

DICKER
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Microsoft Copilot

Partner Guide

How to engage your customers and grow your AI practice



88% of Australian companies and 90% in New Zealand intend to invest in AI in the coming 12 months, and they're looking to partners like you to help them get results.*

Microsoft offers a wealth of Copilot resources for partners, but finding what you need, when you need it, takes time. This guide distils the essential strategies, tools and programs to help build your Copilot practice and guide customers through their AI journey.

Inside you'll find:

- A practical action plan to build your Copilot practice
- Customer journey framework from readiness to managed service
- Objection handling and qualification guidance
- Microsoft programs, funding and incentives
- Curated links to key resources



TIP: Upload this guide to Copilot so you can reference it as you build your AI offerings.



Copilot partner action plan

Seven steps from first conversation to recurring revenue.

STEP
1

Share this guide

Send these resources to your team, along with the companion [Copilot Customer Brochure](#) that you can download from the Dicker Data Partner Portal.

Upskill your team

Use [Microsoft Learn](#) and [Partner Center](#) to upskill your team. If you attain Solutions Partner designation (SPD) status, one of [the many benefits](#) is that you can claim up to 60 funded workshops (valued at \$2,000 USD each).

STEP
2

STEP
3

Identify prospects

Use CloudAscent and renewal data to identify ready-to-buy prospects within your target audience. Your Dicker Data team can help source this.

Educate customers

Schedule 'AI Journey Workshops' with customers. [Immersion Briefings](#) cover Security Productivity, Data Security & Threat and Copilot & Agents. If you don't have SPD yet, Dicker Data can host workshops on your behalf which help to qualify opportunities – for example to identify use cases for proof of concept projects or qualify license needs.

STEP
4

STEP
5

Scale deployments

Deploy successful pilots across your customer's organisation, leveraging the latest SKUs and offers such as using Copilot Business licensing (for organisations under 300 seats).

Extend with agents

Help customers move from AI concept to production, building custom agents with M365 Copilot and Copilot Studio, or accessing Dicker Data's strategic partner UnifyCloud's CloudAtlas AI Factory (Copilot studio and Azure AI agent templates). TechClick is another project-based technical ANZ resource that can extend your team to offer wider AI services.

STEP
6

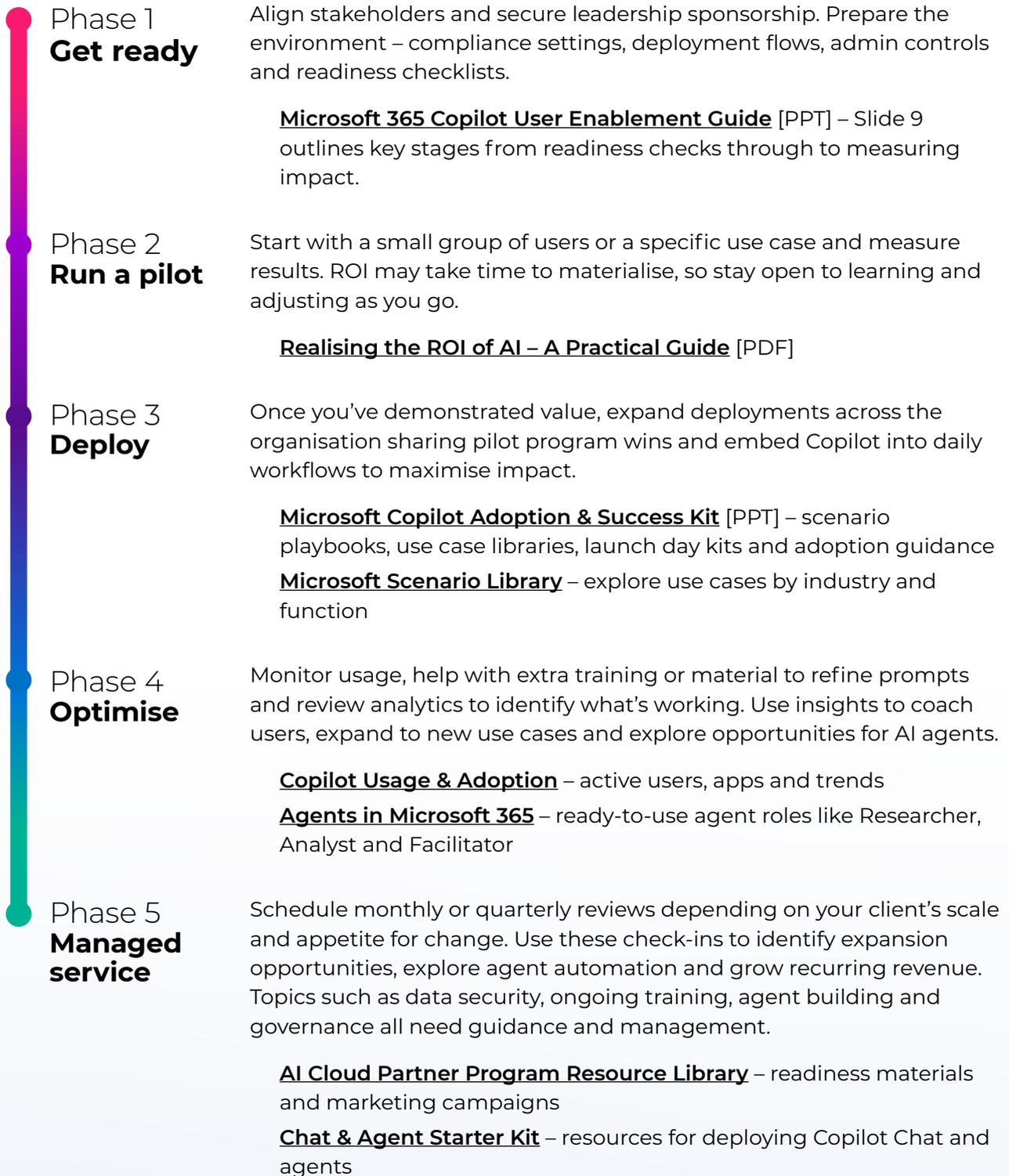
STEP
7

Grow revenue

Build recurring revenue by identifying the right opportunities. Your Dicker Data Partner Development Manager (PDM) can provide prospect data or your team can self-serve through our portal. Security, training and expansion require planning and regular services to keep on track.

Copilot customer journey

Guide your customers from readiness to managed service.



Target the right customers

We know AI is a top priority for ANZ organisations, but not all prospects are at the same stage. Knowing where your customers sit helps you match them to the right engagement.

Positive signals

Review your target audience for these indicators:



Running M365 Business Premium or Standard



Already purchased Copilot licenses



Have a security framework in place or mandated (such as Essential Eight, NIST, ISO 27001)



Leadership mandate for AI adoption in the coming 12 months



Operations with high-volume, high-friction processes that need automation



TIP: Create tags in your CRM for each of these signals to help your sales team prioritise. Or download our [Prospect Targeting Template](#) to track and assign prospects.

Matching prospects to engagements

Once you've identified positive signals, match the prospect to the right engagement:

Ready to move:

Customers with Copilot licenses, security compliance needs or clear AI goals.

→ *Schedule a 1:1 workshop to identify use cases.*

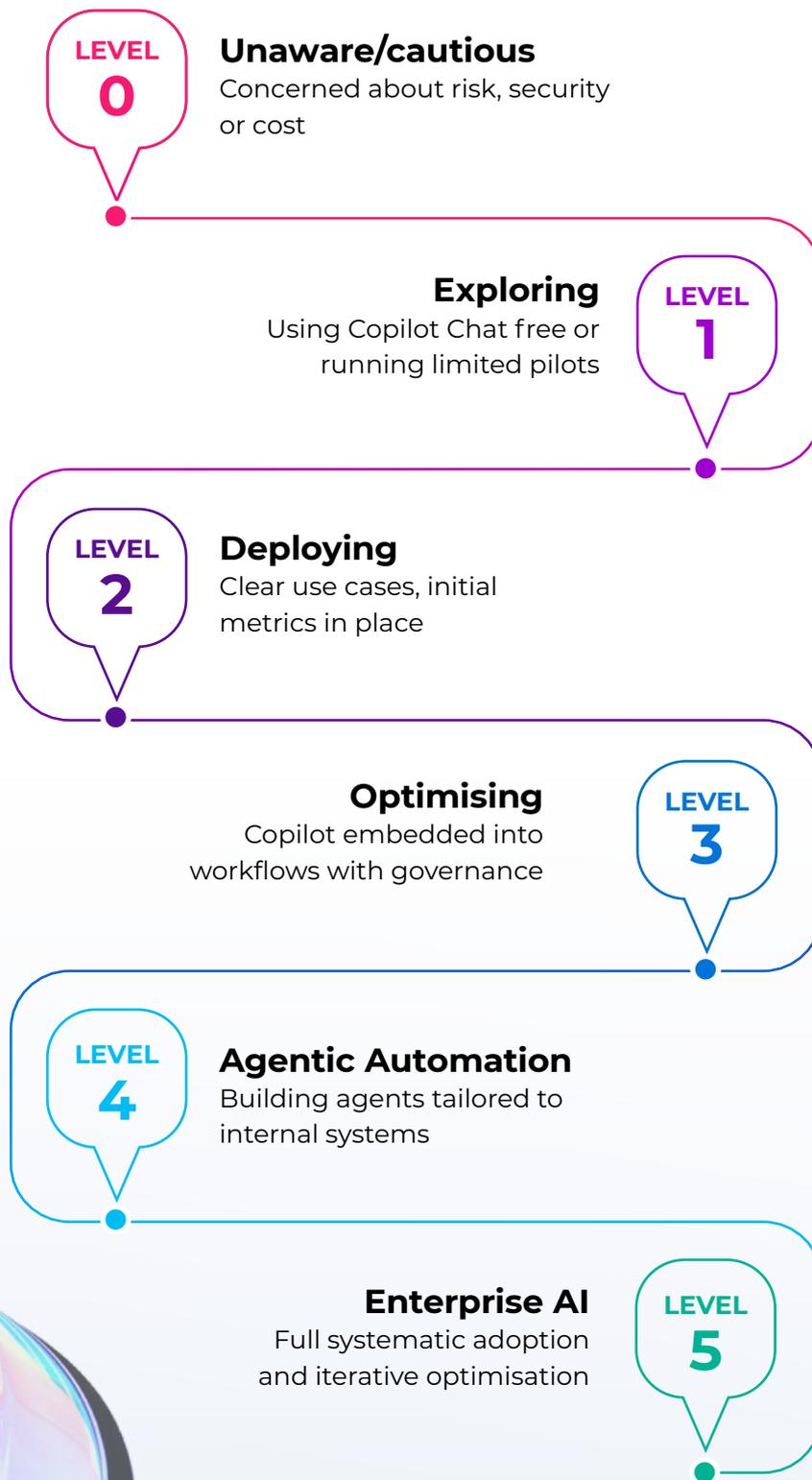
Interested but uncertain:

Customers keen to adopt AI but without concrete plans.

→ *Suggest an Immersion Briefing (90 minutes, minimum 5 customers) as a qualifying step to show them what's possible.*

Copilot AI Maturity Stages

When scaling up your AI practice, your marketing engine will require a more detailed view of where your customers and prospects sit, consider using a grading system aligned to an AI maturity model to guide your conversations and match them to the right services and shorten qualifying sales conversation cycles.



Handle objections

Common questions and answers for sceptical prospects.

“We’re not sure if our people would use AI”

Response: Your tenant can already show us who’s using AI, how often, and in which apps – even before licenses are bought. This shifts the conversation from theoretical to evidence-based and gives you useful data for building the business case.

We know that individuals are often ahead of organisations: **59% of Australian and 53% of New Zealand companies say employees are already using shadow AI.***

[Copilot Usage & Adoption](#) – understand adoption rates and usage patterns

“We’re not sure if we’re technically ready”

Response: We can assess your environment and walk you through a clear path to deployment – covering security settings, licensing prerequisites and data governance – in a phased approach that meets you where you are.

[Microsoft Copilot Technical Readiness Guide](#) [PPT]

“We don’t have resources to implement”

Response: We have specialist delivery partners who can support implementation while your team stays focused on other priorities.

Arrange a [TechClick – Game Plan for Growth Workshop](#)

Partner note: TechClick works exclusively with the IT partner channel in ANZ – they won’t compete for your customer relationships. They can help fill skills or capacity gaps across Azure, Copilot, Fabric and more.

“I’m not convinced about the ROI of AI”

Response: We can help you identify high-impact use cases, set up clear metrics and demonstrate expected returns. Start with a low-cost pilot, measure the results, then scale what works.

[Realising the ROI of AI – A Practical Guide](#) [PDF]

“We need to address security first”

Response: Security is a core element of adopting AI and Copilot. You can't responsibly use AI without security. Before we begin, we can run a security briefing to assess your M365 foundations and plot a pathway to ensure you're Copilot-ready when you need to be.

[Security Immersion Briefings](#)

“We don't know what to use AI for”

Response: We can show you detailed proven use cases for your industry and identify where AI could have the most impact.

[Microsoft Scenario Library](#)

“We are looking at Gemini and ChatGPT before we try Copilot”

Response: Microsoft Copilot is worth reviewing alongside these options. To help, share our battlecards with your prospects. They include prompt comparisons, compliance and governance advantages to help position Copilot's core strengths.

[Microsoft Partner Compete Battlecards](#)



Conversation starters

Use these questions to dig deeper into opportunities for AI:

“Which internal processes cause your staff the most friction?”

“What decisions are being delayed due to manual data analysis?”

“Which teams feel the greatest workload pressure?”

“What repetitive tasks take up a lot of your team's time?”

“Which reports or documents take longest to produce?”

Partner programs

Key programs, funding and resources to support your Copilot practice.

Key Copilot growth opportunities:

- Copilot for M365** – seat acquisition and deployment
- Copilot Business** – SMB momentum (under 300 seats)
- Copilot Chat** – adoption for frontline roles
- Agents in Microsoft 365** – entering growth curve
- Copilot Studio** – agent development and credit consumption
- Security Copilot** – AI-powered security
- Data readiness and compliance** – Purview, Entra, Intune and Defender

Ways to package and monetise Copilot services:

- Readiness Assessment (fixed fee)
- Envisioning and Value Blueprint
- Copilot Pilot-in-a-Box
- Change Management as a Service
- Monthly Managed Service (Copilot Success Desk)
- Security Optimisation
- Copilot Studio Agent Development Bundles – ask your PDM about access to the Agent Factory
- Prepaid Agents (credits markup model)
- AI Capability Uplift Packages (training, agent creation, governance)

Copilot M365 Business

A strong entry point for SMB customers on **M365 Business SKUs** with under 300 seats – combining Copilot adoption with improved security foundations.

- Dicker Data M365 Copilot Business** – program details and partner support
- TechClick – Game Plan for Growth** – in-depth workshop to build your revenue roadmap

Microsoft commercial incentives (MCI)

Funding programs and toolkits to support your engagement and go-to-market activities.

- MCI Program Resources** – MCI landing page with campaign assets
- MCI Program Guide [PDF]** – comprehensive program details (useful to upload to your Copilot for reference)
- MCI Engagements / Claims** – Partner Center workspace
- Immersion Briefings Claims Walkthrough** – how to claim workshop funding
- Incentives Support** – how to contact the team

More funding options

- End Customer Investment Funds (ECIF)** – **funds, training and readiness resources for Copilot** and AI

For SPD Partners:

- Immersion Workshops** – earn up to \$2,000 USD per session delivering 1:Many briefings
- Proof of Concept Funding** – may be available for strategic customers. Talk to your Dicker Data PDM.

Training and certification

Build your team's AI and Copilot expertise.

- Partner Skilling Hub** – free access to in-person training and on-demand courses
- Microsoft 365 Copilot Learning Path** – step-by-step setup and optimisation guide



TIP: TIP: Check with your PDM for any special pricing offers or current incentives.

Resources

Curated links organised by topic to support your Copilot practice.

SMB and CSP Adoption

[Copilot and Security Licensing Q&A](#) – short video explaining the new SMB SKU

[Copilot for Small & Medium Business](#) – SMB success kit and community

Adoption and Success Kits

[Microsoft 365 Copilot Adoption Hub](#) – overview, success kit and essential guides

[Copilot Success Kit](#) – downloadable role-based assets, launch day and enablement templates

[Essential Guide to Copilot Adoption](#) – phased framework (Get Ready, Onboard, Engage)

[Copilot Adoption Playbook](#) – customer-ready narrative and steps for partner workshops

AI use case library

Browse the [Microsoft Scenario Library](#) by industry or function to find practical use cases to inspire your customers.

Uses by sector:

[Retail](#)

[Education](#)

[Manufacturing](#)

[Financial Services](#)

[Healthcare](#)

[Energy and Resources](#)

[Media and Entertainment](#)

[Nonprofit](#)

[Government](#)

Uses by function:

[Accessibility](#)

[Communications](#)

[Customer Service](#)

[Executive Offices](#)

[Finance](#)

[Human Resources](#)

[Information Technology](#)

[Legal](#)

[Marketing](#)

[Operations](#)

[Sales](#)

[Sustainability](#)

Readiness, requirements and admin guides

[Enablement Resources for IT Admins](#) – deployment steps and readiness checklists

[App and Network Requirements for Microsoft 365 Copilot](#)

[Set Up Copilot and Assign Licenses](#) – readiness activities and security measures

[Copilot Readiness Report in Admin Centre](#) – identify eligible users, usage and update channels

Governance and Responsible AI Controls

Security and governance are foundational to AI adoption. Key topics to address with customer risk and compliance teams:

DLP, MIP, sensitivity labels

Data access boundaries

Tenant controls for agents

Logging and audit

Approvals for agent publishing

Endpoint considerations

Recommended admin roles

Contact your Dicker Data PDM for expert support from our security specialists.

Agents in Microsoft 365

[Copilot Chat and Agent Starter Kit](#) – IT controls, user training and overview guides

[Agents Overview](#) – Researcher, Analyst, Facilitator, Interpreter, PM and more

[AI Agents Hub](#) – governance, security, scenario library and events

[Getting Started with Agents](#) – end user guide

[Agent 365 Overview \(preview\)](#) – Entra Agent ID, observability and admin controls

Copilot Studio

[Copilot Studio Product Overview](#) – build and customise agents

[Copilot Studio Documentation](#) – end-to-end build, publish and govern

[Copilot Studio Pricing and Licensing](#) – plans, credit model, PAYG

[Azure PAYG Details](#) – Copilot credits pricing

[Community-Curated Resources](#) – Power CAT (GitHub)

[Hands-On Workshop Resources](#) – slides, labs and trial links (GitHub)

Partner GTM and practice development

Modern Work for Partners – Copilot CSP GTM library (pitch decks, campaigns, demos)

Modern Work Practice Development – Copilot and Agents updates

Copilot Partner Directory – find and benchmark other partner offerings (Tip: check your listing is up to date)

LevelUp (Technofocus) – self-paced training courses for Microsoft Partners

Copilot and Agents at Work – Immersion Briefing resources (90-minute lab-based sessions, 1:Many format)

Copilot Envisioning and PoC Assets (GitHub) – pre-sales tools including needs analysis, solution blueprints and business case templates

Microsoft Marketplace – Consulting Services – browse partner offerings and consider listing your Copilot services

Security Copilot

Security Copilot Product Overview – embedded agents across Defender, Entra, Intune and Purview (included with M365 E5)

Get Started with Security Copilot – pricing, licensing and onboarding paths

Security Copilot in Intune – feature overview and roles

Security Copilot Adoption Hub – role-based resources and agents

Security Immersion Briefings – Secure Productivity (M365 foundations, Copilot readiness) and Advanced Security (Defender + Purview)

Let's grow together

Meet your Copilot experts

Our dedicated Dicker Data Microsoft team has broad experience in Microsoft Copilot and Security tech stack; they can help you every step of the way.



Adam Smith

Modern Workplace, Security
& AI Practice Lead ANZ



Darren Bennett

Partner Technology
Strategist AU



Kane McGhie

Microsoft Security Business
Development Manager NZ



Alaa Rahal

Microsoft Solutions
Development Specialist ANZ



James Xuereb

Copilot Partner Sales Specialist -
Microsoft Cloud ANZ



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