



Getting Started with AI

A Microsoft Copilot Guide for Service Leaders

E-book



INTRODUCTION

Welcome to AI for service

A survey of customer service agents conducted by Gartner® reveals that “43% percent of customer service agents reported they were overwhelmed by the number of systems and tools needed to complete work.”¹ And it’s widely believed their jobs are only getting harder, as increased customer expectations, scattered knowledge sources, and legacy processes drag agents away from what they do best—helping customers.

As the pressure rises for service teams to modernize, many organizations are deploying a timesaving, focus-preserving solution to empower their agents: AI.

Integrating AI into contact center and productivity tools can help service agents deliver exceptional service and build loyalty with every interaction. This guide will give you the knowledge and confidence to use AI to achieve new levels of productivity, efficiency, and customer satisfaction. You’ll learn how an AI-powered assistant can help you:

- **Increase agent productivity.**
- **Streamline repetitive tasks.**
- **Unify knowledge.**
- **Elevate customer and agent experiences.**

¹Gartner, *Optimize Rep Productivity With a Connected Tech Strategy*, 2024. <https://www.gartner.com/en/customer-service-support/trends/the-customer-service-customer-rep>. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

Your guide to AI for service teams

CHAPTER 1:

Why AI now

Get ahead in a fast-paced world.

Why now is the time to invest in AI

How AI transformed Microsoft service processes

What service agents want from AI

How Copilot protects your data

CHAPTER 2:

The impact of Copilot for Service

Boost key performance indicators and service metrics with an AI assistant.

Reduce agent handling time

Onboard and retain agents

Increase first-time resolution

Improve service metrics

CHAPTER 3:

Where to start

Guidance to save time and sidestep common issues.

Assign licenses

Prioritize ongoing training

Help build new habits

Quantify impact

Identify champions

Celebrate successes

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We're at the forefront of integrating AI to not just work faster, but to work smarter.

Karim R. Lakhani

Chair, Digital Data Design Institute at Harvard,
and Dorothy & Michael Hintze Professor of Business Administration at Harvard Business²

²Microsoft. [“2024 Work Trend Index: Annual Report | AI at Work Is Here. Now Comes the Hard Part”](#) May 8, 2024.

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Why now is the time to invest in AI

The world of work is changing fast, with more data, communication tools, and customer demands than ever before. Service professionals are hardly immune. With so much on their plates, finding time to work through increasingly complex issues and handle high-value transactions can be a challenge—but that’s the work that really pushes businesses forward.

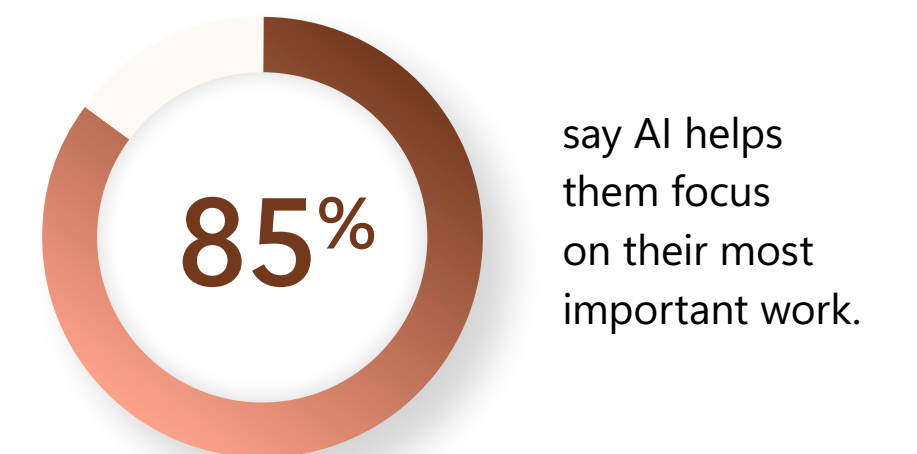
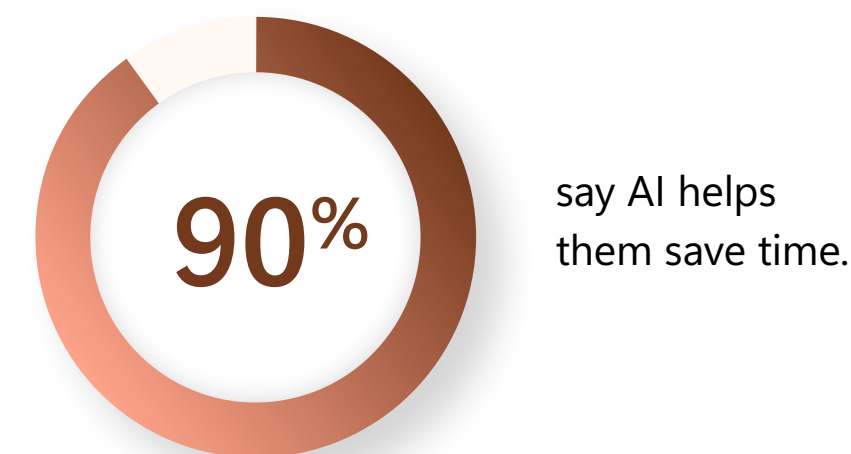
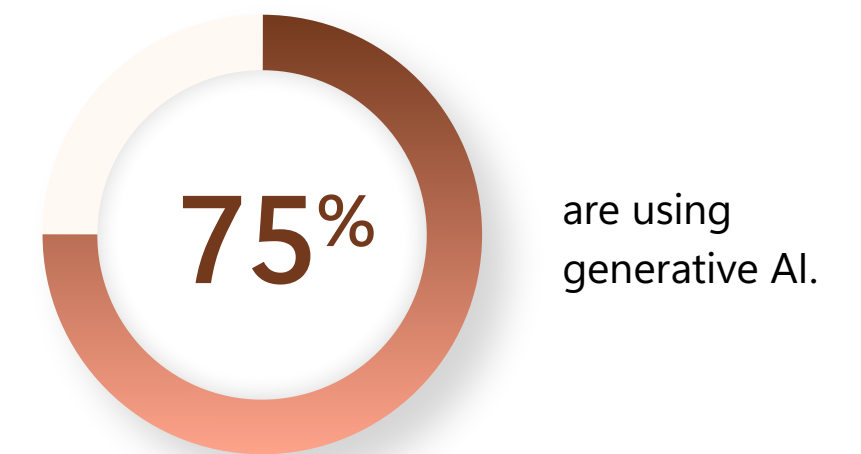
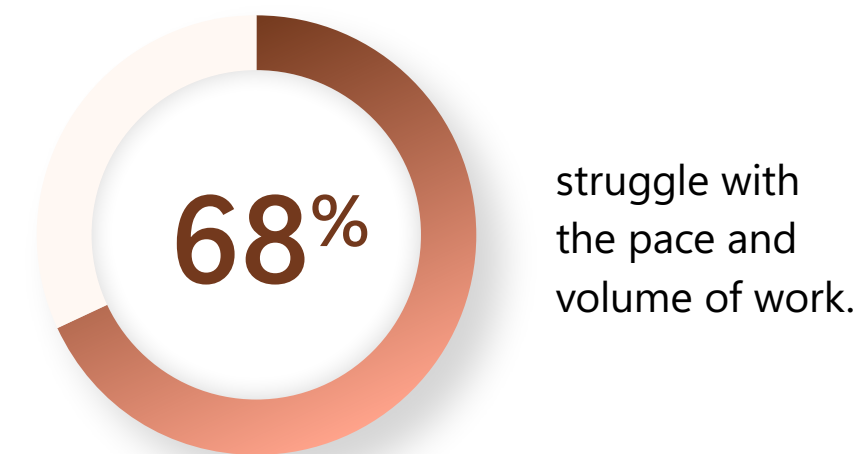
AI can help your service teams accomplish more by automating routine tasks, optimizing workflows, and enhancing experiences for customers and agents alike. Using AI lets service professionals decrease average handling time and focus on the work that matters most, empowering them to uncover helpful insights and discover new opportunities. In fact, Bain & Company found that 29% of customer service agents’ time can be automated with AI.³

AI has been around for decades, but it’s never been more accessible, cost-efficient, and powerful than it is today. Thanks to advances in cloud computing, data science, and natural language processing, AI can now understand, reason, and learn from vast amounts of information and interact with humans using natural language. This means that it’s easier than ever to use AI to augment your abilities and elevate your performance.

AI isn’t just a trend; it’s a transformation. And that transformation is now fully underway. To join the next wave of productivity growth and meet evolving customer needs, service organizations must invest in AI technology now—or they risk falling behind their competitors.

KEY INSIGHTS

The Microsoft 2024 Work Trend Index explored how workers feel about AI’s potential to reshape work.⁴ The annual report found that:



³Bain & Company. [“How Generative AI Will Supercharge Productivity.”](#) August 22, 2023

⁴Microsoft. [“2024 Work Trend Index: Annual Report | AI at Work Is Here. Now Comes the Hard Part.”](#) May 8, 2024.

What service agents want from AI

Microsoft surveyed customer service employees to understand how AI can transform their typical business processes. According to these employees, AI tools and technologies would have a positive impact on their performance.⁵

- ✓ 75% would use AI to help locate important information.
- ✓ 70% would use AI to intelligently route issues to appropriate agents.
- ✓ 68% would use AI to detect trends across agent-customer interactions.
- ✓ 68% would use AI to create a first draft of a document.
- ✓ 68% would use AI to stay in a productive workflow.

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When we’re constantly switching, we don’t work as well. AI can help liberate workers from menial work and enable innovation.

Michael Platt

Neuroscientist and Professor
Wharton School of the University of Pennsylvania⁶

⁵Microsoft. “[Microsoft Work Trend Index Special Report 2023](#).” November 15, 2023.

⁶Microsoft. “[2024 Work Trend Index: Annual Report | AI at Work Is Here. Now Comes the Hard Part](#).” May 8, 2024.

How AI transformed Microsoft's service processes

Incorporating generative AI into customer service processes helped Microsoft better manage agents' workload. It's like having a personal assistant that knows your customers and business, helping your agents make the best decisions.

After deploying Microsoft Copilot across our Customer Service and Support (CSS) team, we studied how it impacted the work of thousands of agents. The results were eye-opening; not only did agents who used Copilot spend less time resolving a case, they had less need for time-consuming consultation with peers—resolving issues independently so fewer customers had to be put on hold.⁷

Key benefits of Copilot for our service team include:

Higher agent productivity:

Copilot helped agents stay in the flow of work by resolving questions with relevant answers from CRM solutions, contact center systems, knowledge sources, and organizational data.

Streamlined tasks:

Service agents can now schedule meetings, pull in added context from case summaries, generate meeting recaps, and offer key discussion points and suggested next steps.

Unified knowledge:

Service agents now have one source of information with Copilot connecting to various existing contact center systems and trusted knowledge sources (public websites, SharePoint,

knowledgebase articles, and offline files). Agents also benefit from integration with major service vendors including Salesforce, ServiceNow, and Zendesk.

Elevated service experience:

Copilot provides agents with customized, relevant responses to customers by analyzing CRM data, internal knowledge, historical cases, and customer interaction data.

Copilot is more than just another tool. It empowers agents to work smarter and deliver better customer experiences, helps service teams become trusted advisors for their customers, and ultimately helps drive more revenue and growth.

HOW TO GET COPILOT

Access Copilot capabilities embedded within Dynamics 365 Customer Service or by purchasing a Microsoft Copilot for Service license.

Microsoft Copilot for Service

Purchasing a Copilot for Service license enables agents to work with existing contact center systems like Salesforce and ServiceNow—without complex integrations or software installations. Licenses include Copilot for Microsoft 365, for integration with Microsoft Teams and other Microsoft 365 apps.

Copilot in Dynamics 365 Customer Service

Copilot features are embedded in Dynamics 365 Customer Service to enhance native capabilities. Once enabled, they help agents automate time-consuming tasks and summarize cases.

⁷Microsoft. "[What Can Copilot's Earliest Users Teach Us About Generative AI at Work?](#)" November 15, 2023.

How Copilot protects your data

Microsoft designed Copilot for Service with a comprehensive approach to enterprise-grade security, compliance, privacy, identity, and responsible AI. That means every sales agent can improve efficiency without fear of unethical business practices.

When your employees log in and use Copilot, they automatically enable [commercial data protection capabilities](#) designed to secure your sensitive data, such as:

- ✓ **Disabled chat history.**
Copilot will not retain any chat prompts or responses.
- ✓ **Restricted access to organizational data.**
Microsoft will not have access to your data.
- ✓ **Prohibited use of your data.**
Copilot will not use your data to train the underlying AI model.

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Trust is more than a handshake.
It's the agreement, the bond,
between users of digital services
and the suppliers of those
services that enables us to enjoy,
be productive, learn, explore,
express, create, be informed.

Satya Nadella

Chief Executive Officer
Microsoft

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handling time

Increase first-time
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Reduce agent handling time

Time-consuming and inefficient service processes are a drag on resolution times—leaving both customers and agents frustrated. Speed up service times by using Copilot for Service to streamline how your agents assess customer needs and decide what to do next.

Old manual process

- Open a message or email from a customer detailing a need or issue.
- Pore through past notes, related cases, and documentation.

New Copilot process

- Copilot summarizes the message, the issue or need, previous interactions, and other open cases.
- Copilot instantly pulls up relevant customer data and knowledge bases.
- Copilot offers to automate routine tasks like adding a customer to your CRM and opening a new case.

Outcomes

- Swift agent assessment and grasping of the situation—without having to involve their peers
- Faster, more informed responses to customers

Increase first-time resolution

Running down accurate, timely information needed to solve issues right away requires significant manual research and discovery by service agents. Reimagine agent efficiency by using Copilot for Service to surface the right documents, data, and insights from within the tools that agents use every day.

Old manual process

- Agents sift through documents to find relevant resources and navigate various systems and channels to pull together scattered information.

New Copilot process

- Copilot instantly pores over keywords and topics in email and chat.
- Copilot suggests resources from relevant CRM data, internal knowledge bases, trusted websites, and other external sources.
- Copilot elevates insights from historical cases.

Outcomes

- Immediate information retrieval and less agent time spent finding relevant case info
- Faster answers and increased first-time resolution
- Greater customer satisfaction

Onboard and retain agents

Agents can't have all the answers—especially when they are new to the job. But with the ability to tap into the collective knowledge of their team and larger organization, Copilot for Service helps make new service agents feel right at home, right away.

Old manual process

- Delayed response as agent investigates issue with help from other agents.
- Agent searches through documents for resources across systems and channels.
- Agent reaches out to other departments or teams looking for guidance.

New Copilot process

- Copilot helps agents quickly access tools and resources they need to build confidence.
- Copilot surfaces resolutions from similar cases to speed up productivity.

Outcomes

- Dramatically reduced resolution times
- Shorter onboarding time
- Less agent attrition

Improve service metrics

A customer issue isn't fully resolved until an agent conveys an answer or meets the customer need—but pulling together accurate, cohesive responses that drive critical service metrics can take precious time. Help your organization improve CSAT (customer satisfaction) and net promoter score (NPS) numbers by letting agents use Copilot for Service to gather information that will resonate with customers and close cases faster.

Old manual process

- Manually create a personalized response to the customer.
- Compile resolution steps and links to support articles.
- Search for other resources that might be relevant.

New Copilot process

- Copilot drafts a customer response, using an agent's custom or pre-defined prompt.
- Copilot analyzes relevant CRM data, knowledge bases, and case history to generate a tailored response.
- Agent reviews and personalizes the draft before sending.

Outcomes

- Communicate to customer far faster than a manually created response
- Wrap up cases quickly to exceed standard resolution times—and customer expectations
- Contribute to your bottom line with higher NPS and CSAT numbers

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Guidance to save time and sidestep common issues.

Assign licenses	Identify champions	Quantify impact
Help build new habits	Prioritize ongoing training	Celebrate successes

Assign licenses

Reducing handling times, prioritizing next actions, prepping for customer calls—service organizations are uniquely positioned to benefit from Copilot. To maximize the business impact of Copilot for Service, consider the following factors as you decide on an approach to deploying licenses.

Look at current usage trends

The service professionals who already use Microsoft 365 products most are best positioned to get the full benefits from Copilot. One way to evaluate who uses Microsoft 365 the most is with Microsoft Copilot Dashboard, powered by Microsoft Viva. Navigate to the Readiness tab to see technical eligibility and your total number of Microsoft 365 users.

Define specific use cases

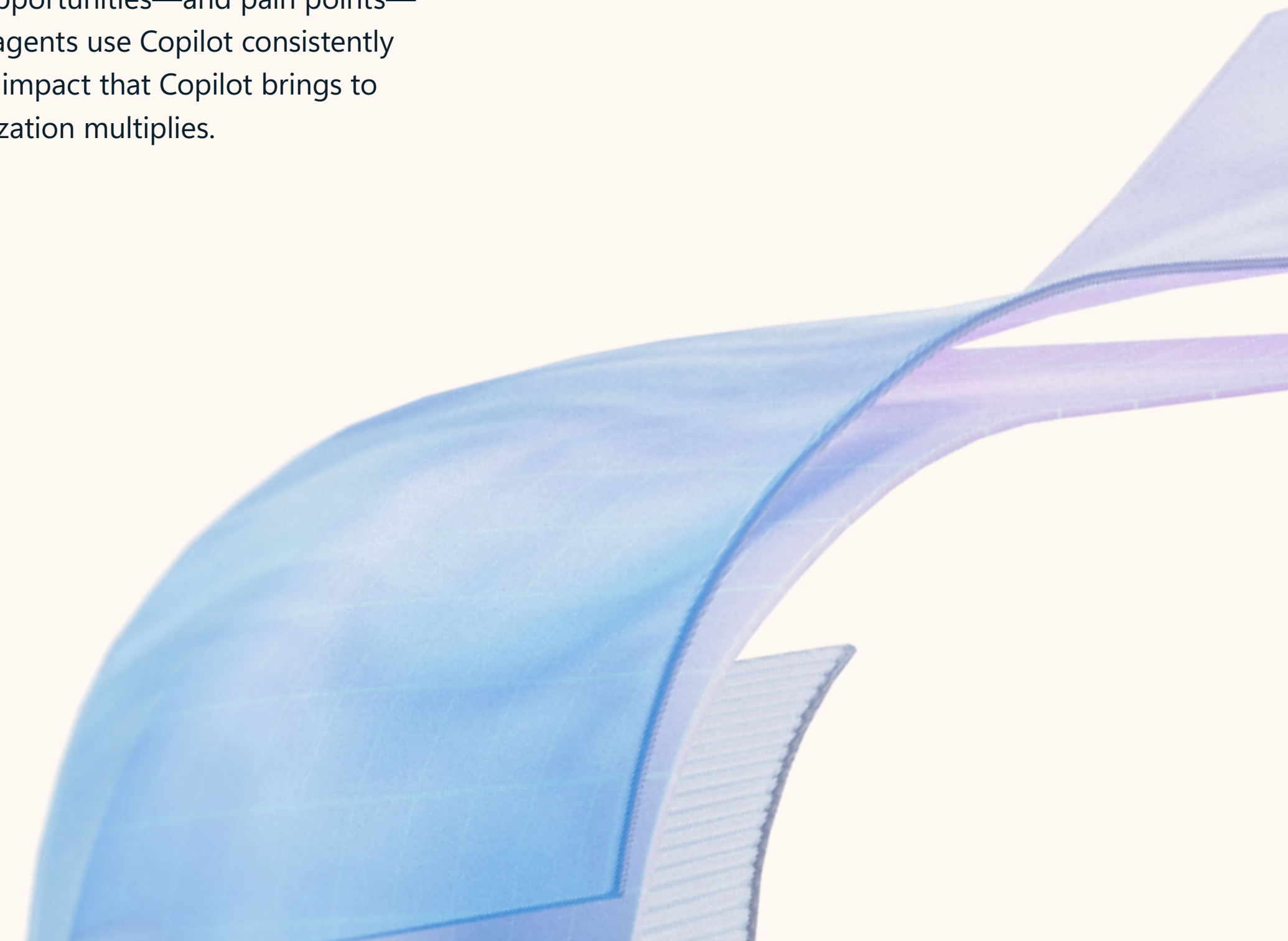
Your service team should have a clearly defined goal or use case for how they'll implement Copilot. Getting specific ensures Copilot is effectively integrated into workflows across various roles and levels. To improve customer service, consider use case metrics like:

- ✓ Reducing onboarding time for new agents.
- ✓ Streamlining access to knowledge.
- ✓ Eliminating repetitive administrative tasks.
- ✓ Reducing ticket volume.

By focusing on specific use cases and high-impact areas first, you'll maximize the ROI of Copilot and prepare your organization for wider adoption. For more service use case examples, take a look at the [Copilot Scenario Library](#).

Allocate Copilot across your team

Some organizations may opt to assign licenses throughout their team to help everyone increase efficiency and transform customer service. When teams have access, they can share insights, learn from each other, and take on your biggest customer service opportunities—and pain points—together. As more agents use Copilot consistently and effectively, the impact that Copilot brings to your service organization multiplies.





Lumen Technologies, a global communications services provider, deployed Copilot to its customer service team. They're now using Copilot to surface relevant policies, summarize tickets, and access step-by-step repair instructions from manuals, summarize next steps, and enrich customer interactions with additional depth and context.

Help build new work habits

Change management is key for implementing an AI tool like Copilot. It helps ensure people across your service organization view it as not just new technology, but a new way of working. It also requires leaders to gauge attitudes and manage expectations.

Measure attitudes and interest

A key part of managing any change is simply recognizing that diverse perspectives exist. A new AI tool is no different, so you'll likely see a combination of enthusiasm and skepticism. An effective adoption strategy must cater to these diverse attitudes, which means support, training, and clear communication to transition workflows and mindsets.

Manage expectations

As part of this training and communication, it's also important users have a clear understanding of what Copilot can and can't do. Equally important is knowing when to use AI capabilities and when to rely on human expertise. Emphasizing that the user is in the driver's seat—or the pilot's seat, if you will—is a great way to communicate the limitations and strengths of AI overall.

PRO TIP

Show what Copilot can do to help promote transparency and user satisfaction, while minimizing potential misconceptions. For example:

Copilot helps service agents prepare for customer engagements. Use it to help generate relevant case information.

Have Copilot pull a summary of customer data and insights directly into Microsoft Teams or Outlook.

Copilot is good at making sense of vast amounts of data. Use it to generate content that would be labor-intensive to create yourself.

Have Copilot create a response to a customer with order status, history, and estimated time of delivery.

Copilot encourages experimentation. If you don't get the desired output on the first try, adjust the prompt or approach.

Have Copilot revise a message to make it sound friendlier.

Copilot empowers agents to prioritize follow-up actions and be more responsive. Use it to help organize your day.

Have Copilot show all open tasks and action items within Microsoft Teams.

Identify champions to lead the way

To drive wide adoption of Copilot, you'll need champions and early adopters. This group will lead by example, helping showcase the practical benefits of Copilot in their daily work. Plus, their positive experiences will naturally inspire curiosity and interest among their colleagues—encouraging broader usage.

To identify Copilot champions and early adopters:

- ✓ Set up a Copilot channel on Microsoft Teams as a place to share news and resources.
- ✓ Check in with your Copilot user community to see who's sharing tips or giving feedback.
- ✓ Reach out to managers and ask them to identify a team representative or power user.
- ✓ Use the Copilot Dashboard to measure usage.

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What Copilot helps me do is get through the administrative tasks faster so I can move on to the next call. Now the whole process is taking 15 minutes or less, where it used to take 30 or 40.

Michael Simons

Support Escalation Engineer,
Microsoft

Prioritize ongoing training

Service teams will see productivity gains right away with Copilot. But how each agent personalizes their Copilot usage will evolve over a 6-month to 12-month period, so ongoing training is critical.

Prompting—giving clear commands to get the right results with an AI tool—is likely a new skill for many employees. Better inputs lead to better outputs, and this requires practice for Copilot to become a natural extension of an agent's workday. Explore resources that help your teams generate powerful prompts in the [Copilot Lab](#).

Business leaders should publicize a variety of guidance and promote collaborative sharing of best practices. This way, Copilot users can stay up to date on new features, troubleshoot issues, and learn from each other's experiences. A culture of continuous learning can also increase engagement, satisfaction, and productivity.

Here are some top training resources to help your service organization get started:

- ✓ [Copilot Success Hub](#): See how Copilot helps boost productivity and save time. Plus, find out how to maximize the impact of Copilot for your business.
- ✓ [Copilot adoption](#): Get resources for deploying, using, and scaling Copilot across your organization.
- ✓ [Copilot for Work](#): Discover work scenarios and how Copilot can become your AI assistant.
- ✓ [Copilot for Service documentation](#): Discover how to use Microsoft Copilot for Service with online training courses, resources, and videos.

PRO TIP

Service agents who view Copilot as a way to amplify what they're already doing—not just as a search engine—will gain value the fastest. Encourage employees to:

Build a daily habit.

Regularly using Copilot helps agents quickly learn how to get better responses—and take full advantage of AI capabilities in their everyday routine.

Think like a manager.

Knowing how to delegate tasks to Copilot is essential. To do this, service agents must be able to create clear, concise prompts with defined parameters, evaluate the results, and decide what do next with the content Copilot generates.

Make the most of reclaimed time.

Guide service agents to be intentional with the time they save with Copilot. Remind teams it's not about doing more—it's doing more of the things that drive value at both the individual and organizational level.

Provide feedback.

Encourage agents to give feedback when Copilot prompts them to. This will continue to improve and refine their experience—while also improving customer interactions.

Quantify impact with the Microsoft Copilot Dashboard

Measure usage and adoption at every phase of the rollout with real-time data and insights from the Copilot Dashboard. The dashboard provides insights to help leaders understand where Copilot is adding value and where enablement strategies could see even greater benefits, including the number of active Copilot users per app and the number of times key Copilot features have been used in those apps. Get additional reporting and deeper functionality with a Microsoft Viva subscription.

Celebrate successes

Implementing new technology takes coordinated effort, so be sure to take a step back and celebrate milestones your service team reaches in your Copilot adoption strategy. Acknowledge the efforts of people who've contributed to the rollout's success and identify your power users, as these stories serve as strong sources of inspiration and showcase how Copilot can deliver tangible benefits within your service organization. Success stories also play a pivotal role in driving adoption and ensuring that your organization maximizes the impact of Copilot while maintaining transparency and realistic expectations.



NEXT STEPS

The road ahead with Copilot for Service

Embracing AI is about more than just improving productivity at an individual level. When every agent in your service organization is more efficient, focused, and effective, it can transform your entire business. Following the best practices and recommendations in this guide will help you start your AI journey with confidence and clarity, generating buy-in at every level of your organization so you can build an AI-centric culture—which is the true secret to gaining a competitive edge with this technology.

At Microsoft, we're committed to empowering every person and every organization on the planet to achieve more with AI. We're constantly innovating and developing new AI capabilities for Copilot, and we offer resources and support to help you learn, adopt, and optimize AI in your service processes and beyond.

We invite you to explore Copilot and discover how you can transform your service organization. Together, we can make AI work for everyone on your customer service team.



For more guidance on how to optimize your customer service activities, check out our [Copilot for Service adoption site](#).