

Copilot in 30

Partner Playbook

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

Land
with the right customers

Prove
value in 30 days

Convert
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

Microsoft 365 Copilot Business trial

Available Now

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

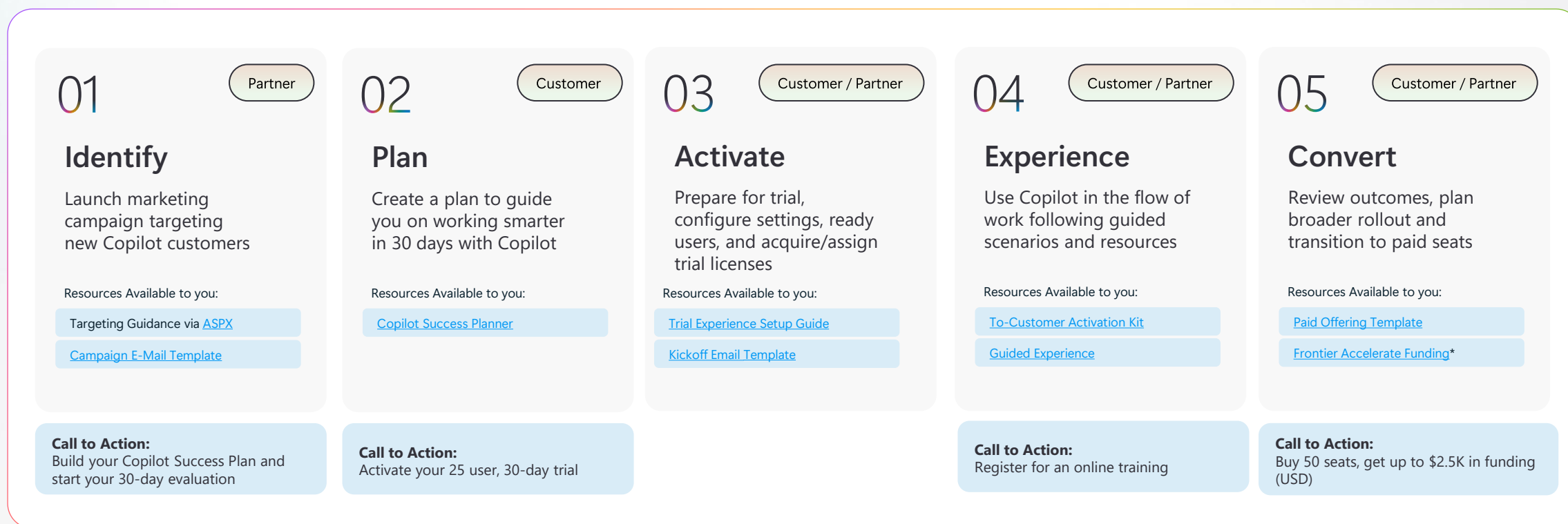
Best Practice

- 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.

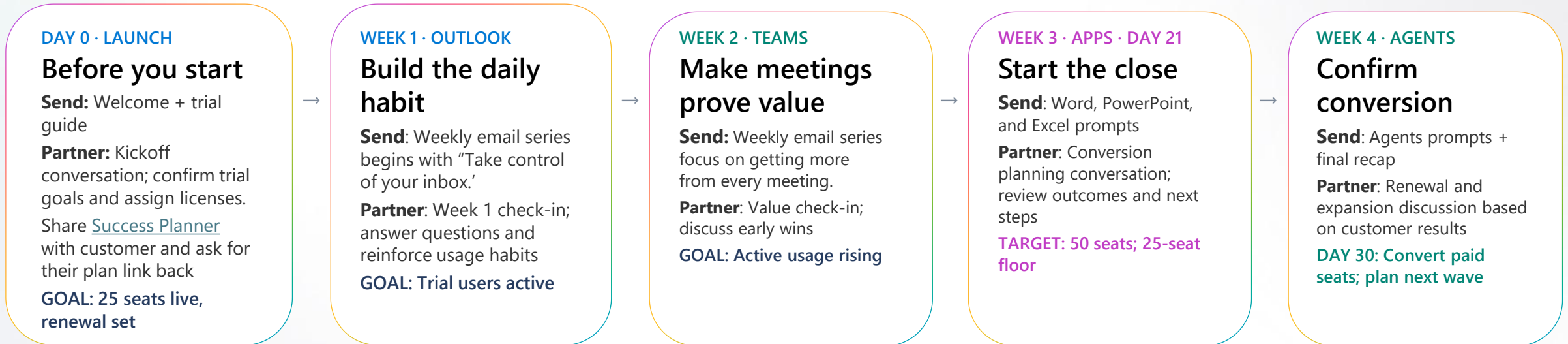
- **Partner value add:** Generate interest, enable success with light-weight training and convert successful evaluations
- **Customer responsibilities:** Plan their evaluation, prepare and configure the environment, prove value through guided experience



[Partner Name] Copilot in 30 Execution Plan

The customer journey is self-guided. Recommended partner check-ins help answer questions, reinforce adoption, and prepare for conversion.

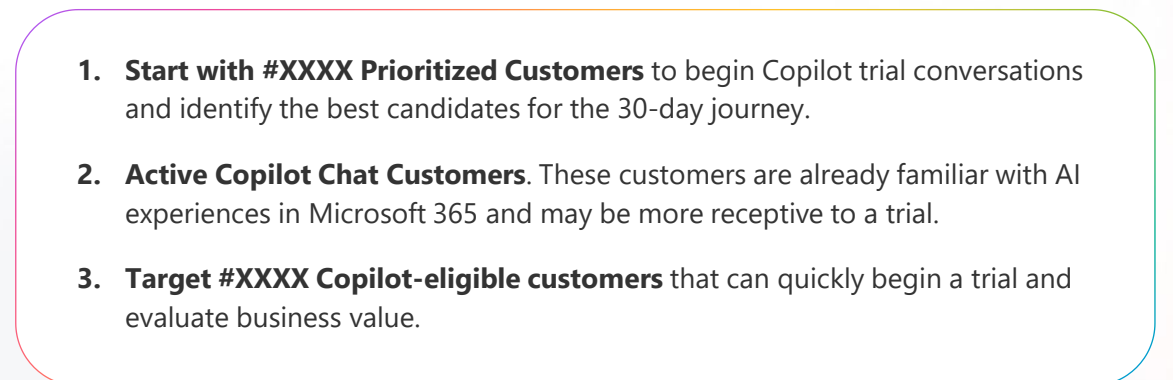
AUTOMATED EMAILS + PARTNER CUSTOMER TOUCHPOINTS



PARTNER'S TARGET BASE · PULL THESE FROM ASPX



YOUR OUTREACH PRIORITIES



Developing your target list of customers

Acquire the right customers from the start to drive higher trial success, stronger conversion, and sustainable Copilot growth.

Customer Targeting Criteria in ASPX (Available now):

- ✓ 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)

Coming in September: one filterable column combining the targeting logic above with post-trial lifecycle states, plus a CSP trial days remaining column.

ASPX filters – start in upper right corner

Change columns Filter Search for Reseller Name, Partner Name

MCI Eligibility	CPOR Eligibility	Potential Earnings	CSP Tier	CPOR Association	CSP Association	T2 Reseller ID	T. R. N
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Dominant SKU Group

Search dominant SKU groups

- ☐ BB
- ☐ BB, BS
- ☒ BP
- ☒ BS

Tenant Country/Region

Search for Tenant Country/Region

- ☐ U.S. Outlying Islands
- ☐ United Kingdom
- ☒ United States

Free-Paid Signals

- ☐ Experiencing Usage Limits
- ☐ Have License Request
- ☐ Penetrated with Free Chat

Tenant Segment

- ☐ Enterprise
- ☐ SME&C Corporate
- ☒ SME&C SMB

Targeting data in Cloud Ascent (Available by 8/31)

- ✓ Identify customers with the highest Copilot opportunity
- ✓ Prioritize accounts using Microsoft 365 but not Copilot
- ✓ Leverage usage, adoption, and growth signals
- ✓ Rank customers based on purchase propensity and expansion potential

New! Copilot Success Planner – available 8/18

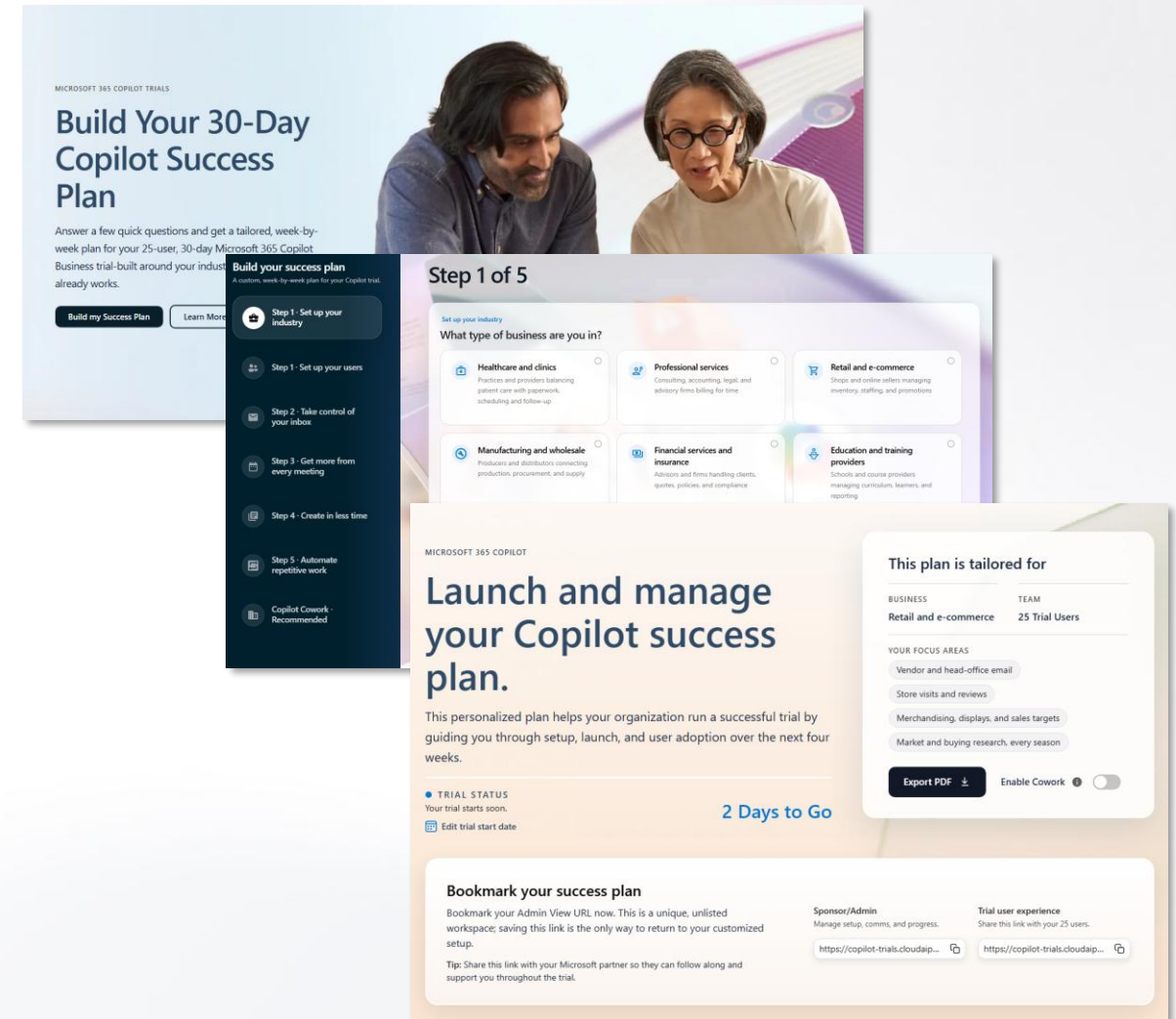
The **Copilot Success Planner** helps customers identify where Copilot can deliver the greatest impact and creates a personalized 30-day adoption plan to accelerate value realization during their trial period.

Through a simple guided experience, customers answer a few questions about their role, business priorities, and how they work today. The Success Planner then generates a tailored 30-day plan with relevant scenarios, prompts, activities, and resources designed to drive adoption, build confidence, and improve trial conversion outcomes.

PARTNER RECOMMENDATION

- **Start with Planning** - Position the Copilot Success Planner as step 1 for every customer to ensure they have a plan in place to make the most of their 30-day trial.
- **Plan together or let them self-serve** - Walk the customer through the wizard or let them complete it on their own.
- **Remind your customer to share the results** - use their personalized plan to focus check-ins, reinforce high-value scenarios, and keep the trial on track toward meaningful outcomes.

adoption.microsoft.com/copilot/success-planner



Build a Copilot in 30 Campaign

Copilot in 30 provides partners with a structured, repeatable framework to help customers experience value with Microsoft 365 Copilot in just 30 days. Help your customers get started with confidence so they get the most value out of their trial.

Launch and onboard customers

Set every trial up for success with the [Success Planner](#) tool, customer-facing Work Smarter in 30 deck, and admin guide. Share the Success Planner during kickoff so each customer receives a personalized 30-day adoption plan based on their role, goals, and daily work.

Drive adoption and engagement

Use scheduled check-ins to review progress, answer questions, and help customers apply Copilot to real business challenges.

Help customers realize value

Encourage customers to share outcomes, successes, and lessons learned throughout the trial. Use insights from the Success Planner and customer feedback to reinforce impactful use cases, demonstrate business value, and prepare for a conversion discussion at the end of the trial.

YOU'RE INVITED: Work Smarter in 30

We're excited to share that your organization has been selected to take part in Work Smarter in 30, a guided 30-day Microsoft 365 Copilot Business trial. The goal is simple: Enable 25 of your users to experience the value of Copilot in 30 days.

START HERE: Your Copilot

The trial guide walks you through how to get your team set up, use Copilot, and explore the trial guide.

What to expect — four weeks, 1 month

- Week 1: Catch up & communicate
- Week 2: Meetings that run themselves
- Week 3: Create in minutes
- Week 4: Unlock the next level

Please let me know if you'd like a Business trial. Best regards, Partner name

Copyright © 2024 Partner Name. Insert privacy/subscribe statement

Work Smarter in 30 Week 2

WEEK 2: Meetings that run themselves

Copilot in Teams: Auto-recaps and action items — so you can actually be present. This week, let your meetings do the note-taking. Copilot in Teams recaps discussions, captures action items, and can even help you contribute in real time. **One prompt a day** — try them right inside your Teams meetings and chats.

Day 6

COPILOT PROMPT

Recap this meeting and list the key decisions and action items.

Use this in the meeting chat after a meeting.

Try it in Microsoft Teams

Day 7

COPILOT PROMPT

I joined late — what have I missed?

Copilot answers privately during a live meeting.

Try it in Microsoft Teams

Day 8

COPILOT PROMPT

What questions should I ask to move forward?

Use mid-meeting to sharpen the conversation.

Try it in Microsoft Teams

Day 9

COPILOT PROMPT

Draft a follow-up email from this meeting.

Turn the recap straight into action.

Try it in Microsoft Teams

Work Smarter in 30 Setup & Admin Guide

Everything your IT admin sets up before Day 1 to ensure the best Copilot experience.

Before you begin

Before enabling Microsoft 365 Copilot, establish a secure foundation. [Microsoft 365](#)

- Enable MFA for all users and configure Conditional Access policies to reduce the risk of unauthorized access.
- Review and remediate permissions for all SharePoint sites, OneDrive accounts, and Teams channels to ensure only authorized users have access.
- Implement access controls and labels to ensure Copilot only uses information users are authorized to see.

Enable Copilot (optional)

- Only for Copilot in Teams: Enable Copilot in Teams for all users. For a trial, leave the scope small, enable only the trial users, and set a starting date for trial users to access Copilot. Don't start too soon!
- For Copilot in Word, Excel, PowerPoint, and Outlook: Enable Copilot in all apps for all users.

Enable the best Copilot experience

On the Microsoft 365 admin center, confirm the following default settings.

Setting	When in Microsoft 365
Web search	On
File search	On
Recap in Teams	On
Teams in Teams	On
SharePoint in Teams	On
OneDrive in Teams	On
Outlook in Teams	On
Word in Teams	On
Excel in Teams	On
PowerPoint in Teams	On

Work Smarter in 30 Days

Enable your teams to work smarter and build AI habits with a 30-day Microsoft 365 Copilot Business trial.

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

25

Add to cart

Full description

Microsoft 365 Business Premium (no Teams)

By Microsoft Corporation - Trial, License

This product has: Additional Terms

25

Add to cart

Full description

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

M365 Copilot + Agents Guided Experience

A ready-to-use workshop that helps trial customers experience Copilot and agents in real business scenarios and build momentum during their 30-day trial

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.

Partner recommendation: Invite all trial customers to attend the Guided Experience as part of their Copilot in 30 kickoff. The session helps participants identify relevant use cases, experience Copilot in action, and establish adoption goals for their 30-day evaluation.

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>

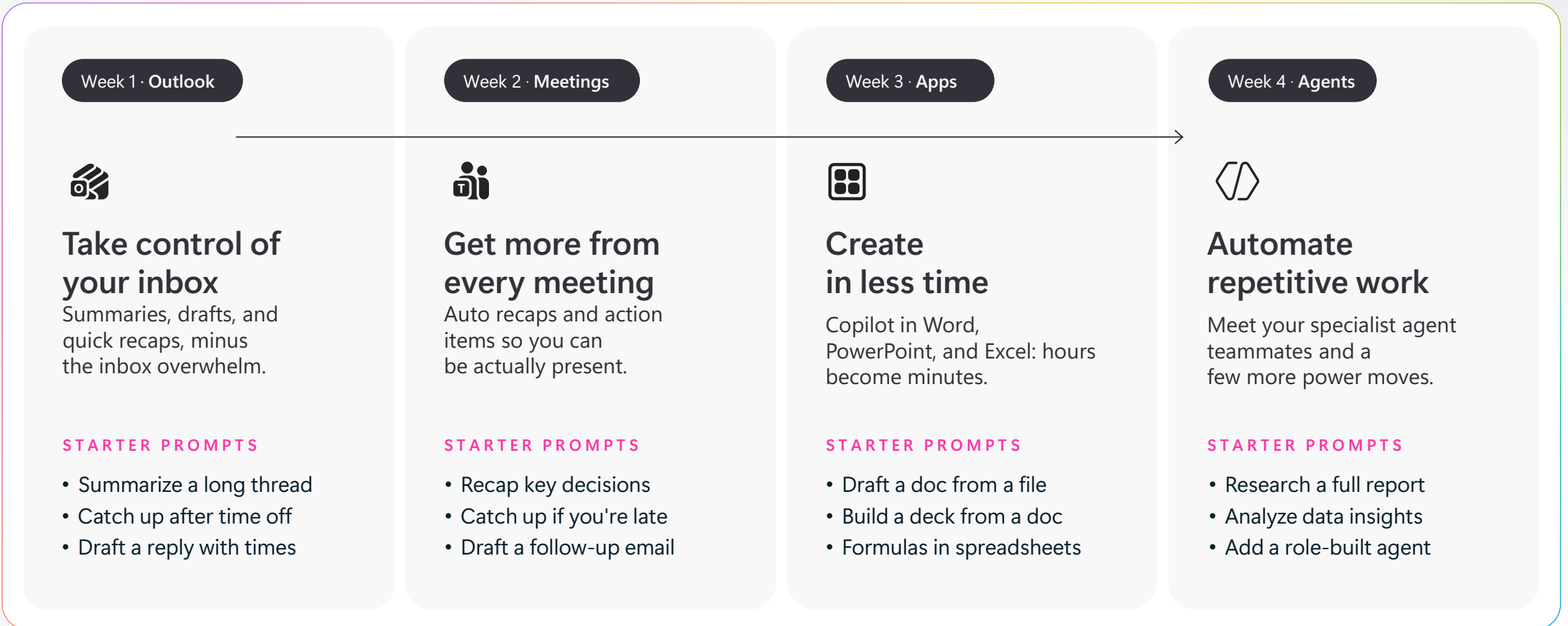
Before delivery: Confirm eligible Microsoft 365 Copilot Business licensing or trial access.



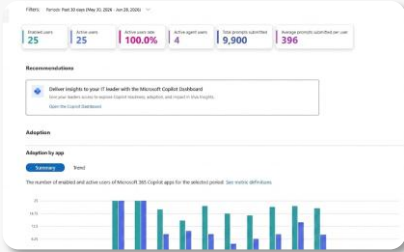
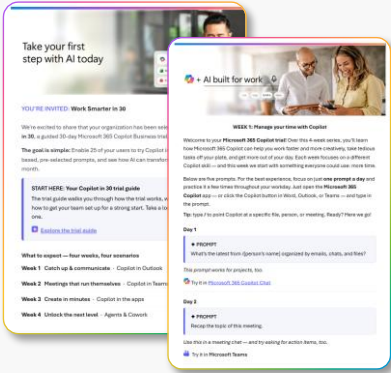
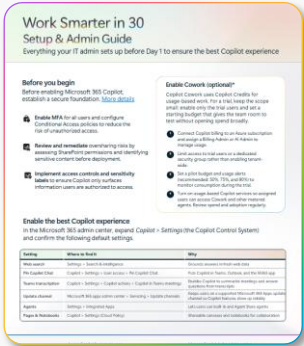
✓ Files summarized

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

Know how your trial is landing

A quick weekly check can show whether users are engaging, where they are finding value, and who may need a nudge. A single licensed user can verify usage and adoption in their admin center.



Readiness & adoption report

In the [Microsoft Admin Center](#), navigate to:

Reports > Usage > Microsoft 365 Copilot > Copilot

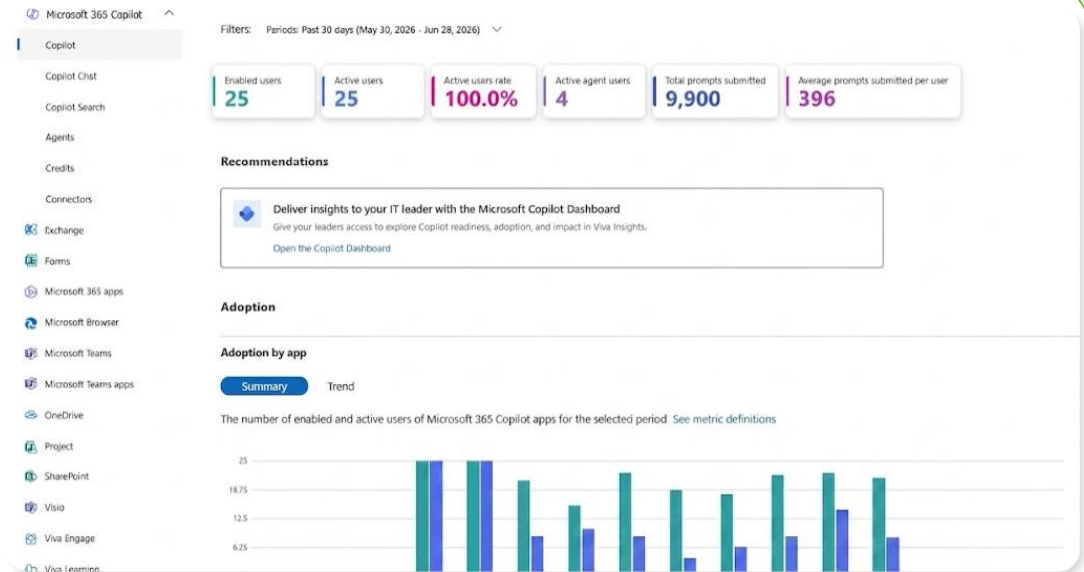
Review Indicators:

- **Active users** – Are licensed users engaging with Copilot?
- **Prompt volume** – Is usage growing week over week?
- **App adoption** – Are users finding value across the apps they work in?

Need deeper insights?

Open the Microsoft Copilot Dashboard in Viva Insights¹ to explore readiness, adoption, impact, and sentiment trends.

¹ Data processing starts with 1 assigned Copilot license. 50 or more Copilot or Viva Insights licenses unlocks agent insights, benchmarks, and group-level data.



Microsoft Admin Center - Microsoft 365 Copilot usage

What good looks like: Adoption is steady or increasing, prompt volume continues to grow, and usage expands beyond chat into everyday workflows.. Spot at-risk users early - anyone with no actions or unopened emails by midweek - and send a quick nudge. Usernames are hidden in usage reports by default. The customer's admin can turn this on in the admin center settings.



Watch [Tracking trials to paid](#) | [Microsoft Partner Skilling Hub](#)

Managing Trial Performance (Coming to ASPX in September, 2026)

- Get access to new insights to track your customers move through the trial lifecycle including activations, usage, and expirations



Trials activated

Number of 30-day trials started.



Activation rate

% of provisioned users actually using Copilot in week one.



Active usage

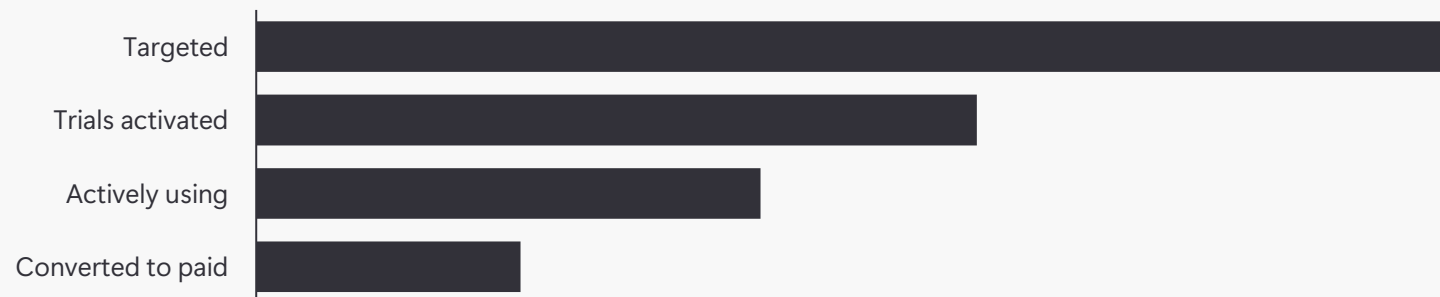
% of trial users active across the 30 days — the leading signal.



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.

Use trial signals to move from evaluation to conversion

From **September**, [ASPX](#) will show trial expiration, active usage, and conversion-ready signals. Until then, ask your customer to share their Copilot usage report from the [Microsoft 365 Admin Center](#).

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 Accelerate](#) 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 Accelerate 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.

*Requires Copilot Specialization, or Copilot Jumpstart at Ready tier or higher as of June 30, 2026. Amount varies by market. Strategic 500, EDU and non-profit customers are excluded from the smallest engagement sizes. See slide 20.

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.

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](#).

CSP Copilot Promotional Offering Lineup

- Choose the path that fits your needs: start with Microsoft 365 Copilot Business for simplicity or upgrade to a bundled offer to maximize savings and drive broader coverage
- Visit <https://aka.ms/CSPPromos> to learn more about each promotion and available resources

	M365 Copilot Business	Business Basic & Copilot Business	Business Standard with Copilot	Business Premium with Copilot
ERP	\$21	\$28	\$23.5	\$32
Promo ERP	\$18 (~15% off)	\$21 (25% off)	N/A	N/A
Net Partner Price	\$14.4 (~15% off)	\$16.8 (25% off)	\$18.8	\$25.6
Promo Seats Minimum	Up to 300	Up to 300	N/A	N/A
Promo Term	Dec 1, 2025 – Dec 31, 2026			

All pricing is per user per month on annual/annual pricing

¹15% and 30% M365 Copilot 1-year promotions are SMB and Corporate only and customer segmentation can be validated by partners via [ASPX](#).

M365 Copilot Deployment Accelerator

Engagement summary: The Frontier Accelerate for Copilot: M365 Copilot Deployment Accelerator is designed for partners to deliver post-sales activities that progress deployment and adoption of Microsoft 365 Copilot and Microsoft 365 Copilot Business. Examples include: technical deployment of Microsoft 365 Copilot, implementing security, governance policies and controls, training users, and driving adoption and change management initiatives. This engagement can be used by partners to drive increased incremental usage of Microsoft 365 Copilot and incremental purchase of Microsoft 365 Copilot.

Investment term: July 1, 2026 – June 30, 2027, or until program cap is reached.

M365 Copilot Deployment Accelerator

Partner eligibility:

- Copilot Specialization OR
- Copilot Jumpstart (FY27: Copilot & Agents Partner Community) – Ready or Higher Tier: Partners in Ready or Prioritized tier as of June 30, 2026, remain eligible through December 31, 2026.
- Effective January 1, 2027, Copilot specialization is required for partner eligibility.

Customer eligibility & activity pay-out

Size	Customer eligibility	Min. Hours	Payment: Market A	Payment: Market B	Payment: Market C	Performance
						M365 Copilot MAU
XXS	50+ ¹	10	\$2,500	\$1,875	\$1,250	50 users
XS	300+ ¹	20	\$5,000	\$3,750	\$2,500	300 users
S	500+ ¹	40	\$10,000	\$7,500	\$5,000	500 users
M	1.5K+ ¹	100	\$25,000	\$18,750	\$12,500	1.5K users
L	3K+ ¹	200	\$50,000	\$37,500	\$25,000	3K users

The following limits are in effect:

Strategic 500 customers are ineligible for Frontier Accelerate for Copilot: M365 Copilot Deployment Accelerator engagements.

EDU and non-profit customers are ineligible for the XXS and XS size Frontier Accelerate for Copilot: M365 Copilot Deployment Accelerator engagements.

The maximum approved claims per customer tenant are capped at four (4).

The maximum concurrent claims per customer tenant are capped at one (1).

* Additional terms apply, see [Microsoft Partner Commercial Incentives Guide](#) for complete details and full market rates.

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](#)

Get up to speed with partner microskilling

These 2-5 minute microskilling modules cover the key elements of Copilot in 30, from identifying the right customers and running successful trials to tracking adoption and converting evaluations into paid deployments.



▶ Microskilling

MICROSKILLING

Tracking trials to paid

Short-form skilling opportunity for sellers.

Once your customers are into their 30 days, keep your eye on the funnel and watch the drop-off at each stage.

⌚ 2 min

[View details](#)



▶ Microskilling

MICROSKILLING

The trial experience in 30 days

Short-form skilling opportunity for sellers.

Once you've identified your customers, it's time to get them set up. Inside Partner Center. We will dive into how you can convert them into a customer.

⌚ 2 min

[View details](#)



▶ Microskilling

MICROSKILLING

Find your best customers with ASPX and Cloud Ascent

Short-form skilling opportunity for sellers.

Learn how to identify the right Microsoft 365 customers for a successful Copilot trial using ASPX, prioritize high-potential accounts based on eligibility and intent signal...

⌚ 2 min

[View details](#)



▶ Microskilling

MICROSKILLING

Customer Experience at 30 Days

Short-form skilling opportunity for sellers.

Discover how Copilot in 30 helps partners guide SMB customers from AI curiosity to confident adoption through a structured 30-day, 25-seat Microsoft 365...

⌚ 3 min

[View details](#)

aka.ms/MicroSkilllingCopilotTrial

Engage and level up with partner skilling

Microsoft Partner Skilling Hub provides free, comprehensive skilling and development to make the Frontier Firm possible.



Certification Ready

Drive Designation and Specialization growth.



Tech Deal Ready

Influence sales solution scope and usage through.



Sales Ready

Demonstrating and landing Solution Play value.



Project Ready

Build technical deep delivery capability.



Build relevant and critical skills faster

Explore hundreds of role-based training opportunities in the Partner Skilling Hub, with in-person and on-demand options to build skills across industries and technologies.

[Explore the Partner Skilling Hub](#)

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](#)

MICROSOFT 365 COPILOT BUSINESS

[Copilot and Agent Resources](#)

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

[Copilot Cowork](#)

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.