



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 on a lean team at a growing coffee company, it is imperative that Hilary can respond to new cases and inquiries efficiently. She receives an email from a customer reporting an issue with a coffee machine they bought. Hilary uses Copilot to generate a new case and draft a reply with the case details, including a Teams call invite to discuss the issues with the customer.

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 for the customer. After ending the call, she uses Copilot again to write a meeting summary that can be added automatically to the customer's contact record so she can use that time to answer any inquiries she missed while on the call.

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 for the day, she receives a live chat inquiry from another customer about a product promotion. She develops a concise summary of the promotion and crafts a response 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? Check out the [Microsoft Copilot Scenario Library](#).

