

# Copilot in 30

Drive first-time Copilot wins with a scalable, guided 30-day customer evaluation for SMB's

Land  
the right customers

Prove  
value in 30 days

Convert  
with intent

# Introducing Copilot in 30 – a new CSP-led motion

- Copilot in 30 gives partners a repeatable, scalable way to acquire **new Copilot customers** via a guided 30-day evaluation
- Beginning August 1, the motion is powered by a new 25-user, **30-day Microsoft 365 Copilot Business trial** available through CSP (Limited Time Only)
- Together, customers can experience the value of premium AI firsthand while creating a clear onramp to paid Copilot deployment



## THE MOTION

### Scale Copilot evaluations

A highly repeatable 30-day evaluation experience that scales for SMB



## THE FOCUS

### First-time Copilot customers

Aimed at new-to-Copilot accounts to get them hands on and seeing value quickly



## THE GOAL

### Expand your reach, increase conversion

Generate demand, create pipeline, and accelerate evaluation to paid deployment

**Be Customer Zero:** Access Microsoft 365 Copilot Business microskilling resources to build hands-on experience, strengthen your Copilot expertise, and confidently guide customers through the 30-day trial. [aka.ms/MicroSkillling](https://aka.ms/MicroSkillling)

# Microsoft 365 Copilot Business trial

Available 8/1

## M365 Copilot Business

Standalone SKU

Licenses: 25 Seats

Duration: 1 month

Cost: \$0

Product ID: CFQ7TTC0MM8R

SKU ID: 006Z

Trials set to auto convert by default



Available through December 31, 2026

### Trial Details

- Trials can be transacted and provisioned via CSP
- Trials have a fixed quantity and duration – no extensions or qty changes
- Only one trial available per customer, per offer
- Auto-renews to paid subscription by default (25 seats, A/M billing)
  - Partners have the ability to change auto-renew seat quantity, billing term and billing frequency (A/A, A/M, M/M billing)
- 7-day cancellation window applies

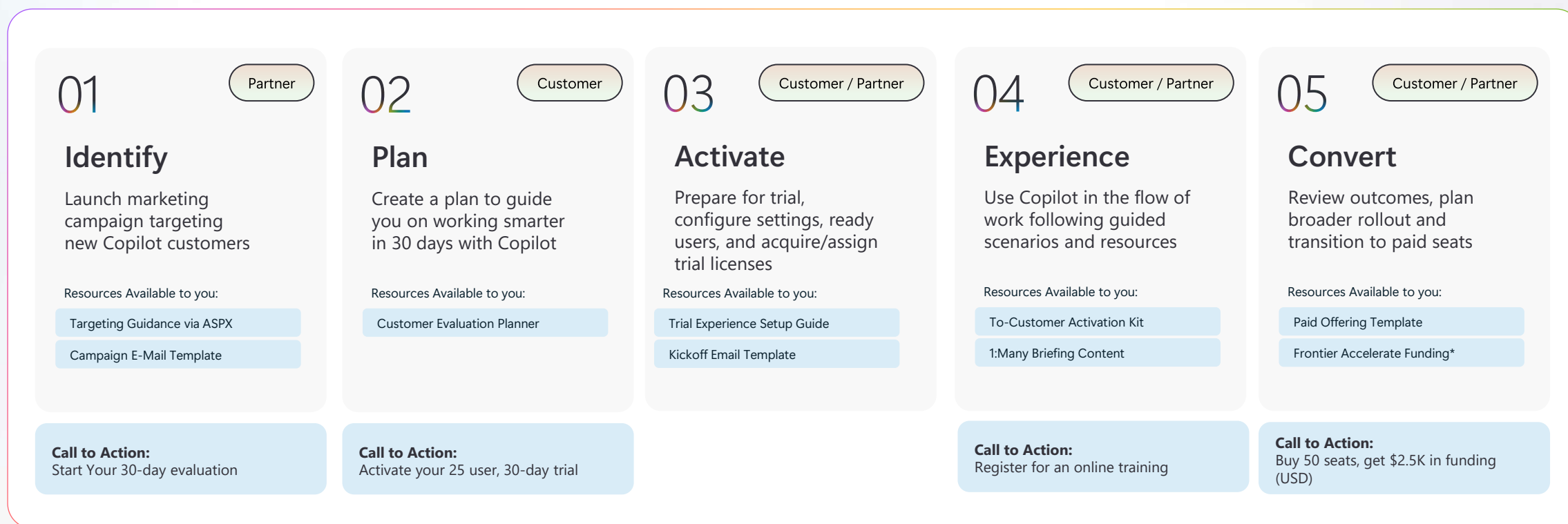
### Best Practice

- Pre-schedule the renewal prior to trial expiration so quantity, term, and billing preferences are applied automatically at conversion.

# Partner-led. Customer-driven.

Built for scale, Copilot in 30 empowers customers to self-serve their evaluation while enabling partners to focus on acquisition and conversion.

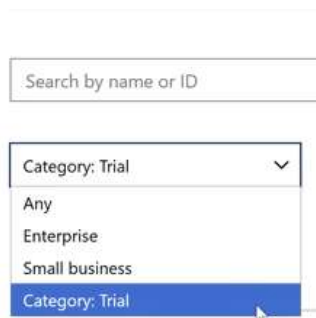
- **Partner value add:** Generate interest, enable success with light-weight training and convert successful evaluations
- **Customer responsibilities:** Plan their evaluation, prepare and configure the environment, prove value through guided experience



# Quick steps to transact the trial

Within Partner Center, select the customer you want to transact a trial offer with and add a new subscription.

1. Filter the category to **“Trials”** to show all available Trial Offers



Search by name or ID

Category: Trial

- Any
- Enterprise
- Small business
- Category: Trial

2. Find the **Copilot trial** and select “Add to Cart”



Microsoft 365 Business Premium **New Commerce Experience**

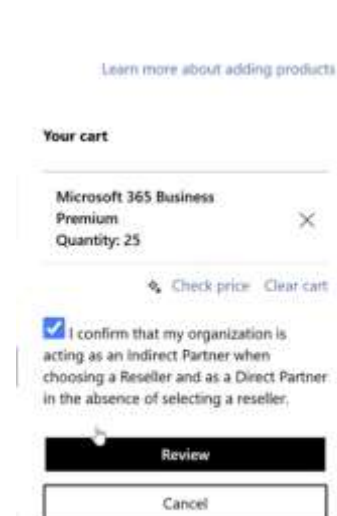
Microsoft 365 Business Premium  
By Microsoft Corporation - Trial, License  
This product has: Additional Terms  
Full description

25 Add to cart

Microsoft 365 Business Premium (no Teams)  
By Microsoft Corporation - Trial, License  
This product has: Additional Terms  
Full description

25 Add to cart

3. **Review** the cart to checkout



Learn more about adding products

**Your cart**

Microsoft 365 Business Premium  
Quantity: 25

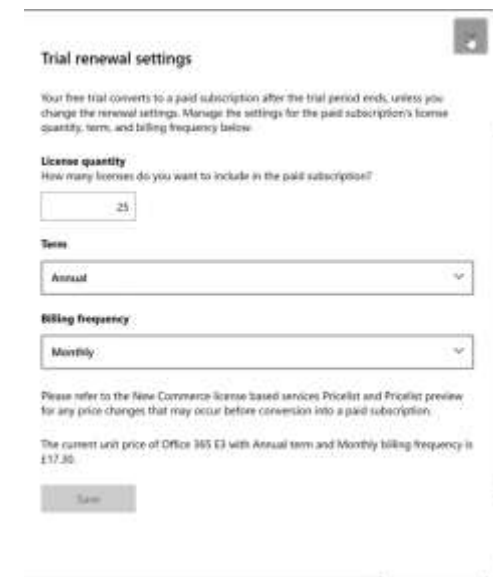
Check price Clear cart

☒ I confirm that my organization is acting as an indirect Partner when choosing a Reseller and as a Direct Partner in the absence of selecting a reseller.

Review

Cancel

4. **Configure the trial renewal settings** to update the renewal qty, term and billing frequency. Save and then click **“Buy”**



**Trial renewal settings**

Your free trial converts to a paid subscription after the trial period ends, unless you change the renewal settings. Manage the settings for the paid subscription's license quantity, term, and billing frequency below.

**License quantity**  
How many licenses do you want to include in the paid subscription?  
25

**Term**  
Annual

**Billing frequency**  
Monthly

Please refer to the New Commerce license based services Pricelist and Pricelist preview for any price changes that may occur before conversion into a paid subscription.

The current unit price of Office 365 E3 with Annual term and Monthly billing frequency is £17.30.

Save

# Easily adjust renewal settings

- Microsoft 365 Copilot Business trials are fixed at **25 users for 30 days**.
- Partners can update the **paid renewal settings** at any point before the trial converts.



## Set the renewal quantity

The paid renewal defaults to 25 seats. Partners can adjust the renewal quantity up or down to align with the customer's need.



## Choose auto-renew

Auto-renew is enabled by default. Leave it on to convert automatically or turn it off before the trial ends based on the customer's preference.



## Choose term and billing

Select annual/annual, annual/monthly, or monthly/monthly for the paid subscription. Renewal billing term can be manually updated after the trial begins.



## Confirm the payment path

Ensure payment has been collected and the customer is prepared for automatic conversion before renewal.

One trial per eligible customer | 7-day cancellation window after paid conversion

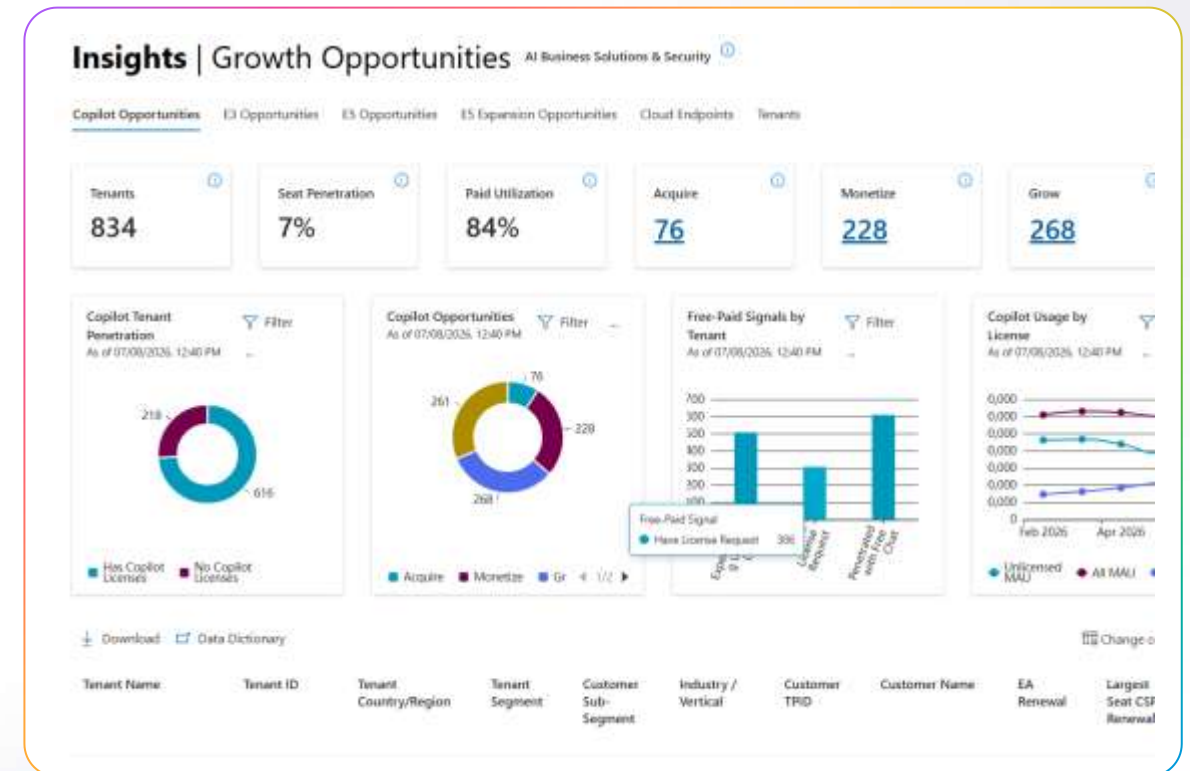
# Build your prioritized customer list

Target the right customers from the start to maximize trial success, conversion rates, and long-term Copilot growth.

## Customer Targeting Criteria in [ASPX](#) (8/2):

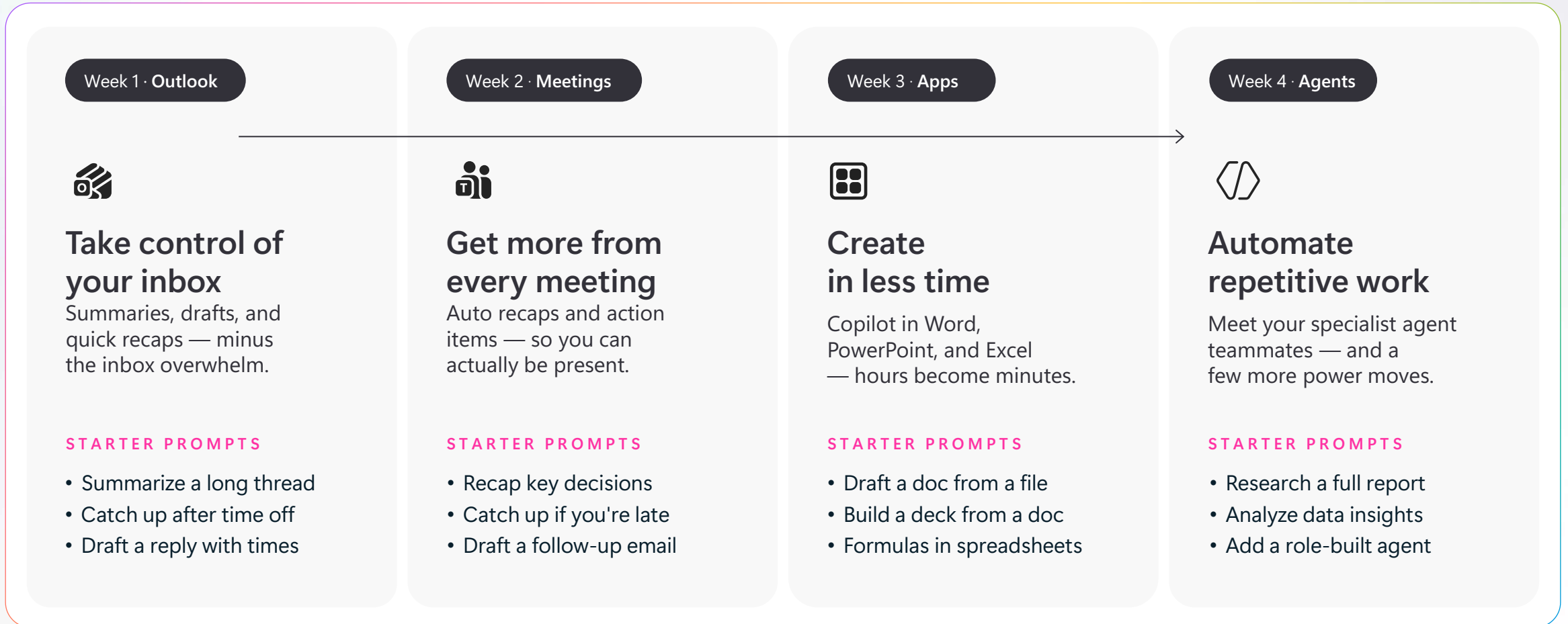
- ✓ Existing Microsoft 365 Business Standard/Premium Customers
- ✓ Has 50 to 300 Copilot eligible M365 users
- ✓ New to Copilot (no paid Copilot licenses)
- ✓ Upcoming M365 renewal (not required)

Targeting data will also be available in [Cloud Ascent](#)



# A 30-Day guided evaluation

- To maximize value from the 30-day evaluation, partners can guide customers to experience a simple, structured journey
- Goal is to focus on one high-value scenario each week, supported by guided prompts, best practices, and daily recommendations



# Everything we hand the customer so the 30 days run turnkey



## Customer trial guide

An editable, customer-ready story for the trial offer.



## Admin setup guide

Clear steps to enable the best Copilot experience before Day 1. Includes copy/paste content for team channel posts to keep users engaged



## Weekly email series

Four weeks of daily-prompt emails, ready to schedule and send.



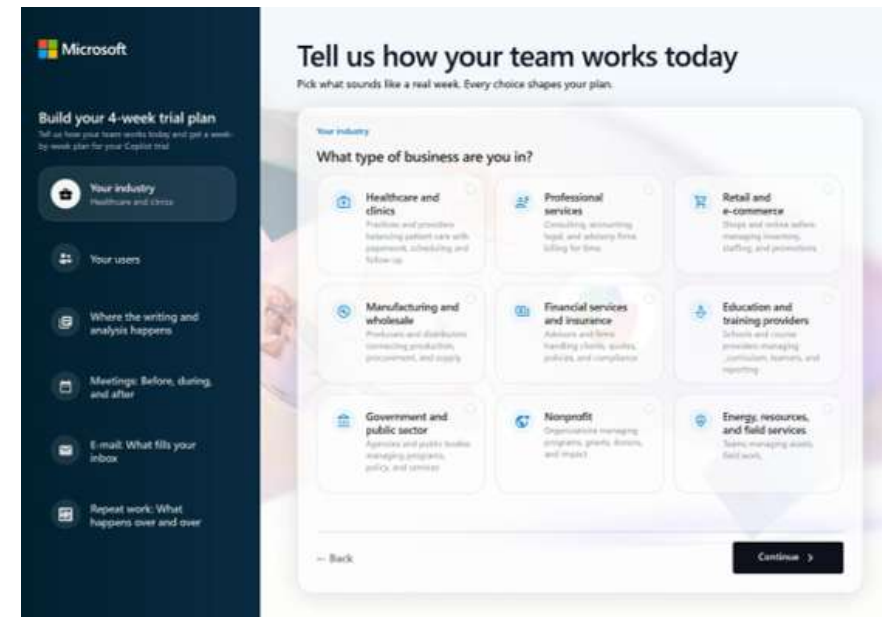
## Reporting in Admin Center

Easily monitor usage trends and how the trial is taking hold.

[aka.ms/Copilotin30Kit](https://aka.ms/Copilotin30Kit)

# Success Planner (coming soon)

- A simple 5-step planning experience that creates a personalized success plan for the 30-day evaluation
- Recommends high-value scenarios, guided activities, prompts, and resources based on how the customer works today
- Helps customers focus on the actions most likely to demonstrate value and accelerate adoption



# Turn evaluations into new Copilot customers



## Discuss ROI with customer

Quantify time savings, business impact, and key outcomes



## Lead with a 50-seat offer

Position a best-value offer: M365 Business Standard or Business Premium with Copilot, plus \$2,500 in deployment funding\*



## Address objections early

Be prepared to discuss cost, security, and change management. Leverage the [Partner Copilot FAQ](#)



## Convert, then expand

Land the initial deployment, then identify the next wave of users to scale adoption.

### THE COMPELLING OFFER

## Anatomy of an offer that closes

- ⚡ Proven value, in their words and numbers
- ⚡ A clear, simple path from trial to paid
- ⚡ A time-bound incentive that rewards acting now
- ⚡ A named expansion plan beyond the first team

\*Deployment funding available through participating partners, subject to partner availability and eligibility requirements.

# The metrics that tell you the motion is working



## Trials activated

Number of 30-day trials started.



## Activation rate

% of provisioned users actually using Copilot in week one.



## Active usage

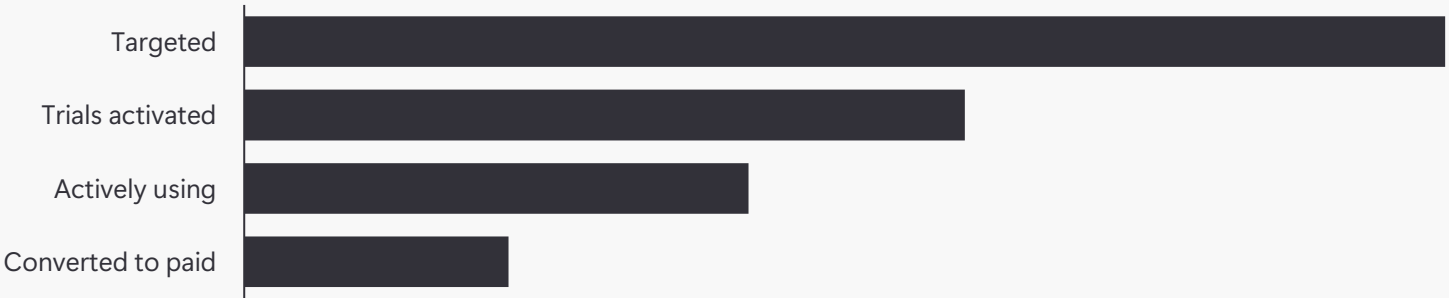
% of trial users active across the 30 days — the leading signal.



## Conversion rate

% of trials that convert to paid Copilot seats.

### The Trial Funnel — Watch the drop-off at each stage



### Partner tip

Engage with your customer throughout the trial to discuss metrics they are seeing and help support engagement and adoption.

# Your 30-60-90-day plan

30 days

## Stand it up

- Build your Tier A target list
- Review the campaign templates
- Provision your first 2–3 trials

60 days

## Run the motion

- Support adoption across active trials
- Launch the nurture campaign to Tier B
- Capture usage and proof points

90 days

## Convert & scale

- Close your first conversions
- Map seat-expansion paths
- Refine targeting from what worked
- Queue the next cohort of trials

### Start this week:

- Review the [Customer Kit](#) and provision your first trial in CSP New Commerce.
- For step by step guidance, leverage the [Copilot in 30 Microskillings](#).

# Use trial signals to move from evaluation to conversion

As customers near the end of their 30-day trial, partners should use ASPX signals - such as usage, expiration date, and conversion readiness - to guide the right paid offer conversation.

**For customers showing strong momentum, lead with the best-value path:** Microsoft 365 Business Standard or Business Premium with Copilot, anchored around a 50-seat conversion to take advantage of [Frontier Accelerator](#) deployment funding\*.

If the customer is not ready to expand, **protect the win by converting the 25 trial seats** and building a clear plan for the next wave of users.



## Track who is ready to convert

Use ASPX to monitor trial expiration, active usage, and customers showing conversion-ready signals — then prioritize outreach before the trial ends.



## Lead with Microsoft 365 Business + Copilot value story

For customers seeing value, position Microsoft 365 Business Standard/Premium with Copilot as the simplest path to continue the experience and make the move to paid easy to understand.



## Make 50 seats the target motion

Where the customer has momentum, lead with a 50-seat paid offer and available Frontier Accelerator deployment funding to help them expand beyond the initial trial group.



## Don't let successful trials stall

At minimum, convert the 25-seat trial into paid seats with the right term, billing, and expansion plan — then build the next-wave user list.

*\*Deployment funding available through participating partners, subject to partner availability and eligibility requirements.*

SKILLING TO SALES

# How Microsoft Supports Partners

## Partner Activation Framework

### Develop Skills

[Copilot in 30 Partner Microskilling](#)

[Partner Skilling Hub & Skilling Plan Agent](#)

[Titan Learning Path – Sales](#)  
[Titan Learning Path – Pre-sales](#)

### Build a Practice

[Copilot + Agents Partner Practice Development Guide](#)

MAICPP specializations: [Copilot](#),  
[Frontier](#) & [Frontier Distributor](#)

[M365 Copilot & Agents Guided Experience](#)

### Go-To-Market

[Copilot in 30 Launch Kit](#)

[Leverage Copilot CSP Offers](#)

[Supporting Assets on Cloud Solution Provider site](#)

# M365 Copilot + Agents Guided Experience

A partner-ready kit for delivering structured, hands-on Copilot and agent scenarios with customers.

**Partners can use this kit to:** deliver a structured, hands-on Copilot + agents experience with customers and connect Copilot + agents to everyday business workflows.

It includes a repeatable experience flow, guided prompts, sample data, and facilitator materials to make delivery easier to run and easier to scale.

## Prepare

Set up access, sample data, and delivery readiness.

## Deliver

Run guided prompts and business scenarios for hands-on customer engagement.

## Extend

Identify follow-up services around adoption, governance, and managed support.

**Download kit:** <https://aka.ms/CopilotBusinessGuidedExperience>

*Before delivery: Confirm eligible Microsoft 365 Copilot Business licensing or trial access.*



✓ Files summarized

# Resources

## **COPILOT ADMIN SETUP**

[Assign Copilot licenses to users](#)

[Minimum requirements to deploy Microsoft 365 Copilot](#)

[Set up Microsoft 365 Copilot securely](#)

[Copilot app admin settings](#)

[Manage Copilot in the admin center](#)

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## **MICROSOFT 365 COPILOT BUSINESS**

[Copilot and Agent Resources](#)

[Usage-based billing & cost management](#)

[Copilot Cowork](#)

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## **ENABLEMENT**

[Copilot in 30 Microskillings](#)

# Top 5 Copilot in 30 questions

More questions? Use the [Microsoft 365 Copilot Partner FAQ](#)

- 1. How do I set up a trial for a customer?** Trials are provisioned through CSP New Commerce. Partners should first confirm customer eligibility, then transact the Microsoft 365 Copilot Business trial. Each eligible customer may receive one 25-user, 30-day trial. Trial terms, duration, and seat quantity are fixed and cannot be modified during the trial period.
- 2. Which M365 Copilot SKUs qualify for trials?** The trial applies to Microsoft 365 Copilot Business, which is available to SMB customers with eligible Microsoft 365 Business plans and up to 300 seats per tenant. Microsoft 365 Copilot Business delivers the same core in-app Copilot capabilities as Microsoft 365 Copilot, packaged specifically for SMB customers with simplified licensing and purchasing options. Eligibility is based on Microsoft 365 Business Basic, Business Standard, or Business Premium as the underlying subscription.
- 3. Can EDU, Non-profit, or GCC customers leverage?** The CSP trial offered is the standard commercial SKU of M365 Copilot Business and may not qualify for EDU, Non-profit, and GCC customers.
- 4. Do users need special setup or enablement?** Trial licenses are assigned the same way as paid Microsoft 365 Copilot Business licenses. Partners should help customers complete basic readiness activities, including license assignment, identity and access validation, and permissions review, to ensure users can realize value quickly. As with any Copilot deployment, a small amount of upfront readiness and user guidance can accelerate adoption and time to value.
- 5. What happens at the end of the trial?** Microsoft 365 Copilot Business trials are configured to automatically convert to a paid subscription at the end of the trial period unless canceled within the applicable cancellation window after conversion. Partners should use the trial period to establish success criteria, review adoption and usage data, and align on the customer's post-trial licensing strategy, including conversion and expansion opportunities.