



Microsoft 365 Copilot Business GTM Playbook

Your guide to winning the SMB AI opportunity

v1 November 2025



Welcome

Small and medium businesses (SMBs) are at a turning point. They need to do more with less, and AI delivers exactly that—streamlining workflows, automating tasks, and freeing up time for what matters most.

This playbook will equip you, with everything you need to seize this opportunity and help SMBs make AI-powered productivity their new standard.

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THE OPPORTUNITY

The largest untapped market for AI productivity

Small and medium businesses represent the largest untapped market for AI-powered productivity.

These organizations are under constant pressure to do more with less, making efficiency and automation critical to their success. AI delivers exactly that—streamlining workflows, reducing manual tasks, and freeing up time for strategic work.

Momentum is building fast: many SMBs are already experimenting with generative AI through consumer tools, but they need trusted solutions that are secure, integrated, and designed for business.

Unlocking the opportunity:

The moment has come **to redefine what productivity means for SMBs**. AI can no longer be seen as a luxury or a “nice to have”—it must become the new standard for businesses that want to compete, grow, and thrive.

This is more than a technology shift; it’s a transformation in how work gets done. With **Microsoft 365 Copilot Business** and our new **Microsoft 365 Copilot Business Bundles**, you have the power to help customers embrace this future and unlock outcomes that truly matter—greater efficiency, smarter decision-making, and accelerated growth.

80% of SMB users are bringing their own AI tools to work¹

¹Data sourced from 2024 Work Trend Index Annual Report 26 from Microsoft and LinkedIn



MICROSOFT 365 COPILOT BUSINESS

A copilot for every user

AI-powered productivity isn't one-size-fits-all—every SMB needs solutions that meet them where they are. Our vision is simple yet bold: to put a Copilot in the hands of every user, transforming how work gets done.

Microsoft 365 Copilot Chat is available at no cost and provides web-grounded AI assistance. It's the perfect entry point for SMBs to experience the value of AI in everyday tasks—research, drafting, and quick answers—without complexity or additional investment.

For SMBs ready to take AI productivity to the next level, available December 1, 2025, **Microsoft 365 Copilot Business** brings generative AI directly into the Microsoft 365 apps they use every day—Word, Excel, Outlook, and more.

Built to scale up to 300 employees and those on Microsoft 365 Business plans, Copilot Business delivers the same powerful features and capabilities as Microsoft 365 Copilot—at a 30% savings. This makes enterprise-grade AI accessible to SMBs, enabling them to do more with less and compete at a whole new level.

Together, Copilot Chat and Copilot Business create a clear, affordable path for SMBs to adopt. This is how we make AI-powered productivity the new standard for every business.

 [View feature comparison](#)

Microsoft 365 Copilot Chat

- Use secure, web-grounded AI chat powered by the latest large language models
- Get Copilot Chat in select Microsoft 365 apps¹
- Access and use agents, priced on a metered basis
- Maintain IT control, including enterprise data protection and agent management

Included + Metered

New! Microsoft 365 Copilot Business

Everything in Microsoft 365 Copilot Chat, plus:

- AI-powered chat grounded in business data
- Access work-grounded Copilot in apps
- Create and use agents with Copilot Studio
- Enterprise-grade security, privacy, and compliance

\$21 per user/month

¹ Copilot Chat is available at no additional cost to all Microsoft Entra ID users with an eligible Microsoft 365 subscription. An Azure subscription is required to use agents and is priced on a metered basis.

The all-in-one AI Productivity solution

With Copilot Business, we have the chance to make AI-powered productivity the new standard for SMBs—not an add-on.

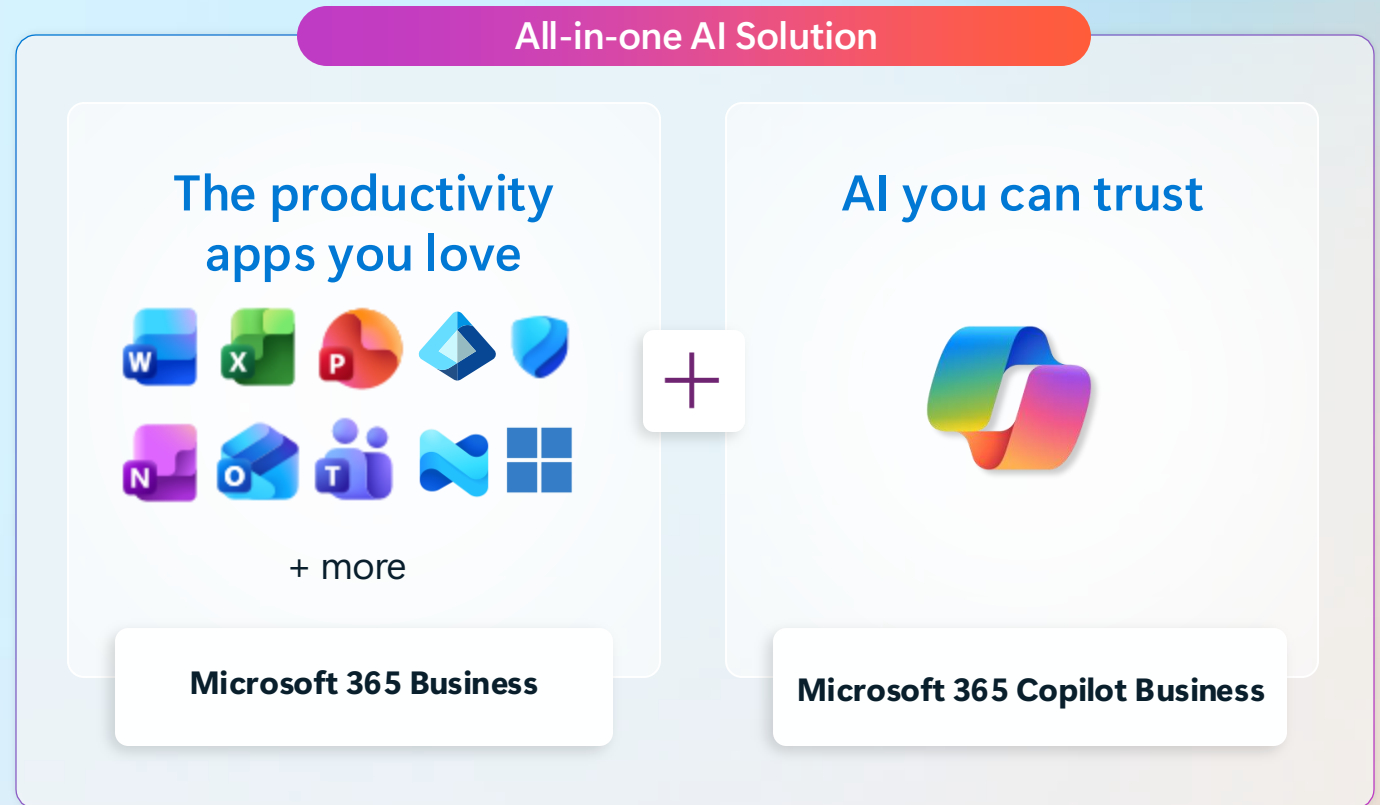
To simplify adoption, we're bundling Copilot Business with qualifying Microsoft 365 Business plans, creating an all-in-one solution that feels natural and effortless.

Instead of positioning Copilot as a standalone SKU, make it part of the core productivity experience—helping customers see AI as essential to how they work.

These convenient bundles will be available in multiple configurations, with and without Teams.

- ✓ Business Basic + Copilot Business (\$27 user/month)
- ✓ Business Standard + Copilot Business (\$33.50 user/month)
- ✓ Business Premium + Copilot Business (\$43 user/month)

[→ Compare Copilot Plans](#)



Speaking SMB's Language

Small and mid-sized businesses deserve more than just tools—they need solutions that simplify daily operations, fuel growth, and protect what matters without adding complexity or extra costs.

Clear, consistent messaging helps you articulate the value of AI-powered productivity and position Microsoft 365 Copilot Business as essential for small business success.

We have conducted research and have developed more aligned messaging and positioning for our Copilot offerings.

Messaging available for the following

- ✓ **Microsoft 365 Copilot Business**
- ✓ **Microsoft 365 Copilot Business bundle offers**
 - ✓ Microsoft 365 Copilot Business bundle offer (Basic)
 - ✓ Microsoft 365 Copilot Business bundle offer (Standard)
 - ✓ Microsoft 365 Copilot Business bundle offer (Premium)

→ Core Messaging Pillars

- 01**
Get more value with one, simplified solution
- 02**
Run your business with confidence
- 03**
Built in security you can trust

How to position Microsoft 365 Copilot Business

The below provides guidance on how we can communicate the value of Microsoft 365 Copilot Business to small business customers.



Get more value with one, simplified solution

Copilot is integrated into your existing productivity tools, so you don't have to navigate across separate AI experiences.

- **Single solution:** One AI solution that works across your business and is included with your Microsoft 365 Business plan
- **Connected experience:** Copilot works across familiar apps like Teams, Outlook, Word, Excel and PowerPoint, no context-switching required
- **Unified interface:** The Copilot app unifies chat, search, apps and agents in a single, easy-to-navigate experience



Run your business with confidence

Copilot provides relevant, personalized assistance, so you can make faster, more informed decisions.

- **Relevant context:** Copilot is grounded on your work data across calendars, emails, chats, documents and meetings to improve relevance and accuracy
- **Ability to customize:** Add your own data and build your own custom agents with minimal coding experience required
- **Role-based solutions:** Get tailored AI experiences across various roles like Sales, HR, and Marketing



Built-in security you can trust

Your data stays safe with Microsoft's trusted security, privacy, and compliance controls to give you peace of mind as your business grows.

- **Protect sensitive data:** Copilot follows your existing security, privacy, and compliance settings
- **Allow your data to stay with you:** Only surfaces what users have permission to access; never used to train foundation models
- **Adopt AI safely:** Reduce oversharing and keep your business data governed and protected

Positioning Microsoft 365 and Copilot Business bundles

This section lays out a complete framework for positioning Copilot Business Bundles with SMB customers. It starts with top-level messaging that tells the bigger story—why bundles matter and how they make AI adoption simple by turning AI-powered productivity into the new standard. From there, it dives

into bundle-specific positioning, offering clear, value-driven messages for each option. These messages are designed to help you confidently communicate the unique benefits of every bundle through an AI-first lens, ensuring customers see Copilot as essential to their productivity journey

→ Top Level Positioning

This new Microsoft 365 Copilot Business bundle offers combine **best-in-class productivity tools with AI built for work**, so you get familiar Microsoft 365 apps—Word, Excel, Outlook, and more—plus intelligent assistance that helps you work smarter, faster, and more creatively.

Business Basic + Copilot Business

Essential web-based productivity tools and AI in one simple bundle.

- **Do more with less switching.** Copilot can draft emails, summarize chats, and create content without having to manage multiple AI tools.
- **Web access.** Chat with Copilot directly in your web browser across any device for easy access.
- **Built-in security.** Copilot runs in Microsoft's secure cloud, so your prompts and answers stay protected.

Business Standard + Copilot Business

All Microsoft 365 desktop apps and cloud services, now with built-in AI.

- **Create faster.** Use Copilot to write, rewrite, summarize, and build content across Word, Excel, PowerPoint, Outlook, and Teams
- **Keep work flowing.** The Copilot app unifies chat, search, apps, and agents so teams can find, create, and act from one place.
- **Stay secure everywhere.** Copilot uses Microsoft 365's built-in protections like encryption and multi-factor sign-in to keep your data safe online and in app.

Business Premium + Copilot Business

AI-powered productivity and advanced security in one comprehensive solution.

- **Stronger safeguards.** Pair Copilot with Business Premium's advanced security and device management so sensitive work stays protected.
- **Automate busywork.** Let Copilot recap meetings, draft responses, and transform files into usable outputs, so your team can focus on customers.
- **One platform, fewer vendors.** Consolidate tools, reduce toggling, and get built-in security to minimize your administrative load.

Tailoring the message for SMB focused industries

Small businesses want solutions that truly solve their challenges. To connect in a meaningful way, we need to speak their language—addressing what matters most in their world and their industry. In the following section, you'll find tailored variations of our core messaging pillars, designed specifically for SMB-focused industries to drive relevance and spark excitement.

1

Professional Services



Spend less time on admin and more time serving clients

- **Get more done:** Draft proposals, contracts, and client emails faster.
- **Simplify workflows:** Capture meeting notes, action items, and follow-ups automatically.
- **Protect your firm:** Ensure sensitive client data stays private with zero extra setup.

2

Construction



Build more, manage less. Copilot keeps your projects moving with less admin and more clarity.

- **Get more done:** Draft bids, proposals, and progress reports quickly.
- **Simplify workflows:** Summarize site updates, track tasks, and manage change orders.
- **Protect your business:** Secure project data and financials with enterprise-grade safeguards.

3

Creative Agencies



Copilot helps your agency spend less time on busywork and more time delivering standout ideas

- **Get more done:** Draft proposals, contracts, and communications in the apps you already use.
- **Simplify workflows:** Turn meeting notes, action items, and follow-ups.
- **Protect your agency:** Keep sensitive client data private with built-in security and compliance.

PROMOTIONAL OFFERS

Introductory Pricing: A catalyst for AI adoption

With the launch of Microsoft 365 Copilot Business and the Copilot Business bundle offers, we’re introducing limited-time promotional pricing designed to create excitement and accelerate adoption.

These offers aren’t just discounts—they’re a strategic lever to turn routine renewals into powerful upgrade moments and open doors for mid-term upgrades. Use these offers to create urgency using the limited-time savings to shift the conversation from “Why AI?” to “Why wait?” These offers are designed not just to reduce cost but to remove friction—making AI adoption a clear, compelling choice for every SMB.

To make AI adoption simple and irresistible, we’ve introduced a set of promotional offers designed to meet SMB needs and create clear upgrade paths. These offers will run from 12/1/25 through 3/31/2026.

15% off Microsoft 365 Copilot Business add-on

This promotion makes it easier for customers who want to start with Copilot as an add-on to experience AI-powered productivity.

Up to 35% off Microsoft 365 Business + Copilot Business bundles

Promotional bundles combine Microsoft 365 Business Standard or Premium with Copilot Business in one SKU—making AI a natural extension of productivity. As our hero motion, lead with bundles to help customers upgrade seamlessly from core productivity to AI-powered work at an unbeatable price.

50% off Microsoft Purview Suite for Business Premium*

For security-conscious customers, we’re adding a Purview Suite promotion to create an opportunity to pair AI innovation with enterprise-grade security, addressing one of the biggest SMB concerns.

15%_{off}

1-300 licenses

Microsoft 365 Copilot Business

35%_{off}

10-300 licenses

Microsoft 365 Business Standard + Copilot Business

25%_{off}

10-300 licenses

Microsoft 365 Business Premium + Copilot Business

30%_{off}

10-300 licenses¹

Microsoft 365 Business Premium + Copilot Business & Purview Suite

50%_{off}

1-300 Licenses

Microsoft Purview Suite for Business Premium²

¹ This is positioning the combination of the 25% off Business Premium + Copilot Business bundle offer and the 50% off Microsoft Purview offer
² Purview Suite for Business Premium can only be added to customers that have purchase Business Premium and Copilot Business Or Microsoft 365 Copilot

Scaling AI adoption: Moving from add-on to essential

AI-powered productivity isn't just a feature—it's the future of work. With Copilot Business and the new bundles, we have an opportunity to transform the go-to-market approach and accelerate results.

Our strategy shifts Copilot from a standalone, add-on to a core part of the productivity story—because SMBs don't want extras; they want solutions that help them do more with less. AI is now central to that expectation.

SMBs are under pressure. Many are experimenting with consumer AI tools, inadvertently creating risks with "shadow AI" that fragment workflows and increase security gaps. Partners can change that—positioning AI as essential, not optional. By embedding

Copilot into Microsoft 365 licensing, we deliver a simple, scalable path for secure AI adoption without complexity.

SMBs are price-sensitive, short on time and resources, and often unsure how to start their AI journey. To make our strategy successful, our go-to-market approach must evolve to overcome these business barriers.

The Solution: Drive adoption by making Copilot Business an easy choice. Use promotional pricing to remove barriers, position it as "AI out-of-the-box" with zero setup, and lead with bundled offers as the fastest, simplest upgrade—delivering immediate value right in the flow of work.

→ Key barriers

Price Sensitive
01 SMBs operate on tight budgets and perceive AI as expensive

Limited Resources
02 SMBs lack bandwidth for pilots or complex deployments.

Value Realization
02 They know AI matters but don't know where to begin

→ Solution

Promotional Pricing
→ New discounted offers make Copilot the most affordable way for SMB's to adopt AI.

Out-of-the-Box AI
→ Position Copilot Business as a turnkey, zero-setup solution—built into the apps SMBs already use.

Lead with bundles
→ Use Copilot Business bundles to connect AI value directly to core productivity.

Tapping into the immediate growth opportunity

To accelerate AI adoption, simplicity is key. By combining new bundle offers with promotional pricing, we remove complexity and make it easy for customers to choose a single solution for secure, AI-powered productivity—with the option to add Microsoft Purview Suite for advanced data protection.

This is a unique opportunity to deliver an offer that resonates. We've identified two primary motions to maximize impact by leveraging these offers and promotional pricing:

Renewal Motion: With our largest renewal wave approaching, you can turn routine renewals into secure AI upgrades by leading with bundle offers priced to win.

Mid-Term Motion: For customers not up for renewal, there's still a strong opportunity to drive AI adoption. Lead with the Copilot Business Standalone offer.

→ Turn every renewal into an AI upgrade

Enhanced Security, with an AI productivity upgrade

Same great plan, with an AI productivity upgrade

→ Drive mid-term AI attach and expansion

Expand AI productivity to every user

Get started with Copilot for less

Turn every renewal into an AI upgrade

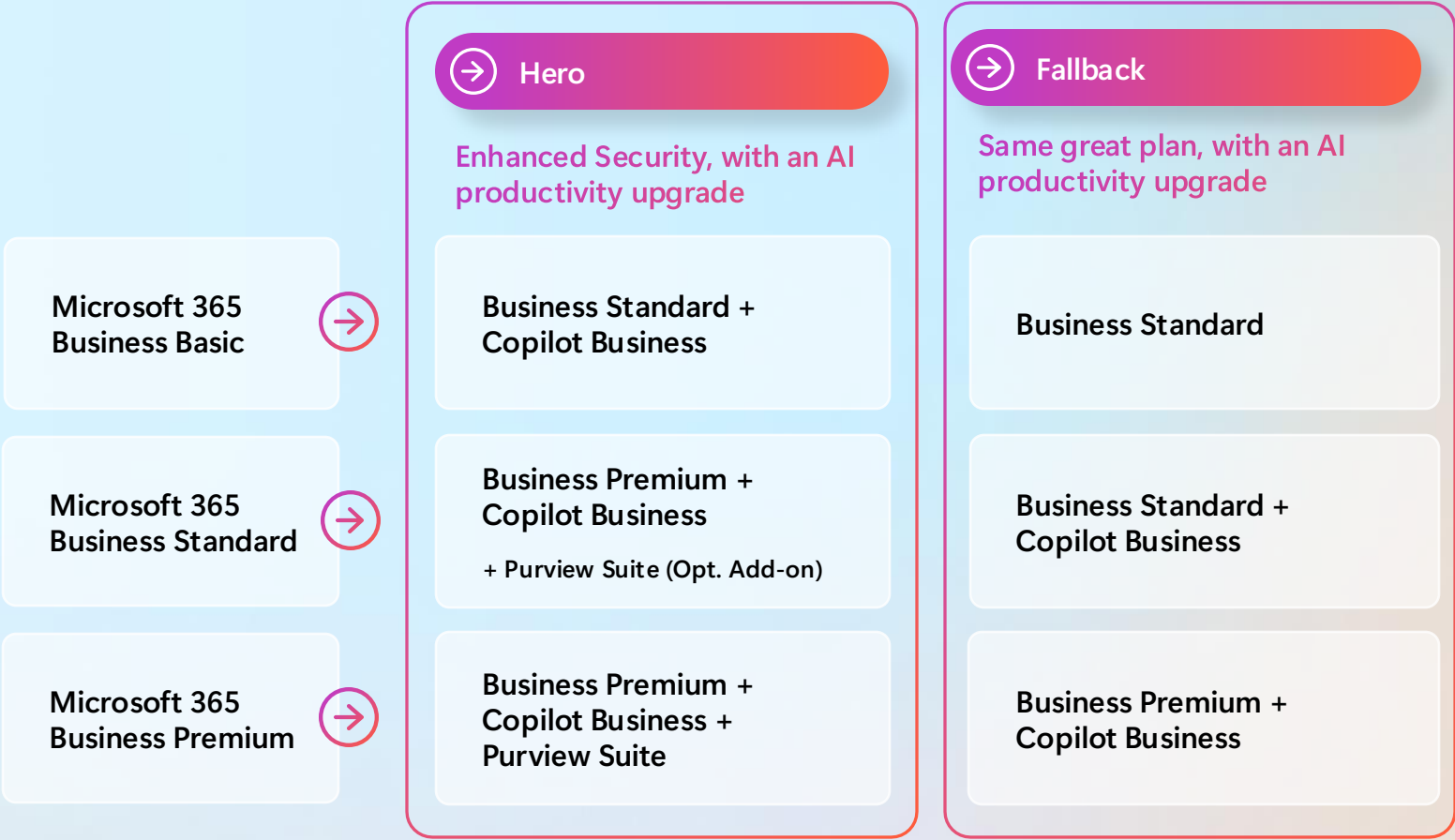
Renewals are your most strategic opportunity to drive AI adoption—especially with new promotional offers creating a compelling event.

The key is to meet customers where they are and make the path forward simple. We have defined an approach to capitalize on this opportunity.

Hero motion: Lead with the all-in-one bundle for secure, AI-powered productivity. Position this as the ultimate upgrade—advanced security plus AI in a single step for maximum value.

Fallback Approach: For customers not ready to go all-in, offer an easy entry point. Position “Stay on your current plan and add AI” as the simplest way to unlock productivity without changing their core subscription.

These options become even more attractive when paired with limited-time promotional pricing, making renewal conversations the perfect moment to upgrade.



GO TO MARKET APPROACH

Enhanced Security, with an AI productivity upgrade

Security isn't optional—it's essential. That's why our hero motion combines advanced protection with AI-powered productivity in one comprehensive solution. These upgrade paths make it simple and cost-effective to deliver unmatched security and intelligence.

By upgrading customers to Business Premium with Copilot and Purview Suite, you deliver the most secure AI experience available—protecting sensitive data while unlocking intelligent workflows. Lead with security as the differentiator and show customers why this is the smartest way forward.

The most secure
AI solution for
your business



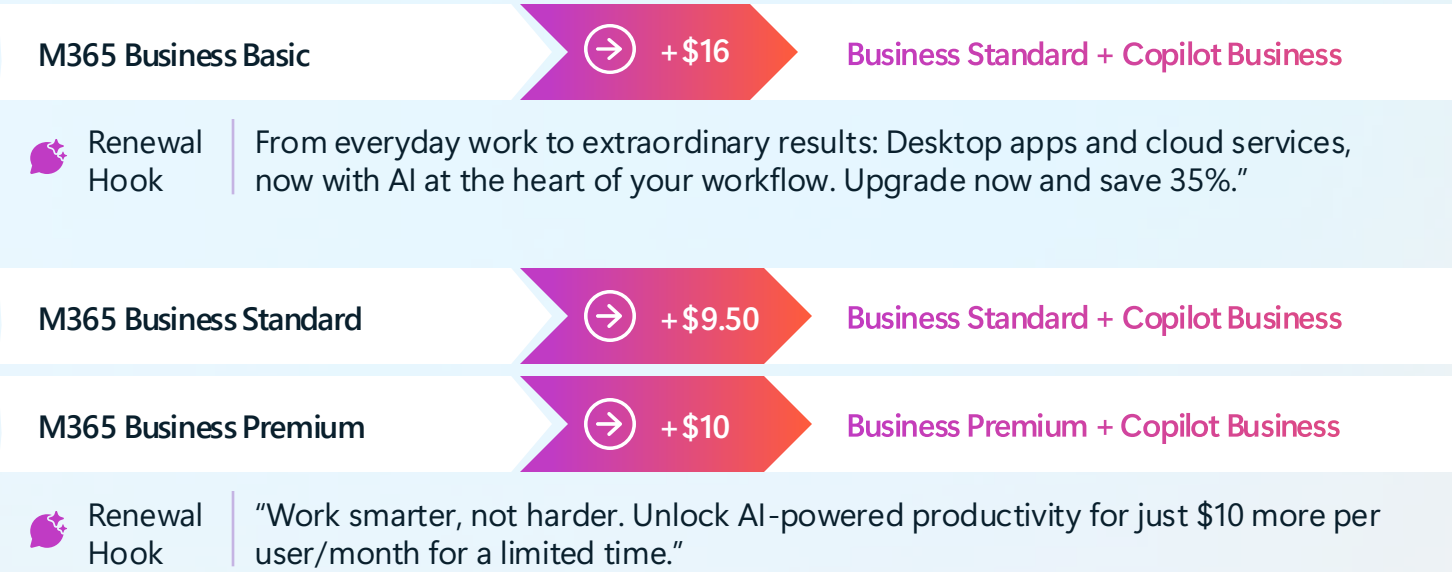
GO TO MARKET APPROACH

Same great plan, with an AI productivity upgrade

For customers who aren't ready to make the full leap to advanced security and AI, there's still a simple, cost-effective way forward—add Copilot to the plan they already know and love. Choosing the right upgrade path is key to unlocking AI for every customer.

Whether they're on Business Basic, Standard, or Premium, these options make adoption effortless and affordable, with limited-time pricing. For customers on Business Standard or Business Premium they can upgrade to the bundle offer with Copilot for just \$10 more.

The all-in-one AI solution for your growing business



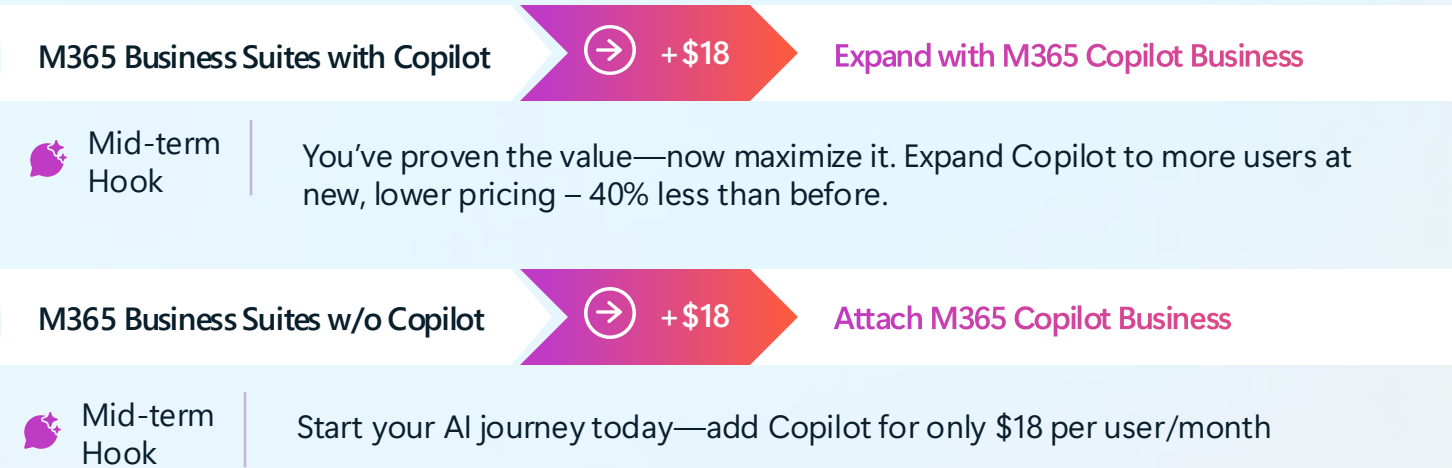
GO TO MARKET APPROACH

Drive mid-term AI attach and expansion

For customers not up for renewal, there’s still a strong opportunity to drive AI adoption. Lead with the Copilot Business Standalone offer, now available at 40% off previous pricing (i.e. \$30 user/month), to help existing Copilot customers expand Copilot to more users across their organization.

For customers just starting their AI journey, the standalone offer is the perfect entry point. Begin with 3–5 users to build confidence, demonstrate value, and create momentum ahead of their renewal—making future expansion seamless and cost-effective.

The all-in-one AI solution for your growing business



Microsoft 365 Copilot Business Marketing

To accelerate AI adoption, simplicity is key. By leading with new bundle offers, we remove complexity and make it easy for customers to choose a single solution for secure, AI-powered productivity—with the option to add Microsoft Purview Suite for enhanced data protection.

Build your assets.

Start with a clear strategy that positions **Copilot Business** as essential for SMBs. Highlight benefits like flexibility, promo pricing, and immediate AI value. Leverage the [Launch Kit](#) for ready-to-use assets that make campaign execution faster and more consistent.

Target customers and drive demand.

Segment customers by renewal timelines and business needs. Use personalized outreach, case studies, and ROI messaging to create urgency—mid-term upgrades mean customers don't wait for renewal. Incorporate [Microsoft 1:Many Briefings](#) to land promotional offers at scale and educate customers on why upgrading now delivers maximum value.

Close deals.

Simplify the buying process and emphasize full mid-term upgrades for unified licensing and flexibility to add seats at discounted rates. Provide clear pricing, address objections, and position yourself as a trusted advisor helping SMBs future-proof with AI.



[Download Launch Kit](#)

Launch kit assets



GTM playbook



Promotional flyers and handouts



Pitch decks



Sales enablement email OFTs



Website template



Social Ads



Product FAQs



To-customer email OFTs

Promotion one-sliders

Easily customize these offer slides and add to your own offer pitch deck or circulate in a to-customer email.

Asset Details	
Size	n/a
Notes	n/a
Design Options	4 To-Partner variants 6 To-Customer variants
Editable File Type	PowerPoint
File Name	M365 Copilot Business Promotion One Sliders_To-Partner_To-Customer

Partner promotion details

Microsoft 365 Copilot Business

How to position this offer:
Leverage this exclusive offer to help your customer take their Copilot adoption to the next level. This offer is available to all CSP partners.

Offer details:

- **Discount:** 10% off net partner price with purchase of up to 300 new Copilot seats
- **Billing Option:** Annual commitment with annual or monthly billing
- **Availability:** Available worldwide December 31, 2025 - March 31, 2026
- **Customer Eligibility:** New or existing Microsoft Business customers transacting via CSP
- **Partner Eligibility:** Available to all CSP partners

Why it matters:
This offer provides a compelling reason for your customer to upgrade and add additional seats to their Copilot Business subscription. Customers utilizing these promotions will retain the discounted rate for the entire subscription duration and may add additional seats up to 300 throughout the term.

For more details, please review [this link](#)

Microsoft 365 Business Standard and Copilot Business

How to position this offer:
Leverage this exclusive offer to help your customer take their Copilot adoption to the next level. This offer is available to all CSP partners.

Offer details:

- **Discount:** 10% off net partner price with purchase of up to 300 Microsoft 365 Business Standard and Copilot Business seats (30-month term)
- **Availability:** Available worldwide December 31, 2025 - March 31, 2026
- **Customer Eligibility:** New or existing customers transacting via CSP
- **Partner Eligibility:** Available to all CSP partners

Why it matters:
This offer provides a compelling reason for your customer to upgrade and add additional seats to their Copilot Business subscription. Customers utilizing these promotions will retain the discounted rate for the entire subscription duration and may add additional seats up to 300 throughout the term.

For more details, please review [this link](#)

Microsoft 365 Business Premium and Copilot Business

How to position this offer:
Leverage this exclusive offer to help your customer take their Copilot adoption to the next level. This offer is available to all CSP partners.

Offer details:

- **Discount:** 20% off net partner price with purchase of up to 300 Microsoft 365 Business Premium and Copilot Business seats (30-month term)
- **Availability:** Available worldwide December 31, 2025 - March 31, 2026
- **Customer Eligibility:** New or existing customers transacting via CSP
- **Partner Eligibility:** Available to all CSP partners

Why it matters:
This offer provides a compelling reason for your customer to upgrade and add additional seats to their Copilot Business subscription. Customers utilizing these promotions will retain the discounted rate for the entire subscription duration and may add additional seats up to 300 throughout the term.

For more details, please review [this link](#)

Add-on Purview Suite for Business Premium

How to position this offer:
Leverage this exclusive offer to help your customer take their Copilot adoption to the next level. This offer is available to all CSP partners.

Offer details:

- **Discount:** 10% off net partner price with purchase of up to 300 Purview Suite for Business Premium seats (30-month term)
- **Availability:** Available worldwide December 31, 2025 - March 31, 2026
- **Customer Eligibility:** Customers licensed for Business Premium and Copilot Business or Microsoft 365 Copilot
- **Partner Eligibility:** Available to all CSP partners

Why it matters:
This offer provides a compelling reason for your customer to upgrade and add additional seats to their Copilot Business subscription. Customers utilizing these promotions will retain the discounted rate for the entire subscription duration and may add additional seats up to 300 throughout the term.

For more details, please review [this link](#)

To-Customer M365 Copilot Business

AI Productivity + Advanced Security. One Smart Bundle.

Get more value with one, simplified solution
Save time and money by bringing together your productivity apps, AI and advanced security in one bundle. No need to manage separate tools.

Run your business with confidence
Don't compromise when it comes to your data. Get AI and security tools that understand your business and are deeply integrated with your existing Microsoft 365 apps and services.

Built-in security you can trust
Take the guesswork out of security. Advanced protection included to keep your business data and devices safe. Extended with optional security add-ons for even more peace of mind.

Make the smart & secure decision.
Upgrade for an unbeatable price.

Partner Promotion Price
\$32 per user / month

Microsoft 365 Business bundle offer

Included with Microsoft 365 Business Basic & Business Standard

- Productivity & Collaboration Apps
- Identity & Access Controls
- Device Management

Included with Microsoft 365 Business Premium

- Advanced Identity Protection
- Device Security
- Email & App Security
- Data Security

Included with Microsoft 365 Copilot Business

- AI-Powered Chat
- Personal Assistant
- Pre-Built Agents
- Advanced Management

Supercharge your organization with AI today

Transform your business with **Microsoft 365 Copilot Business** and save 15%!
AI-powered productivity and advanced security in one comprehensive solution.

NEW!

15% off

Microsoft 365 Copilot Business

Get more value with AI

- Help your team get more done - faster, smarter, and with less effort
- Get started with a department to see impact quickly
- Experience the latest innovation with **newly announced GPT-5**

Details:

- Available worldwide to CSP customers
- Flexible billing: annual upfront or annual term with monthly payments
- Eligibility: Microsoft 365 customers with qualified [pre-req SKUs](#)

Available to all markets December 1, 2025 - March 31, 2026

Secure your business & unlock AI-powered productivity

Transform your business with **Microsoft 365 Business Standard and Copilot Business** and save 35%!
All Microsoft 365 desktop apps and cloud services, now with built-in AI.

NEW!

35% off

Microsoft 365 Business Standard and Copilot Business

Get more value with AI

- **Create faster.** Use Copilot to write, rewrite, summarize, and build content across Word, Excel, PowerPoint, Outlook, and Teams—on desktop, web, and mobile.
- **Keep work flowing.** The Copilot app unifies chat, search, apps, and agents so teams can find, create, and act from one place.
- **Stay secure everywhere.** Copilot uses Microsoft 365's built-in protections like encryption and multi-factor sign-in to keep your data safe online and in-app.

Details:

- Available worldwide to CSP customers
- Flexible billing: annual upfront or annual term with monthly payments
- Eligibility: Microsoft 365 customers with qualified [pre-req SKUs](#)

Available to all markets December 1, 2025 - March 31, 2026

To-Customer M365 Standard + Copilot Business

To-Customer M365 Premium + Copilot Business & Purview

AI Productivity + Advanced Security. One Smart Bundle.

Get more value with one, simplified solution
Save time and money by bringing together your productivity apps, AI and advanced security in one bundle. No need to manage separate tools.

Run your business with confidence
Don't compromise when it comes to your data. Get AI and security tools that understand your business and are deeply integrated with your existing Microsoft 365 apps and services.

Built-in security you can trust
Take the guesswork out of security. Advanced protection included to keep your business data and devices safe. Extended with optional security add-ons for even more peace of mind.

Make the smart & secure decision.
Upgrade for an unbeatable price.

Partner Promotion Price
\$32 per user / month

Microsoft 365 Business bundle offer

Included with Microsoft 365 Copilot Business

- AI-Powered Chat
- Personal Assistant
- Pre-Built Agents
- Advanced Management

Included with Microsoft 365 Business Premium

- Identity & Access Controls
- Device Management
- Device Security
- Email & App Security
- Data Security

Simplified compliance and data governance

Microsoft 365 Business Premium + Copilot + Purview Suite at 50% off!
AI-powered productivity and advanced security in one comprehensive solution.

NEW!

50% off

Purview Suite for Business Premium

Get best in class security

- **Discovery & Audit:** Empowers legal and compliance teams with integrated tools and deep visibility to extensive investigations, enforce legal holds, and maintain regulatory readiness.
- **Insider Risk Management:** Helps detect and mitigate internal threats with privacy-respecting behavioral analytics and granular communication controls.
- **Information Protection & Governance:** Enables organizations to classify, protect, and manage sensitive data across its lifecycle, ensuring secure collaboration and compliance at scale.

Details:

- Available worldwide to CSP customers
- Flexible billing: annual upfront or annual term with monthly payments
- Customer Eligibility: Microsoft 365 Business Premium and M365 Copilot Business or M365 Copilot
- View the customer pitch deck for [Purview Suite for Business Premium](#)

Available to all markets December 1, 2025 - March 31, 2026

Strengthen security and supercharge productivity

Transform your business with **Microsoft 365 Business Premium and Copilot Business** and save 25%!
AI-powered productivity and advanced security in one comprehensive solution.

NEW!

25% off

Microsoft 365 Business Premium and Copilot Business

Get more value with AI

- **Stronger safeguards.** Pair Copilot with Business Premium's advanced security and device management so sensitive work stays protected.
- **Automate busywork.** Let Copilot recap meetings, draft responses, and transform files into usable outputs, so your team can focus on customers.
- **One platform, fewer vendors.** Consolidate tools, reduce toggling, and get built-in security to minimize your administrative load.

Details:

- Available worldwide to CSP customers
- Flexible billing: annual upfront or annual term with monthly payments
- Eligibility: Microsoft 365 customers with qualified [pre-req SKUs](#)

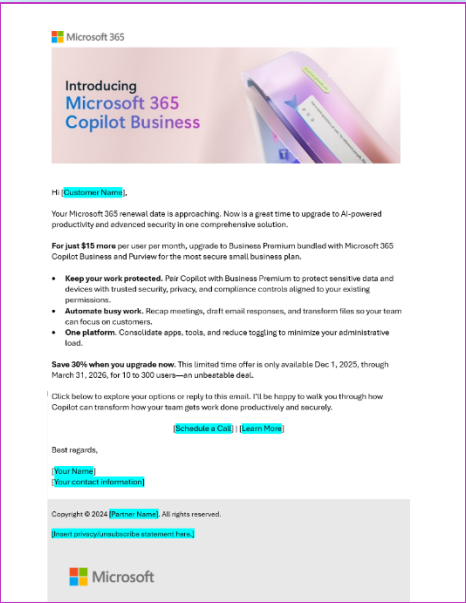
Available to all markets December 1, 2025 - March 31, 2026

Email: To-Customer

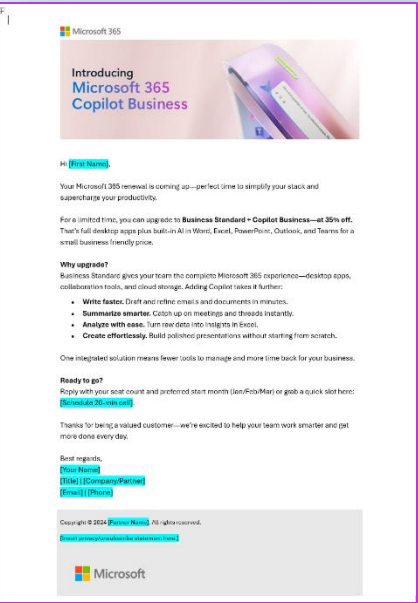
Customize these email templates to announce and promote your offer to customers.

Asset Details	
Size	n/a
Notes	n/a
Design Options	2 variants
Editable File Type	OFT (Outlook File Template)
File Name	To Customer_Premium To Customer_Standard

To-Customer Premium



To-Customer Standard



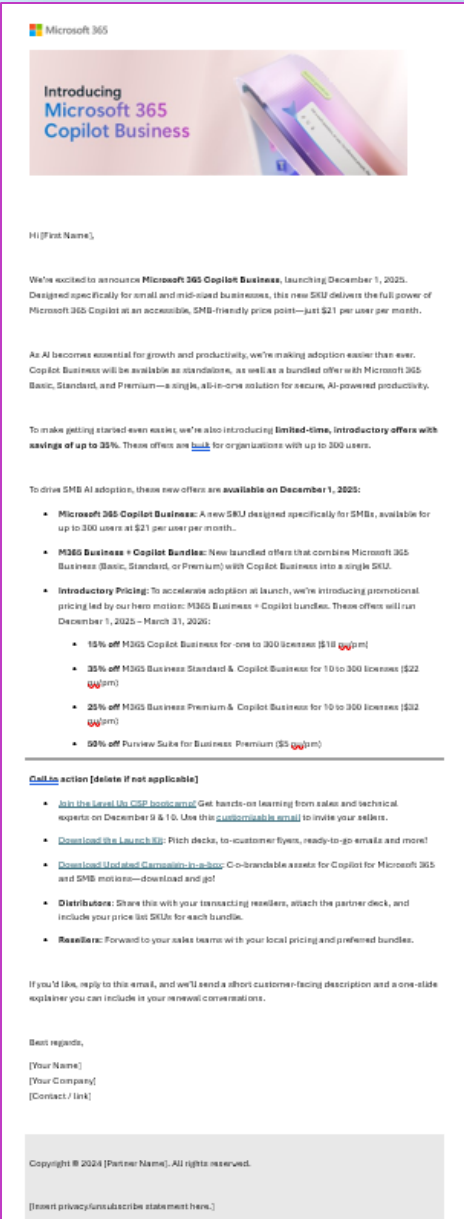
Reminder: Once you have the OFT open for editing, update the highlighted text with the appropriate information. Remove the yellow highlight.

Note – If you are using the new Outlook, you need to update the font to Segoe Sans Display or Segoe UI for all copy. Make sure all the originally bolded text is still bolded after the update.

Email: Partner enablement

Customize these email templates to announce the product news and offers to your sales teams.

Asset Details	
Size	n/a
Notes	n/a
Design Options	1 variant
Editable File Type	OFT (Outlook File Template)
File Name	To Partner_Reseller



Reminder: Once you have the OFT open for editing, update the highlighted text with the appropriate information. Remove the yellow highlight.

Note – If you are using the new Outlook, you need to update the font to Segoe Sans Display or Segoe UI for all copy. Make sure all the originally bolded text is still bolded after the update.

Offer one-pager: announcement

Customize this one-pager template to provide promo details to your customers, along with showcasing the value of Copilot

Asset Details	
Size	8.5x11 page
Notes	n/a
Design Options	2 options
Editable File Type	PowerPoint
File Name	To Customer Flyer_M365 Bus Premium Security Bundle
	To Customer Flyer_M365 Business Standard

To-Customer M365 Business Premium Security Bundle

Insert Partner Logo Here

AI Productivity + Advanced Security.

One smart bundle.

The most secure AI solution for your business.

Take the guesswork out with built-in security you can trust. Advanced protection included to keep your business data and devices safe. Extend with optional security add-ons for even more peace of mind.

Best-in-class productivity



+ more

Microsoft 365 Business Premium

AI built for work



+ more

Microsoft 365 Copilot Business

Enterprise-grade security



+ more

Microsoft Purview Suite for Business Premium

Limited time offers!

The most secure AI solution for only \$15 more per user/month

Secure AI productivity for only \$10 more per user/month

Advanced security add-on for only \$5 more per user/month

M365 Business Premium + Copilot Business

M365 Business Premium + Copilot Business

M365 Business Premium + Copilot Business

Purchase requirements: Qualified purchase of 10 to 300 licenses required during the promotion period of December 1, 2025 – March 31, 2026.

Ready to get started?

Contact the <Partner Name> team.

user.name@company.com

company.com

linkedin.com/username

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MICROSOFT NAMES AND LOGOS ARE TRADEMARKS OF MICROSOFT CORPORATION.

Microsoft

To-Customer M365 Business Standard

Insert Partner Logo Here

Your plan just got smarter with Copilot.

AI built for work.

Get more value with one, simplified solution.

All Microsoft 365 desktop apps and cloud services, now with built-in AI. Save time and money by bringing together your productivity apps, AI and advanced security in one bundle. No need to manage separate tools.

Best-in-class productivity



+ more

Microsoft 365 Business Plan (Basic, Standard, Premium)

AI built for work



+ more

Microsoft 365 Copilot Business

Limited time offer!

Your all-in-one AI solution for only \$10 more per user/month

Microsoft 365 Business Premium + Copilot Business

Purchase requirements: Qualified purchase of 10 to 300 licenses required during the promotion period of December 1, 2025 – March 31, 2026.

Ready to get started?

Contact the <Partner Name> team.

user.name@company.com

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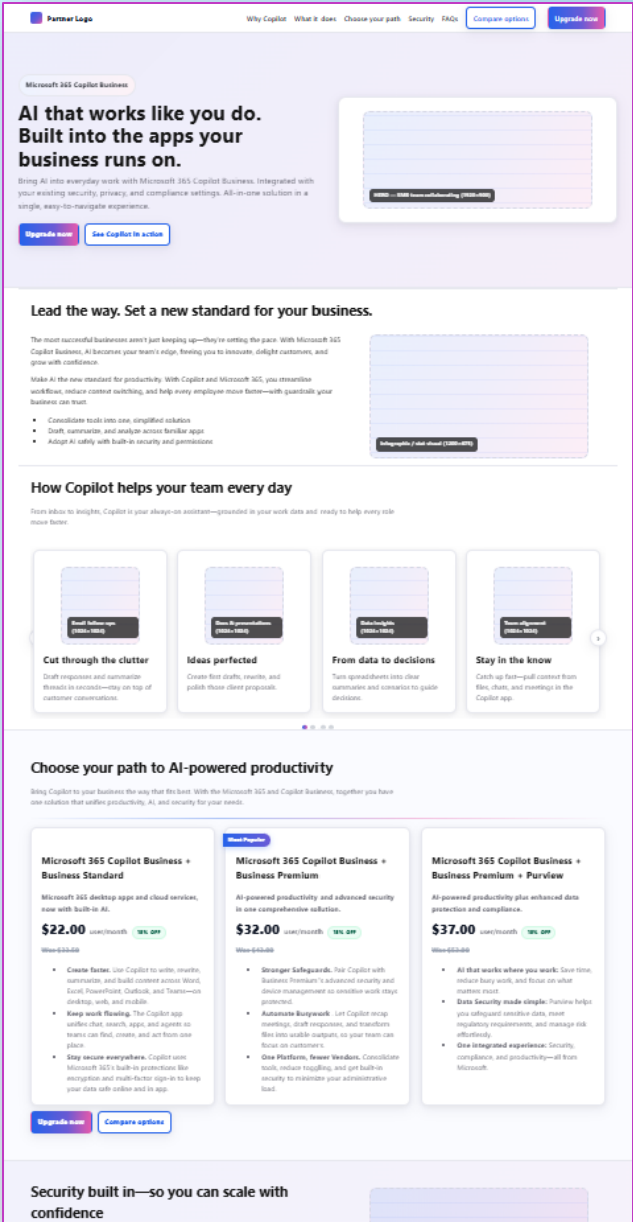
Microsoft

Navigation icons: Home, Previous, Next

Website template

Leverage for your corporate webpages. Spread the word on your offer.

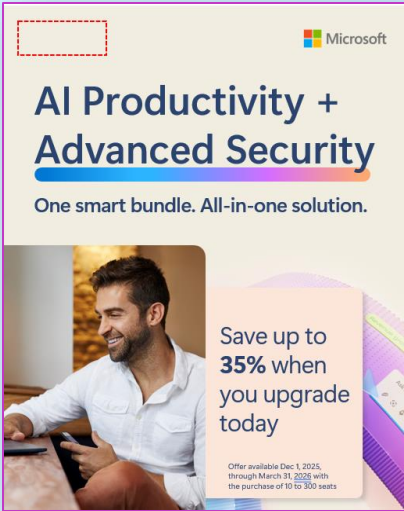
Asset Details	
Notes	n/a
Design options	Customizable
Editable file type	Html
File name	CopilotBusiness_Website



Digital banner

Place banners in newsletters, social posts, or corporate media and webpages. Spread the word on your offer.

Asset Details	
Notes	n/a
Design options	4 ad options, horizontal and vertical
Editable file type	PowerPoint
File name	M365 Copilot Business_Social Ad



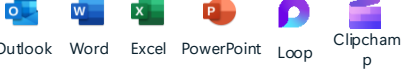
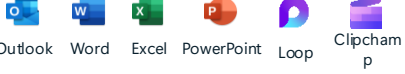
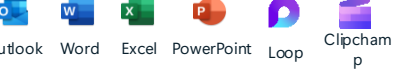
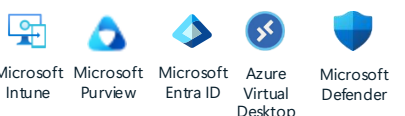
Microsoft 365 Copilot feature comparison

● =Included ▲ =Included- Metered

		Microsoft 365 Copilot Chat	Microsoft 365 Copilot Business ⁵ \$21/ user/ month	Microsoft 365 Copilot \$30/user/month
Licensing	Seats	All users	Up to 300 users	All users
	Pre-requisite	O/E/B/F SKUs	B-SKUs	O/E/B/F SKUs
Chat	Copilot Chat – Web grounded (powered by GPT 4o)	●	●	●
	Copilot Chat – Work grounded (shared tenant Graph data, 3rd party data via graph connectors, personal data)		●	●
	Copilot Pages	●	●	●
	File upload ¹	●	●	●
	Code Interpreter ¹	●	●	●
	Image generation ¹	●	●	●
Agents ²	Create agents powered by Copilot Studio ³ , including SharePoint agents	●	●	●
	Discover and pin agents	●	●	●
	Use agents grounded on web data	●	●	●
	Use agents grounded in work data (work data in your tenant’s Microsoft Graph and 3 rd party data via graph connectors)	▲	●	●
	Use agents that act independently and autonomous actions	▲	▲	▲
Personal assistant	Copilot reasons over personal work data (i.e. Outlook, OneDrive, meeting transcripts)		●	●
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		●	●
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)		●	●
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		●	●
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		●	●
	Copilot in PowerPoint (Narrative Builder, presentation translation, generate company branded slides or images)		●	●
	Copilot Actions		In preview	In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview	In preview
Copilot Control System	Enterprise Data Protection (EDP)	●	●	●
	IT management controls	●	●	●
	Agent management	●	●	●
	SharePoint Advanced Management		●	●
	Copilot Analytics to measure usage and adoption ⁴		●	●
	Pre-built reports and advanced analytics to measure ROI		●	●

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio [here](#). 4. Basic reporting in Microsoft Admin Center available for Copilot Chat. 5. Microsoft 365 Copilot for Business includes a fixed set of capabilities. Microsoft 365 Copilot for Enterprise may expand to include additional features over time.

Microsoft 365 Copilot Business offer line up

Add-on	Bundle	Bundle	Bundle	Bundle + Add-on
Microsoft 365 Copilot Business Supercharge employee productivity and streamline business processes with an AI built for work. AI-enabled Cloud services  Built for work ➤ Advanced skills and in-app editing ➤ Comprehensive agent access ➤ Advanced Mgmt. & Analytics	M365 Business Basic + Copilot Business Essential web-based productivity tools and AI in one simple bundle AI-enabled Cloud services  Teams Exchange OneDrive SharePoint Bookings AI-enabled web apps  Outlook Word Excel PowerPoint Foundational security ➤ Identity & access control ➤ Exchange Online Protection ➤ Mobile device management	M365 Business Standard + Copilot Business All Microsoft 365 desktop apps and cloud services, now with built-in AI. AI-enabled Cloud services  Teams Exchange OneDrive SharePoint Bookings AI-enabled Desktop and web apps  Outlook Word Excel PowerPoint Loop Clipchamp Foundational security ➤ Identity & access control ➤ Exchange Online Protection ➤ Mobile device management	M365 Business Premium + Copilot Business AI-powered productivity and advanced security in one comprehensive solution. AI-enabled Cloud services  Teams Exchange OneDrive SharePoint Bookings AI-enabled Desktop and web apps  Outlook Word Excel PowerPoint Loop Clipchamp Comprehensive security  Microsoft Intune Microsoft Entra ID Microsoft Defender	M365 Business Premium + Copilot Business or Microsoft 365 Copilot Business & Purview Suite Business Premium* The most secure AI tools for your business AI-enabled Cloud services  Teams Exchange OneDrive SharePoint Bookings AI-enabled Desktop and web apps  Outlook Word Excel PowerPoint Loop Clipchamp Advanced security  Microsoft Intune Microsoft Purview Microsoft Entra ID Azure Virtual Desktop Microsoft Defender
\$18 per user/month	\$27 per user/month	\$22 per user/month	\$32 per user/month	\$37 per user/month
Limited time promo pricing		Limited time promo pricing	Limited time promo pricing	Limited time promo pricing

*Purview Suite for Business Premium can only be added to customers that have purchase Business Premium and Copilot Business Or Microsoft 365 Copilot Business

**Purview Suite for Business Premium is only DLP for emails and files, Intune Plan 1, Entra ID Plan 1.

Learn more about billing options [here](#)

Note: Not all features/product logos shown. Price is subject to change based on subscription term, currency and region.

Mid-Term Upgrades: Flexible, Fast, and Cost-Effective

Upgrading to Copilot Business mid-term gives partners a powerful way to help customers adopt AI without waiting for renewal. The most strategic option is a **full mid-term upgrade for all seats**, which transitions the entire subscription to include Copilot immediately. This approach simplifies management, ensures consistency across the organization, and unlocks promotional discounts during the upgrade window. By leading with this scenario, partners can position Copilot as an urgent productivity and security enhancement rather than a future consideration.

The alternative is a partial mid-term upgrade, where only select seats are upgraded. While this can address specific departmental needs, these seats must align with the existing subscription expiration date, creating a “snap-to” requirement.

This limits flexibility and can complicate license management compared to a full upgrade. Partners should clearly communicate this trade-off, so customers understand the operational and cost implications.

Ultimately, full mid-term upgrades offer the greatest flexibility because they allow customers to add additional licenses throughout the subscription term at promotional pricing. This eliminates staggered expirations and makes scaling Copilot adoption easier as business needs evolve. By emphasizing unified licensing, simplified management, and cost savings, partners can frame mid-term upgrades as a proactive investment that accelerates AI adoption and delivers immediate value.



Flexible billing options through annual/monthly

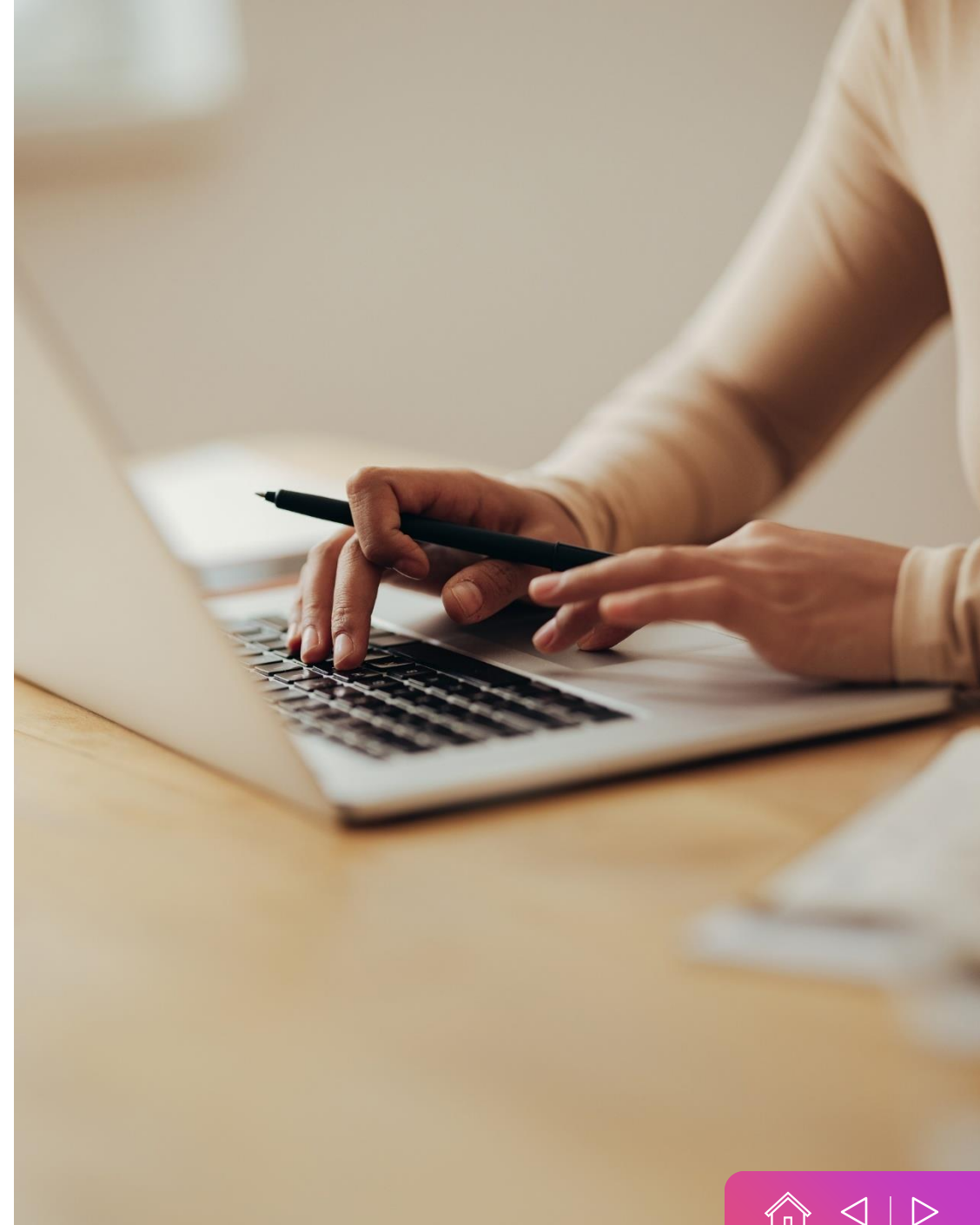
Microsoft 365 Copilot offers two subscription options: an annual commitment paid yearly, or an annual commitment paid monthly. The yearly payment option allows customers to purchase and pay for the entire subscription term upfront.

Alternatively, the annual commitment paid monthly option provides flexibility designed to provide customers with the benefits of an annual subscription while easing their cash flow. Instead of paying the entire annual subscription upfront, customers can spread the

cost over 12 monthly payments. This approach allows businesses to manage their budgets more effectively and invest in additional licenses or services as needed.

Customers who choose this plan will pay a slightly higher rate—5% more than the annual upfront payment option—but will benefit from the convenience of monthly payments. This flexibility is particularly advantageous for businesses looking to scale their use of Copilot without a significant initial investment.

[→ Learn more about Annual/Monthly Billing](#)



Sample messaging

Focus on developing a narrative that best describes the savings and value making the move to Copilot can deliver through one of the Microsoft 365 and Copilot Business bundle offers.

Key customer challenges

Small business customers are more price sensitive, and are hesitant to commit to something they don't know how to make the most of

With limited resources, and need to do more with less

Concerns about how to get started, and want a simple approach to starting their AI transformation without all the hassle

Suggested short messages

For customers less familiar with Copilot:

- Discover what's possible with AI
- Maximize your team with AI
- Unlock AI productivity now
- Boost your productivity with Copilot – now for only \$10 per user/month!

For customers familiar with Copilot:

- Renew into savings with Copilot Business
- Your plan just got smarter with Copilot
- Your AI advantage – built into Microsoft 365

Key messages

Copilot Business bundles provide a single solution, that works across your business and is included with your Microsoft 365 Business plan.

Now with even more bundle savings, enjoy enterprise-grade security at small business pricing. Add 10+ users for only \$10 per user/month for a limited time.

Protect your business while scaling. Copilot is built with Microsoft's trusted security and privacy tools, giving you peace of mind and allowing you to get started quickly and securely.

Sample Copilot pitch copy block

Most AI tools don't understand your business. Copilot does. It's built to work with your team's files, chats, and emails to help you get real work done. Copilot automates tasks, supports your team, and helps you make decisions and run your business more efficiently.

Find time to be more creative with a Copilot that works alongside you, embedded in the Microsoft 365 apps millions of people use daily, including Microsoft Teams, Word, Excel, PowerPoint, Outlook, Loop, and more.

AI Business Solutions – M365 Business SKU + M365 Copilot Business

Customer Outcome

Enable customers to safely run their businesses from anywhere with a secure, comprehensive, AI-powered cloud solution in a hybrid work scenario, while providing comprehensive AI led business transformation benefits to Customers through Partner led solutions and services.

Partner Outcome

Drive upsell from M365 BB/BS/BP to M365 B SKU + M365 Copilot Business bundle offer. Drive Wall-To-Wall Copilot coverage by attaching Copilot Chat to bundles

Differentiated Partners Capabilities

Execute campaigns to help generate leads – New customer acquisition, upsell, and Copilot attach	Help build customer intent; Message – Get Copilot ready, vendor consolidation, security concerns	Leverage CSP offers to upsell and acquire customers	Deliver end user Copilot adoption & change management to help drive Wall-To-Wall Copilot coverage
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Win Formula aligning to MCEM

1 Listen & consult

Build Pipeline
Target customers and execute campaigns to generate demand.
Position Wall-to-Wall Copilot coverage for all users.

- Campaign-in-a-box
- Cloud Ascent
- APSX - ABS & Security Insights
- Partner Coop Funds
- Partner MDF

2 Inspire & design

Deliver

- Build intent by delivering immersive customer experiences.

- Immersion Briefings
- Copilot Masterclass
- Multi-customer Briefing

3 Empower & achieve

Win Deal

- Leverage time-bound CSP Promotions.
- Navigate customers to use Security for AI Assessment to identify security gaps.

- CSP Promotions
- CSP Incentives
- SMB Secure AI Productivity Assessment

4 Realize value

Deploy/Drive Adoption
Address data security and privacy while driving end user enablement.

5 Manage & optimize

Drive Expansion
Build business case for expansion to include Copilot Chat and Microsoft Security and Compliance mini-bundles.

- ASPX – ABS & Security Usage and Insights

Microsoft 365 Copilot Business Promotional offers

Introductory promotional pricing available for new offers from December 1, 2025, through March 31, 2026.
Microsoft 365 Business + Copilot bundle offers require a minimum purchase of 10 seats to qualify for promotional pricing

	Microsoft 365 Copilot Business	Business Basic and Copilot Business	Business Standard and Copilot Business	Business Premium and Copilot Business	Purview Suite for Business Premium*
ERP (per user/month)	\$21	\$27 (\$6 + \$21)	\$33.50 (\$12.50 + \$21)	\$43 (\$22 + \$21)	\$10
Promo price	\$18 (~15% off)	N/A	\$22 (~35% off)	\$32 (~25% off)	\$5 (~30% off)
Promo Seats (min/max)	1 to 300	N/A	10 to 300	10 to 300	10 to 300
Promo term	December 1, 2025 – March 31, 2026	N/A	December 1, 2025 – March 31, 2026		

*Purview Suite for Business Premium can only be added to customers that have purchase Business Premium and Copilot Business Or Microsoft 365 Copilot Business

Note: Not all features/product logos shown. Price is subject to change based on subscription term, currency and region.

RESOURCES

Partner resources

Copilot Practice Development & GTM
[Copilot CSP Landing Page](#)

Copilot & agents CSP Briefings
[Copilot Briefings Kit](#)

M365 Lighthouse (Copilot Insights)
[Lighthouse for Partners](#)

Level Up CSP (Digital & In-Person)
[Level Up CSP Bootcamps](#)
[Level Up CSP agents hands on labs](#)

Copilot Wave 2: Spring Release
[Read the Apr. 23 blog](#)

Copilot Getting Started Offer Landing Kit
[Copilot Getting Started Landing Page](#)

Copilot Partner Services Blueprint
[Download the Blueprint](#)

M365 Copilot 15% Promo FAQ
[To-Partner FAQ](#)

Agents CSP Deck
[Accelerate your CSP business with agents](#)

Agent simulated demos
[Download demos here](#)

UPDATED! Copilot QuickStart Training
[QuickStart Training Registration Page](#)

Copilot Success Kit
[Download the Copilot Success Kit](#)

Copilot Scenario Library
[See the latest scenarios](#)

Global Promo Readiness Guide
[See the latest Promo Guide](#)

Thank you

