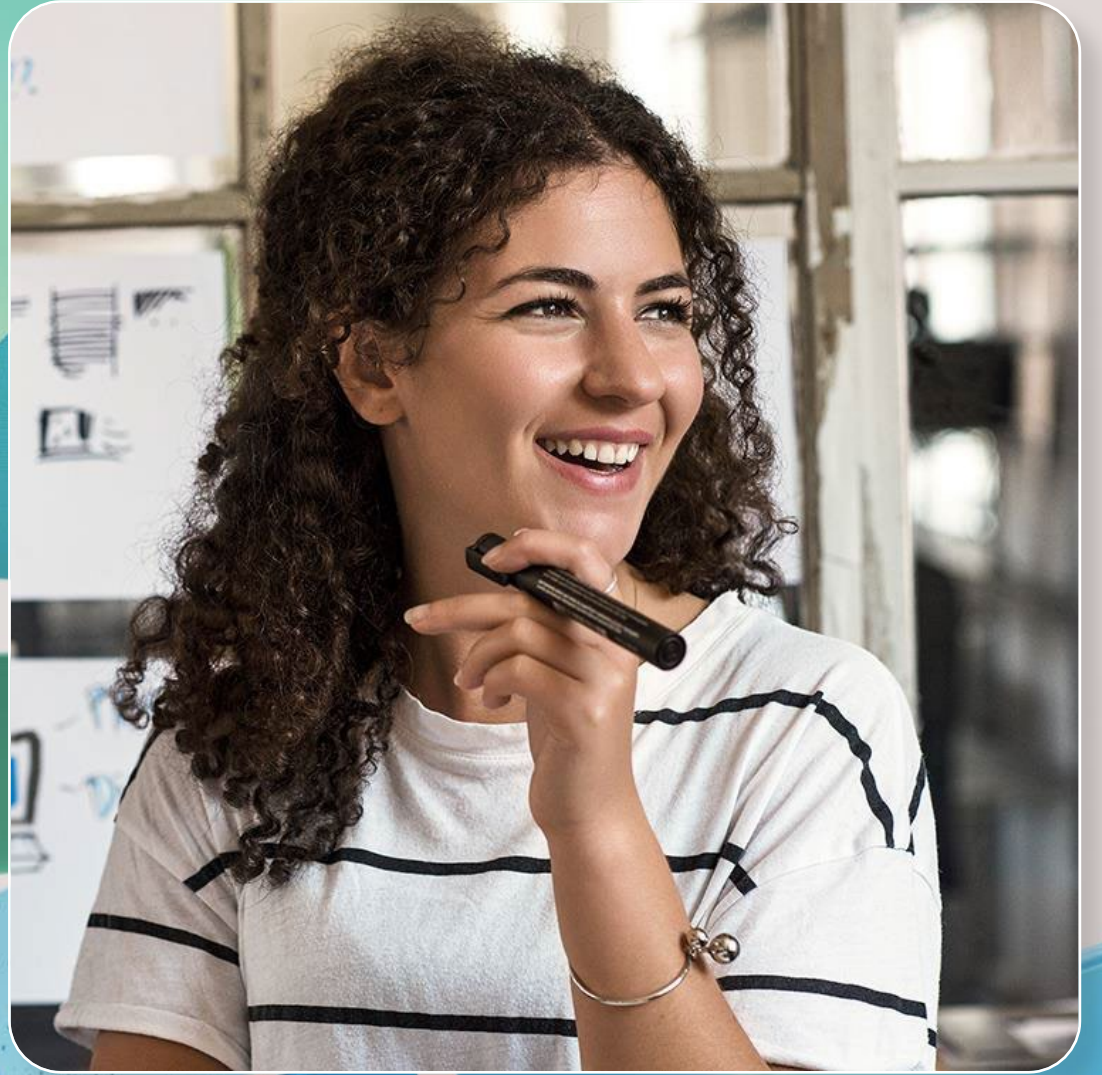




# Copilot scenarios for Marketing



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## Overview and KPIs

KPIs play a crucial role in organizations, providing a compass to navigate toward success. Let's dive into KPIs for Marketing and how Copilot can assist.



## Use Case by Role

Copilot can simplify the tasks that execs perform every day. Look at key use cases and how Copilot can be your AI assistant along the way.



## Day in the Life

See how real-life marketers are using Copilot in their day to day.

# Using Copilot in Marketing



## Goals and challenges

It's getting harder than ever to create leads with marketing content. The platforms and modalities to deliver marketing messages and splintering the audience. Marketing teams must overcome the traditional communications gap between marketing and sales and marketing and product teams to develop a cohesive strategy for success.



## Copilot can assist with...

Copilot can help to achieve alignment between teams and help to generate creative content that can deliver a marketing message effectively.

- [Collect and share product feedback](#)
- [Create a new offering](#)
- [Coordinate Market Research](#)
- [Product Launch](#)
- [Creating a BoM](#)



## Marketing roles



[Product marketing manager](#)



Content creator



Pricing analyst

## Microsoft Copilot opportunity to impact key Industry KPIs



### [Increase brand value](#)

Improving the customer of marketing content and customer interactions such as emails and meetings can help to improve close rates. In addition, improving targeting, pricing analysis, and creating effective promotions can also improve close rate.



### [Number of leads created](#)

Simplifying and automating tasks like preparing for meetings, tracking tasks, sending emails, creating proposals, and researching customer and product information can allow sellers to pursue more opportunities.



### [Cost per lead generated](#)

Copilot makes researching product information easier and can prepare detailed responses to RFP questions with a simple prompt. Companies can also use Copilot Studio to create custom bots to answer questions based on curated information.



Accelerate growth



Cost savings and avoidance



Employee retention

# KPI – Impact on brand value



Brand value isn't just about logos; it's about shaping perceptions and building lasting relationships with your audience. A strong brand fuels demand generation.

**85%** of users said Copilot helps them get to a good first draft faster.

## Use cases

### Draft marketing assets

- Improve marketing copy by having Copilot check for tone
- Improve quality of emails campaigns

### Create pricing and promotions

- Use Copilot to research market conditions
- Use Copilot to compare sales across regions or other variables

### Improve marketing materials

- Draft blogs with Copilot
- Create engaging social content
- Improve quality of emails campaigns

## Roles

Improving brand value can require input from:

- Brand Manager
- Creative Director
- Graphic Designer
- Digital Marketing Manager
- Product Marketing

## Microsoft AI solutions

- Copilot for Microsoft 365



# KPI – Impact on number of leads



Lead generation is a critical aspect of marketing and paves the way toward gaining new customers.

## Use cases

### Inform market research

- Research company information and competitors
- Learn how to position the product
- Recap survey results

### Improve demand generation materials

- Draft blogs with Copilot
- Create engaging social content
- Improve quality of emails campaigns

### Speed up internal communications

- Have Copilot assist with emails
- Draft email comms and announcements with Copilot

### Save time on administrative activities

- Generate meeting notes and follow up items



## Roles

Generating more leads can require input from:

- Marketing Lead
- Content Strategist
- SEO Specialist
- Market Researcher
- Product Marketing Manager
- Digital Marketing Manager



## Microsoft AI solutions

- Copilot for Microsoft 365

# KPI – Impact on cost per leads



Cost Per Lead (CPL) is a crucial metric used to measure and monitor the effectiveness of marketing campaigns. It represents the amount of money a business spends to generate a single new lead.

## Use cases

### Improve quality of customer-facing materials

- Improve marketing content
- Improve quality of proposals and RFP responses
- Improve quality of emails and chats

### Create pricing and promotions

- Use Copilot to research market conditions
- Use Copilot to compare sales across regions or other variables

### Inform market research

- Research company information and competitors
- Learn how to position the product
- Recap survey results



## Roles

Impacting the cost per lead can require input from:

- Account Executive
- Technical Sales
- SEO Specialist
- Product teams
- Product Marketing
- Finance



## Microsoft AI solutions

- Copilot for Microsoft 365

# Marketing use case | Collect and share product feedback

## Potential benefits

Increase brand value

First draft faster

Enhanced quality

### 1. Summarize interviews

Engage with customer to understand their triumphs and challenges with the product through recorded interviews.



Copilot in Teams

**Be present** during your customer interview by relying on Copilot in Teams for transcription and summary.

### 2. Draft customer messages

Continue the conversation with your customer by sending a timely and thorough follow up email, capturing your earlier call.



Copilot in Outlook

Thank customers by asking Copilot in Outlook to draft a response and drop in bullets from the Copilot meeting summary.

### 3. Identify themes

Paste Teams summaries into a Word and prompt Copilot to show you themes. Create a follow up survey with Copilot in Microsoft Forms.



Copilot in Word  
Copilot in Forms

Don't start with a blank page again. **Draft with Copilot** and get to a finished document in a fraction of the time.

### 6. Thank your stakeholders

Starting a new email, prompt Copilot in Outlook to draft a message to all key stakeholders with the results and path forward.



Copilot in Outlook

**Save time** preparing emails with Copilot as your drafting partner.

### 5. Share results

Use Copilot in PowerPoint to create a slide deck to share with the leadership and engineering teams. Use Copilot in Teams to capture action items and feedback.



Copilot in PowerPoint  
Copilot in Teams

**Creating a presentation** makes it easier to convey a clear message especially when it's critical feedback on your product.

### 4. Analyze data

Use Copilot in Excel to sort and analyze data gathered from the surveys and website metrics.



Copilot in Excel

**Identify insights** with Copilot in Excel.

# Marketing use case | Create a new offering

Potential benefits

First draft faster

Streamlined collaboration

## 1. Brainstorm with Copilot

Use Copilot in Loop to brainstorm ideas, leverage the draft marketing plan in the ideation, then incorporate the new ideas into the draft marketing plan by using Copilot in Word.



Copilot in Loop  
Copilot in Word

**Kickstart your project** as you plan and collaborate easier with Copilot in Loop.

## 2. Draft new offering announcement

Prompt Microsoft Copilot to create content that is written in the style of a blog post or social media post, leverage existing documents including your Marketing plan.



Copilot

**Brainstorm and draft** content quickly with Copilot. Collaborate on ideas and content using your instructions or reference files.

## 3. Keep the team up to date

Use Copilot in Teams to summarize key meetings, identify most frequent questions, and action items from the meeting. Use this to generate an initial FAQ document by using Copilot in Word.

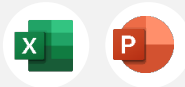


Copilot in Teams  
Copilot in Word

**Don't start with a blank page again.** Draft with Copilot and get to a finished document in a fraction of the time.

## 6. Share results broadly

Post campaign evaluate how your new offering landed with customers and which channels proved the most effective.



Copilot in Excel  
Copilot in PowerPoint

**Using higher quality presentations** makes it easier to highlight wins and lessons learned.

## 5. Execute your campaign

Leverage Copilot to create tailored messages to each of your communication channels to drive sales.

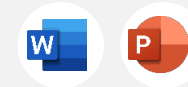


Copilot

With the **right prompt ingredients**, Copilot can provide something in the voice of your company – witty, smart, creative – you choose.

## 4. Prep your sellers

Create presentation from your Marketing Plan and FAQ to share with the sales team prior to the product promotion.



Copilot in Word  
Copilot in PowerPoint

**Document and socialize** your plan to keep sellers up to date.



# Marketing use case | Coordinate Market Research

Potential benefits

First draft faster

Cost per lead

## 1. Define the objective

Prepare a brief for your upcoming research by using Copilot for your first draft and tagging other key documents.



Copilot  
Copilot in Word

**Summarize** many types of documents, including PDFs and website content, making it easier to consume dense content online.

## 2. Determine your approach

Meet the research team with your objective in hand. Determine the best research approach over a Teams meeting. Rely on Copilot in Teams for action items.



Copilot in Teams

**Keep the conversation flowing** onto meaningful topics to help cover the agenda quicker and reduce meeting times.

## 3. Discover market trends

Select the Show data insights prompt in Copilot in Excel.



Copilot in Excel

Use Copilot to help you explore and **understand your data better.**

## 6. Communicate results

Starting in a new email, prompt Copilot in Outlook to create a dynamic message that includes key links.



Copilot in Outlook

**Document and socialize** the research findings to help better inform product strategy.

## 5. Present the findings

In a new PowerPoint file, select the default Create presentation from file.



Copilot in PowerPoint

Let Copilot help you build a presentation by **generating slides** or images with your organization's branding.

## 4. Create a complete snapshot

Prompt Copilot in Word to draft you an internal snapshot of the findings, citing the results.



Copilot in Word

**Don't start with a blank page again.** Draft with Copilot and get to a finished document in a fraction of the time.

# Marketing use case | Product Launch

## Potential benefits

Intel gathering

First draft faster

Streamlined collaboration

### 1. Learn about your customer

Use Microsoft 365 Chat to gather market research data to better understand your customer.



Copilot

**Rapidly get up to speed** to focus on key issues and concerns. Have additional time to identify key pain points for customer.

### 2. Craft your positioning

Leverage those insights to draft a strategy document for brand awareness using Copilot in Word.



Copilot in Word

**Create a draft** of the announcement blog from your current documents.

### 3. Pitch your positioning

Present your plan to the leadership team and use Copilot in Teams to summarize the meeting and identify action items to ensure a successful product roll-out.



Copilot in PowerPoint  
Copilot in Teams

**Create a presentation** from your blog document to present to sellers about the new offer and product that's coming to market.

### 6. Celebrate success

Use Copilot Chat to generate ideas for a punchy LinkedIn post for launch day.



Copilot

Creating **captivating taglines** is an art – get started by using the power of the AI language model.

### 5. Prepare your team

Use Copilot in Outlook to draft an email to your stakeholder group and include Loop and Copilot Teams meeting recap.



Copilot in Outlook

**Draft a thank you** note to the engineering team, marketing team, and event team for their efforts.

### 4. Develop your assets

Query your current asset depository with Copilot Studio to see what assets are currently available. Use Copilot in Loop to collaborate on branding elements that are still needed.



Copilot Studio  
Copilot in Loop

**Prompt Loop** in Copilot to "Brainstorm a list of creative ways to introduce our new product to customers."

# Marketing use case | Creating a marketing Bill of Materials

## Potential benefits

Streamlined collaboration

First draft faster

### 1. Whiteboard ideas

Use Copilot in Whiteboard or Copilot in Loop to brainstorm ideas around the assets needed to upcoming PR announcement.



**Copilot in Whiteboard**  
**Copilot in Loop**

**Kickstart your project** as you plan and collaborate easier with Copilot in Whiteboard or Copilot in Loop.

### 2. Create taglines

Come up with a clever tagline for the PR announcement that will be on all marketing materials, tying them together.



**Copilot**

Creating **captivating taglines** is an art – get started by using the power of the AI language model.

### 3. Create a MPF

Draft your messaging and positioning framework by starting with Copilot in Word and referencing key documents.



**Copilot in Word**

Get to a **first draft quickly** by relying on Copilot in Word for starting your MPF.

### 6. Track inventory

Use Copilot in Loop to collaborate with graphic designers and various groups on status of assets (draft, in design, in review).



**Copilot in Loop**

Use Copilot in Loop to collaborate and **stay in sync**.

### 5. Build assets

Build out additional assets like a product description and pitch deck with Copilot.



**Copilot in Word**  
**Copilot in PowerPoint**

**Draft a thank you** note to the engineering team, marketing team, and event team for their efforts.

### 4. Meet with product group

Meet with the product group and use Copilot in Teams to summarize the meeting and identify action items to ensure alignment on key features.



**Copilot in Teams**

**Leverage meeting recap** to capture action items and alignment to move forward.

# A day in the life of a Marketing Manager

8:00 am

Daichi uses Copilot to prepare a brief to give to the agencies bidding on a new advertising campaign.



Copilot in Word

**Prepare a brief** outlining the advertising strategy from [Contoso widget marketing plan](#). Include sections on target market, pricing, tone, imagery, and taglines.

8:30 am

Daichi meets with his team to brainstorm feature enhancements based on customer feedback. Copilot categorizes the ideas for easier discussion.



Copilot in Whiteboard

**Categorize the ideas.**

10:00 am

Daichi must analyze the marketing data from the latest round of surveys. Using plugins made in Copilot studio, Copilot can pull the survey data from Mailchip or similar app. He uses Copilot in Excel to prepare charts so he can see the trends in the data.



Copilot Studio  
Copilot in Excel

**Show all data insights.**

4:00 pm

Daichi needs to catch up on email before he heads out for the day. Copilot speeds the work by summarizing email threads and preparing draft responses.



Copilot in Outlook

**Ask for more details.**

2:00 pm

Daichi updates the roadmap deck to reflect the commitments from the engineering team meeting.



Copilot in PowerPoint

**Add a slide** based on [copy in bulleted list of roadmap updates]

11:00 am

Daichi meets with the engineering team to plan the development of new features. During the meeting he uses Copilot to understand the prioritization of the features.



Copilot in Teams

**Create a table** to categorize the features discussed so far by priority.

Daichi  
is a marketing  
manager at  
Contoso

