

# USE CASE PERSONA CARDS



# PARTNER PERSONAS

Sales  
THE RELATIONSHIP  
BUILDER



Finance  
THE NUMBER  
CRUNCHER



IT & Service Desk  
THE PROBLEM  
SOLVER



Marketing  
THE CAMPAIGN  
STRATEGIST



Public Sector  
THE CASE  
HANDLER



Professional Services  
THE TRUSTED  
ADVISOR



Sales

# THE RELATIONSHIP BUILDER

## Pain points

- Spending too much time on admin instead of selling
- Searching for customer information across emails and meetings
- Preparing follow-ups and summaries manually

## Copilot value

- Summarises meetings and key actions in Teams
- Drafts customer emails and follow-ups faster
- Surfaces customer insights across Microsoft 365 workflows

## Key benefits

- Helps sales teams respond faster
- Reduces repetitive admin
- Frees up more time for customer conversations and opportunities

## Security foundation

- Defender for Office 365 helps protect customer communications from phishing threats
- Purview helps prevent sensitive customer data from being overshared

## Example Copilot prompt:

**"Summarise my recent customer meetings and emails with ABC Company and draft a follow-up email with the agreed next steps."**

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Sales

# THE RELATIONSHIP BUILDER



Finance

# THE NUMBER CRUNCHER

## Pain points

- Managing large volumes of reporting and spreadsheets
- Working to tight deadlines with limited time
- Balancing productivity with compliance requirements

## Copilot value

- Helps summarise reports and analyse trends faster
- Supports quicker document and spreadsheet creation
- Reduces manual admin across Excel, Outlook, and Teams

## Key benefits

- Improves efficiency across finance workflows
- Helps teams focus on higher-value analysis
- Supports faster decision-making

## Security angle

- Purview helps protect sensitive financial data and support compliance
- Entra ID P2 helps control access to critical information

## Example Copilot prompt:

**"Review this monthly financial report and highlight key trends, risks and recommendations for leadership."**





IT & Service Desk

# THE PROBLEM SOLVER

## Pain points

- Managing growing workloads and support requests
- Responding to repetitive user queries
- Balancing productivity with increasing security pressures

## Copilot value

- Speeds up documentation and knowledge access
- Helps draft responses and summarise incidents faster
- Reduces time spent on repetitive admin tasks

## Key benefits

- Helps IT teams work more efficiently
- Supports faster response times
- Frees up time for strategic projects

## Security angle

- Defender helps protect users, devices, and identities from cyberthreats
- Helps detect and respond to security risks earlier

## Example Copilot prompt:

**"Summarise the details of this support incident and create a response for the user with the next steps."**



## IT & Service Desk THE PROBLEM SOLVER



Marketing

# THE CAMPAIGN STRATEGIST

## Pain points

- Pressure to deliver more campaigns in less time
- Managing multiple projects, deadlines, and stakeholder requests
- Time spent gathering insights, writing briefs, and handling admin tasks

## Copilot value

- Helps generate campaign ideas faster
- Summarises meetings, feedback, and campaign discussions
- Surfaces insights and supports faster collaboration across teams

## Key benefits

- Helps teams move faster and stay organised
- Increases productivity across campaign planning and delivery
- Frees up more time for creative and strategic work

## Security angle

- Purview helps protect sensitive campaign and customer data
- Data Loss Prevention helps reduce accidental oversharing

## Example Copilot prompt:

**"Create three campaign ideas for promoting our latest solution and suggest LinkedIn post copy for each."**

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Marketing

# THE CAMPAIGN STRATEGIST



Public Sector

# THE CASE HANDLER

## Pain points

- Spending too much time on admin and documentation
- Managing large volumes of information daily
- Working within strict compliance and governance requirements

## Copilot value

- Helps summarise information and documentation faster
- Reduces repetitive admin tasks
- Improves access to relevant information across Microsoft 365

## Key benefits

- Supports productivity without adding complexity
- Frees up more time for people-focused work
- Helps reduce administrative burden

## Security angle

- Purview helps support compliance and protect sensitive information
- Insider Risk Management helps reduce data-related risk

## Example Copilot prompt:

**"Summarise this case file and highlight the key actions, deadlines and information that requires follow-up."**

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## Public Sector THE CASE HANDLER



Professional Services

# THE TRUSTED ADVISOR

## Pain points

- Reviewing large volumes of documents and client information
- Preparing reports and communications under tight deadlines
- Managing confidential business and client data

## Copilot value

- Summarises documents and meeting notes quickly
- Helps draft reports, proposals, and client communications
- Improves information access across Microsoft 365 applications

## Key benefits

- Supports faster turnaround times
- Reduces time spent on repetitive document work
- Frees up time for higher-value client engagement

## Security angle

- Purview helps protect confidential client information
- Defender for Cloud Apps improves visibility across business applications

## Example Copilot prompt:

**"Review these meeting notes and draft a client-ready project update with key progress, risks and next steps."**



## Professional Services

# THE TRUSTED ADVISOR





