 hrs	$25,000

Frontier Accelerate for Copilot: M365 Copilot Deployment Accelerator

Key deliverables

1. Technical deployment of M365 Copilot
2. Governance & change management
3. Training to drive incremental usage

Supported Scenarios

1. Microsoft 365 Copilot seats
2. Incremental Copilot MAU growth

Partner Eligibility

Copilot Specialization; OR Copilot Jumpstart Ready+ tier (valid Jul 1 – Dec 31, 2026 only; Specialization required from Jan 1, 2027).

Customer Eligibility

Excludes Strategic 500; EDU/Non-Profit ineligible at XXS/XS. Max 4 approved claims, 1 concurrent claim per tenant. Requires purchased M365 Copilot seats AND incremental Copilot MAU opportunity, scaling XXS 50+ to L 3,000+.

Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft | Post-Sales

Measure and Reward

Post-sales deployment and adoption engagement for Microsoft 365 Copilot; technical deployment, governance, training, and change management to drive incremental Copilot usage.

Engagement size	Seat Threshold	Min. Hours	Partner Payment
XXS	50+	10 hrs	$2,500
XS	300+	20 hrs	$5,000
S	500+	40 hrs	$10,000
M	1,500+	100 hrs	$25,000
L	3,000+	200 hrs	$50,000

Frontier Accelerate for Copilot: Agent Solution Deployment Accelerator

Key deliverables

1. Agent activation & Agent 365 deployment
2. Custom agent build
3. Governance & training for adoption

Supported Scenarios

1. Agent 365
2. Power Platform agent solutions
3. Custom agent build

Partner Eligibility

Copilot Specialization OR Business Applications Specialization; OR Copilot Jumpstart Ready+ tier (valid Jul 1 – Dec 31, 2026 only; Specialization required from Jan 1, 2027).

Customer Eligibility

Excludes Strategic 500; EDU/Non-Profit ineligible at XXS/XS. Max 4 approved claims, 1 concurrent claim per tenant. Seat thresholds (purchased O365/M365 incl. OE3/OE5/ME3/ME5/G3/G5, BS/BP), scaling XXS 50+ to L 3,000+.

Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft

Post-Sales

Measure and Reward

Post-sales design, build, deploy, and adopt engagement for Agent and Power Platform solutions; agent activation, Agent 365 deployment, custom agent build, governance, and training.

Engagement size	Seat Threshold	Min. Hours	Partner Payment
XXS	50+	10 hrs	$2,500
XS	300+	20 hrs	$5,000
S	500+	40 hrs	$10,000
M	1,500+	100 hrs	$25,000
L	3,000+	200 hrs	$50,000

Conversation starters...

Audience & Goals	Questions to Ask	What to Listen For	Scenario Routes
Business Decision Maker (Owner, CEO, COO, CFO) Goals: Growth & competitive edge, ROI & cost control, AI-driven innovation, scaling without adding headcount.	1. What are the top one or two outcomes your business is prioritizing this year (e.g. growth, efficiency, customer experience)? 2. How much time does your team spend on repetitive tasks like drafting emails, summarizing meetings, or building presentations? 3. How is your organization thinking about AI? Are employees already using consumer AI tools like ChatGPT with company data today? 4. How important is it that your AI tools keep company data within your own environment rather than flowing through third-party services? 5. What would it mean for your business if every employee had an AI assistant that understood your company's data, without the security risks of consumer tools?	1. Desire for faster decision-making and competitive advantage 2. Concerns about employees using unsanctioned, consumer-grade AI tools (shadow AI) 3. Interest in AI but uncertainty about where to start or how to measure ROI 4. Pressure to do more with current headcount and budget 5. Need for quick, visible wins that justify investment	**Growth / customer experience focus Sales & Marketing:** Copilot drafts proposals, summarizes CRM notes, creates pitch decks **Efficiency / headcount pressure Operations & Finance:** Copilot automates reporting, summarizes data in Excel, drafts status updates **Shadow AI concerns All departments:** Position Copilot as the secure, governed alternative to consumer AI tools
IT Decision Maker (IT Director, CTO, CIO) Goals: Security & data governance, seamless M365 integration, IT control & compliance, managing AI adoption responsibly.	1. What does your Microsoft 365 environment look like today? Are you on Business Basic, Standard, or Premium? 2. Do you have visibility into whether employees are already using third-party AI tools with company data? Does that concern you? 3. When you think about introducing AI, is your bigger concern keeping company data secure, or is it more about getting productivity gains to your team quickly? 4. How do you currently manage access permissions and data governance across your M365 tenant? 5. What would an ideal AI rollout look like for your organization: pilot first, phased, or company-wide?	1. Concerns about data leakage or employees using consumer AI tools outside the M365 boundary 2. Whether they understand that Copilot's built-in data protection is a significant step up from consumer AI 3. Limited IT staff and desire for solutions that are easy to deploy and manage 4. Interest in AI but need for admin controls, audit logs, and governance 5. Questions about licensing, bundling, and total cost of ownership	**Shadow AI / data governance concern IT & Governance:** Copilot's tenant-level isolation and permission model as the governed alternative **Small IT team / "do more with less" IT Operations:** Copilot automates documentation, troubleshooting summaries, and internal comms **Pilot-first mindset** Recommend starting with a high-output team (e.g. Sales, HR) to prove value before broader rollout

Conversation starters (continued)

Audience & Goals	Questions to Ask	What to Listen For	Scenario Routes
IT Practitioner (IT Manager, Systems Admin) Goals: Ease of deployment & management, reducing routine workload, empowering end users without creating support burden.	1. What are the routine tasks that consume most of your team's time each week? 2. How comfortable are your end users with the Microsoft 365 apps they use today (Outlook, Teams, Word, Excel)? 3. Are employees already using any AI tools on their own, even informally, and do you have visibility into that? 4. Are there specific departments or roles that you think would benefit most from AI-assisted productivity? 5. What has your experience been with rolling out new features or tools to end users? What makes adoption stick? 6. What would make you confident that an AI tool is safe and manageable in your environment?	1. Too much time spent on support tickets, onboarding, or manual processes 2. Desire for tools that work inside apps users already know (no new platforms) 3. Signs of shadow AI usage that they want to bring under control 4. Need for a phased or pilot-based rollout approach 5. Interest in identifying high-impact use cases before scaling 6. Preference for tools with built-in admin controls and minimal configuration overhead	**Support burden / routine tasks** **IT & Admin:** Copilot drafts internal documentation, automates meeting notes, summarizes long email threads **User adoption concerns** Start with power users in Teams-heavy roles. Meeting recaps and chat summaries show instant, visible value **Specific department mentioned** Map to the relevant scenario in Section 3 (e.g. HR for onboarding docs, Finance for Excel analysis)

Objection handling...

"We can't justify the cost on top of what we already pay for M365."

Consider the time savings: if Copilot saves each employee even 30 minutes a day on emails, meeting recaps, and document drafting, the ROI can exceed the license cost within weeks. Many SMBs also find they can consolidate or eliminate third-party AI tools and point solutions once Copilot is in place.

"Our team is too small to need AI. That's an enterprise thing."

Small teams are actually where Copilot delivers the most visible impact. When one person wears five hats, saving 30 to 60 minutes a day on drafting, summarizing, and data analysis is transformative. Copilot Business was purpose-built for organizations with up to 300 users. Same enterprise-grade AI, but packaged and priced for SMBs. It doesn't require dedicated AI staff or complex integrations; it works inside the M365 apps your team already uses.

"We're worried about data privacy. We don't want AI reading our sensitive business data."

That's exactly why Copilot Business is a better choice than any consumer AI tool. It operates entirely within your Microsoft 365 tenant, respects your existing access permissions, and never trains its models on your business data. Your data never leaves your organization's boundary. Business Standard with Copilot gives you solid built-in protections: tenant-level data isolation, enterprise data protection, GDPR support, and admin controls. Unlike consumer tools where company data can end up training public models, Copilot keeps your information private and fully within your control.

"Our employees already use ChatGPT and it's free. Why would we pay for Copilot?"

That's actually the risk. When employees paste company data into consumer AI tools, that data may be used to train public models and leaves your compliance boundary entirely. Copilot Business keeps everything inside your M365 tenant with enterprise data protection. Plus, unlike standalone chat tools, Copilot is embedded directly in Word, Excel, PowerPoint, Outlook, and Teams, so it can draft from your actual emails, meetings, and files, not just generic web knowledge. It's the difference between a general-purpose chatbot and a context-aware work assistant.

Objection handling (continued)

"We tried AI tools before and adoption was low. People just didn't use them."

Adoption is the number-one factor in AI ROI, and the reason many standalone tools fail is that they require users to switch context and learn something new. Copilot is different because it shows up inside the apps your people already use every day: Outlook, Teams, Word, and Excel. Microsoft also provides adoption guides, suggested prompts, and admin dashboards that track usage. We recommend starting with a pilot group of 5 to 10 power users in a high-impact workflow (e.g. sales, operations) and letting their results build internal momentum.

"We're not sure our data is organized enough for AI to be useful."

You don't need a perfect data environment to get started. Copilot works with the emails, chats, meeting transcripts, and documents already in your Microsoft 365 tenant. Most SMBs see immediate value from meeting recaps, email drafting, and document summarization without any data cleanup. That said, this is a great opportunity to review your SharePoint permissions and file organization. We can help you assess readiness and prioritize quick wins before a broader rollout.

"We're locked into our current M365 contract. We can't change plans right now."

You don't need to change plans. Copilot Business is an add-on. You can purchase it alongside your existing Business Standard plan at any time without waiting for renewal. You only need to wait for your commitment end date if you want to switch your base M365 plan itself.

"What if Microsoft discontinues Copilot or changes the pricing significantly?"

Microsoft has invested billions in AI infrastructure and has made Copilot central to the M365 platform. Over 90% of Fortune 500 companies already use it. The recent introduction of Copilot Business as a dedicated SMB offering, along with new bundled SKUs and promotional pricing, signals a long-term commitment to this market segment. Additionally, Microsoft has a strong track record of honoring existing subscription commitments even as offerings evolve.

Scenario discovery...

Department / Role	Discovery questions	Signals to listen for	Copilot capabilities to highlight
Sales & Business Development	1. How much time do your salespeople spend writing proposals, follow-up emails, or prepping for client meetings? 2. Do you have a CRM or customer data in Outlook/Teams that sales relies on?	Mentions long proposal cycles, manual follow-ups, inconsistent messaging, time lost on meeting prep.	1. Draft personalized proposals and follow-up emails in Outlook grounded in prior correspondence 2. Summarize customer email threads and meeting transcripts in Teams to prep for calls 3. Generate pitch deck drafts in PowerPoint from meeting notes or briefs 4. Analyze sales data and trends in Excel with natural-language prompts
Marketing & Communications	1. How does your team currently create content (blog posts, social copy, newsletters, internal comms)? 2. How much back-and-forth goes into drafting and editing marketing materials?	Content bottlenecks, small team producing high volume of materials, inconsistent brand voice, heavy editing cycles.	1. Draft blog posts, social media copy, and newsletters in Word with brand tone guidance 2. Repurpose long-form content into multiple formats (e.g. blog → email → social post) 3. Summarize competitive research or market reports from documents in SharePoint 4. Create presentation decks from campaign briefs in PowerPoint
Finance & Accounting	1. How much time does your finance team spend building reports, reconciling data, or answering ad-hoc data questions? 2. Are they comfortable with Excel, or do they rely on someone else to build formulas and pivot tables?	Manual reporting, spreadsheet complexity, time spent on recurring financial summaries, ad-hoc data requests from leadership.	1. Analyze and visualize financial data in Excel using natural-language prompts 2. Generate recurring report drafts (monthly close summaries, variance analysis) in Word or Excel 3. Summarize long financial documents or contracts for quick review 4. Build formulas, pivot tables, and charts in Excel by describing what's needed in plain language

Scenario discovery (continued)

Department / Role	Discovery questions	Signals to listen for	Copilot capabilities to highlight
HR & People Operations	1. How does your HR team handle onboarding documentation, policy updates, and internal communications? 2. How much time goes into scheduling, interview prep, and writing job descriptions?	Manual onboarding processes, outdated policy docs, high volume of internal Q&A, time spent writing job postings and offer letters.	1. Draft job descriptions, offer letters, and onboarding materials in Word 2. Summarize employee feedback surveys and exit interview notes 3. Generate policy update communications for company-wide distribution in Outlook 4. Prep interview summaries and candidate comparison notes from Teams meetings
Operations & Project Management	1. How do your project teams track status, share updates, and document decisions today? 2. How many meetings does your team have per week, and who writes up the action items?	Meeting overload, lost action items, status updates that take too long to compile, information scattered across Teams/email/SharePoint.	1. Auto-generate meeting recaps with action items and owners in Teams 2. Draft weekly status reports in Word by summarizing Teams chats and emails 3. Create project update presentations in PowerPoint from meeting notes 4. Catch up on missed meetings and long chat threads with Copilot summaries in Teams
Customer Service & Support	1. How does your support team currently document resolutions and share knowledge internally? 2. Do your support reps spend time writing similar responses to recurring customer questions?	Repetitive response drafting, inconsistent resolution documentation, knowledge not being captured or shared, slow response times.	1. Draft customer response emails in Outlook grounded in previous case correspondence 2. Summarize long customer interaction histories across email and Teams 3. Create and update internal knowledge base articles in Word or SharePoint 4. Generate FAQ documents from recurring support email pattern

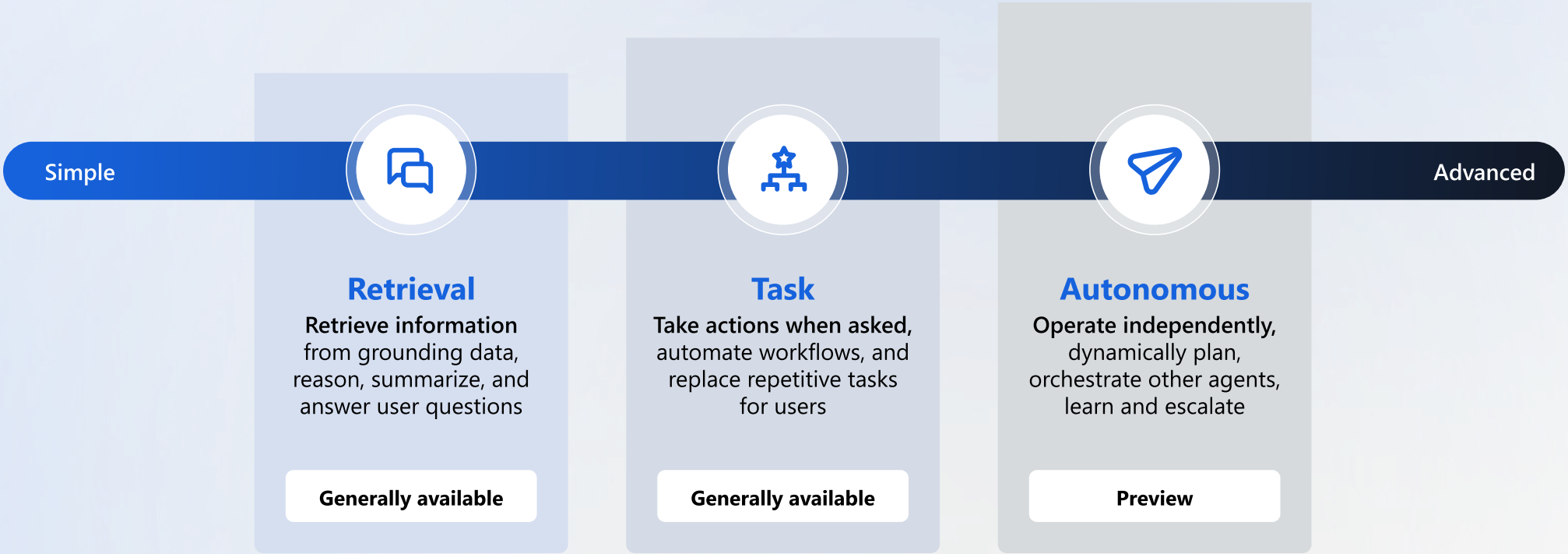
Build custom agents

Copilot Studio

Navigate from below:

- Solution overview
- Customer scenarios
- Investments
- Conversation guidance

Understanding the spectrum of agents



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

Why customers choose Copilot Studio for customer agents?

Copilot Studio is a low code tool for building agents quickly, without worrying about infrastructure

Deeply connected with the Microsoft ecosystem

1. Easily access backend systems
2. Seamless extension with Microsoft 365 Copilot, Foundry and Microsoft Fabric

Intelligent control

1. Define the logic, model usage, triggers, deep reasoning and more with a straightforward maker experience
2. Use autonomous triggers so your agent can think independently
3. Mix both generative AI and traditional automation in one system

Multi-modal experiences

1. Easy one-click access and use of the 1,900+ models from Foundry including Llama, Mistral, Cohere etc. to handle task and scenario specific needs
2. Near-instant availability to new models

Access to a broad range of knowledge sources

1. Microsoft 365
2. Dataverse
3. Azure
4. Internet & uploads
5. External apps and services

Seamless distribution across multiple channels

1. Single click distribution across multiple channels
2. Direct deployment to everyday apps such as Microsoft Teams, SharePoint, and Microsoft 365 Copilot Chat.
3. Access to even more channels beyond what's natively available in Copilot Studio by leveraging Azure Bot Service, Microsoft 365 Agents SDK, Agents Client SDK and Dynamics 365.

Extensive security and governance

1. Enterprise-grade governance controls
2. Sensitive data leakage prevention
3. Data loss prevention
4. Management controls to employ agent lifecycle management controls, and oversee agent spend


Travel and Transportation
Financial Services
Government
Retail
Healthcare
Education
Professional Services
Customer Service
Sales & Marketing
HR
IT
Legal
Finance
Manufacturing
Create solutions for every
industry &
department

Aligning Microsoft solutions to customer AI and agent requirements



Orchestration Principles	Scenario
Microsoft 365 Copilot	✓ Transform their M365 estate with AI-first apps in the context of work ✓ Enhance organizational productivity and collaboration
Copilot Studio and Copilot in Dynamics 365	✓ Deliver transformative employee experiences with agents ✓ Transform and optimize new and existing CRM/ERP business processes via AI-first intelligent apps ✓ Unlock untapped value via CRM/ERP business process innovation ✓ Deliver exceptional customer experiences with agents
Foundry	✓ Build and orchestrate complex AI agents, with full control of all layers ✓ Use their own models, data, and tools with pro-dev flexibility ✓ Monetize their unique IP or deploy externally

Example: Problem Resolution - Always-on AI Assistant

Boost agent efficiency with generative AI, offering instant knowledge, response recommendations, and insights to accelerate issue resolution

KPIs Impacted

- First call resolution rate
- Issue resolution time
- Repeat Issue Rate

No Code

M365 Copilot + Service Agent

Respond to a customer complaint

Streamlined collaboration to diagnose and respond to an issue.

Low Code

Copilot Studio + D365 Contact Center

D365 Contact Center Case Management Agent

+

Automated CRM updates
Pre and post summarization of prior customer interactions
Real-time AI intent detection, generated insights and suggested actions

Pro Code

Azure AI Foundry

Call Summarization and analytics
Contact center agent assistant

+

Real-time call summarization and analytics
Real-time guiding of the contact center agent
Fully customizable (i.e. choice of LLM model)
Extensive finetuning

Automated CRM updates
Pre and post summarization of prior customer interactions
Real-time AI intent detection, generated insights and suggested actions

Example: Product Development - Ship Software Faster, with Higher Quality

With generative AI, developers can write better code faster, spend less time looking for information, and deliver higher quality solutions in less time.

KPIs Impacted

- Faster solution time-to-market
- Reduced development and IT operations costs
- Reduced risk of security breach

No Code
M365 Copilot

Create technical & functional solution documentation

Network Script Generation

No Code
GitHub Copilot

Code Completion, Autofix

+

Embedded in Visual Studio
Auto-suggested fixes & completions for code
Advanced automation capabilities that streamline repetitive coding tasks

Pro Code
Azure AI Foundry

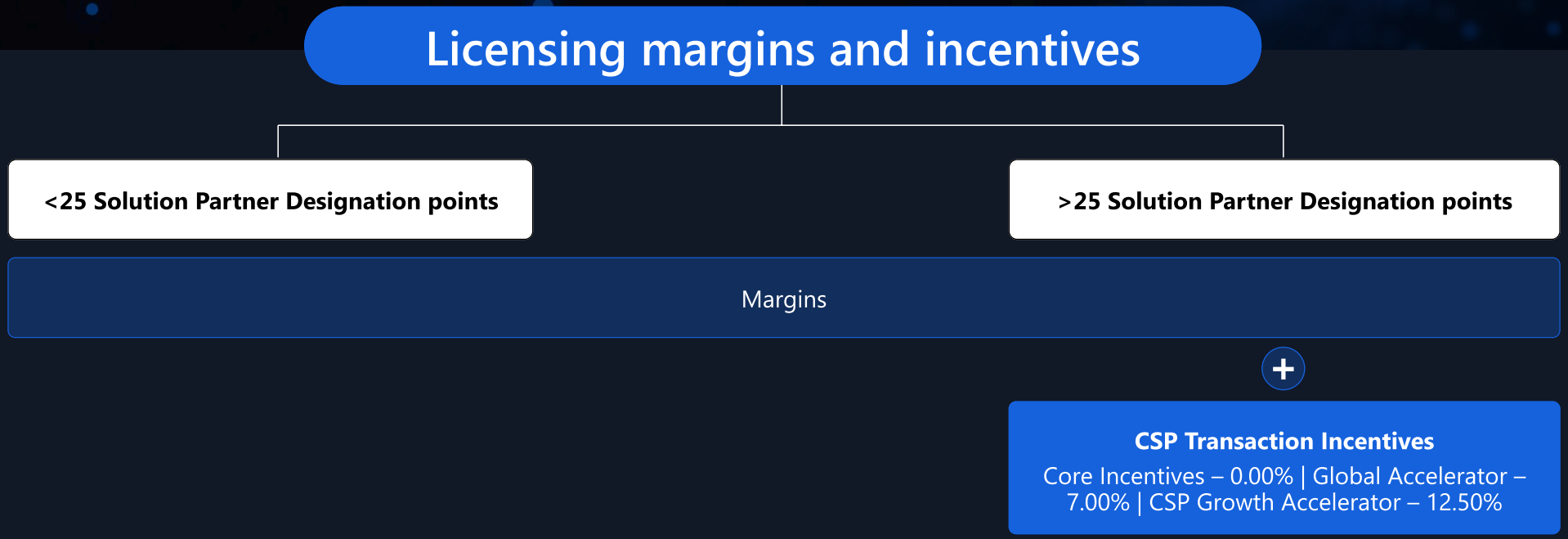
AI-enabled code generation

+

Fully customizable (i.e. choice of AI model, framework)
Extensive finetuning
Supports any channel and format

Embedded in Visual Studio
Auto-suggested fixes & completions for code
Advanced automation capabilities that streamline repetitive coding tasks

Overview of available incentives and programs



Overview of available incentives and programs

Customer offers and services credit

Enterprise Pre-Sales (Assessment + POV)

Enterprise Post-Sales (Deployment)

Agent Solution Deployment Accelerator — Up to $50,000
Builds & deploys Agent 365/Power Platform agent solutions.

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Frontier Accelerate for Copilot: Agent Solution Deployment Accelerator

Key deliverables

1. Agent activation & Agent 365 deployment
2. Custom agent build
3. Governance & training for adoption

Supported Scenarios

1. Agent 365
2. Power Platform agent solutions
3. Custom agent build

Partner Eligibility

Copilot Specialization OR Business Applications Specialization; OR Copilot Jumpstart Ready+ tier (valid Jul 1 – Dec 31, 2026 only; Specialization required from Jan 1, 2027).

Customer Eligibility

Excludes Strategic 500; EDU/Non-Profit ineligible at XXS/XS. Max 4 approved claims, 1 concurrent claim per tenant. Seat thresholds (purchased O365/M365 incl. OE3/OE5/ME3/ME5/G3/G5, BS/BP), scaling XXS 50+ to L 3,000+.

Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft | Post-Sales

Measure and Reward

Post-sales design, build, deploy, and adopt engagement for Agent and Power Platform solutions; agent activation, Agent 365 deployment, custom agent build, governance, and training.

Engagement size	Seat Threshold	Min. Hours	Partner Payment
XXS	50+	10 hrs	$2,500
XS	300+	20 hrs	$5,000
S	500+	40 hrs	$10,000
M	1,500+	100 hrs	$25,000
L	3,000+	200 hrs	$50,000

Agent opportunity discovery by department...

Department	Discovery Questions	Process Automation Opportunity	Agent Solutions
Customer Service & Support	1. What are the top 10 to 20 questions your customers ask most frequently? (e.g. order status, return policies, pricing, hours, product specs) 2. How do you handle customer inquiries outside of business hours? 3. How long does it take to resolve a typical customer request? How much of that time is spent retrieving information vs. actually helping? 4. Do you have a customer-facing knowledge base or FAQ? How current is it?	High volume of repetitive customer inquiries handled manually. After-hours inquiries going unanswered. Support reps spending time searching for information before responding. Outdated or underutilized knowledge bases.	• Customer FAQ agent grounded in your product docs, policies, and knowledge base, deployed on your website or Teams, available 24/7 • Order status agent connected to your CRM or order management system that retrieves real-time order data and answers 'where's my order' instantly • Escalation-aware agent that handles routine inquiries and seamlessly hands off complex issues to a human with full conversation context • Internal support knowledge agent that helps reps find answers faster by searching across all support documentation in seconds
HR & People Operations	1. What questions do new hires ask most frequently during their first 30 days? (benefits enrollment, policies, IT setup, org structure) 2. How much time does your HR team spend answering recurring policy questions (PTO, expenses, dress code, parental leave)? 3. What does your employee onboarding process look like? How many manual steps are involved? 4. Do you have an employee handbook or policy documents? Are they easy for employees to find and search?	HR team spending significant time answering the same policy questions. New hire onboarding involving manual checklists and multiple handoffs. Employees unable to find policy information quickly. HR knowledge scattered across documents, SharePoint, and email.	• HR policy agent grounded in your employee handbook, benefits guides, and policy documents, deployed in Teams so employees get instant answers • Onboarding agent that walks new hires through their first 30 days: benefits enrollment, IT setup checklists, key contacts, and company policies • PTO and benefits agent connected to your HR system that answers balance questions and guides employees through request processes • Expense policy agent that answers 'can I expense this?' questions instantly based on your actual expense policies

Agent opportunity discovery by department...

Department	Discovery Questions	Process Automation Opportunity	Agent Solutions
IT Support	1. What are the most common IT support requests your team receives? (password resets, access requests, VPN issues, printer problems, software installation) 2. What percentage of your help desk tickets could be resolved with self-service if employees knew where to look? 3. How long is the average resolution time for a routine IT request? How much of that is waiting in a queue? 4. Do you have IT support documentation? Is it current and accessible, or do employees skip it and submit a ticket instead?	Help desk overwhelmed with routine, repetitive requests. Employees submitting tickets for issues they could self-resolve. Long wait times for simple requests like password resets or access provisioning. IT documentation exists but is hard to find or outdated.	• IT helpdesk agent that walks employees through common fixes: password resets, VPN troubleshooting, printer setup, software installation guides • Access request agent connected to your provisioning system that takes access requests, routes them for approval, and confirms when access is granted • IT knowledge agent grounded in your IT documentation that employees query in Teams before submitting a ticket, deflecting 30 to 50% of routine requests • New employee IT setup agent that guides new hires through device enrollment, app installation, and security configuration step by step
Sales & Business Development	1. How do your salespeople currently find product information, pricing, competitive positioning, or case studies when preparing for a call? 2. Do you have a sales playbook or competitive battle cards? How quickly can a rep access the right information for a specific deal? 3. How do you handle inbound sales inquiries from your website? Is there a process, or do they go to a general inbox? 4. How much time do sales reps spend on non-selling activities (searching for content, qualifying leads, answering standard prospect questions)?	Sales reps spending time searching for product info, pricing, and competitive positioning. No instant response to inbound website inquiries. Sales playbooks and battle cards exist but aren't easily searchable. Time spent qualifying leads manually.	• Sales knowledge agent grounded in your product catalog, pricing sheets, competitive battle cards, and case studies, available instantly in Teams • Inbound lead qualification agent on your website that engages prospects, asks qualifying questions, captures contact info, and routes qualified leads to sales reps • RFP and proposal assistant agent that retrieves relevant product specs, case studies, and pricing from your knowledge base to accelerate proposal drafting • Competitive intelligence agent that answers 'how do we compare to X?' questions instantly using your battle cards and positioning documents

Agent opportunity discovery by department (continued)

Department	Discovery Questions	Process Automation Opportunity	Agent Solutions
Operations & Facilities	1. What operational requests do employees submit regularly? (room bookings, supply orders, maintenance requests, visitor registration) 2. Are there approval workflows that create bottlenecks because they depend on a specific person responding? 3. How do you handle facility or maintenance issues? Is there a ticketing system, or do requests come in via email and chat? 4. Are there recurring operational reports or status updates that someone compiles manually?	Operational requests handled via email or ad-hoc messages. Approval workflows stalled waiting for manual responses. Facility issues reported inconsistently. Recurring reports compiled manually from multiple sources.	• Facilities request agent in Teams that takes maintenance requests, categorizes them, and routes them to the right team with automatic prioritization • Approval orchestration agent that collects request details, routes for approval via adaptive cards in Teams, and confirms the outcome without chasing • Visitor registration agent on your company portal that handles guest registration, sends visitor passes, and notifies hosts automatically • Operational reporting agent connected to your data sources that compiles and delivers recurring status reports on schedule
Finance & Procurement	1. How do employees submit expense reports or purchase requests today? How many steps and approvals are involved? 2. What financial questions do employees or managers ask frequently? (budget remaining, spending against plan, invoice status, vendor details) 3. Are there procurement workflows that involve multiple manual steps: request, quote, approve, order, confirm? 4. How do you handle vendor inquiries about invoice or payment status?	Multi-step procurement and expense workflows with manual handoffs. Frequent ad-hoc financial questions directed to the finance team. Vendor inquiries about invoice/payment status handled manually. Budget and spending information not easily accessible to managers.	• Expense and procurement agent that guides employees through submission, checks against policy, routes for approval, and confirms when complete • Budget inquiry agent connected to your financial systems that answers 'how much is left in my budget?' or 'what's the status of PO #1234?' in seconds • Vendor payment status agent (external-facing on your portal or via email) that handles 'when will I be paid?' inquiries automatically by pulling from your AP system • Invoice processing agent that extracts key data from submitted invoices, matches against purchase orders, and flags discrepancies for review

Objection handling...

"We already have Copilot. Why do we need Copilot Studio?"

Copilot gives every user an AI assistant inside Word, Excel, Outlook, and Teams. Copilot Studio lets you build custom AI agents that handle specific business processes end to end. Think of Copilot as your personal assistant, and Copilot Studio agents as your specialized digital employees. An HR agent that answers policy questions 24/7, an IT agent that walks employees through password resets, a customer service agent that handles order inquiries on your website. If you have a Copilot Business license, you already have Copilot Studio Lite included at no extra cost for building internal agents within Microsoft 365.

"We don't have developers. We can't build AI agents."

Copilot Studio was built for exactly this situation. You describe what you want the agent to do in plain language, upload your knowledge sources (SharePoint sites, documents, FAQs), and the platform builds the agent for you. No coding required. The guided agent builder walks you through setup, testing, and deployment. Business users, not developers, are typically the ones building agents in Copilot Studio. If you've ever created a PowerPoint or organized a SharePoint site, you have the skills to build an agent.

"We tried chatbots before and they were terrible. Customers hated them."

The chatbots of five years ago were rigid, scripted, and broke the moment someone asked an unexpected question. Copilot Studio agents are fundamentally different. They use large language models to understand natural language, so they handle variations in how people ask questions. They're grounded in your actual business data (SharePoint, documents, knowledge bases), so answers are accurate and specific to your organization. They can escalate to a human when they can't help. And you can test and refine them before deployment. The experience is closer to talking to a knowledgeable colleague than navigating a phone tree.

"How much does Copilot Studio cost? The pricing seems confusing."

There are two clear paths. If your team already has Microsoft 365 Copilot licenses, Copilot Studio Lite is included at no additional cost for building and using internal agents within Microsoft 365 (deployed in Teams, SharePoint, etc.). For organizations that need external-facing agents (on your website, apps, or partner portals) or advanced capabilities (complex workflows, multi-agent orchestration, 1,400+ system integrations), Copilot Studio is available as a tenant-wide license at $200/month per 25,000 Copilot Credits. Credits are consumed each time an agent completes a task. There's also a pay-as-you-go option at $0.01 per credit. For most SMBs starting with one or two agents, the prepaid credit pack provides predictable monthly costs.

Objection handling (continued)

"We only have a small team. We don't have enough volume to justify AI agents."

Small teams are where agents deliver the most visible impact. When a five-person customer service team answers the same 20 questions 50 times a week, an agent that handles those instantly frees them to focus on complex issues. When HR gets the same benefits and policy questions every onboarding cycle, an agent eliminates that entirely. When IT fields repetitive password reset and access requests, an agent resolves them in seconds. You don't need high volume to see value. You need repetitive, predictable tasks, and every small business has them.

"What happens when the agent can't answer a question? We can't afford bad customer experiences."

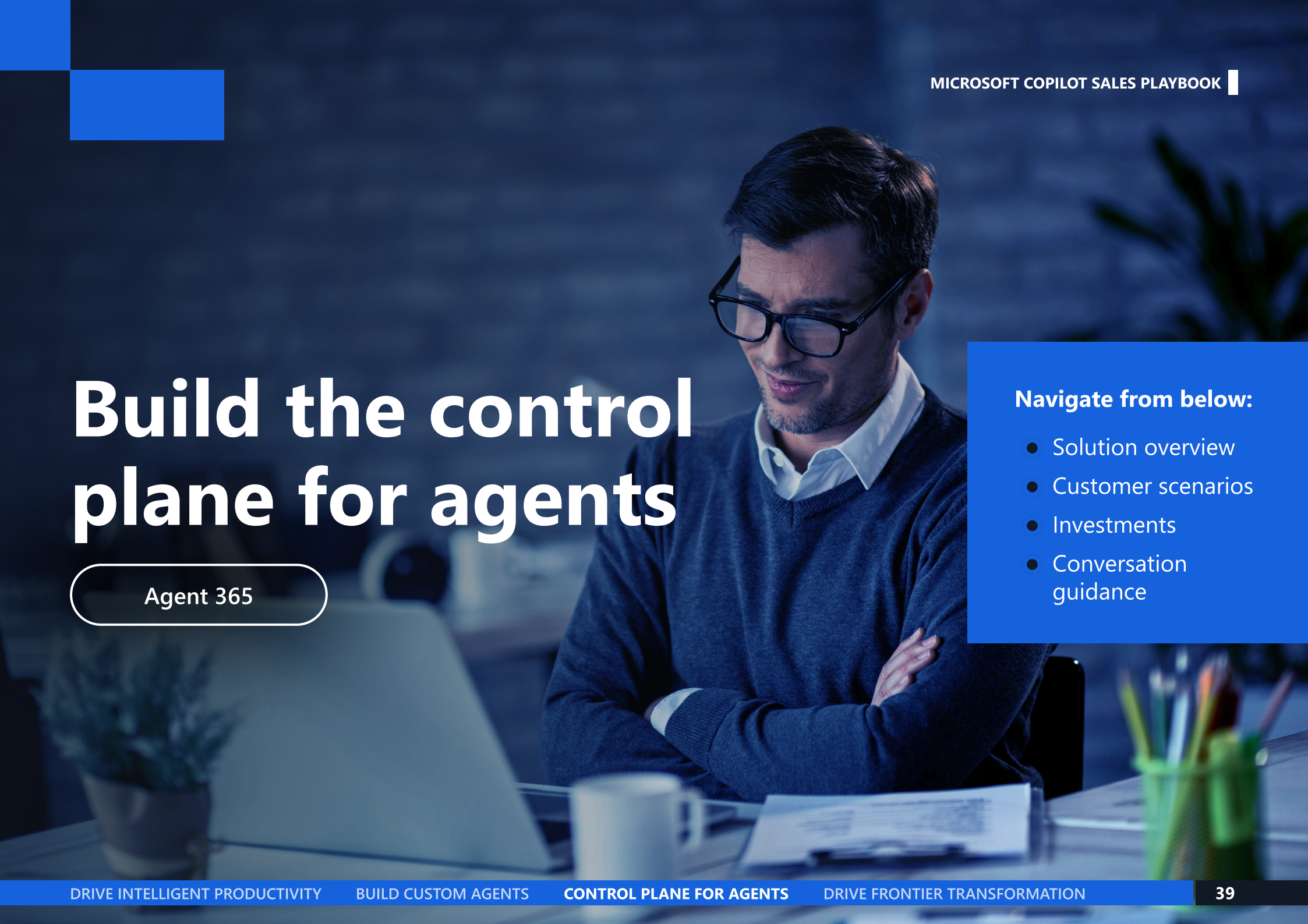
Copilot Studio agents are designed for graceful escalation. You configure exactly when and how the agent hands off to a human: when it can't find an answer, when the question involves a sensitive topic, or when the customer explicitly asks for a person. The agent passes the full conversation context to the human, so the customer doesn't have to repeat themselves. You also control the agent's scope: it only answers based on the knowledge sources you provide, so it won't make things up. Before deployment, you test with real scenarios and refine until you're confident.

"Is our data safe? We don't want an AI agent exposing sensitive information."

Copilot Studio agents operate within your Microsoft 365 security boundary. They respect your existing permissions: if a user doesn't have access to a document, the agent won't surface it. You control exactly which data sources the agent can access. Agents can be configured to require authentication before responding. For organizations with M365 Business Premium, the agent interactions are covered by the same security controls (Defender, Intune, conditional access) and data governance (DLP, sensitivity labels, audit logging) that protect the rest of your environment. IT admins have full visibility and control through the Copilot Studio admin center.

"How do we measure whether an agent is actually working?"

Copilot Studio provides built-in analytics that show you agent performance: total conversations, resolution rate, escalation rate, customer satisfaction scores, and topic-level engagement. You can see exactly which questions the agent handles well and where it struggles. We recommend defining success metrics before deployment: ticket deflection rate, average response time, time saved per team member, or after-hours inquiry resolution. Most organizations see measurable results within the first two weeks. The analytics dashboard makes it easy to refine the agent continuously based on real usage data.



Build the control plane for agents

Agent 365

Navigate from below:

- Solution overview
- Customer scenarios
- Investments
- Conversation guidance

Solution overview

Agent 365 provides one place for IT and security leaders with a unified admin experience to **observe, secure, and govern ALL agents** across the organization. It does that by extending the management, security, and governance processes organizations already use for employees to agents.

Observability

Provides a unified control plane that gives IT and security leaders full visibility into all agents in the environment:

- Who's using them - registry
- How they're used - analytics
- How they behave - relationship mapping

With this, organizations can proactively identify agent sprawl, usage trends, and emerging risks before they impact the business, shifting from reactive cleanup to proactive management.

Governance

Applies the same policy-driven governance model used for users and apps to agents. It enables:

- IT-led onboarding
- Least-privilege access
- Lifecycle controls
- Audit logging
- Built-in compliance

This ensures every agent starts governed and compliant from day one, allowing IT and Security teams to confidently innovate while maintaining accountability, audit readiness, and regulatory alignment.

Security

Extends enterprise-grade security controls to agents, including:

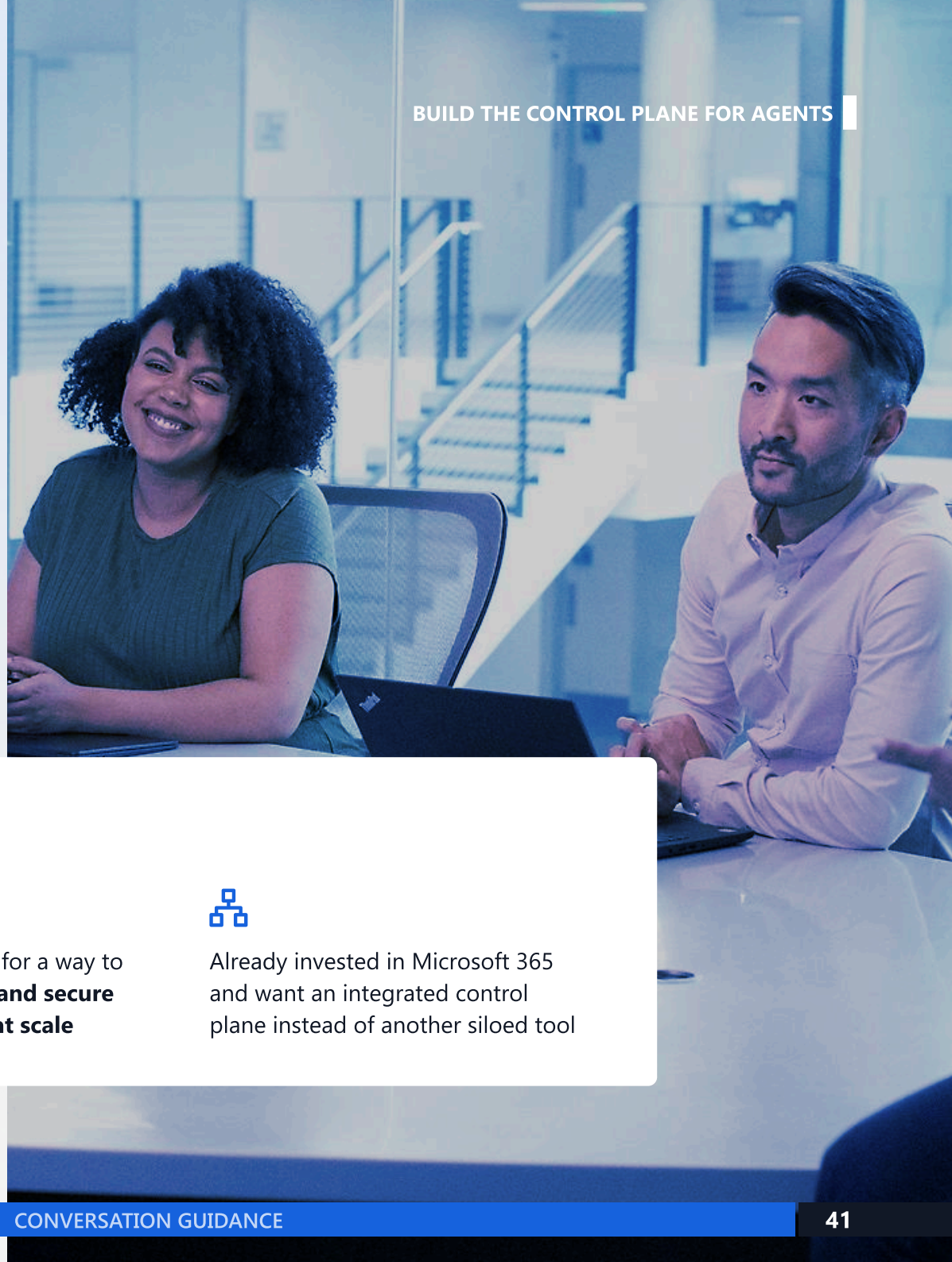
- Identity protection
- Conditional access
- Data loss prevention
- AI-specific threat protection

Security teams gain visibility into agent threats, vulnerabilities, and attack paths, with the ability to detect, investigate, and block risky behaviour in real time.

Ideal customers

Pre-requisites for using Agent 365
Agent 365 access is available to tenants with a Microsoft 365 Copilot license

Agent 365 is built for IT and Security leaders such as CIOs, CTOs, and CISOs who are responsible for enabling AI adoption without losing control, security, or compliance.



The organizations would be:

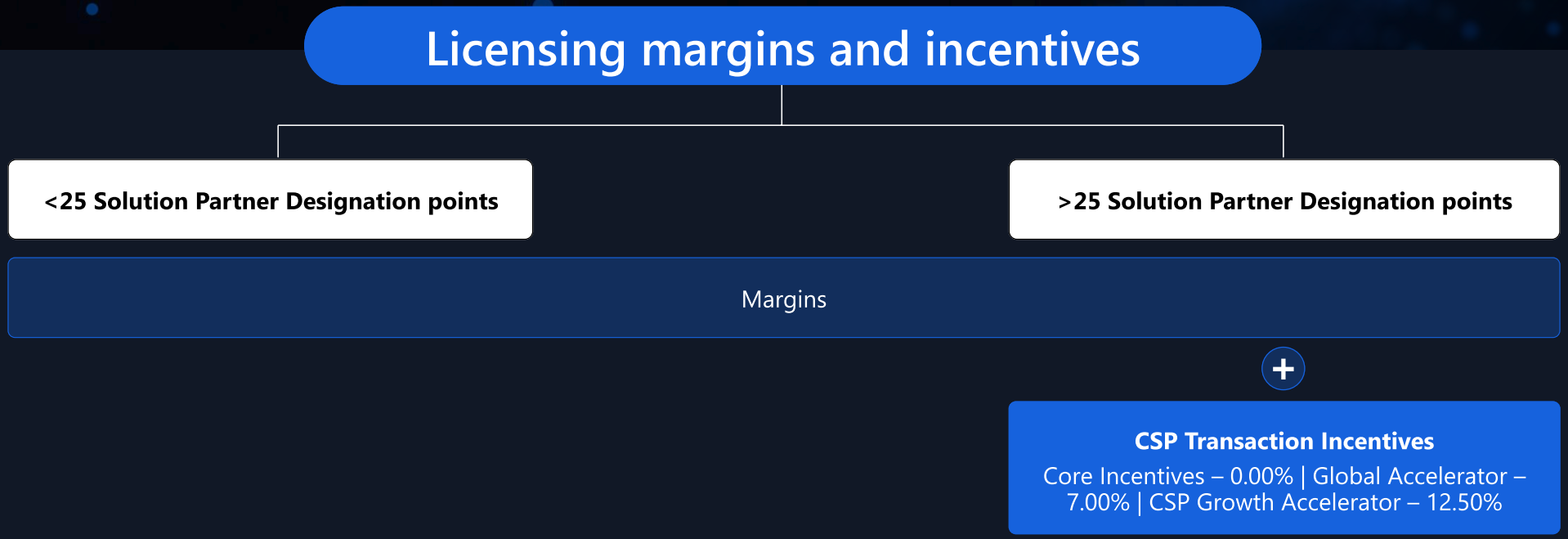
Actively adopting **AI agents** or planning to

Concerned about **shadow agents,** unclear ownership, or lack of visibility

Looking for a way to **govern and secure agents at scale**

Already invested in Microsoft 365 and want an integrated control plane instead of another siloed tool

Overview of available incentives and programs



Overview of available incentives and programs

Customer offers and services credit

Enterprise Pre-Sales (Assessment + POV)

Enterprise Post-Sales (Deployment)

Agent Solution Deployment Accelerator — Up to $50,000
Builds & deploys Agent 365/Power Platform agent solutions.

All Copilot engagements require Copilot Specialization, or Copilot Jumpstart Ready+ tier through Dec 31, 2026 (Specialization required from Jan 1, 2027).

Frontier Accelerate for Copilot: Agent Solution Deployment Accelerator

Key deliverables

1. Agent activation & Agent 365 deployment
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Supported Scenarios

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Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft

Post-Sales

Measure and Reward

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M	1,500+	100 hrs	$25,000
L	3,000+	200 hrs	$50,000

Conversation starters

Visibility

"Many organizations are moving into agent adoption faster than their governance model can keep up. How are you currently tracking which agents exist, who owns them, and what data they can access?"

Governance

"As agents start acting on behalf of users, the challenge shifts from building them to governing them. What guardrails do you have today for onboarding, access, lifecycle, and auditability?"

Security

"Agents behave like users but scale like apps, which creates a new attack surface. How are your security teams thinking about agent identity, data leakage, and threat protection?"

Operational maturity

"Where are you today: experimenting with a few agents, or trying to operationalize AI agents across departments? Agent 365 becomes especially valuable when AI moves from pilot to scale."

Objection handling...

"We already have Microsoft 365 Copilot. Why do we need Agent 365?"

Copilot helps end users work with AI. Agent 365 is different. It is the **control plane for agents** and is designed to help organizations **observe, govern, and secure agents across the enterprise.** The FAQ is clear that Agent 365 complements Copilot rather than replacing it.

"We do not want another standalone security tool."

Agent 365 is positioned as an **extension of Microsoft 365 and Microsoft Security**, not a bolt-on silo. It brings agent oversight into the Microsoft Admin Center and connects with **Entra for identity, Purview for data security and compliance, and Defender for threat protection.**

"Do we need Microsoft 365 E7 to buy this?"

No. **Microsoft 365 E7 is not required.** Agent 365 can be purchased as a **standalone per-user subscription,** while E7 simply offers the most complete bundled experience.

"Do we need E3 or E5 first?"

No, there is **no licensing prerequisite** for Agent 365 itself. However, some underlying security and compliance capabilities depend on the customer's broader Microsoft licensing. In other words, Agent 365 works without E3 or E5, but some advanced protections depend on what the customer already owns.

Objection handling (continued)

"We are only in early experimentation. This feels premature."

That is exactly when many organizations should start the conversation. Agent 365 addresses the problems that show up early: **shadow agents, unclear ownership, inconsistent governance, and reactive security cleanup.** It helps put the model in place before adoption becomes chaotic.

"We use third-party or custom agents too."

Agent 365 is meant to help govern **all agents across the organization,** including Microsoft-built, partner-built, and custom agents, provided they are integrated correctly.

"Our security team already uses Entra, Purview, and Defender. Why add Agent 365?"

Because those tools each handle important parts of the problem, while Agent 365 acts as the **unifying control plane for agents.** It uses the registry as a single source of truth and connects identity, threat protection, data security, audit, and governance into one operating model for agentic workloads.

"Will Agent 365 give us E5-level Purview or Defender if we do not already have it?"

No. Agent 365 license **does not grant E5-level security entitlements** or upgrade the user's existing Purview or Defender rights.

Drive frontier transformation with the all-in-one solution

Microsoft 365 E7

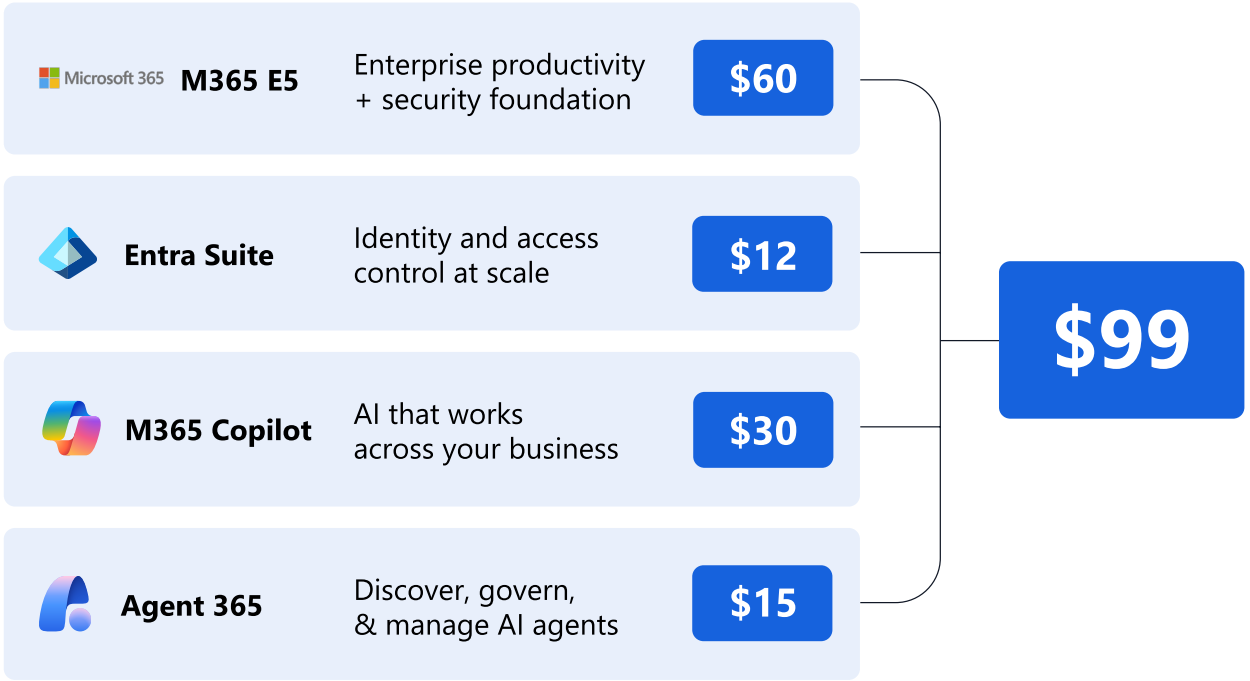
Navigate from below:

- Solution overview
- Customer scenarios
- Investments
- Conversation guidance

Solution overview

ME7 is the all-in-one solution for customers ready to run AI and agents at scale, bringing productivity, security, identity, Copilot, and agent governance together into a single operating platform.

One platform. AI, security, identity.



Microsoft 365 E5

The security and compliance foundation for enterprise-grade productivity

Microsoft Entra Suite

Identity, access, and policy enforcement for autonomous systems

Microsoft 365 Copilot

AI embedded across the flow of work

Microsoft Agent 365

Discovery, governance, and lifecycle mgmt. for AI agents

Equipping organizations to achieve more

		Office 365 E3 **$23,** $26	Microsoft 365 E3 **$36,** $39	Microsoft 365 E5 **$57,** $60	FY26 ERP, FY27 ERP Microsoft 365 E7 **$99,** $99
Best-in-class Productivity	**CORE PRODUCTIVITY** Word, PowerPoint, Excel, Power BI, Loop Copilot Chat	✓	✓	✓	✓
	COMMUNICATION Outlook, Teams	✓	✓	✓	✓
	STORAGE SharePoint, OneDrive	✓	✓	✓	✓
Base Security	Defender P1, Purview P1, Intune P1, Entra P1		✓	✓	✓
Advanced Security	Defender P2, Purview P2, Intune P2, & Security Copilot			✓	✓
AI Driven Intelligence	M365 Copilot				✓
Secure Foundations for Autonomous Systems	Entra Suite				✓
Agent Platform and Governance	Agent 365				✓

Identify the right customers

01

Enterprises Committed to Long-Term AI Transformation

Who they are:

These customers are actively planning AI transformation. They have begun building agents and need a way to secure and govern them at scale.

Signals:

- M365 E3/E5 & agent usage
- Multi-year digital transformation roadmap
- Strong Copilot coverage and usage

02

Organizations Standardizing AI Across the Enterprise

Who they are:

These customers are progressing in their security and Copilot journey's but show limited agent signals.

Signals:

- M365 E5 with limited to no agent usage
- Multiple tools or inconsistent AI usage
- Lack of Copilot attach and usage (AI Nascent)

Hero Outcomes

Lock in value using our promotions and scale with confidence:

- **ME5 + Copilot customers:** Step up to ME7 for just **$7***
  Get full A365 value
- **ME3 + Copilot customers:** Step up to ME7 for just **$17***
  Get ME5 + Entra value with A365

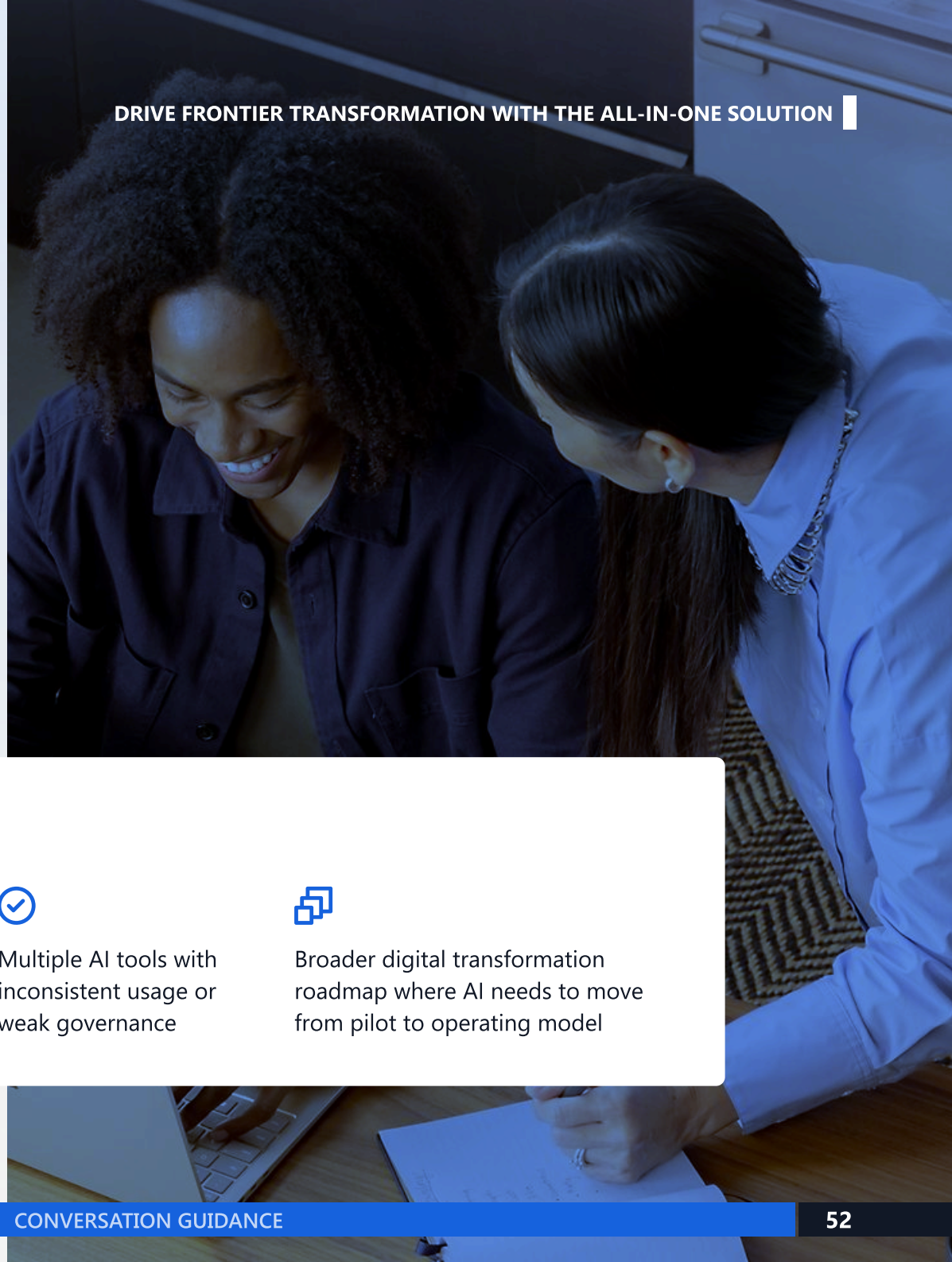
Create a consistent AI standard and advance with assurance:

- **ME5 customers with no Copilot:**
  Upsell to ME5 + Copilot for an incremental **$23*** or

  Upsell to ME7 for an incremental **$30***
  Get full Copilot and A365 value

Ideal customers

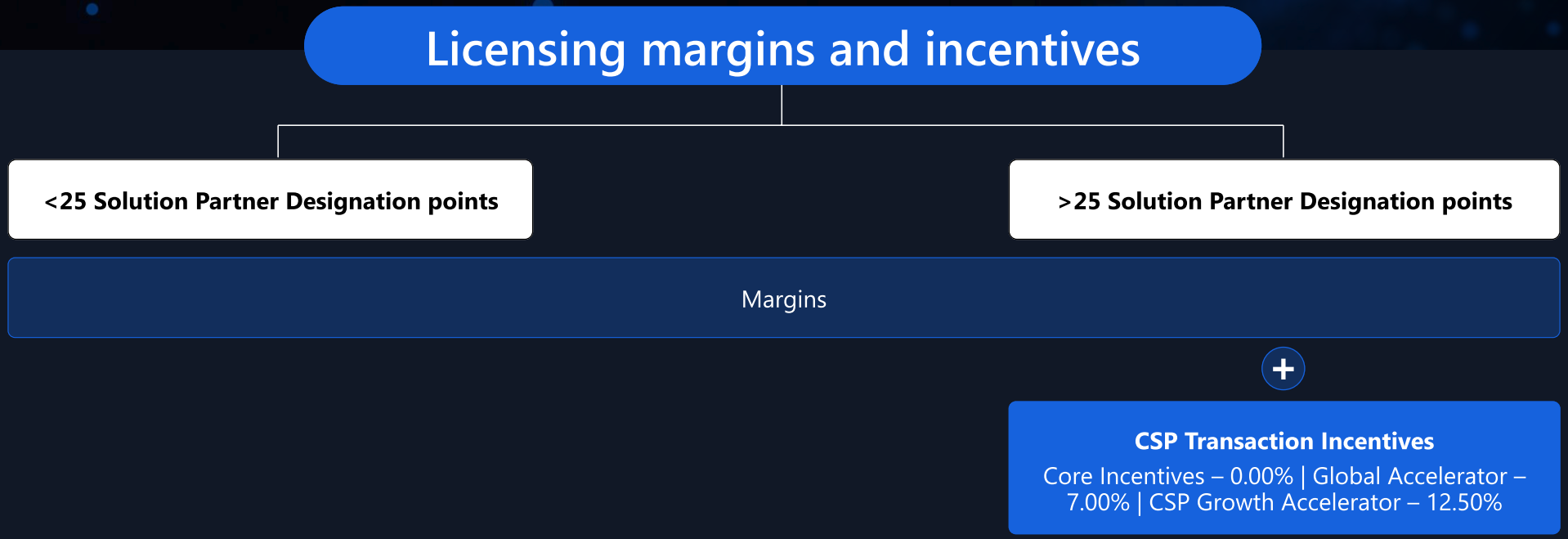
Microsoft 365 E7 is designed for organizations that want AI to work across the entire business, not just in isolated pilots. It is best suited for enterprises moving from experimentation to enterprise-wide operationalization.



The organizations would be:

- Strong ME3 or ME5 footprint
- Paid or growing Copilot MAU
- Emerging or rising agent MAU
- Multiple AI tools with inconsistent usage or weak governance
- Broader digital transformation roadmap where AI needs to move from pilot to operating model

Overview of available incentives and programs



Overview of available incentives and programs

Customer offers and services credit

Enterprise Pre-Sales (Assessment + POV)

Envisioning & POC — Up to $25,000
Needs analysis, roadmap, and POC for M365 Copilot/Agent opportunities.

Enterprise Post-Sales (Deployment)

M365 Copilot Deployment Accelerator — Up to $50,000
Deploys M365 Copilot and drives incremental usage adoption.

Agent Solution Deployment Accelerator — Up to $50,000
Builds & deploys Agent 365/Power Platform agent solutions.

All Copilot engagements require Copilot Specialization, or Copilot Jumpstart Ready+ tier through Dec 31, 2026 (Specialization required from Jan 1, 2027).

Frontier Accelerate for Copilot: Envisioning & POC

Key deliverables

1. Needs analysis & opportunity assessment
2. Solution blueprint and roadmap
3. Business case and POC/pilot build

Supported Scenarios

1. Microsoft 365 E7
2. Microsoft 365 Copilot
3. Agent 365
4. Custom agent opportunities

Partner Eligibility

Copilot Specialization; OR Copilot Jumpstart Ready+ tier (valid Jul 1 – Dec 31, 2026 only; Specialization required from Jan 1, 2027).

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Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft Pre-Sales

Measure and Reward

Pre-sales engagement (needs analysis, roadmap, solution blueprint, business case, POC) to progress Microsoft 365 E7, M365 Copilot, Agent 365, and Agent opportunities.

Engagement size	Seat Threshold	Min. Hours	Partner Payment
XXS	300+	10 hrs	$2,000
XS	500+	20 hrs	$5,000
S	1,000+	40 hrs	$10,000
M	1,500+	100 hrs	$25,000

Frontier Accelerate for Copilot: M365 Copilot Deployment Accelerator

Key deliverables

1. Technical deployment of M365 Copilot
2. Governance & change management
3. Training to drive incremental usage

Supported Scenarios

1. Microsoft 365 Copilot seats
2. Incremental Copilot MAU growth

Partner Eligibility

Copilot Specialization; OR Copilot Jumpstart Ready+ tier (valid Jul 1 – Dec 31, 2026 only; Specialization required from Jan 1, 2027).

Customer Eligibility

Excludes Strategic 500; EDU/Non-Profit ineligible at XXS/XS. Max 4 approved claims, 1 concurrent claim per tenant. Requires purchased M365 Copilot seats AND incremental Copilot MAU opportunity, scaling XXS 50+ to L 3,000+.

Engagement Term

Jul 1, 2026 – Jun 30, 2027

Microsoft | Post-Sales

Measure and Reward

Post-sales deployment and adoption engagement for Microsoft 365 Copilot; technical deployment, governance, training, and change management to drive incremental Copilot usage.

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Key customer promos

Microsoft | Funded engagement

10% off

Microsoft 365 E7 Annual terms (1-year)

Ideal for customers taking the first step toward enterprise AI adoption or expanding beyond initial pilots.

Seat minimum: **10**
Seat maximum: **9,999**

15% off

Microsoft 365 E7 Annual terms (1-year)

Best for organizations ready to standardize AI across teams and functions with meaningful near-term impact.

Seat minimum: **100**
Seat maximum: **9,999**

15% off

Microsoft 365 E7 Triennial terms (3-year)

Built for customers committed to long-term transformation—locking in value while scaling AI enterprise-wide.

Seat minimum: **300**
Seat maximum: **9,999**

Conversation starters

From pilot to scale

"You may already have AI pilots running, but how are you planning to scale AI across the workforce without creating more silos, risk, and inconsistent adoption?"

AI in the flow of work

"Today, are employees getting AI where they already work, or are they still jumping between separate tools and disconnected workflows?"

Governance and trust

"As AI usage grows, how are you thinking about governance across Copilot, custom agents, and third-party agents?"

Standardization

"Do you want AI to stay as a set of experiments, or do you want one governed platform that can support the whole organization with consistency?"

Objection handling

"We already have Microsoft 365 E5 and Copilot. Why do we need E7?"

E7 is not just E5 plus more AI. It combines M365 E5, Copilot, Entra Suite, and Agent 365 into one governed platform for secure AI at scale. The key difference is that E7 adds the integrated AI operating model and control plane needed to move from pilots to enterprise execution.

"This sounds like an IT admin SKU, not something for all employees."

E7 is meant to be deployed broadly because governance and control need to apply wherever AI is used. If employees can still interact with agents outside covered seats, organizations create visibility and policy gaps.

"We are still early in AI. This feels too soon."

E7 is specifically designed to help organizations move from AI experimentation to enterprise-wide execution. It gives customers a secure foundation early so adoption can expand without fragmented tools, inconsistent value, and unmanaged risk.

"We already have agent governance through other tools."

E7 is different because it extends the same Microsoft 365 foundation customers already use for users, data, and devices to AI and agents. The differentiation is the native connection across productivity, identity, security, compliance, Copilot, and agent governance rather than a separate control layer.


Thank You
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