



 data-driven

Unlock more business potential

with Microsoft 365 Copilot

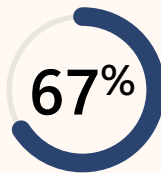
 Microsoft 365

Introduction

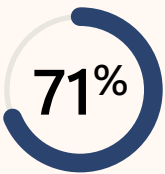
Over the last several years, growing businesses report that work has accelerated faster than their employees' ability to keep up.



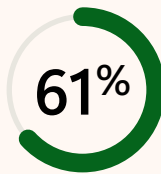
of people say they struggle with the pace and volume of work. 46 percent feel burnt out.¹



of 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 percent 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 Data-Driven can help you realize the benefits of Microsoft 365 Copilot across:

1. [Sales](#)
2. [Marketing](#)
3. [Human relations](#)
4. [Customer service](#)

76%

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

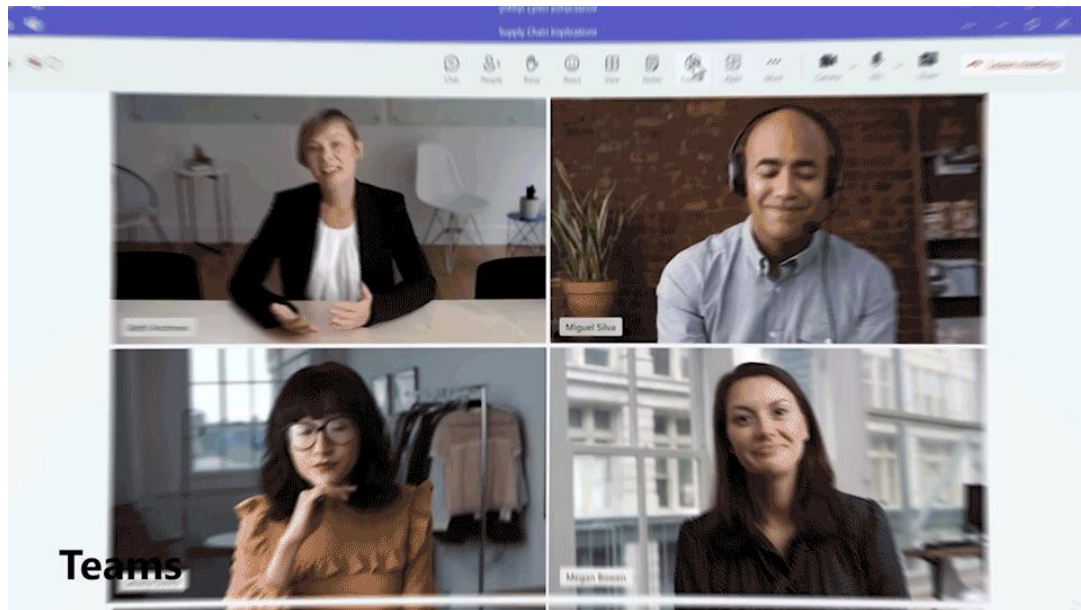
63%

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

Sales



Example Microsoft 365 Copilot sales prompts:

- Can you summarize this week's sales performance compared to our targets?
- Could you generate a list of our top-performing products this quarter and any trends you've noticed?
- Please create a report on the current status of our key client accounts, including any pending action or follow-ups.

On average, sales reps spend an average of 440 hours annually trying to find the right content to share with their prospects and customers.³ Microsoft 365 Copilot works alongside sales teams to handle administrative and repetitive tasks, from conducting industry research to creating personalized proposals. As a result, they save time and focus on building stronger relationships, enhancing their pipeline, and closing deals.

Create more opportunities

Better prepare for discovery sessions with tailored questions and content for the customer's industry, business size, and challenges.

Increase deal size

Use Copilot to generate charts and presentation content to showcase the value of the offer 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 on customer communications to address issues quickly.

Lean 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.

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

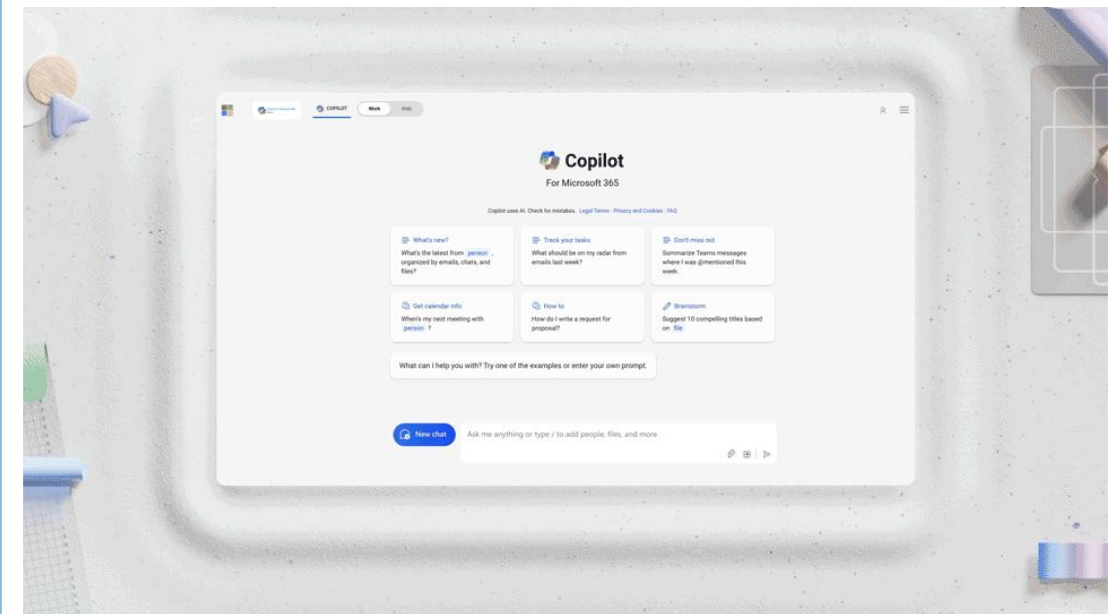
Improve customer retention

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 providing Copilot as their AI assistant to streamline time-consuming and repetitive tasks so they can focus on the work that matters most to them.

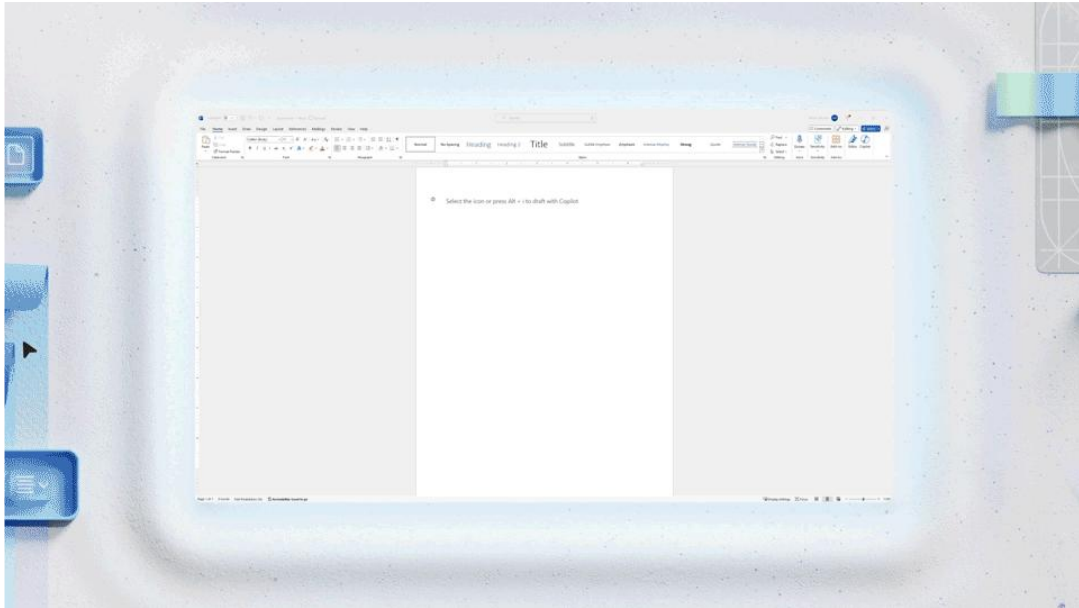
Marketing



Example Microsoft 365 Copilot marketing prompts:

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

HR



Example Microsoft 365 Copilot human resources prompts:

- 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.
- Please generate a report on the current status of recruitment efforts, including open positions, candidate pipeline, and time-to-hire metrics.

HR managers need a solution that enables them to quickly identify and hire top talent and develop effective onboarding and training so employees can start driving impact faster. Copilot assists your HR team by providing simplified access to data, improving talent quality, and increasing employee satisfaction, and improving key performance indicators.

Reduce employee onboarding 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 by creating self-service options with Copilot.

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.

43 percent 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 agent desktops, they can spend less time searching for answers and collaborate across departments.

Reduce average resolution time

Service agents can quickly find answers, pull customer information, and draft responses using Copilot, reducing the time it takes to resolve issues and, in turn, improving customer satisfaction rates.

Optimize the number of calls handled by agents

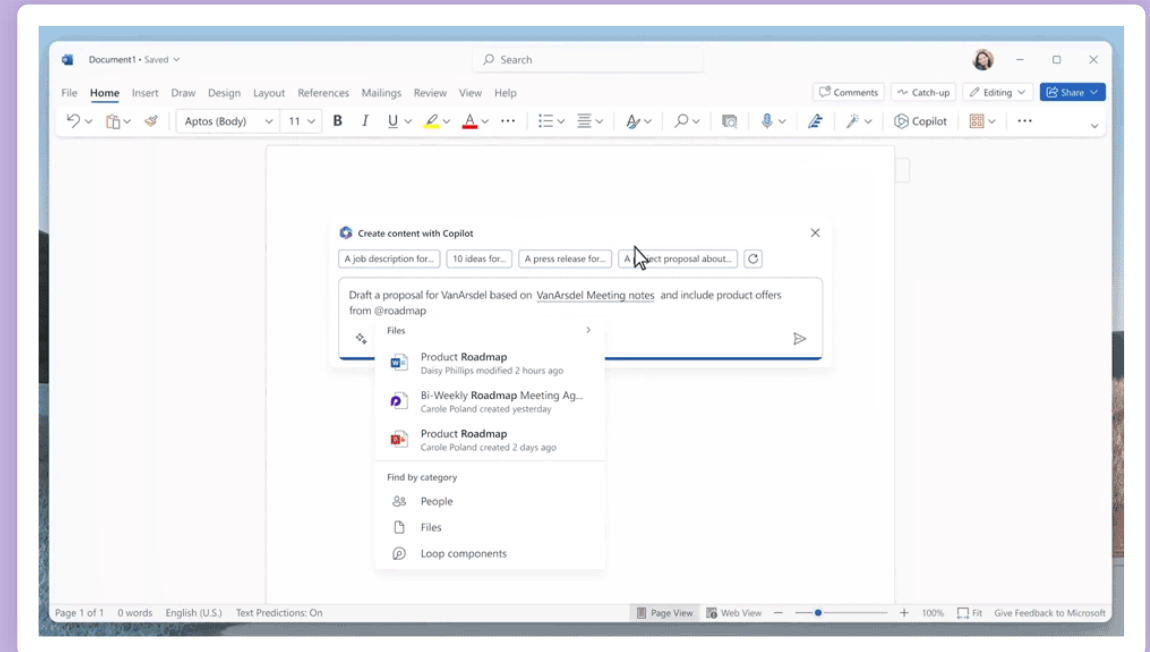
Develop customer self-service options for customers with Copilot using natural language search or automated call systems. These solutions can decrease the number of calls that require a service agent.

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 agents to focus on delivering high-quality engagements.

4. "The Connected Rep. Deliver better customer service by enabling reps with technology," Gartner, 2023

Customer service



Example Microsoft 365 Copilot customer service prompts:

- Draft an Outlook reply that includes the case details from the CRM, and a Teams meeting invite to diagnose the customer's issue.
- Provide suggestions on how to resolve the customer's issue based on their query and provide links or files with additional information.
- Review all the service satisfaction survey responses this week and provide a summary that includes sentiment analysis, the average scores, and the most common issues customers mentioned.

The top ways to start exploring Copilot

As you prepare your organization to embrace AI innovation, you can encourage your team to build their AI skills with Copilot at copilot.microsoft.com. Here are the top ten ways your employees can develop their foundational Copilot skills.

1. Recap a meeting

Let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.



2. Summarize an email thread

Get quickly caught up to a long, complex email thread.



3. Draft email

Personalize the tone and length.



4. Summarize a document

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



5. Tell me about a topic/project

Provide insights and analysis from across multiple sources to get up to speed quickly.



6. Give me some ideas for...

Boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.



7. Help me write...

Jumpstart creativity and write and edit like a pro by getting a first draft in seconds.



8. What did they say...

When you vaguely remember someone mentioning a topic, have Copilot do the research.



9. 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.



10. Translate a message

With business becoming increasingly international, it's important to be able to read or write messages in other languages.





Conclusion

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

Data-Driven can help unify your data and get your business AI-ready so you can get the most of your investment across all your business segments. Microsoft 365 Copilot is integrated into the apps your team uses daily to provide and combines the most advanced AI models and your business data to provide intelligent, real-time support. 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 Data-Driven's Microsoft expertise today.

Get started