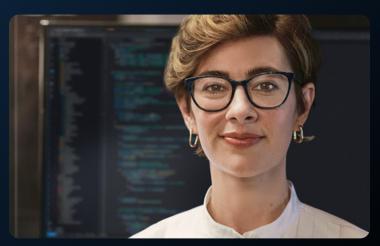# LEARNING TREE™
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A day in the life of a Customer Service Agent

Empower your customer service agents with one embedded solution using Microsoft 365 Copilot.

Discover how **Microsoft 365 Copilot** can enable your customer service team to find answers and collaborate easily to provide faster, more personalized experiences. Learning Tree International can help you **accelerate Copilot adoption with your customer service team by conducting employee training sessions on how to get the most from Microsoft 365 Copilot as your business grows.**

8:00 AM

As a customer service agent at a growing coffee company, Hilary needs to handle new cases quickly. When a customer emails about an issue with their coffee machine, Hilary uses Copilot to create a case and draft a reply, including a Teams call invite to discuss the problem.

Copilot in Outlook

> **Generate a new case** based on this email and draft a response using the case details.

9:00 AM

Hilary uses Copilot to prepare for her call with the customer. She asks Copilot to summarize any communication, related documents, and past cases with this customer that are available in the company's CRM.

Microsoft Copilot

> **Help me prepare** for my meeting by summarizing emails, chats, and related documents to this customer.

2:00 PM

Hilary meets with the customer and uses Copilot in Teams to suggest questions and solutions. After the call, she uses Copilot to create a meeting summary that's automatically added to the customer's contact record, saving time to answer missed inquiries.

Copilot in Teams

> **Identify and suggest** a fix that can be communicated to the customer with links to additional resources.

4:00 PM

Before Hilary signs off, she gets a live chat about a product promotion. She quickly summarizes the promotion and responds using Copilot in Teams.

Copilot in Teams

> **Write a response** to this customer inquiry using the product promotion plan document sent over from the marketing team.

There are many opportunities to integrate Microsoft 365 Copilot tools you use every day to automate processes and grow your business. **Contact Learning Tree International** to learn more about how **we can help you take advantage of Copilot to streamline your busy schedule and focus on impact-driving tasks.**

Interested in seeing more ways Microsoft 365 Copilot can assist with everyday tasks across your business?

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