

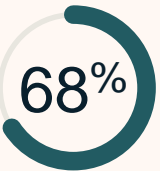


Unlock more business potential with Microsoft 365 Copilot

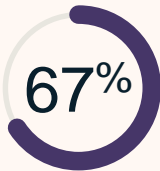


Introduction

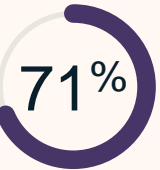
Over the last several years, growing businesses report that work has accelerated faster than their employees' ability to keep up.



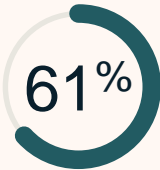
Of people say they struggle with the pace and volume of work; 46% feel burnt out.¹



Of small to medium-sized businesses (SMBs) struggle with being innovative or thinking strategically.¹



Of SMBs lack the energy to complete their day-to-day work, while more than half need more focus time.¹



Of SMBs believe they spend too much time searching for the right data or information when needed.¹

1. [“2024 Work Trend Index Annual Report,”](#) Microsoft, 2024.

80%

These trends have led to 80% of employees bringing their own AI to work.¹ However, businesses need a cohesive AI platform that supports their entire business to get the most value and can protect their sensitive data.

Empower your employees with the AI assistant for work: Microsoft 365 Copilot

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 growing your business and scaling securely while staying in control of your business data.

*For more information on how Microsoft 365 Copilot can support your finance and legal departments, please contact our team.

2. SMB Copilot for Microsoft 365: Early Adopter Insights by Research + Insights Hyper Targeted Research Platform.

Realize the benefits

In this e-book, we will look at how Folio3 Software can help you realize the benefits of Microsoft 365 Copilot, Copilot Chat, and agents across:

- ✓ [Sales](#)
- ✓ [Marketing](#)
- ✓ [Human resources](#)
- ✓ [Customer service](#)

76%

Of SMB users say that Microsoft 365 Copilot meets or exceeds their expectations.²

63%

Of SMB users utilize Microsoft 365 Copilot to summarize content—from emails and slides, to data and chats.²

62%

Of SMB users say that Microsoft 365 Copilot helps them achieve a good first draft quicker.²

Introducing Copilot Chat and agents

Copilot Chat

Growing 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.

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.



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.

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.



The top Copilot prompts to start exploring

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.

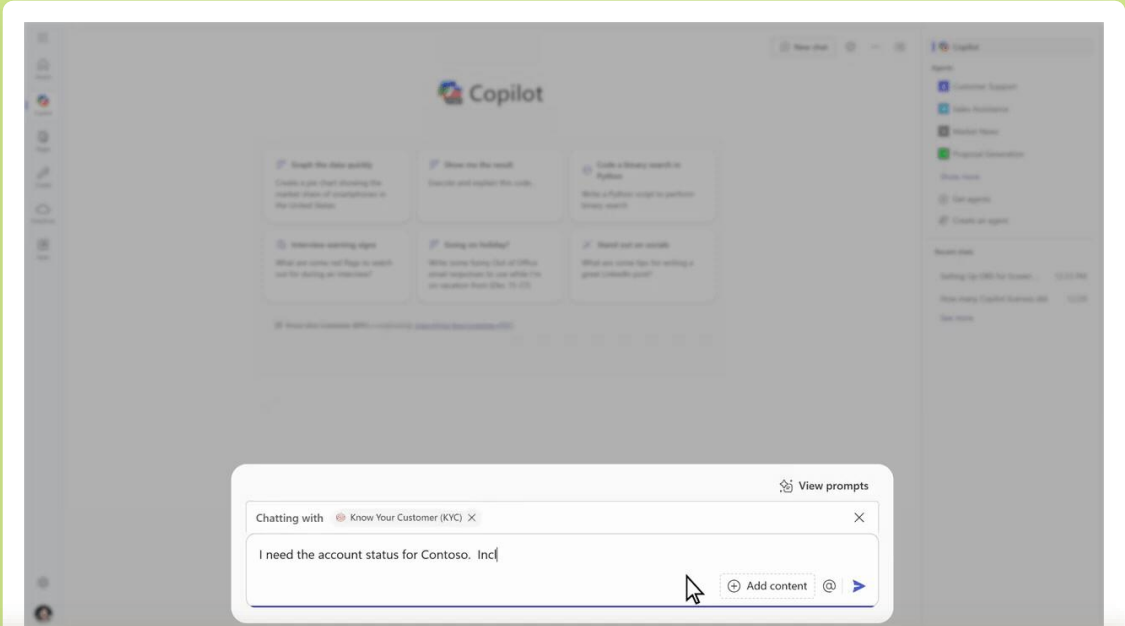
9. What did they say...

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.

Sales



The screenshot shows the Microsoft 365 Copilot interface. At the top, there's a header with the Copilot logo. Below it, there are several suggested prompts in a grid. A chat window is open at the bottom, showing a conversation with 'Know Your Customer (KYC)'. The chat input field contains the text 'I need the account status for Contoso, Inc'. To the right of the chat window, there's a 'View prompts' button. Below the screenshot, there's a box titled 'Examples Microsoft 365 Copilot prompts for sales:' containing three bullet points. To the right of this box is a small Copilot logo icon.

Examples Microsoft 365 Copilot prompts for sales:

- ✓ Copilot, I need the account status for Contoso. Include a general overview, the number of licenses, and account value.
- ✓ Help me prepare for the product demonstration this afternoon.
- ✓ How's my pipeline looking compared to my monthly targets?

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 customers³. 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.

Create more opportunities

Better prepare for discovery sessions with an agent that drafts tailored questions and content.

Increase deal size

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

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.

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.

Outcome

Increased revenue with more sales closed

3. "70+ Sales Enablement Statistics To Blow Your Mind in 2024," G2, 2024.

Marketing

Growing 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.

Increased 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.

Improve customer retention

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

Reduce agency spend

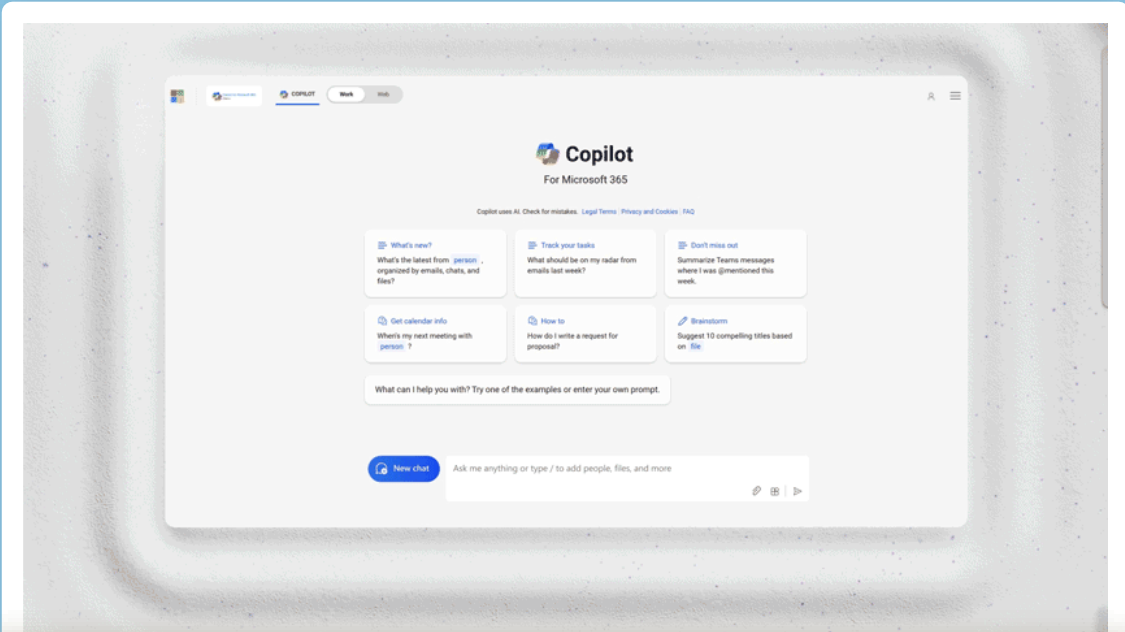
Optimize budget spending, bringing previously outsourced work in-house by quickly generating high-quality, tailored content with Copilot.

Enhance employee retention

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

Outcome

Improve employee capacity to be more creative

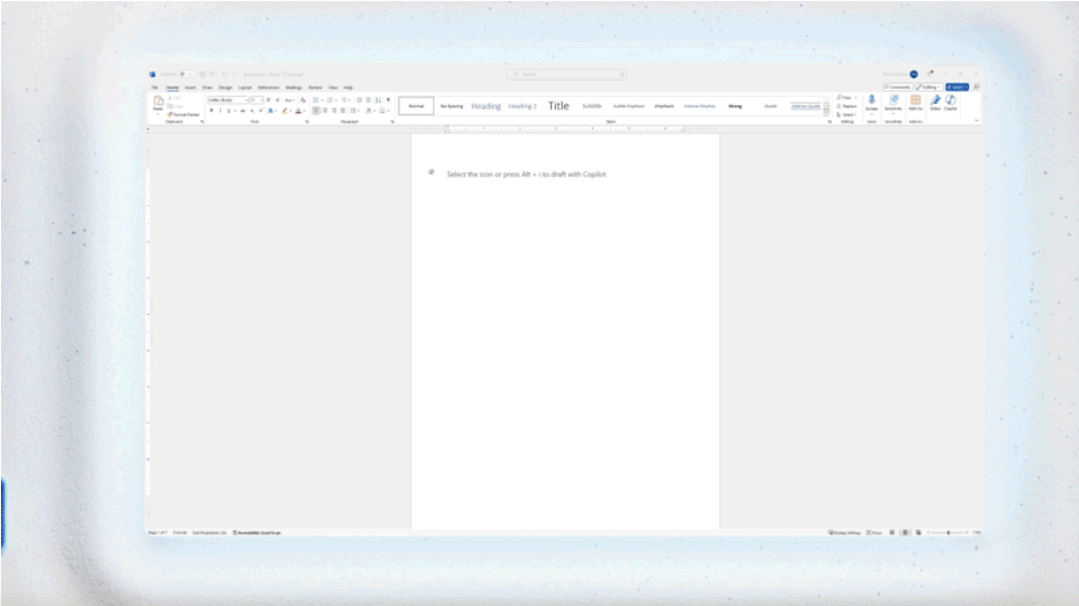


Examples Microsoft 365 Copilot prompts for marketing:

- ✓ Can you analyze the performance of our latest marketing campaign and highlight the key metrics: ROI, engagement rates, and conversion rates?
- ✓ Copilot, please generate a social media content calendar for the next month. Include key dates, themes, and content examples of our posts.
- ✓ Provide a competitive analysis report, including the latest marketing strategies and campaigns for our top competitors.








Human resources



Examples Microsoft 365 Copilot prompts for HR:

- ✓ Can you summarize the current employee engagement survey results, highlighting key areas of concern and potential actions?
- ✓ Could you create a training schedule for the next quarter? Please include mandatory compliance training and professional development opportunities.
- ✓ Copilot, please generate a report on the status of recruitment efforts, including open positions, candidate pipeline, and time-to-hire metrics.



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.

- 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.
- 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.
- 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 employee retention

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

Outcome
Improved time-to-hire and employee retention

Customer service

Delivering high-quality customer service is essential for growing 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.⁴

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

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.

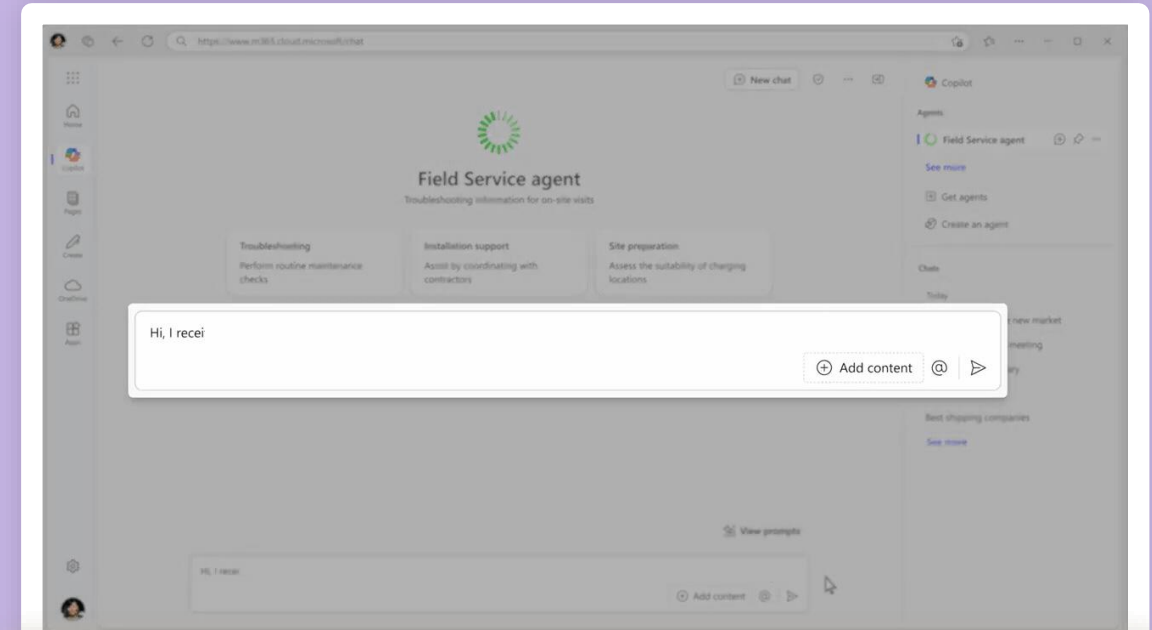
Improve service quality and customer satisfaction scores

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.

4. ["The Connected Rep. Deliver better customer service by enabling reps with technology."](#) Gartner, 2023. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the US and internationally and is used herein with permission. All rights reserved.

Outcome

Simplified customer and employee experiences



Examples Microsoft 365 Copilot prompts for customer service:

- ✓ Copilot, can you help me find the right documentation and provide a step-by-step guide to solve the customer's issue based on their query?
- ✓ Draft an email reply that includes the case details from the CRM and send a meeting invite to diagnose the customer's issue.
- ✓ Review all the service satisfaction responses this week and provide a summary that includes sentiment analysis, the average scores, and the most common issues customers mentioned..





AI has the potential to bring a whole new level of value across your entire business.

Folio3 Software 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.

Get started on your AI transformation journey today by taking advantage of Folio3 Software's Microsoft expertise today!

