



To help your sellers get the most out of Copilot for Sales, we've written four customizable emails that provide tips and easy steps on how to get started.

Before sending these emails, we recommend that you...

- ✓ Ensure Copilot for Sales is deployed in your organization
- ✓ Install Copilot for Sales in Outlook
- ✓ Install Copilot for Sales in Teams

If you elect to only send a single email, we recommend Email #1, as it helps users get onboarded. If you'd like to send a second email, Email #4 contains a summary of tips for after a user is onboarded.

Email Series

1. **Email #1** – Getting Started: What you can do with Copilot for Sales and how to get started in three easy steps
2. **Email #2** – Copilot for Sales in Outlook: How sellers can use AI to catch up on customer correspondence, prepare for sales meetings, and follow up with ease
3. **Email #3** – Copilot for Sales in Teams: How sellers can use AI to get more from their customer meetings
4. **Email #4** – Recap of Copilot for Sales tips: Features that can help sellers, before, during, and after meetings in Outlook and Teams

Step 1 - Customize:

These email templates were designed to be customizable—you can adjust messaging as needed. Your own marketing team may have brand guidelines you need to follow. '

Step 2 - Save:

Once you have finished editing the email, save the template (.OFT format). To do this, follow these steps:

1. Open email
2. Click on the 'File' tab and choose 'Save as'
3. Rename the file appropriately and under 'Save as type' choose 'Outlook Template (*.oft)'

Step 3 - Send:

To optimize open rates, we suggest you send the emails from an email account the end user is used to receiving critical communications.

We suggest sending emails on Tuesday morning between 9AM and 12PM when people are fresh and already into their workweek. To supplement your email communication, we recommend posting about Copilot for Sales to your internal social channels like Teams and Viva on Wednesday and Thursday mornings as a follow-up to your Tuesday emails.