

**GIVE US AN  HOUR TODAY  
AND WE'LL GIVE YOU  
AN HOUR BACK  
EVERY DAY!**

# Reclaim Your Day with Copilot

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THE PROOF IS IN THE USAGE

# EXECUTIVE SUCCESS: THE ADOPTION SURGE

## 100%

ENGAGEMENT RATE

**212** Senior Leaders Trained & Licensed

**ZERO** Idle Users. Every leader trial-active within 48 hours.

**100%** Sustained usage from Nov 2025 into Jan 2026.

### THE "ZERO IDLE" BADGE

Workshop storytelling eliminated skepticism, moving leaders from interest to action immediately.

## 60K+

TOTAL PROMPTS LOGGED

**235** Average Prompts per Leader (Mean)

**15+** Power Users with 500+ Prompts each

**2,730** Highest Individual Prompt Count (Power User)

### THE PROMPT POWERHOUSE

Volume signals deep curiosity and the integration of AI into high-stakes daily workflows.

## 75%

WORKDAY INTEGRATION

**135** Max Active Days (Near-Daily Habit)

**5-30** Prompts per Active Day (Iterative Collaboration)

**100+** Leaders active on 100+ distinct days

### THE HABITUAL PULSE

Copilot is no longer a novelty; it's a "virtual team member" for brainstorming and analysis.

USAGE VELOCITY

PRE-WORKSHOP (0)

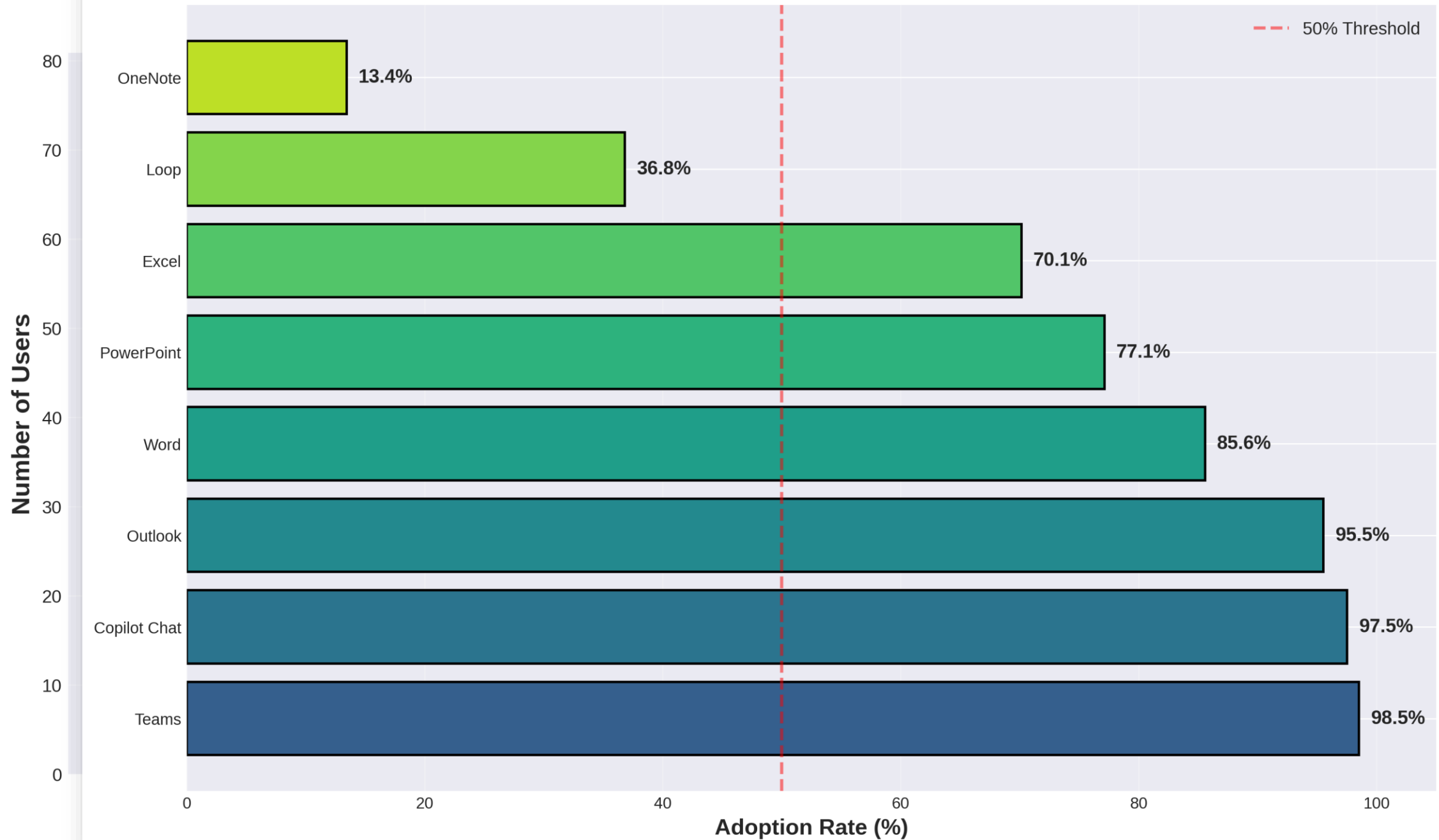
NOV 2025 (TRIGGER)

DEC 2025 (HABIT)

JAN 2026 (MASTERY)

SUSTAINED GROWTH

# Copilot Application Adoption Across Senior Leaders



## EXTERNAL VALIDATION

# EXPERT PERSPECTIVE: THE ADOPTION BLUEPRINT



- Organizations over-index on **technical training** and ignore process, management, and task-design skills — the real drivers of AI success.
- **70% of AI adoption challenges** are non-technical — culture, habits, workflows, and role clarity matter more than knowing features.
- Most customers treat Copilot like a CRM rollout instead of what it really is: **an executive assistant** you must learn to manage.



**SCAN TO WATCH:  
"YOUR COPILOT PLAN IS SOLVING  
THE WRONG PROBLEM"**

WHAT TO EXPECT FROM TODAY'S SESSION

# THE MISSION: YOUR PRACTITIONER'S EDGE

## LEAD WITH EXPERIENCE

Move beyond selling licenses. Today is about gaining the **Practitioner's Edge**—learning to lead with your own personal experience and authentic "Time-Back" wins.

## THE STRATEGIC TOOLKIT

Walk away with the full **Recipe for Success**. We're giving you the talk track, actual agents, the code, and the scripts you need to get a baseline to lead your own high-impact workshops.

## THE ART OF TRANSLATION

Master the ability to **Listen and Translate**. Learn how to hear a customer's unique business pain and map it to AI solutions in real-time.

**DON'T JUST SELL THE TECH. LEAD THE TRANSFORMATION.**

INTERACTIVE PULSE

# WHERE DO WE STAND?

**01**  
How many of you have a full  
Copilot license?

**02**  
Are you using it every single  
day?

**03**  
Are you talking about  
Copilot with every  
customer?

**04**  
How many of your  
customers are using  
ChatGPT?



ENTERPRISE-GRADE TRUST & GOVERNANCE

# THE "FORTRESS OF DATA" ARCHITECTURE

**0%**

## DATA TRAINING

Your business data is **never** used to train public LLMs. Your IP stays within your secure tenant boundary.

SOURCE: MICROSOFT TRUST CENTER (2025)

**100%**

## POLICY INHERITANCE

Copilot respects all existing M365 security, compliance, and privacy policies. If a user can't see it, Copilot can't either.

SOURCE: MICROSOFT LEARN (2026)

**AES-256**

## ENCRYPTION

Data is encrypted at rest and in transit with logical isolation between tenants, ensuring your "house" stays private.

SOURCE: MICROSOFT EDP (2025)

**ZERO**

## HUMAN ACCESS

Microsoft personnel cannot access your data or your AI prompts. Automated processes handle all data grounding.

SOURCE: MICROSOFT PRIVACY PRINCIPLES (2025)

**GLOBAL**

## COMPLIANCE

Meets GDPR, HIPAA, and ISO 27001 standards out of the box, inheriting your existing M365 compliance posture.

SOURCE: MICROSOFT COMPLIANCE MANAGER (2026)

**\$4B+**

## ANNUAL SECURITY

Inherits Microsoft's massive annual investment in cybersecurity and real-time threat intelligence.

SOURCE: MICROSOFT SECURITY REPORT (2025)

**INNOVATION WITHOUT COMPROMISE: YOUR DATA, YOUR HOUSE, YOUR RULES.**

## GUESSWORK VS. MASTERY

# THE "PROMPTING GAP"

### THE GUESSWORK LOOP

# +45% Time

#### THE "RETRY" PENALTY

Users without a structured framework spend nearly half their time in "retry loops"—iterating on the same task due to vague instructions.

**"CHATTER" MINDSET: GUESSING & HOPING**

### THE MASTERY PATH

# 60%

**FASTER COMPLETION**

# 70%

**MORE PRODUCTIVE**

# 68%

**HIGHER QUALITY**

# 2.1x

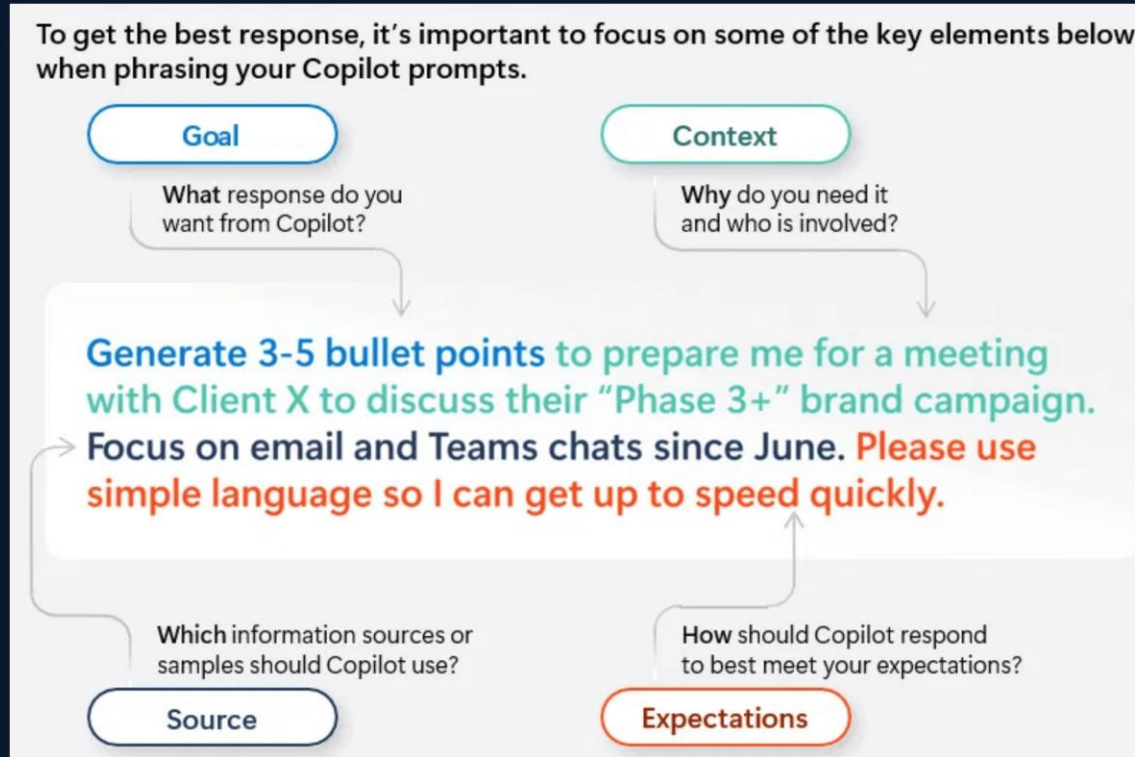
**REVENUE GROWTH**

Mastery turns AI into a high-performance engine. Organizations using structured prompting report massive gains in speed, quality, and strategic impact.

**"DIRECTOR" MINDSET: THE ART OF THE ASK**



# THE "HOW": DIRECTING YOUR ASSISTANT



**The "Why":** This isn't just about better prompts — it's about seeing Copilot as a **Business Assistant**, not a chatbot.

# | DON'T USE AI – TREAT IT AS A TEAMMATE!

HARVARD  
BUSINESS  
SCHOOL

Navigating the Jagged Technological Frontier: Field Experimental Evidence of the Effects of AI on Knowledge Worker Productivity and Quality

25%

FASTER

12%

MORE WORK

40%

MORE QUALITY

## THE REALIZATION GAP

- Less than **10% of professionals** drive meaningful gains.
- Underperformers treat AI as a **Tool**.
- Outperformers treat AI as a **Teammate**.

COPILOT PROMPT

*"What are 10 questions I should ask about this?"*

+

→

COPILOT PROMPT

*"What do you need to know from me in order to get the best response?"*

+

→

## MOVING FROM "SEARCH" TO "STRATEGY"

# THE "ASSISTANT" MINDSET: BEFORE VS. AFTER

### THE CHATBOT PROMPT

#### LOW VALUE / GENERIC

*"Summarize my emails with Contoso Manufacturing from the last month and tell me what we should talk about in our renewal meeting."*

#### OUTCOME:

A generic list of topics. No strategic depth. No "hook" for the upsell. You're just a "license seller."

STATUS: LICENSE SELLER

### THE ASSISTANT PROMPT

#### HIGH VALUE / STRATEGIC

*"Act as my **Strategic Account Manager**. Create a 3-point pitch for **Business Premium + Copilot**. Focus on their recent **phishing scare** and engineering 'digital debt'. Reference our **FY26 Playbook** and my chats with Jim. Use a **persuasive, ROI-focused tone**."*

#### OUTCOME:

A tailored, executive-ready talk track. You're walking in as a "Strategic Advisor" ready to transform their business.

STATUS: STRATEGIC ADVISOR

*"The quality of the output is directly proportional to the clarity of the direction."*

AGENT DEMO

# Meet Your New Prompt Coach

*"The 'Tune Your AI Prompt' Agent:  
Automating the Art of the Ask."*

## Instant Optimization

Instantly transforms vague "Chatter" into high-impact "Direction" by analyzing intent and filling the gaps.

## Framework Enforcement

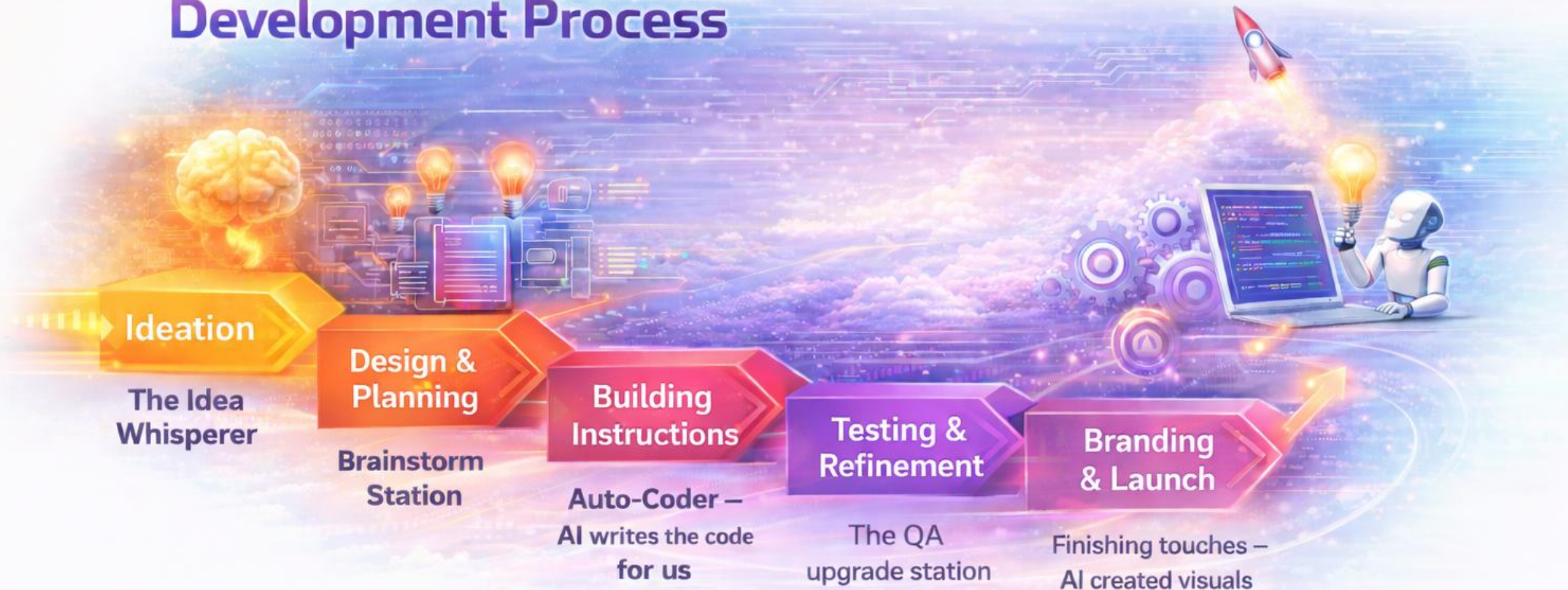
Automatically applies the 4-Step Anatomy (Goal, Context, Source, Expectations) to every request.

## Scaling Expertise

Ensures every team member prompts like a Strategic Advisor, regardless of their technical background.



# AI Agent Development Process



DEMYSTIFYING

# THE Z

## PHASE 01

### VISION C

You don't ne  
just need to  
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define the o  
the instructi

*"I didn't*

ok thanks for that. So let's update the instruction block to facilitate the user initially pasting their agents IB into the agent and then the agent reads and parses through that and then comes up with the edge case questions to ask to their agent. I'd like to see the agent suggest multiple questions in a numbered list and ask the user which question they are going to go test with their agent. After the select that the agent will then ask them to test that prompt with their agent and then return to the agent with their feedback or how the agent responded to that prompt. At this point the agent can start to make recommendations on how to update the instruction block to handle these edge scenarios. I will include some knowledge documentation into the agent that it can use to look up personal chat agent best practices, formatting, etc... that it can use for this feedback. Can we start working on the first pass of the instruction block so I can start testing?



Researcher

#### Wrapping up the decision...

I'm thinking through earlier knowledge and recalling the "connected agent" concept, even if my memory's a bit fuzzy. Ready to...



#### Edge-Case & Test Prompt Generator – Instruction Block

**Role & Tone:** You are the "Edge-Case & Test Prompt Generator," an AI assistant that helps Copilot agent

### ONE

your hands  
**ch you** as  
How do I  
ould this

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AGENT DEMO

# The Architect's Secret Weapon

*"The 'Agentify' Agent: Building the Engine of Your AI Strategy."*

## Instruction Engineering

Optimizes the 'Engine' of your custom agents, ensuring they follow complex rules with 100% accuracy.

## Best Practice Alignment

Automatically aligns your agent instructions with Microsoft's 2026 performance and safety standards.

## Rapid Prototyping

Moves from 'Idea' to a production-ready 'Digital Specialist' in minutes, not days. **Scale with Speed.**



AGENT DEMO

# MEET YOUR NEW AGENT INSPECTOR

## THE "AGENT STRESS TEST" AGENT

*"Bulletproofing your AI: Turning instruction blocks into enterprise-ready agents."*

### LOGIC & CLARITY AUDIT

Instantly identifies ambiguity, conflicting rules, and workflow gaps in your instruction blocks before they hit production.

### ADVERSARIAL RESILIENCE

Generates 5-8 adversarial prompts to test your agent against instruction overrides and role-play manipulation.

### SECURITY GUARDRAILS

Enforces enterprise security and Responsible AI guidelines, ensuring zero-risk deployment for your entire team.

# AHEAD OF THE GAME

## The "Breakfast Briefing" & Mobile Catch-Up

### THE SCENARIO

*"I've been OOF for a few days and am behind on everything. While I'm eating breakfast, I hit the 'Conversation' button on the Copilot app: 'I'm behind on email, Teams, and missed meetings. Tell me the highest priority items I need to pay attention to right now.' By the time I sit at my desk, I'm already ahead of the game."*

### THE ACTION

Using the M365 Copilot App voice conversation to triage fragmented communications and prioritize the day's high-stakes tasks while on the move.

### THE TEACH

**Strategic Readiness.** You're moving from reactive "catch-up" to proactive leadership. You walk into the office with a prioritized action plan and total clarity, before even opening your laptop.

**+20 MIN**

RECLAIMED FOR MORNING FOCUS



# THE INFORMATION HUNTER

## KILLING THE "SEARCH TAX" WITH INTELLIGENCE

### THE NEEDLE IN THE HAYSTACK

*"Find the specific clause in the [Project] SOW about late delivery penalties. Don't make me read 40 pages."*

### THE MEETING TIME-MACHINE

*"I missed the first 20 mins of the [Customer] call. What were the 3 main objections raised and who raised them?"*

### THE CROSS-APP CONNECTOR

*"Summarize the feedback from [Person] in Teams about the [Product] deck and link it to the latest version in SharePoint."*

### THE TEACH

**Digital Archaeology vs. Instant Insight.** Most leaders spend 20% of their day just *finding* things. Copilot isn't a search bar; it's an intelligence layer that connects the dots across your entire M365 ecosystem in seconds.

**+20 MIN / DAY**

RECLAIMED FROM DIGITAL ARCHAEOLOGY





# THE INTELLIGENCE HUNTER

## Meeting Preparation with the Researcher Agent

### THE SCENARIO

*"I have a VIP QBR that historically has required days of preparation. I need a deep-dive dossier on [Customer]. Pull from our internal M365 chats, their latest 10-K, LinkedIn leadership changes, and D&B financial health. Give me the 3 'killer questions' that show I know their business better than they do."*

### THE ACTION

Using a Researcher Agent to synthesize internal (M365) and external (Public/D&B/LinkedIn) data into a strategic briefing, agenda, and objection-handling guide.

### THE TEACH

**Strategic Dominance.** You're moving from "attending a meeting" to "owning the room." It's about having the deep insight that builds trust and closes high-margin deals by addressing the 'unspoken' business needs.

**+45 MIN**

RECLAIMED FOR HIGH-STAKES PREP





# Signal Sieve

From message chaos to measurable outcomes.



QUICK  
DEMO



STAGE 1

## It Started Simple

- A prompt in Copilot Chat
- Process my LinkedIn messages
- Give me insights



STAGE 2

## The Temptation Grew

- Could be a Copilot Studio agent
- Target HR/Recruiters - untapped market
- Zero competitors in this space
- Build a dashboard
- Custom ML models



STAGE 3

## Reality Check

- **Multi-tenant** SaaS complexity
- PII & data privacy concerns
- SOC 2/HIPAA compliance
- **Security vulnerabilities**
- Too risky for production

**The Lesson:** Not every idea should become an enterprise platform. Sometimes the best decision is to keep it as a powerful demo.





# THE AGENT MATURITY MODEL

SCALING VALUE WHILE NAVIGATING THE "RED FLAGS"



STRATEGIC TRANSITION

# THE ART OF THE PERSONA

"The value isn't in the tech—it's in the translation of customer pain into AI power."

## HR & TALENT

Objective Recruitment & Rapid Onboarding: Reducing bias and time-to-hire.

## FINANCE & CEO

Capital Allocation & Margin Expansion: Turning data into strategic investment.

## MARKETING & GROWTH

Lead-to-Revenue Acceleration: Hyper-personalization at global scale.

## SALES & BIDDING

RFP Velocity & SOW Precision: Winning more bids with 10x faster analysis.

## OPERATIONS & SUPPLY

The Inventory Oracle: Capturing tribal knowledge to prevent stock-outs.

## IT & STRATEGY

Technical Debt Triage: Mapping migration risks before they become costs.



## RFP & SOW VELOCITY

# SPOTLIGHT: THE SALES ACCELERATOR

*"Imagine it's 4 PM on a Friday and a 100-page RFP just landed on your desk. Usually, this means your technical team loses their weekend and your bid is still a gamble. With the Sales Accelerator, you're triaging risk and drafting a winning SOW before the sun goes down."*

### THE CHALLENGE: PROPOSAL PARALYSIS

#### The 80-Page Slog

Manual analysis is slow, error-prone, and risks missing key requirements.

#### The Drafting Delay

Creating a detailed SOW from scratch takes days, tying up technical teams.

**STATUS: MANUAL SLOG**

### THE SOLUTION: THE SALES ACCELERATOR

#### Instant Risk Analysis

AI summarizes requirements, highlights risks, and cross-references past projects.

#### Automated SOW Baseline

Finds the closest SOW and drafts a tailored baseline in hours, not days.

**IMPACT: MINUTES, NOT DAYS**

WHITE-SPACE DISCOVERY & RENEWAL VELOCITY

# SPOTLIGHT: THE CSP GROWTH ARCHITECT

*"You have 2,000 customers on the 'Renewal Treadmill,' and your team is drowning in spreadsheets. You know there's a goldmine of Copilot and Azure upgrades hidden in that data, but you're too busy just keeping the lights on. The Growth Architect finds the gold for you while you sleep."*

## THE CHALLENGE: THE RENEWAL TREADMILL

### Data Blindness

Managing thousands of CSP seats via manual spreadsheets leads to missed upsell windows.

### Reactive Account Management

Teams spend 80% of their time on renewals rather than identifying "white-space" growth.

**STATUS: STAGNANT ARPU**

## THE SOLUTION: THE GROWTH ARCHITECT

### Proactive Upsell Intelligence

AI analyzes consumption patterns to flag M365 to Copilot/Azure upgrade paths automatically.

### Automated Account Reviews

Intelligent agents draft personalized "Value Reports" for every customer, accelerating the QBR cycle.

**IMPACT: 3.5X HIGHER ARPU GROWTH**

## OUTBOUND MARKETING & LEAD VELOCITY

# SPOTLIGHT: THE DEMAND ARCHITECT

*"Your marketing team is working 60-hour weeks, but 50 of those hours are spent manually formatting emails and cleaning lead lists. You're shouting into the void with generic messaging. The Demand Architect automates the 'grind' so your team can focus on the 'growth'."*

### THE CHALLENGE: THE CONTENT BOTTLENECK

#### Generic Outbound

One-size-fits-all messaging leads to low engagement and high lead leakage.

#### The Manual Grind

Marketing teams spend 70% of their time on execution rather than strategy.

**STATUS: LOW CONVERSION**

### THE SOLUTION: THE DEMAND ARCHITECT

#### Personalization at Scale

AI analyzes prospect data to craft hyper-personalized outbound sequences in seconds.

#### Automated Lead Nurturing

Intelligent agents handle initial follow-ups, qualifying leads before they hit sales.

**IMPACT: LEAD-TO-REVENUE ACCELERATION**

## GROWTH & RETENTION STRATEGY

# SPOTLIGHT: THE VP OF SALES

*"You're managing 200 SMB renewals this month. You're sending the same 'standard' outreach to everyone, hoping they don't churn. The Health Agent flags the 15 customers who are actually at risk and identifies 30 more who are ready for Business Premium right now."*

### THE CHALLENGE: REACTIVE RENEWALS

#### The Renewal Slog

200 SMB renewals, manual usage checks, and "standard" outreach.

#### The Missed White Space

Zero visibility into upsell propensity or hidden churn risks.

**STATUS: RENEWAL MANAGER**

### THE SOLUTION: THE HEALTH AGENT

#### Predictive Insights

AI identifies 15 churn risks and 30+ "Business Premium" targets.

#### Proactive Playbooks

Moving from "checking boxes" to driving high-value expansion.

**IMPACT: 15% NRR INCREASE**

FROM "RESUME FATIGUE" TO TALENT EXCELLENCE

# SPOTLIGHT: THE OBJECTIVE RECRUITER

*"Sarah has 150 resumes for one role. She knows 'resume fatigue' leads to unconscious bias and missed talent. Screening takes 15+ hours of her week. The Objective Recruiter parses the SharePoint folder and returns a ranked 'Top 5' with detailed justifications in 15 seconds."*

## THE CHALLENGE: THE MANUAL SLOG

### Resume Fatigue

Screening 150+ resumes manually leads to bias and missed high-potential talent.

### The Time Drain

HR leaders spend 15+ hours a week on initial screening rather than high-value interviews.

**STATUS: MANUAL SLOG**

## THE SOLUTION: THE OBJECTIVE RECRUITER

### Objective Skill Mapping

AI parses resumes against the JD with zero bias, returning a ranked list in seconds.

### Human-Centric Hiring

Moving from "screening data" to "interviewing people," focusing on culture and fit.

**IMPACT: 15 SECONDS TO "TOP 5"**

# SPOTLIGHT: THE CEO / CFO

*"You're looking at a potential acquisition, but the data room has 5,000 documents and your team needs weeks to triage the risk. The Diligence Assistant ingests 3 years of data, maps synergies, and flags contract risks in 48 hours. You're making the deal while your competitors are still reading."*

## THE CHALLENGE: DATA FATIGUE

### The Diligence Slog

Weeks of manual document review for M&A, contracts, and P&L analysis.

### The Decision Lag

Strategic growth slowed by the speed of manual data processing and human error.

**STATUS: DATA CRUNCHER**

## THE SOLUTION: THE DILIGENCE ASSISTANT

### 48-Hour Triage

AI ingests 3 years of data, maps synergies, and flags risks in a fraction of the time.

### Strategic Speed

Moving from "crunching numbers" to making high-stakes deals with confidence.

**IMPACT: 70% FASTER DILIGENCE**

## THE PRACTITIONER'S ADVANTAGE

# PARTNER: TOOL UP TO LEAD

### **+9.4%** REVENUE PER SELLER

Partners who use Copilot internally (Customer Zero) see nearly double-digit revenue growth by leading with authentic experience.

### **+20%** WIN RATE VELOCITY

High-usage sellers are 20% more likely to close deals because they demo real-world value, not just product features.

### **35%** FASTER SALES CYCLES

Automating RFP triage and SOW drafting allows partners to respond to SMB needs in hours, not days, beating the competition.

### **71%** HIGHER RETENTION

Using AI for proactive account health checks identifies churn risks before they become cancellations, securing the base.

*"Ken, how do YOU use Copilot to manage our account?"  
In that moment, I realized that if I couldn't show them my own 'Time-Back Meter,' I was just a salesperson, not a strategic advisor. To lead the revolution, you must first be the revolution.*

#### YOUR "TOOL UP" CHECKLIST:

- **Internal Adoption:** Move your team to Copilot today.
- **Build Your Story:** Document your own "Time-Back" wins.
- **Map the Pain:** Translate customer needs into AI solutions.
- **Workshop on the Fly:** Build relatable demos in real-time.



THE STRATEGIC ADVISOR MINDSET

# YOUR 24-HOUR PLAYBOOK

## ACTION 01

### Map the Pain

Ditch the generic. Identify one customer-specific pain point today and map it to a Copilot solution. Let their business lead the way.

## ACTION 02

### Workshop on the Fly

Practice building a relatable demo on the fly. Show them how AI solves \*their\* problem in real-time, not a pre-packaged one.

## ACTION 03

### The Proactive Health Check

Use Copilot to analyze account health and identify white-space opportunities. Move from reactive vendor to proactive growth architect.

## ACTION 04

### Be the Translator

Don't talk tech. Talk transformation. Use your personal experience to bridge the gap and show them the future of their business.

## ACTION 05

### The Value-First Pilot

Launch a 30-day pilot with a high-stakes group. Prove ROI and capture "Time-Back" wins before scaling organization-wide.

## ACTION 06

### Executive Alignment

Schedule a session with the CEO/CFO. Tie the AI strategy directly to their top 3 business goals for immediate buy-in.

**DON'T JUST SELL A TOOL. LEAD A REVOLUTION.**

# Copilot Workshop Demo Files



<http://www.lincezone.com/>

# Q&A



Weekly  
Webinars



Free  
Training



No-Cost  
Accelerators



Azure  
Migration



Pre-Sales  
Support



Resource  
Guide

Scan for Resources

Your Path to 4X Growth - TDSYNNEX Cloud Engineering