

A day in the life of a Service agent



Available with:
Copilot for Service (includes Microsoft 365 Copilot)

Scenario level: Extend

Benefits

~1 hour

Areas of investment: Learning

★ Faster analysis, communications, and streamlining tasks

8:00 am

Ethan, an agent at Fourth Coffee, receives an email from a customer Joanna about her coffee machine's warranty. Ethan uses Microsoft Copilot for Service in Outlook to generate a case summary.



Copilot in Outlook
+Copilot for Service

Action: **Generate a case summary** in Outlook that includes details from Salesforce and other knowledge sources to help Ethan get up to speed.

8:15 am

Now, one of Joanna's coffee machines is making a strange noise. Ethan uses Copilot in Outlook to quickly draft a reply. Copilot for Service adds case details from his CRM to the email. He adds an invitation to a Teams call.



Copilot in Outlook
+Copilot for Service

Action: **Draft a reply in Outlook** in the case details from the CRM. He adds an invitation to a Teams call so he can help diagnose the issue.

10:00 am

Ethan uses Copilot to prepare for his call with Joanna. He prompts Copilot to summarize all of his communications and related documents. Copilot for Service includes Joanna's case histories and other data from Ethan's CRM.



Business Chat²
+Copilot for Service

Example prompt: **Help me prepare** for my meeting by summarizing emails, chats, and related documents.

4:00 pm

Later, Ethan receives a live chat inquiry from another customer asking about a promotion. He uses Copilot for Service in Teams to get a concise summary of the promotion and craft a response.



Copilot in Teams
+Copilot for Service

Action: Get a **concise summary** of the promotion from the CRM and craft a response.

2:00 pm

After ending the call with Joanna, he uses Copilot in Teams to summarize the meeting. Copilot for Service adds the summary to Joanna's contact record directly from Teams.



Copilot in Teams
+Copilot for Service

Action: **Summarize the meeting** and add the summary to the CRM contact record directly from Teams.

11:00 am

On the call, Ethan uses Copilot in Teams to suggest questions to ask Joanna. Copilot for Service identifies and suggests a fix, which he then communicates to Joanna on the call.



Copilot in Teams
+Copilot for Service

Action: Use Copilot for Service in Teams to identify and suggest a fix, which he then communicates to Joanna on the call.

Ethan
is a Customer
Service Agent



¹Access Copilot at copilot.microsoft.com or the Microsoft Copilot mobile app and set toggle to "Web".

²Access Business Chat at copilot.microsoft.com, the Microsoft Copilot mobile app, or the Copilot app in Teams, and set toggle to "Work".

³Copilot agents allow Microsoft 365 Copilot to access your organization-specific apps. In the past this would have required an API call to get data from a system of record.

The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.