A group of six business professionals are gathered around a table in a modern office setting. A woman in a pink shirt is standing and pointing at a laptop screen, while five others are seated, looking at the screen. The office has large windows and a decorative white wall with geometric patterns.

CS Role-Based Copilot Envisioning. Workshop.

[Overview](#)





CS Role-Based Copilot Envisioning. Workshop format overview.

Aim of the workshop

Get an overview, understand how sales, customer service, and finance functions benefit by implementing role-based Copilots and build an implementation roadmap

0 €
if eligible

Approach

-  Assessment to measure technical readiness
-  Identifying your high-value use cases that can benefit from Microsoft role-based Copilots
-  Building the business case for role-based Copilot
-  Developing a roadmap to address gaps found in the questionnaire and implement the high-value user scenarios

Results

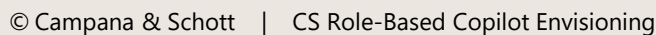
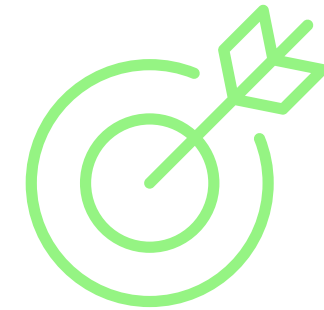
- Gap analysis for technical readiness
- Overview on key capabilities of the role-base Copilots
- Prioritized high-value use cases benefiting of the role-based Copilots
- Business Case for derived role-based Copilots
- Roadmap for the implementation of the use cases.

Setup



Requirements

Copilot for M365 should be in place and should be configured and functional. Customer should have supported systems in place (e.g. Dynamics CRM, ...)

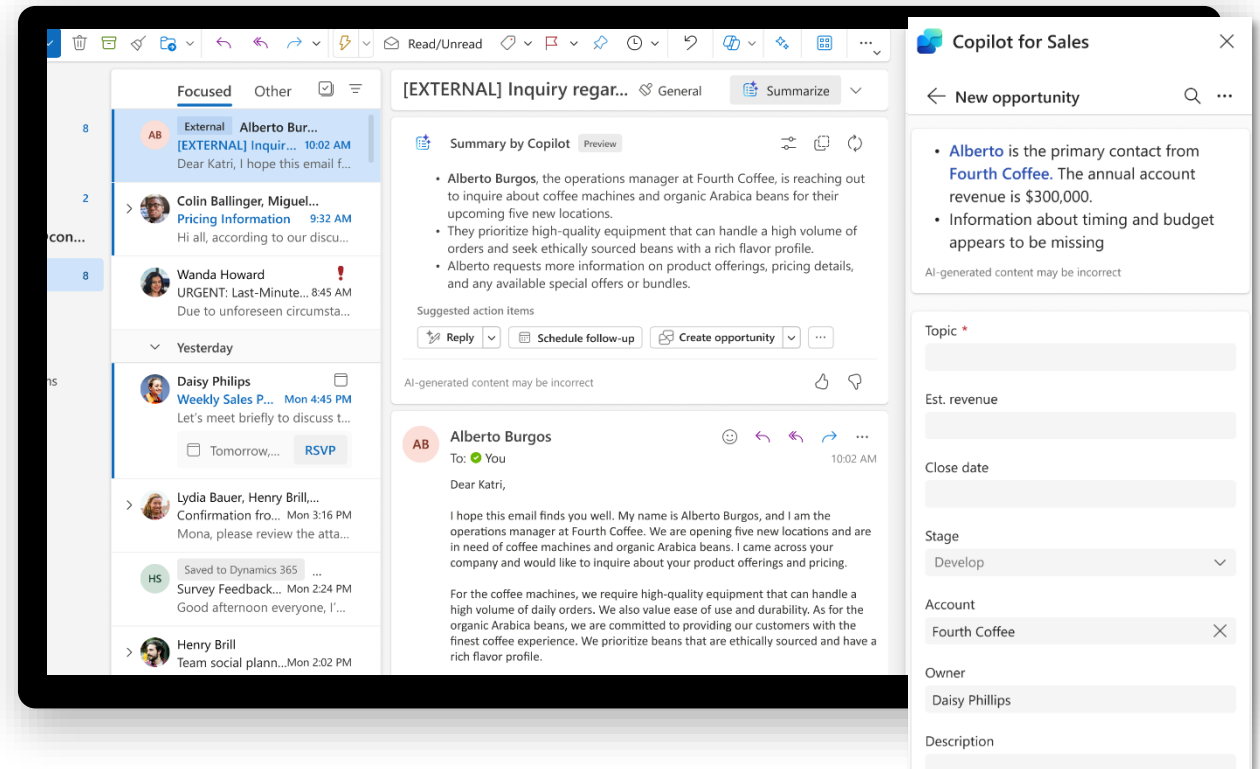


Maximize seller productivity. Exemplary use case supported by Copilot for Sales.

Copilot assistance to add contacts and update CRM records in Outlook and Teams

Copilot-generated opportunity summaries and CRM record information directly in Outlook and Teams

Personalized sales content with Copilot assistance in Word, PowerPoint, and Excel



Extend Microsoft 365 Copilot with role-base Copilots and custom Copilots.



Microsoft 365 Copilot

Microsoft Copilot Studio

Customize and build Copilots to meet your business needs

Microsoft 365 Copilot Sales agent

Close more deals with the AI assistant designed for Sellers,
**Sales Managers, Seller
Operations**

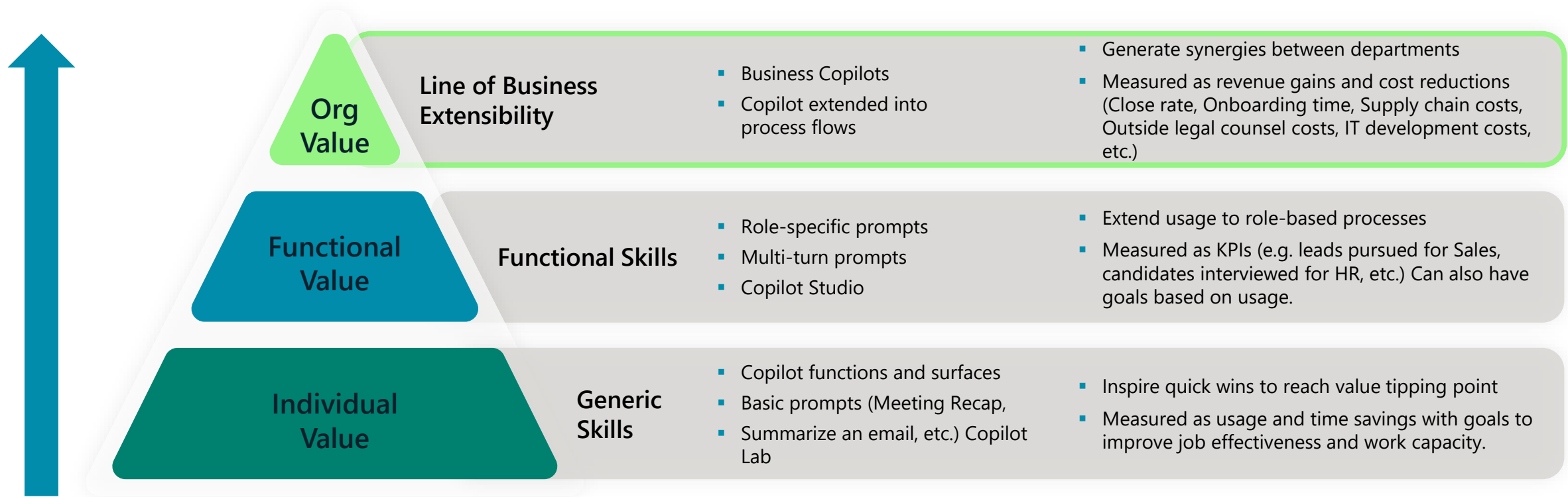
Microsoft 365 Copilot Service agent

Modernize your contact center
with a copilot designed for
Customer Service Agents

Microsoft 365 Copilot Finance agent

Streamline financial processes
with the AI assistant for
**Financial Analysts,
Accountants, Controllers,
Treasury Professionals**

Moving beyond time savings. How role-based Copilots help to transform your organization.



Copilot solutions build upon Microsoft Technologies.

Overview.

I want to build a solution with custom data and UI and deploy internally or externally

I want out-of-the-box solutions that work with my existing data estate for my employees

I want full control over PaaS services and customize with code

I want a SaaS tool to build with natural language and GUI

I want insights and actions on Microsoft 365 data and products

I want role-specific insights and actions for sales, service, and financial professionals that integrate with external CRM and ERP systems that also connect data to Microsoft 365 productivity apps



Azure AI Studio



Copilot Studio



Microsoft 365 Copilot

Enhanced Together



Copilot for Sales



Copilot for Service



Copilot for Finance

Add-ons to Copilot for Microsoft 365



Azure Service Meter



Tenant Capacity Pack



Per User



Per User



Per User



Per User

Transformation

Passion

Results

Thank you!

