



FOR APPXITE RESELLER PARTNERS

The Copilot Partner Growth Playbook

A repeatable motion to qualify opportunities,
position the right solution, drive adoption and grow
customer value

01
QUALIFY

02
POSITION

03
LAUNCH

04
GROW

The Copilot commercial opportunity

30M+

Microsoft Copilot paid seats, reported July 2026

58%

of AI users say they now produce work they could not have a year ago

132–353%

projected 3-year ROI for a 200-employee SMB running Microsoft Copilot

That last figure is a modelled projection from a Forrester study commissioned by Microsoft, based on a composite 200-employee organisation. Treat it as a planning benchmark, not a guarantee.

What this means for partners

Most customers are past the question of whether to adopt Copilot. The seat count above still has a long way to run against several hundred million Microsoft 365 commercial seats, which means most of your accounts have licences left to add. The work that actually wins and keeps that business is readiness, governance and adoption, not the licence line itself. This playbook is AppXite's model for that work: four commercial moments in every Copilot account.

01 Qualify

Confirm the account is technically and commercially ready before you propose anything.

02 Position

Match the right Copilot starting point, and the governance commitments behind it, to what the customer actually needs.

03 Launch

Get the customer to first value without creating an identity, data or adoption problem.

04 Grow

Track the signals that predict renewal, and turn adoption into expansion.

Qualify: is there a real opportunity?

Run this against every account before you propose anything. A deal missing more than one or two of these is not ready to quote, whatever the licence count looks like.

CUSTOMER	☐ Named executive or business sponsor ☐ At least one specific business use case ☐ Defined target users for the first rollout
TECHNOLOGY	☐ Eligible Microsoft 365 foundation in place ☐ Copilot readiness reviewed (see below) ☐ Data exposure considered, not assumed clean
COMMERCIAL	☐ Initial user population identified ☐ A services opportunity identified alongside the licence ☐ Expansion potential documented for the next cycle

Reviewing Copilot readiness

The Microsoft Copilot readiness report in the Microsoft 365 admin center helps identify technically eligible users and gives visibility into prerequisite licences, eligible update channels, assigned Copilot licences and available licences. One field worth knowing: each week it also flags the top 25% of non-licensed users by Microsoft 365 app usage as suggested candidates for a pilot, which Microsoft is explicit is meant to support rollout planning, not performance evaluation.

Pair that with a look at data exposure. Use capabilities such as SharePoint Advanced Management's data access governance reports and Microsoft Purview Data Security Posture Management to identify potentially overshared or sensitive content before a broad rollout. This is a review, not a fixed procedure, since the right combination of tools depends on the customer's tenant.

What disqualifies a deal today

Governance, security and data readiness remain significant barriers to Copilot deployment. Screen for these before you quote, not after.

64%

of IT leaders say information governance and security risk requires significant time and resources

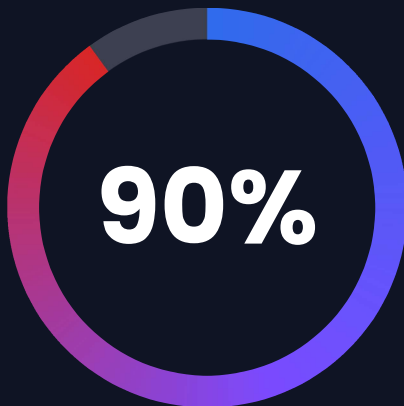
40%

delayed their Copilot rollout by 3 months or more because of data oversharing concerns

72%

say they still struggle to fit Copilot into daily working routines

Independent research from Omdia reinforces the same pattern across the wider market: intent is high, but capability gaps are the real blocker.



of executives plan to increase AI-related investment in the next 12 months

The barriers Omdia identifies most consistently are a lack of qualified in-house expertise, data privacy concerns, data quality issues, compliance and regulatory challenges, and integration with legacy systems. Each one is a service you can scope and charge for before the Copilot licence is even quoted.

Position: choose the right Copilot starting point

02

Microsoft's packaging around Copilot changes often, including a recent rename: Microsoft 365 Copilot is now Microsoft Copilot, and Microsoft 365 Copilot Chat is now Microsoft Copilot Chat. Rather than quoting a fixed tier structure, start from what the customer actually needs.

START HERE

Secure AI chat for everyone

Microsoft Copilot Chat is available at no extra cost for eligible users who sign in with a Microsoft Entra work or school account and have a qualifying Microsoft 365 subscription. Good starting point to build appetite before quoting anything further.

EVALUATE

AI embedded in everyday work

Microsoft Copilot adds chat grounded in the customer's own work data and embedded experiences in Word, Excel, Outlook and Teams. Evaluate the applicable licensing option against the customer's Microsoft 365 plan, user count, workloads and intended use cases, rather than defaulting to one SKU.

DESIGN

Business-specific AI experiences

Agent Builder suits lightweight, individual or small-team Q&A agents, managed in the Microsoft 365 admin center. Copilot Studio suits multi-step workflows with connectors and governance. Microsoft prices organisational-data agents on a metered basis in some scenarios, so treat this as both a technology and a services conversation, not a flat licence line.

Package the opportunity, not just the seat

This is the page that turns a licence sale into an account. Most resellers stop at the first line. The stack below is where the recurring revenue actually sits.

- 01 **Licensing** — the Copilot seat itself, matched to the use case above
- 02 **Readiness assessment** — the Qualify work, scoped and charged as a service
- 03 **Security & governance** — identity, data exposure and information protection
- 04 **Deployment** — pilot design, rollout sequencing, change management
- 05 **Adoption** — training, champions, usage monitoring
- 06 **Agent development** — Agent Builder or Copilot Studio build work
- 07 **Managed services** — ongoing monitoring, governance and expansion planning

Address governance before procurement

Bring security, privacy, compliance and responsible AI stakeholders into the conversation before commercial commitment, not after. Microsoft publishes six responsible AI principles: fairness, reliability and safety, privacy and security, inclusiveness, transparency and accountability, which are a useful shared reference point for that conversation rather than something you need to re-explain from scratch.

Fairness

Reliability &
safetyPrivacy &
security

Inclusiveness

Transparency

Accountability

Launch: get the customer to **first value**

Once the quote is signed, the goal is first value without creating a mess. Four things to get right, in this order.

1

Control identity

Verify authentication, access and privilege through Microsoft Entra Conditional Access before granting broad access, so the right users have the right access to the right resources.

2

Reduce data exposure

Find oversharing and excessive permissions before Copilot can see them: review SharePoint access governance and Purview's oversharing assessment, and remediate what they surface.

3

Protect sensitive information

Apply Purview sensitivity labels and data loss prevention for Copilot as usage scales, so protection grows with adoption instead of trailing behind it.

4

Establish AI governance

Define ownership, acceptable use, agent governance and ongoing monitoring. Help the customer set a governed enterprise AI standard so employees know which AI experiences are approved for business data and how to use them.



This is a natural AppXite-led engagement in its own right: a short security and access review, scoped and charged before any Copilot licence conversation, positions you as the trusted advisor rather than just the billing platform.

Turn use cases into agent opportunities

Microsoft groups its own agent capabilities into three broad categories. Use the grouping to scope what an agent should actually do, so the customer is not paying for autonomy they do not need.

CUSTOMER NEED	STARTING APPROACH	EXAMPLE
Find knowledge faster	Retrieval agent, buildable in Agent Builder with no development work	Help a service team locate the current approved pricing and policy documents
Reduce repetitive admin	Task agent, built in Copilot Studio with approval steps	Prepare new customer onboarding paperwork and route it for sign-off
Coordinate ongoing work	Autonomous agent, highest governance overhead	Watch a recurring operational process and flag exceptions for a human to resolve

1 in 4

Only 1 in 4 AI users say their organisation’s leadership is clearly and consistently aligned on AI. Closing that gap with a short leadership briefing before rollout is one of the highest-value, lowest-cost things a reseller can add at Launch.

Grow: turn adoption into the next commercial cycle

The renewal conversation starts the day the deployment goes live, not three months before the contract ends. Track three signals on every account.



Adoption

Are licensed users actively using Copilot? Use the Microsoft Copilot Dashboard in Viva Insights to track this on an ongoing basis, not just at launch.



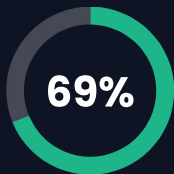
Value

Can the customer point to a repeatable business outcome tied to usage, not just a login count? If not, that is the conversation to have now, before renewal.

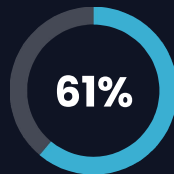


Expansion

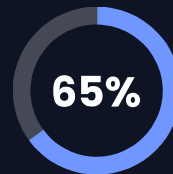
Which teams, workloads or agent opportunities should enter the next commercial cycle? A successful rollout is the easiest opening for the next one.



improved task speed



improved work quality



of managers saw team-level improvement

In Microsoft's own Copilot trial with the Australian Government, spanning more than 2,000 participants across 50-plus agencies, 69% agreed Copilot improved task speed and 61% agreed it improved work quality, while 65% of managers saw team-level improvement. The same trial found Excel and Outlook use cases did not always meet expectations, a useful, honest data point for setting expectations rather than overselling at renewal.

Renewal risk is cultural, not technical

Microsoft's own research describes this as the “transformation paradox”: people know they need to change, and hesitate anyway. Watch for both numbers at once in an account.

65%

fear falling behind if they do not adapt to AI, yet hesitate to change how they work

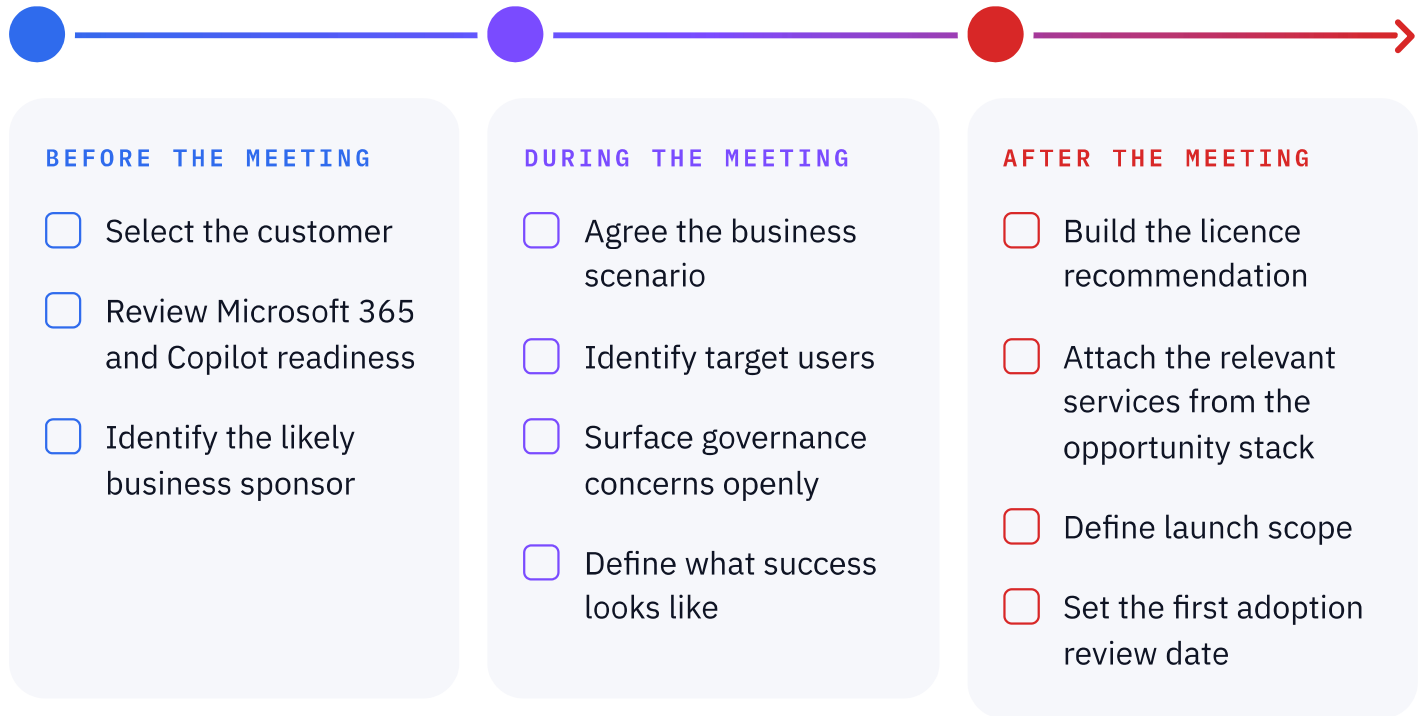
45%

say it still feels safer to focus on current goals than to redesign how they work



High anxiety and low behaviour change together are a renewal flight risk even if usage looks fine on paper. That is the conversation to have before the contract comes up, not after.

Run your first Copilot Commerce conversation



Need support running this?

This playbook is a partner campaign and customer-enablement resource, designed to help structure Copilot conversations, readiness discussions and adoption opportunities. Whether a particular campaign or activity qualifies for Microsoft funding is handled separately under the applicable programme rules.

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Your dedicated AppXite partner account manager

Sources

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- 13 OECD.AI, Microsoft 365 Copilot Trial policy initiative record (Australian Government).



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