3 Frontiers Playbook for Agentic AI Success in CSP

Last update: October, 2025.
Post-Ignite version coming soon.

Lead your Customer's Frontier Transformation

Thank you for leading the way in AI transformation as a Microsoft partner. Together, we're reimagining a future of ubiquitous innovation. This book is a collection of resources, technologies, and insights, based on research into becoming a Frontier organization.

You will find 16 offers across **no-code, low-code, and pro-code** frontiers. While these offers aren't necessarily meant to be followed in a specific order, they're designed to guide you on the unique path to becoming a strategic advisor for your customers.
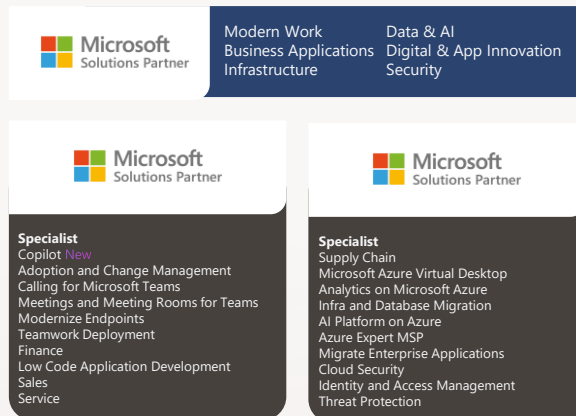
We'll continually update this to reflect the latest innovations and opportunities in this ever-evolving landscape.

READ THE CASE STUDY

RSM reimagines the future of work as a Frontier Firm

As the professional services firm turned 100 years old this year, they have committed to a bold strategic transformation to become AI-first:

1. **Scaling Microsoft Copilot** globally to transform operations and upskill teams, acting as their own Customer Zero.

2. **Empowering employees** to experiment, collaborate, and build AI fluency, fostering a pioneering culture.

3. Creating a **living knowledge base and storytelling platform** to capture innovations and drive client impact.

Microsoft Solutions Partner

Modern Work	Data & AI
Business Applications	Digital & App Innovation
Infrastructure	Security

Microsoft Solutions Partner

Specialist
Copilot New
Adoption and Change Management
Calling for Microsoft Teams
Meetings and Meeting Rooms for Teams
Modernize Endpoints
Teamwork Deployment
Finance
Low Code Application Development
Sales
Service

Microsoft Solutions Partner

Specialist
Supply Chain
Microsoft Azure Virtual Desktop
Analytics on Microsoft Azure
Infra and Database Migration
AI Platform on Azure
Azure Expert MSP
Migrate Enterprise Applications
Cloud Security
Identity and Access Management
Threat Protection

RSM's 5 Keys to Frontier Transformation

- Inspire client innovation: lead with AI business outcomes, value, and POC
- Embody a pioneer culture for the frontier – be customer zero
- Inspire client innovation – lead with AI business outcomes, value, and POC
- Align with Microsoft solution plays, incentives, and co-selling
- Elevate AI human impact storytelling and invest in marketing

"If there was someone who could have been here all **100 years** and could know every project we've done in each role we served, and could tell that story, that would be so powerful."

Mike Gillis,
Consulting Partner & Principal,
RSM

aka.ms/RSMFrontier

Frontier 1

Copilot and Agents at Work

- **AI + Copilot Discovery** $ $ $
- **Copilot Readiness and Deployment** $ $ $
- **Copilot Extensibility** $ $ $
- **Quick Work Agents using M365 Copilot & Copilot Chat** $ $ $
- **Copilot Adoption & Change Management** $ $ $

Frontier 2
Innovate with low-code AI and business processes

Frontier 3
Build transformational AI applications at scale

AI + Copilot Discovery

Guide customers through their AI strategy and adoption journey, with Microsoft 365 Copilot, Copilot Chat and Copilot Studio as centrepieces.

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Partner Value Proposition

- Position yourself as a strategic advisor to unlock new consulting revenue and deepen customer relationships, setting the stage for larger implementation projects

Customer Value Proposition

- Build a pipeline for high-value use cases and an adoption and a governance plan
- Build strong business cases for scalable AI rollouts

Customer Profile

- O365/M365 licenses with Copilot eligibility – Leverage Copilot SPARK propensity, M365 Lighthouse and/or Cloud Ascent (M365 Cohort > Act Now or Evaluate status > With Low or no Copilot purchase)
- Early adoption stage – structured approach before full rollout.
- Compliance-conscious – regulated or security-sensitive environment

Customer Triggers & Scenarios

- Before or right after Copilot purchase to define execution path
- After initial AI experimentation – to scale with governance

Customer Questions

- What is a critical team in your organization that would benefit from Copilot?
- What is the most important task they perform?

Example Offerings

AI + Copilot Vision Briefing
- AI readiness
- Use case discovery
- Governance and security planning

AI Strategy & Adoption Roadmap
- Full AI adoption plan
- ROI projections
- Business case development

AI Governance & Compliance Framework Design
- Design and configuration of security, privacy, and responsible AI policies

Success Outcomes
- License purchase and deployment
- License expansion

Practice Development Guide

Build skills - Certify teams and aim to get Adoption & Change Management and Copilot Specialization

Package offering - Start with a 3–5-day AI vision briefing: use case discovery, readiness assessment, and ROI roadmap

Get initial wins - Target existing M365 base, especially those on Business Premium, E3, or E5 to capture lowest hanging fruit

Scale practice - Build reusable IP for advisory such as templates, playbook, and industry packs

Enhance capability - Certify teams on specific compliance frameworks or develop specialized offerings for verticals to truly standout

Customer Zero Guidance

- Deploy Copilot internally to gain hands-on experience
- Leverage Internal Use Rights across delivery and corporate teams
- Capture internal success stories, challenges, and demos

Technology Stack

Core Modern Work stack	Copilot stack	Identity, security & compliance stack
O365 & M365	M365 Copilot	Entra ID
Microsoft Graph	Copilot Studio	Purview
	Copilot Chat	

Skilling Pathway

1 Modern Work Solution Partner Designation
- **MS-900** Microsoft 365 Fundamentals
- **MD-102** Endpoint Administrator Associate
- **MS-102** Administrator Expert

2 Security Solution Partner Designation
- **SC-300** Identity and Access Administrator Associate
- **SC 401** Information Security Administrator Associate

3 Other certification requirement for Copilot specialization
- **APL-4002**: Prepare security and compliance to support Copilot
- **APL-7008**: Create custom agents with Microsoft Copilot Studio

Key incentives and investments levers

CSP Incentive
Rate: 7.00%, up to $175K
Partner eligibility: One of six Solutions Partner designations

Copilot + Power Envisioning & PoC
Earn up to: $25K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Resources
- Scenario library
- Technical readiness guide
- Stakeholder management worksheet
- License allocation guide
- Microsoft AI Tour sessions
- Resources for executives
- Business Case Builder

Copilot Readiness & Deployment

Guide customers through a secure and compliant rollout of Microsoft 365 Copilot, ensuring readiness, governance, and rapid time-to-value

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Partner Value Proposition

- Become a trusted expert for deploying Microsoft 365 Copilot securely and efficiently
- Generate substantial services revenue through planning, configuration, and support engagements – often as a part of a larger AI journey

Customer Value Proposition

- Accelerate time-to-value from their Copilot investment
- Minimize risk and disruption – Ensure compliance and governance standards are met from day one

Customer Profile

- Organizations that have purchased (or are about to purchase) Microsoft 365 Copilot licenses – Leverage Copilot SPARK propensity and/or Cloud Ascent (M365 Cohort > Act Now or Evaluate status)
- Regulated or security-conscious companies who need careful Copilot configuration
- Customers who ran a small Copilot pilot and are ready to scale

Customer Triggers & Scenarios

- Immediately after license procurement
- During an ongoing Microsoft 365 migration or upgrade, when new tools are being introduced
- When a client raises concerns around data security or compliance related to Copilot

Key Questions

- How confident are you that your tenant, policies, and data protection are ready for Copilot?
- What's your plan to ensure a secure rollout for Copilot?

Example Offerings

Copilot Readiness Assessment
- Microsoft 365 environment review
- Readiness report and checklist of actions

Technical Deployment & Configuration
License assignment, Semantic Index configuration, Graph connectors setup, and admin settings

Security & Compliance Setup
Implement necessary policies and controls: e.g. DLP rules, sensitivity labels, access reviews, audit logging

⭐ Success Outcomes

- Microsoft 365 Copilot License expansion
- Increase in Copilot usage

Practice Development Guide

- **Build skills -** Ensure your technical team is proficient in Microsoft 365 administration (tenant configuration, license management) and Semantic Index and Graph connectors
- **Package offering -** Define a phased deployment offering (Assessment – Pilot – Full Deployment) with standardized deliverables (checklist documents, configuration templates)
- **Get initial wins -** Engage with existing customers with base Microsoft licensing and successfully deploy Copilot for them
- **Scale practice -** Train additional consultants or engineers, build reusable IP such as deployment templates, compliance workflows, etc
- **Enhance capability -** Keep the service updated with the latest offerings (such as Copilot Researcher)

Customer Zero Guidance

- Invest in Copilot for initial set of employees and deploy a small-scale Copilot (even if just for a department)
- Simulate edge cases – Test out unusual scenarios – e.g. enabling Copilot for a user with no OneDrive, or trying a connector to an uncommon data source.
- Build reference architecture and config playbook from internal lessons

Technology Stack

Core Modern Work stack:
- O365 & M365
- Microsoft Graph

Copilot stack:
- M365 Copilot
- Copilot Studio
- Copilot Chat

Identity, security & compliance stack:
- Entra ID
- Purview

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Partner eligibility: One of six SPDs

Copilot + Power Deployment Accelerator
Earn up to: $50K/- per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Copilot + Agents Immersion Briefing
Earn up to: $2K/- per engag.
Partner eligibility: Nominated partners by PSS

Resources

- Technical readiness guide
- Video: How to get ready for M365 Copilot
- Data, Privacy, and Security for Microsoft 365 Copilot
- Implementation summary guide
- Optimization assessment
- Scenario library

Copilot Extensibility

Extend Microsoft 365 Copilot into enterprise systems and workflows with custom connectors, plugins, and secure actions

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Partner Value Proposition

- Differentiate by offering advanced AI integrations, driving higher-value consulting projects
- Unlock new revenue streams & deepen customer reliance by gathering knowledge about customer's systems and workflows

Customer Value Proposition

- Enable richer AI assistance that knows the customer's business context beyond the M365 graph
- Maximize ROI on Copilot licenses as it taps into CRM, ERP & others, including non-Microsoft systems

Customer Profile

- Organizations with Copilot license - Leverage Cloud Ascent (M365 Cohort > With existing Copilot purchase)
- Enterprises with diverse LoB applications (CRM, ERP, DBs) seeking to bring that data into Copilot's reach.

Customer Triggers & Scenarios

- After a successful initial Copilot deployment with >40% MAU, when the customer is ready to expand into more complex use cases.
- When customers identify critical workflows or data sources not covered by Copilot's default knowledge

? Key Questions

- If Copilot could take secure actions in your systems, what would you automate first?
- How much more powerful would Copilot be if it could access your CRM, ERP, or other LoB apps?

Example Offerings

Copilot Extensibility Ideation Workshop

- Discover high-value integration opportunities
- Map systems (incl. non-Microsoft) and processes to connect into Copilot

Custom Connector Development Sprint

- Rapid development of a M365 Copilot connector
- Testing and deployment.

Full Copilot Integration Project

- End-to-end engagement: Solution architecture, connector development, security review, and user enablement.

★ Success Outcomes

- Expansion of systems with Copilot integration
- M365 Copilot license expansion

Practice Development Guide

Build skills - Upskill on Microsoft Graph connectors, Copilot Studio, and relevant APIs

Package offering - Create a repeatable offering with a workshop and a pilot connector build

Get initial wins - Target customers with M365 Copilot purchase who have obvious integration gaps

Scale practice - Develop reusable IP such as connector templates, code libraries, and best-practice patterns

Enhance capability - Invest in advanced training or partnerships for industry-specific systems (e.g. SAP, ServiceNow) – check all connectors

Demonstrate quick wins - Integrate one high-value system (like a CRM) to showcase immediate benefits

Customer Zero Guidance

- Integrate Copilot with one of your own internal business applications
- Document and showcase the results (e.g. how internal support tickets or sales insights improved) to build credibility
- Use internal project to refine an integration playbook – addressing authentication, data filtering, and testing practices

Technology Stack

Copilot platform	Integration tools	Security & identity
M365 Copilot	Microsoft Graph	Entra ID
Power Platform	Copilot connectors	Purview
Power Platform	Copilot APIs	

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- **APL-7008**: Create custom agents with Microsoft Copilot Studio

Key incentives and investments levers

Copilot + Power Envisioning & PoC
Earn up to: $25K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

### Copilot + Power Deployment Accelerator
Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Resources

- Copilot extensibility documentation (connectors, APIs, and plugins)
- Customer stories
- Copilot Connectors
- Build your own Copilot connectors guide
- Agent templates and examples

Quick Work Agents using M365 Copilot & Copilot Chat

Deliver lightweight, role-specific Copilot agents in days, enabling rapid wins for HR, IT, finance, and business teams

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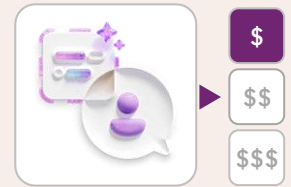
Partner Value Proposition

- Accelerate sales cycles with quick-turnaround AI solutions
- Deliver tangible results in days, not months to build trust and drive expansion
- Lower delivery cost by using Copilot's built-in agent tools for higher margins

Customer Value Proposition

- Rapidly solve specific pain points with minimal disruption
- Empower business users to experiment and innovate safely with AI and build confidence and momentum

Customer Profile

- Customers who have M365 Copilot or Copilot Chat enabled and seek immediate practical use cases
- Business departments (HR, Finance, Sales, etc.) with repetitive Q&A or processes
- Organizations open to agile, pilot-driven projects and with data readily accessible (SharePoint, knowledge bases, FAQs)

Customer Triggers & Scenarios

- Right after initial Copilot rollout, to showcase value early via a compelling demo agent.
- During innovation sprints or hackathons as a way to rapidly build an AI solution

Customer Questions

- If you could spin up a lightweight agent, which process would you tackle first?
- What's one repetitive question your HR, IT, or Finance team is tired of answering?

Example Offerings

AI Agent Ideation Workshop

- Identify and prioritize scenarios
- Design outline for one pilot agent

Departmental Copilot Quickstart

- Build and deploy one Copilot Chat agent
- Basic training for the team

Copilot Chat Hackathon

- Build several minimal-viable agents in Copilot Chat
- Agent training
- Refine agent ideas into functional prototypes

Success Outcomes

- Wall to wall coverage with Copilot Chat and M365 Copilot
- Expansion into advanced agents w/Copilot Studio

Practice Development Guide

Build skills - Train consultants on Copilot Studio's no-code agent builder and prompt design. Encourage certifications in Power Platform basics

Package offering - Standardize a Quick Agent Jumpstart package (reference above)

Get initial wins - Use your own organization or an existing friendly client to create a showcase agent. Document the impact

Scale practice - Develop a library of reusable agent templates and knowledge base integration methods

Enhance capability - Incorporate new Copilot features (like multi-step agent capabilities or better dialog management) and expand to Copilot Studio

Customer Zero Guidance

- Create at least one internal Copilot Chat agent to refine delivery approach and build an execution playbook
- Run a small internal contest or hackathon to foster internal champions and produce internal success stories
- Use your internal agent in prospect meetings or webinars as a live demo

Technology Stack

Copilot user interface:
- Microsoft 365 Copilot
- Copilot Chat
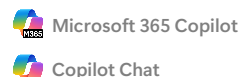
Identity, security & compliance stack:
- Entra ID
- Purview

Skilling Pathway

1

Modern Work Solution Partner Designation

- **MS-900** Microsoft 365 Fundamentals
- **MD-102** Endpoint Administrator Associate
- **MS-102** Administrator Expert

2

Security/Compliance

- **SC-401** Information Protection
- **APL-4002** Prepare security and compliance to support Copilot

3

Copilot Studio skills

- **APL-7008**: Create custom agents with Microsoft Copilot Studio

Key incentives

CSP Incentive
Rate: 7.00%, up to $175K
Partner eligibility: One of six Solutions Partner designations

Resources

- Agent builder in Copilot Chat
- Copilot Chat Agent demos
- Copilot Chat Success Kit
- Which Copilot is right?
- Copilot Chat: Interactive scenario library
- Customer lifecycle management: The great Copilot journey for Copilot Chat
- Copilot Chat vs M365 Copilot
- Copilot Chat FAQ
- Copilot Studio licensing
- Copilot Studio message usage estimator

Copilot Adoption & Change Management

Drive measurable Copilot adoption and license upselling by aligning employees, champions, and leadership with structured change management, training, and ROI tracking

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Partner Value Proposition

- Improve the success rate and drive license upsell for wall-to-wall coverage
- Build revenue streams through training, coaching, and change management services
- Position your firm as a strategic AI partner

Customer Value Proposition

- Maximize the return on Copilot licensing and expand productivity benefits to the broader enterprise
- Mitigate the disruption of introducing AI at work through structured change management

Customer Profile

- Organizations rolling out Microsoft 365 Copilot to users without a structured change management plan
- Organizations with limited experience in AI or past challenges in tech adoption
- Customers in sectors where employee need clear communication on how Copilot works, data usage, and policies, etc.

Customer Triggers & Scenarios

- During the Copilot deployment proposal stage as an add-on offering
- During planning for Copilot deployment - Adoption strategy should run in parallel with technical implementation
- Immediately post-deployment, especially if usage is low or confusion is high

? Key Questions

- What would success look like six months after rollout?
- What's the risk to your AI investment if employees don't know how to adopt Copilot?

Example Offerings

Adoption Strategy Workshop

- Facilitated workshop with leadership and project sponsors
- Tailored change management plan and adoption roadmap

Communications & Training Kit Development

- Customized communication plans (emails, FAQs, demo videos) and prompting training materials

Champions Program Launch

- Establish an internal Copilot Champions community
- Advanced training, resources, and prompting best practices guidance

★ Success Outcomes

- License expansion
- >50% Copilot Monthly Active Users

Practice Development Guide

Build skills - Achieve the Adoption & Change Management Specialization and industry-standard certifications (e.g. Prosci)

Package offering - Productize your approach with defined phases and set deliverables

Get initial wins - Pilot adoption program internally or attach it to an existing deployment. Collect data such as % of active users, improvement in sentiment, etc.

Scale practice - Build a repository of reusable content – email templates, slide decks, workshop agendas, etc.

Enhance capability - Stay current on new Copilot features and how they impact users such as Copilot Researcher, Analyst, etc.

Customer Zero Guidance

- **Encourage everyone**, especially account managers and consultants to use Copilot daily and share best practices in internal forums
- **Identify your champions** – Build an internal community of people excited about AI tools, gather their feedback, and showcase stories
- **Develop collateral** – Build your own Copilot quick-start guides, FAQ documents, and training slide decks
- **Measure and iterate** – Leverage Copilot dashboard to understand usage and impact

Technology Stack

Microsoft 365 Copilot
(Teams, Outlook, Word, Excel, PowerPoint, etc.),

Skilling Pathway

1. Modern Work Solution Partner Designation

- **MS-900** Microsoft 365 Fundamentals
- **MD-102** Endpoint Administrator Associate
- **MS-102** Administrator Expert

2. Adoption and change management specialization

Services Adoption Specialist Partner University Assessment

3. Other certification requirement for Copilot specialization

- **APL-4002**: Prepare security and compliance to support Copilot
- **APL-7008**: Create custom agents with Microsoft Copilot Studio

Key incentives and investments levers

CSP Incentive
Rate: 7.00%, up to $175K
Partner eligibility: One of six Solutions Partner designations

Copilot + Power Deployment Accelerator
Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Resources

- Copilot Success Kit
- Scenario library
- The Great Copilot Journey
- Create an AI Council guide
- Engaging functional business leaders
- Copilot skilling center for all roles
- Copilot dashboard overview
- User engagement tools and templates

Frontier 2

Innovate with low-code AI and business processes

- **Copilot Studio Strategy and Governance** $ $ $
- **Agent Factory** $ $ $
- **Copilot Studio-powered Industry and Functional Accelerators** $ $ $
- **AI Enhancements for Dynamics 365 Business Applications** $ $ $

Copilot Studio Strategy and Governance

Establish enterprise-wide frameworks, guardrails, and operating models for safe, compliant, and business-aligned use of Copilot Studio

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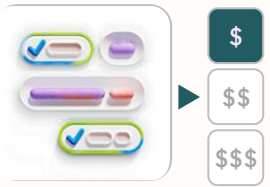
Partner Value Proposition

- Position as an AI thought leader by guiding organizations in discovering key scenarios and their respective costing.
- Differentiate your services with a governance-first approach, reducing project risks and building client trust.

Customer Value Proposition

- Establish a clear framework and business plan to innovate with Copilot Studio just like 30,000+ organizations
- Protect the organization's data and reputation by setting upfront guardrails for secure, compliant usage

Customer Profile

- Enterprises already planning to enable Copilot Studio who have strict IT oversight
- Organizations with multiple departments or citizen developers eager to build AI solutions but need centralized policies, environment setup, and guidance before things scale up
- Customers whose compliance, security, or legal teams are hesitant about generative AI

Customer Triggers & Scenarios

- After an initial M365 Copilot pilot or hackathon or rollout, when enthusiasm is high but leadership is asking "how do we scale this?"
- When enterprise-wide AI initiatives are being discussed (formation of an AI Council, AI Center of Excellence, etc.)

Key Questions

- As teams build their own Copilot agents, how will you avoid shadow AI?
- Who is responsible for agent approvals and compliance in your organization?

Example Offerings

AI Governance Framework Workshop
- Multi-day engagement to define principles and policies - Covers data access rules, content moderation, approval processes etc.

Copilot Studio Strategy & Roadmap
- High-impact use case identification and associated cost
- Process transformation roadmap
- Environment strategy and adoption plan

Center of Excellence (CoE) Setup
- Define team roles, set-up admin center, configure environment and DLP policies, etc.

Success Outcomes
- Copilot Studio implementation
- COE development

Practice Development Guide

Build skills - Aim to get the Copilot Specialization and have team members versed in industry regulations.

Package offering - Develop a structured strategy and governance offerings with clear methodology (questionnaires, usage meter, policy templates, governance charter documents).

Get initial wins - Engage with an existing client (or build a customer zero story) to build initial stories > Document and share tangible outcomes.

Scale practice - Build IP such as industry accelerators, checklists for AI solution reviews or dashboards for monitoring agent usage.

Enhance capability - Build capabilities for Autonomous Agents and custom connectors using Model Context Protocol. Expand capabilities even further by leveraging Azure Foundry.

Customer Zero Guidance

- **Identify use cases** and define policy for building agents via M365 Copilot, Chat, and Copilot Studio (including leveraging MCP Server)
- **Set up internal COE –** Form a small internal AI team for ongoing use case identification, cost governance and security
- **Test your controls –** Validate governance features: e.g., create a dummy agent and attempt to break DLP rules
- **Document and exemplify –** Build execution playbooks and artifacts to drive repeatability with clients

Technology Stack

Copilot stack	Admin & governance	Identity, security & compliance stack
M365 Copilot	Power Platform Admin Center	Entra ID Purview
Copilot Studio	Usage Estimator	Power Platform
Copilot Chat		

Skilling Pathway

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② Security Solution Partner Designation
- **SC-300** Identity and Access Administrator Associate
- **SC 401** Information Security Administrator Associate

③ Low Code Application Development Specialization
- **PL-200:** Power Platform Functional Consultant Associate
- **PL-400:** Power Platform Developer Associate
- **PL-600:** Power Platform Solution Architect Expert

③ Other certification requirement for Copilot specialization
- **APL-4002:** Prepare security and compliance to support Copilot
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Key incentives and investments levers

Copilot + Power Envisioning & PoC
Earn up to: $50K per engagement
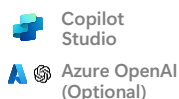**Partner eligibility:** Copilot Jumpstart Ready tier or higher

Resources

- Copilot Studio scenarios
- Governance and security eBook
- Message usage estimator
- Training: Build an autonomous agent
- Custom agent scenario battlecard
- Campaign-in-a-box
- Blog - How to be an agent boss
- Training: Extend agents with MCP

Agent Factory

Build a scalable, repeatable "AI factory" model that continuously delivers high-quality Copilot agents with consistent governance and ROI

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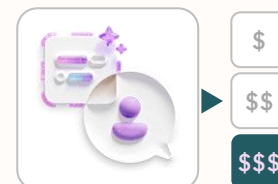
Partner Value Proposition

- Establish a long-term, programmatic engagement that drive ongoing revenue with new agent scenarios and agent lifecycle management requirements
- Develop repeatable IP and accelerators that improve delivery efficiency, increasing your margins

Customer Value Proposition

- Rapidly scale AI innovation across the enterprise to deploy dozens of AI agents
- Ensure consistency and quality in AI solutions with defined standards and best practices for governance, security, and performance benchmarks

Customer Profile

- Large organizations with a backlog of requested AI assistants and want a faster, standardized delivery mechanism
- Clients who have experimented with Copilot or Power Platform and now want to industrialize it

Customer Triggers & Scenarios

- After an initial Copilot solution has proven value
- When a customer's innovation or IT team is overwhelmed with AI project requests
- At the outset of a digital transformation initiative where AI enablement is a goal

Key Questions

- How do you manage the request for AI across departments?
- How do you ensure ROI when moving from one pilot to dozens of Copilot agents?

Example Offerings

Agent Factory Framework Setup

- Agent factory design process - from idea submission to development and testing
- Playbook for building agents

Pilot Agent Sprint Series

- Rapid development program for building agents back-to-back (or in parallel) using the factory model

Agent Factory Managed Service

- Expert development / project managers on a retainer to continually build, deploy, and improve Copilot agents

Success Outcomes

Increase in Copilot Studio metered usage

Practice Development Guide

Build skills - Get Copilot Specialization and additionally build expertise in prompt engineering and DevOps

Package offering - Package Agent Factory methodology across each phase (ideation, dev., QA, deployment, monitoring). Build tools to support it such as a template backlog for AI use cases

Get initial wins - Build multiple small agents internally or for an existing client to pressure-test the process. Document learnings.

Scale practice - Train consultants and improve your internal accelerators – for example: connector configurations etc. Add repeatable agent use cases on the marketplace.

Enhance capability - Build capabilities for Autonomous Agents and custom connectors using Model Context Protocol. Stay on top of emerging multi-agent patterns from industry research and incorporate those into your playbook

Customer Zero Guidance

- Formalize an internal process to go from idea to concept – including checkpoints for quality and security
- Execute internal multi-agent sprint with a few internal use cases
- Capture metrics & refine each step across (design > build > test deploy)
- Package and Showcase IP (such as a custom dashboard to monitor agent usage) as part of your sales demos

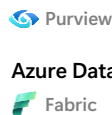## Technology Stack

Agent development stack	DevOps & automation	Integration tools	Security
Copilot Studio	Azure DevOps	Copilot connectors	Purview
Azure OpenAI (Optional)	GitHub	Copilot APIs	**Azure Data**
			Fabric
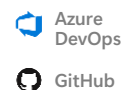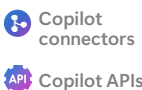
Skilling Pathway

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Modern Work Solution Partner Designation

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- **MS-102** Administrator Expert

2

Other certification requirement for Copilot specialization

- **APL-4002:** Prepare security and compliance to support Copilot
- **APL-7008:** Create custom agents with Microsoft Copilot Studio
- **SC-401:** Implement information protection **in Microsoft 365**

3

Digital and App Innovation SPD

- **AZ-104:** Azure Administrator Associate
- **AZ-204:** Azure Developer Associate
- **AZ-204:** Azure Developer Associate
- **PM-400:** Power Platform Developer Associate
- **AZ-305:** Azure Solutions Architect Expert
- **AZ-400:** Azure DevOps Engineer Expert
- **PL-600:** Power Platform Solution Architect Expert

Key incentives and investments levers

Copilot + Power Envisioning & PoC
Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

### Copilot + Power Deployment Accelerator
Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Resources

- Microsoft Build Session – Architecting multi-agent solutions with Copilot Studio
- Microsoft Learn – Tenant environment strategy for scaling Power Platform/Copilot Studio
- GitHub – Sample Copilot Agents & Templates Repository
- Copilot Studio scenarios
- Agent governance controls
- Message usage estimator

Copilot Studio-powered Industry and Functional Accelerators

Deploy pre-built Copilot accelerators tailored to industry and functional workflows, language, and compliance for rapid, low-risk AI adoption

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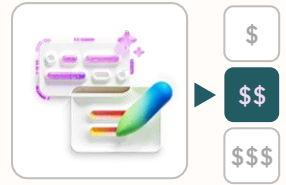
Partner Value Proposition

- Claim niche leadership by combining AI expertise with deep industry knowledge
- Command higher margins and accelerate & delivery sales cycle in targeted industries
- Design Copilots by user roles and industry, ensuring relevance, clarity, and operational efficiency

Customer Value Proposition

- Obtain AI solutions that speak their language, leading to quicker adoption and more relevant outputs
- Reduce project risk and cost by leveraging proven templates

Customer Profile

- Organizations in industries with specialized processes or jargon (e.g. healthcare, legal, finance, manufacturing) that want AI solutions attuned to those specifics
- Customers who value rapid deployment

Customer Triggers & Scenarios

- When engaging a client in a vertical where you have an accelerator ready
- During industry-specific events or planning cycles (e.g. a bank's annual tech budget planning)
- Right after a major industry development (like new regulations or market shifts) that creates urgency for smarter solutions

Key Questions

- What industry-specific process would you automate first?
- How do you balance innovation with regulatory requirements?

Example Offerings

Industry and Functional AI Vision & Use Case Mapping

- Facilitated workshop for scenario discovery and mapping
- Adoption roadmap

Pre-built Copilot Accelerator Deployment

- Quick implementation of a ready-made Copilot solution
- Configuration > Minor customization

Vertical Data & Integration Enhancement

Integration of Copilot with industry or function specific data sources or apps such as insurance claims database, or IoT

Success Outcomes

- Published industry or function-centric, configurable Agent templates

Practice Development Guide

Build skills - Get Copilot specialization and train consultants on industry processes and regulations knowledge

Package offering - Productize and package your vertical or functional accelerator on the marketplace. Create a demo environment with sample data to wow clients (for instance, a fake hospital DB for demonstrating a healthcare Copilot).

Get initial wins - Co-innovate with an early adopter in that industry or business function – perhaps an existing client willing. Document learnings and best practices.

Scale practice - Identify adjacent industries or processes to execute a similar approach. Reuse the core technology and adapt the domain layer.

Enhance capability - Pursue relevant certifications or partnerships (e.g., become an industry-focused solution designated partner). Stay updated on industry trends.

Customer Zero Guidance

- Develop a realistic demo internally using synthetic or publicly available data
- Leverage domain experts with real industry or functional experience who can validate AI output
- Run the accelerator through internal compliance checks such as HIPAA compliance audit
- Document repeatable processes and create an internal deployment guide

Technology Stack

Agent development stack	Industry data integration	Security
Copilot Studio	Graph connectors	Microsoft Purview
Azure OpenAI (Optional)	Power Platform Connectors	Compliance Manager
	Microsoft Industry Clouds	

Skilling Pathway

1

Copilot specialization

- **MS-102:** Enterprise Administrator Expert
- **APL-4002:** Prepare security and compliance to support Copilot
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2

Business Applications Solution Partner Designation

Intermediate and advanced certification in any of Business Application solutions across Dynamics 365 and Power Platform

3

Security Solution Partner Designation

- **SC-300** Identity and Access Administrator Associate
- **SC 401** Information Security Administrator Associate

Key incentives and investments levers

Copilot + Power Deployment Accelerator

Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Resources

- Microsoft Industry Blogs
- Microsoft Learn – Industry Cloud documentation and resources
- Microsoft Trust Center
- YouTube – Microsoft Cloud
- Industry campaign-in-a-box

AI Enhancements for Dynamics 365 Business Applications

Supercharge Dynamics 365 Sales, Service, and ERP with Copilot Studio extensions that automate tasks and improve data quality

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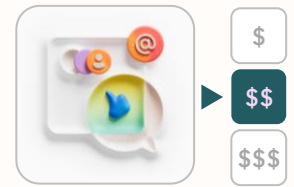
Partner Value Proposition

- Expand Dynamics practice by infusing AI into CRM and ERP projects to differentiate from standard implementations and increase deal sizes
- Deepen customer relationships by driving tangible productivity gains in sales and service teams
- Elevate every CRM/ERP deployment with Copilot and AI agents (1P agents, prebuilt agents, custom agents)

Customer Value Proposition

- Embed intelligent assistance embedded in daily tools.
- Enhance the ROI of existing systems - AI features makes data more actionable, helps people identify patterns, and automate routine tasks

Customer Profile

- Organizations already using Dynamics 365 (Sales, Customer Service, ERP, etc.) who want to maximize those systems w/AI
- Businesses with large sales or support teams with large on-premises or compete CRM implementation

Customer Triggers & Scenarios

- During a Dynamics 365 or other LoB implementation or upgrade cycle – baking AI enhancements into the project
- Drive horizontal AI transformation by automating cross-business processes in ERP, CRM, and productivity apps
- When a client's CRM adoption is plateauing or user feedback is that "data entry is too time consuming" or "we lack insights"

Key Questions

- What if sellers never had to write follow-up emails or log notes manually?
- What would customer satisfaction look like if service agents had AI-suggested responses?

Example Offerings

Dynamics 365 Copilot Value Assessment

- Existing sales/ service process analysis
- Solution mapping with Copilot Studio or custom AI

Sales Copilot Quick Enablement

- Rapid deployment of Sales Copilot: Includes configuration, technical setup, user onboarding, and initial tuning

Custom Copilot Agent Development

- Bespoke AI assistant, integrated with existing Dynamics 365 applications: Includes design, development, and integration

Success Outcomes

- Dynamics 365 purchase
- Copilot Studio metered usage increase

Practice Development Guide

Build skills - Equip consultants with AI knowledge. Ensure they understand out-of-the-box Copilot features in D365, and how to extend Dynamics 365 and other LoB apps w/Copilot Studio.

Package offering - Templatize approach to add Copilot to Dynamics and other apps, along with, ROI calculators, etc.

Get initial wins - Identify an existing client and implement a set of Copilot enhancements for them. Turn this into a case study.

Scale practice - Incorporate Copilot configuration into your standard implementation checklist, and create a knowledge base of common issues.

Enhance capability - Keep pace with Microsoft's AI roadmap and expand your technical toolkit w/Azure AI

Build your own IP, perhaps a small AppSource add-on that extends Copilot for a niche need

Customer Zero Guidance

- If your firm uses Dynamics 365, enable Copilot-like features for your own sales or support teams
- Build an internal demo using your company's (non-sensitive) CRM data. Show how Copilot summarizes your pipeline or generates a QBR (Quarterly Business Review) report.
- Document configuration steps: e.g., consent to data movement, prompt tuning, etc.
- Encourage internal champions to find additional use cases for AI within applications

Technology Stack

Dynamics 365 stack	Agent dev. stack	Industry data integration	Security
Dynamics 365 modules	Copilot Studio	Graph connectors	Microsoft Purview
Microsoft Dataverse	Azure OpenAI (optional)	Power Platform connectors	Entra
		Microsoft Industry Clouds	

Skilling Pathway

1

Copilot specialization

- **MS-102:** Enterprise Administrator Expert
- **APL-4002:** Prepare security and compliance to support Copilot
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Business Applications Solution Partner Designation

Intermediate and advanced certification in any of Business Application solutions across Dynamics 365 and Power Platform

Key incentives and investments levers

Copilot + Power Deployment Accelerator

Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Resources

- Envisioning, deployment and adoption resources for Dynamics 365
- GTM resources for Dynamics 365
- Copilot Studio scenarios
- Agent governance controls
- Message usage estimator

Frontier 3

Build transformational AI applications at scale

- **GenAI Advisory** **(No-Code, Low-Code, Pro-Code)** $ $ $

- **Cloud and Data Platform Modernization** $ $ $

- **GenAI Ops Implementation with Azure** $ $ $

- **Vertical AI Solutions and Platforms with Azure** $ $ $

- **Autonomous Multi-Agent Systems** $ $ $

- **Data Security for AI Apps and Agents** $ $ $

GenAI Advisory
(No-Code, Low-Code, Pro-Code)

Position your practice as the trusted GenAI advisor by packaging no-code to pro-code guidance

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Partner Value Proposition

- **Become a trusted AI advisor** across the full tech stack, helping customers to shape their vision and roadmap
- **Differentiate by offering end-to-end guidance,** covering Gen AI possibilities, data and infra. strategy, use case ideation, COE setup, and Responsible AI frameworks.

Customer Value Proposition

- Custom AI strategy, that leads with business goals instead of technology, helps **realize value from AI investments faster**
- Ensures the data, infrastructure, people are **prepared for AI**
- Holistic offering shows customers **how to leverage the Microsoft technologies they already own** vs buying net-new

Customer Profile

- Organizations scaling beyond initial AI pilots OR building an internal AI COE
- Organizations that have modernized their data estate and now seek to apply AI
- Customers in regulated industries who need guidance on how to leverage AI responsibly

Customer Triggers & Scenarios

- **Post-pilot:** Experimented with chatbots or a small GenAI pilot and now seeking a broader roadmap
- **Recent data/cloud investments:** Recently migrated to Azure & now wants to explore AI use cases
- **Risk & governance concerns** prompted the need for guidance on responsible AI

Key Questions

- Which processes today would benefit from faster automation or augmentation, if AI could help?
- How do you evaluate and prioritize AI use cases across your organization?

Example Offerings

Generative AI Strategy Workshop
- High-value use case envisioning
- Strategic AI adoption roadmap

AI Use Case Proof-of-Value
Rapid prototyping for one identified use case to demonstrate feasibility and build buy-in

AI Center of Excellence (CoE) Launch Advisory
Development of CoE charter, operating model, and a launch plan

Success Outcomes
Use case development using either of no-code, low-code, or pro-code

Practice Development Guide

Build cross-skilled teams - Develop a team of consultants versed in Azure AI, Power Platform, data engineering, and change management. Include experts who can speak to C-suite business strategy

Develop reusable frameworks - Create templates for AI maturity assessments, use-case prioritization matrices, technology mapping based on complexity, and ROI calculators

Demonstrate initial AI success - Invest in your own AI use cases or target existing Microsoft clients to showcase credibility

Continuous learning & CoE - Internally, establish your own AI Center of Excellence to upskill staff, incubate new IP, curate best practices, and accelerate cross-functional expertise development

Build responsible AI capabilities - to bolster advisory credibility on topics like fairness, privacy, bias mitigation, and regulatory compliance

Customer Zero Guidance

- Build an AI use case internally using Azure AI, Copilot Studio and M365 Copilot respectively to gain hands-on experience
- Capture internal success stories, challenges, and demos
- Establish governance, data access, and AI security policies
- Encourage internal champions to find additional use cases and identify the right approach to build them

Technology Stack

Azure AI	Copilot Stack	Security & Governance	Azure Data & Analytics
Azure Foundry	M365 Copilot	Microsoft Purview	Power Platform
Cognitive AI services	Copilot Studio	Entra ID	
AzureML	Copilot Chat		

Skilling Pathway

Solution Partner Designations
- Azure Data & AI
- Azure Infrastructure
- Azure Digital & App Innovation
- Modern Work
- Security
- Business Applications

Specializations

Azure	Modern Work	Security
AI Platform on Azure	Copilot	Identity and Access Management
Analytics on Azure	Adoption and Change Management	Data Security
Build AI Apps with Azure		

Key incentives and investments levers

Copilot + Power Envisioning & PoC
Earn up to: $50K per engagement
Partner eligibility: Copilot Jumpstart Ready tier or higher

Data Security Envisioning Workshop
Earn up to: $8K per engagement
Partner eligibility: Active Security Partner Designation

Resources

- Common agent scenarios
- Stakeholder management worksheet
- Microsoft AI Tour sessions
- Governance and security eBook
- Foundry model catalog
- Custom agent scenario battlecard
- Training: Responsible AI principles and practices
- Finding the best AI model

Cloud and Data Platform Modernization

Lead with cloud and data modernization to position your practice as the launchpad for AI transformation

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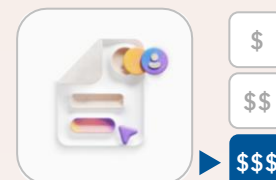
Partner Value Proposition

- **Capture cloud migration wave** as customers seek to drive AI readiness. 75% customers agree that migrating to the cloud is essential to AI and ML adoption, as per Forrester.
- Modernizing platform often unlocks **follow-on high-value projects**
- **Full-stack capability** across infrastructure, databases, and data analytics enables you to stand out

Customer Value Proposition

- 344% three-year ROI by moving legacy infra to Azure,
- A modern cloud/data platform is the prerequisite for AI
- Leverage Microsoft's billions of dollars of security investment and 100+ compliance certifications

Customer Profile

- Organizations with aging or end of support infrastructure
- Companies with a mandate to move to cloud or consolidate data centers
- Enterprises preparing for AI Initiatives
- Mergers & acquisitions situations

Customer Triggers & Scenarios

- On-premises servers reaching end of support (EOS)
- When advanced analytics and AI projects are held back by siloed on-prem data and systems
- Increasing security and compliance requirements

? Key Questions

- What limitations are you facing with your current data or app. platforms when trying to adopt AI?
- What challenges do you face in maintaining your on-premises infrastructure?

Example Offerings

Cloud Readiness Assessment

- Application portfolio and on-premises infrastructure analysis
- Cloud readiness report, along with roadmap and TCO projection

Data Estate Modernization Plan

- Data landscape assessment
- Target state architecture development, along with a phased migration and data governance plan

BI and Analytics Modernization

- Legacy analytics and BI platform to Fabric migration with a modern data model in Azure, and a set of Power BI dashboards

★ Success Outcomes

- Successful migration / modernization to Azure
- AI use case discussions

Practice Development Guide

Establish credentials - Attain Solution Partner designation for Azure Infrastructure. Wherever possible, earn relevant specializations to differentiate and demonstrate deeper skills

Develop a repeatable migration methodology - Define templates and checklists for each stage: Assessment, business case, architecture design, executing migration sprints, and handing off

Build migration offerings and IP - Package standardized offerings and invest in some reusable IP such as automation scripts for bulk VM migrations, etc.
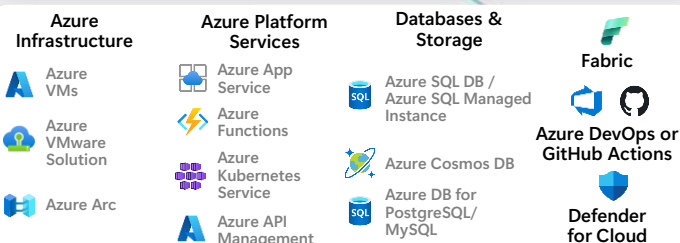
Leverage funding to accelerate projects - Become eligible for Azure Accelerate to access pre-sales funding, assessments, and engineering resources.

Focus on post migration value and optimization – Plan for additional services such as application containerization or cost optimization

Customer Zero Guidance

- Migrate your own workloads, data, and services to Azure / modern data architectures
- Run your internal operations on the same patterns, frameworks, and tools you will roll out to clients
- Use the experience, metrics, pitfalls, and lessons learned to sharpen your methodology, build credibility, and drive better outcomes for customers

Technology Stack

Azure Infrastructure
- Azure VMs
- Azure VMware Solution
- Azure Arc

Azure Platform Services
- Azure App Service
- Azure Functions
- Azure Kubernetes Service
- Azure API Management

Databases & Storage
- Azure SQL DB / Azure SQL Managed Instance
- Azure Cosmos DB
- Azure DB for PostgreSQL/ MySQL

- Fabric
- Azure DevOps or GitHub Actions
- Defender for Cloud

Skilling Pathway

Solution Partner Designations

- Azure Infrastructure
- Azure Digital & Application Innovation
- Azure Data & AI

Specializations

Azure Infrastructure
- Infra and Database Migration to Microsoft Azure
- Microsoft Azure VMware Solution
- Microsoft Azure Virtual Desktop
- Networking Services in Microsoft Azure
- SAP on Microsoft Azure
- Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI

Azure Digital & App Innovation
- Accelerate Developer Productivity with Microsoft Azure
- Kubernetes on Microsoft Azure
- Migrate Enterprise Applications to Microsoft Azure
- Intelligent Automation

Azure Data & AI
- AI Platform on Microsoft Azure
- Analytics on Microsoft Azure Build AI Apps with Microsoft Azure
- Business Intelligence
- Data Warehouse Migration to Microsoft Azure

Key incentives and investments levers

Azure Accelerate Pre-sales:
Data Platform
Earn up to: $25K per engagement
Partner eligibility: Analytics or DW Migration Spec.

### Azure Accelerate Pre-sales:
Core Migrate & Modernize
Earn up to: $25K per engagement
Partner eligibility: Any one Azure Infra Spec.

Resources

- Campaign-in-a-box: Migrate and modernize your estate | Migrate VMware workloads to Azure | Modernize VDI to Azure Virtual Desktop | Unify Data Analytics
- Tools: Azure Cloud Adoption Framework | Azure Migrate | Azure Pricing Calculator | Azure Well-Architected Framework

GenAI Ops Implementation with Azure

Empower companies to build scalable AI systems by helping them executing strong monitoring and governance frameworks

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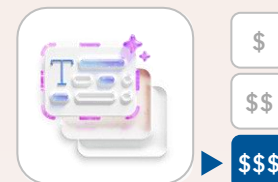
Partner Value Proposition
- Positions you as someone who can run AI at scale
- Enables you to build a full-stack operational framework, covering observability, cost optimization, etc.
- Opens doors for managed services - monitoring token usage, managing prompt libraries, etc.

Customer Value Proposition
- Provides the framework, controls, and ops muscle to deploy LLM solutions at scale
- Minimize risks of bias, hallucinations, IP leakage, or violations
- Monitors token usage, cache outputs, etc., thus reducing waste
- Enables faster innovation

Customer Profile
- Scaling beyond pilot agents into enterprise-wide GenAI adoption
- Running multiple LLM experiments, now needing a centralized operations and governance model
- Regulated industries requiring robust AI controls

Customer Triggers & Scenarios
- After initial Copilot / Azure OpenAI PoCs
- Growing shadow AI risks from unsanctioned LLM apps
- Increasing cloud bills from inefficient LLM usage
- Need to comply with new AI regulations

Key Questions
- How do you validate the accuracy and safety of AI outputs before they impact your business?
- What processes do you have in place today to monitor LLM usage, token costs, and model performance?

Example Offerings

GenAI Ops Strategy & Roadmap
- Business case set-up
- Operating model, including compliance controls, and scaling plan

GenAI Governance Framework Workshop
Defining policies for prompts, model usage, data access, and output moderation

Observability & Monitoring Setup
Implementation of telemetry: Token usage, response latency, output quality, and bias detection

Success Outcomes
- AI use case execution and ACR expansion

Practice Development Guide

Build skills – Build cross-functional team capability across AI engineering, Responsible AI, security, and cloud operations. Create internal sandboxes to practice prompt engineering, LLMOps, etc.

Package offerings – Standardize GenAI maturity assessments, ops framework, monitoring templates, and governance packs

Get initial wins - Apply GenAI Ops to your own practice (internal copilots, knowledge assistants). Document lessons learned to build sales narrative.

Scale practice - Develop accelerators: prompt libraries, observability dashboards, compliance workflows, and industry-tailored bundles.

Enhance capability - Continuously update IP with new Azure services (Fabric, Copilot Studio, AI agents)

Customer Zero Guidance
- Pilot generative AI internally to experience challenges of latency, accuracy, hallucination, and cost management
- Establish internal GenAI Ops CoE that would be responsible for lifecycle management
- Operationalize observability and stress test resilience and scale
- Codify patterns and playbooks for repeatable customer offerings

Technology Stack

GenAI Stack	Ops & Observability	Governance & Security	Responsible AI Tools
Azure OpenAI Service	Azure Monitor	Microsoft Purview	Responsible AI Dashboard
Azure AI Studio	App Insights	Entra ID	Fairlearn
Prompt Flow	Usage Estimator	Defender for Cloud	InterpretML
Semantic Kernel		Azure AI Content Safety	

Skilling Pathway

Solution Partner Designations
- Azure Infrastructure
- Azure Digital & Application Innovation
- Azure Data & AI

Specializations

Azure Infrastructure
- Infra and Database Migration to Microsoft Azure
- Microsoft Azure VMware Solution
- Microsoft Azure Virtual Desktop
- Networking Services in Microsoft Azure
- SAP on Microsoft Azure
- Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI

Azure Digital & App Innovation
- Accelerate Developer Productivity with Microsoft Azure
- Kubernetes on Microsoft Azure
- Migrate Enterprise Applications to Microsoft Azure
- Intelligent Automation

Azure Data & AI
- AI Platform on Microsoft Azure
- Analytics on Microsoft Azure Build AI Apps with Microsoft Azure
- Business Intelligence
- Data Warehouse Migration to Microsoft Azure

Key incentives and investments levers

Azure Accelerate Pre-sales:
AI Apps, Agents and Developer
Earn up to: $25K per engagement
Partner eligibility: Any one Azure AI Specialization

Azure Accelerate Post-sales:
AI Apps, Agents and Developer
Earn up to: $75K per engagement
Partner eligibility: Any one Azure AI Specialization

Resources
- Azure AI Foundry documentation
- Responsible AI tools and practices
- Microsoft Cloud Adoption Framework – AI Adoption Track
- AI playbook
- Technology guidance
- Microsoft Academy hub videos

Vertical AI Solutions and Platforms with Azure

Scale faster by developing repeatable IP and accelerators tailored to industry clouds and Azure AI services

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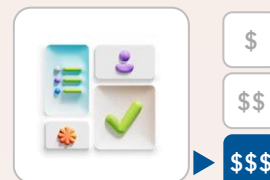
Partner Value Proposition
- Position as an industry AI specialist with tailored solutions
- Get higher margins through IP or even managed SaaS
- Leverage Microsoft's investments in Industry Clouds to reduce cost and time to market
- Increase co-selling opportunities with increased focus and alignment

Customer Value Proposition
- **Accelerate time-to-value** with ready-to-use AI models and industry data platforms
- Reduce risk and ensure compliance with **built-in Responsible AI,** security, and regulatory controls (e.g., HIPAA, GDPR, FINRA).
- **Scale sustainably** with reusable data and AI patterns

Customer Profile
- Seeking industry-specific transformation (e.g., patient care in healthcare).
- Regulated industries requiring responsible, auditable AI practices
- Aiming to integrate AI agents directly into line-of-business workflows
- Existing Dynamics 365 / Industry Cloud users looking to extend value

Customer Triggers & Scenarios
- After cloud modernization
- Internal innovation mandate
- Pressure from competitors launching AI-services

Key Questions
- What are the most critical workflows in your company where AI could create measurable value?
- Have you seen competitors adopt AI in ways that are impacting you?

Example Offerings

Industry AI Use-Case Ideation Workshop
- AI use case envisioning session with business and IT leadership
- High-level business case for each use case

Vertical AI Quickstart (MVP Development)
Minimum viable product AI solution for one key use case, possibly by leveraging Microsoft's industry-specific models

Industry Data Platform Setup
Azure Data Platform development, tailored to the sector with industry-specific data models

Success Outcomes
- AI use case execution and ACR expansion

Practice Development Guide

Build domain expertise - Hire industry SMEs or train your team deeply in workflows, data standards, and compliances of one or two chosen verticals

Build Vertical IP/Accelerators - Invest in creating re-usable solution accelerators for your chosen industry such as chatbot framework. Upload them on the marketplace.

Get initial wins - Target existing customers and deliver pilots with industry clouds to build reference stories

Scale practice - Build solution bundles across industries with reusable IP (e.g., predictive maintenance kit, fraud detection accelerator).

Enhance capability - Stay aligned with Microsoft Industry Cloud roadmaps and emerging AI model catalogs

Customer Zero Guidance
- Build a vertical-specific AI Copilot or agent for your own business processes (e.g., partner operations assistant)
- Test Responsible AI dashboards, safety guardrails, and bias detection with internal data
- Run load, cost, and performance tests on vertical AI models before deploying for customers
- Document integration playbooks and reusable templates

Technology Stack

GenAI Stack	Ops & Observability	Governance & Security	Responsible AI Tools
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Skilling Pathway

Solution Partner Designations
- Azure Infrastructure
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Key incentives and investments levers

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AI Apps, Agents and Developer
Earn up to: $25K per engagement
**Partner eligibility:** Any one Azure AI Specialization

Azure Accelerate Post-sales:
AI Apps, Agents and Developer
Earn up to: $75K per engagement
Partner eligibility: Any one Azure AI Specialization

Resources
- Common agent scenarios
- Microsoft AI Tour sessions
- Training: Finding the best AI model
- Foundry model catalog
- Cloud executive enablement series
- Campaign-in-a-box – Healthcare | Federal
- Industry-specific reference architectures

Autonomous Multi-Agent Systems

Unlock high-value innovation deals by delivering autonomous agent solutions on Azure and Copilot Studio

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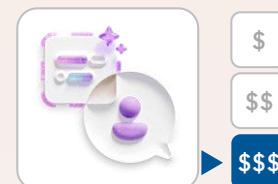
Partner Value Proposition
- Positions you at the cutting edge of AI
- Typically, big-ticket projects involving significant consulting, integration, and custom development
- Yields unique intellectual property, opening a new stream
- Unlocks additional opportunities with exposure to many systems – data platforms, apps, IoT, etc.

Customer Value Proposition
- Gain "digital workers" that can operate 24/7, autonomously
- Tackles complex problems by having specialized agents handle sub-tasks and coordinate
- Ability to create entirely new offerings or capabilities or handle unstructured scenarios

Customer Profile
- Dedicated innovation labs or budgets for experimentation
- Complex workflows that a simple RPA is unable to handle
- Implemented chatbots, RPA, or basic AI assistants and are now ready for the next level
- Defense or large public sector companies who may have autonomous agent simulation requirements

Customer Triggers & Scenarios
- Pilot success of a single agent
- Labor shortages or cost pressures in certain roles
- Need for round-the-clock execution of tasks (e.g., monitoring, scheduling, compliance checking)

? Key Questions
- Which workflows in your business today require coordination across multiple teams or systems?
- How could autonomous agents help you address workforce shortages or cost pressures in operations?

Example Offerings

Autonomous Process Assessment
- Analysis of a complex business process and automation feasibility
- Agent blueprint, integration points, and a phased implementation plan

Proof-of-Concept – Multi-Agent Coordination
Simulation results and a prototype demonstrating multi-agent execution

Autonomous Agents Governance Framework
Workshop that covers roles, safety protocols, ethical guidelines, and compliance considerations

★ Success Outcomes
- Autonomous Multi-Agent Systems Use Case Execution

Practice Development Guide

Invest in R&D - Set up a lab where consultants experiment with agent frameworks and simulation environments. Use internal hackathons to encourage creative solutions.

Hire/train for niche skills - Look for talent with robotics, control systems, or multi-agent system experience. Also train existing staff on concepts like reinforcement learning, planning algorithms, and distributed AI.

Develop a **delivery methodology** that emphasizes safety, transparency, and human oversight of autonomous agents.

Pilot internally - Implement autonomous agents within your own operations to gain experience, understand challenges and build confidence

Scale practice - Extend into industry verticals with repeatable agent bundles (supply chain agents, compliance agents)

Customer Zero Guidance
- Deploy multi-agent copilots in your own business processes
- Simulate load, failures, and adversarial scenarios to validate escalation & fallback mechanisms
- Track cost, performance, collaboration patterns, and decision accuracy
- Document playbooks for incident response, human override, and model retraining workflows
- Use internal metrics and case studies to demonstrate credibility

Technology Stack

Agent Orchestration	GenAI Models	Ops & Observability	Security & Governance
Copilot Studio	Azure OpenAI Service	Azure Monitor	Entra ID
Semantic Kernel	Azure Machine Learning	Application Insights	Microsoft Purview
AutoGen frameworks	Azure Foundry	Log Analytics	Azure AI Content Safety
			Responsible AI Toolbox

Skilling Pathway

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- Networking Services in Microsoft Azure
- SAP on Microsoft Azure
- Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI

Azure Digital & App Innovation
- Accelerate Developer Productivity with Microsoft Azure
- Kubernetes on Microsoft Azure
- Migrate Enterprise Applications to Microsoft Azure
- Intelligent Automation

Azure Data & AI
- AI Platform on Microsoft Azure
- Analytics on Microsoft Azure Build AI Apps with Microsoft Azure
- Business Intelligence
- Data Warehouse Migration to Microsoft Azure

Key incentives and investments levers

Azure Accelerate Pre-sales:
AI Apps, Agents and Developer
Earn up to: $25K per engagement
Partner eligibility: Any one Azure AI Specialization

Azure Accelerate Post-sales:
AI Apps, Agents and Developer
Earn up to: $75K per engagement
Partner eligibility: Any one Azure AI Specialization

Resources
- Understanding core concepts
- AI agent orchestration patterns
- Training: Developing a multi-agent solution | Orchestrating a multi-agent solution
- Overview of AutoGen: Open source, multi-agent conversation framework
- Designing multi-agent intelligence
- Webinar: Working with multi-agents
- Microsoft Learn: Building a multiple-agent workflow automation solution
- Overview of Magnetic-One: A Generalist Multi-Agent System
- Multi-agent custom automation engine solution accelerator

Data Security for AI Apps and Agents

Drive security and compliance-led conversations by bundling Entra, Purview, and Responsible AI into every AI engagement

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Partner Value Proposition

- Security and AI go hand-in-hand. According to Gartner, in >40% of cases, security is taking a seat on Day 1 discussions
- Exponential growth of data and AI projects, with nearly every project requiring data security and governance
- Differentiation in AI Projects: Only a few partners have both security and AI capabilities

Customer Value Proposition

- Protect sensitive data used in AI prompts, training, and inference to avoid leakage or misuse
- Ensure regulatory compliance
- Minimize risks of data exfiltration and shadow AI
- Enable safe innovation and build trust with stakeholders

Customer Profile

- Enterprises piloting or scaling AI copilots, agents, and custom GenAI apps
- Organizations handling sensitive or regulated data

Customer Triggers & Scenarios

- After an initial AI app pilot to address the need for security and compliance for rolling out AI at scale
- Rising shadow AI risks from employees using unapproved LLM tools
- Regulatory audits, compliance reviews, or new data protection mandates
- Security teams raising concerns about PII, IP leakage, or adversarial prompt attacks

Key Questions

- How do you currently prevent sensitive data from leaking into AI prompts?
- What assurances would your compliance team need before approving large-scale AI adoption?

Example Offerings

Data Governance & Compliance Assessment
- Data governance maturity review
- Gap analysis report and roadmap

AI Model Governance Framework Implementation
Processes and tool implementation for data security and integration of Responsible AI dashboards

Security Enhancement for AI/Data Workloads
Implementation of security controls, including using Azure Confidential Computing, and Purview

★ Success Outcomes

- Implementation of Microsoft Purview and Entra to secure and govern AI solutions

Practice Development Guide

Develop multi-disciplinary skills - Include not just technical Azure experts, but also those with backgrounds in privacy law, risk management, or data governance.

Package offerings - Create repeatable AI security assessment templates and compliance playbooks

Get initial wins - Apply security frameworks internally to your own AI agents or extend this service to your existing AI projects, then showcase results

Create frameworks & templates - Develop own accelerators for data security and governance, covering policies for data usage, retention, AI ethics checklist, etc.

Stay updated on regulations - Monitor evolving regulations and standards (EU AI Act, NIST AI Risk Management Framework, etc.)

Customer Zero Guidance

- Leverage Entra, Purview, and Azure Confidential Computing services to secure internal AI apps and agents
- Simulate data leakage, jailbreak prompts, and malicious use cases for adversarial testing
- Track sensitive data usage, prompt flows, and access anomalies
- Build incident response and escalation guides for AI-related breaches
- Share internal lessons on securing AI apps as credibility for customer engagements

Technology Stack

Security & Identity
- Microsoft Entra ID
- Defender for Cloud Apps

Data Governance
- Microsoft Purview
- Azure Confidential Computing

Responsible AI
- Azure AI Content Safety
- Responsible AI Dashboard

Skilling Pathway

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Security Solution Partner Designation

- **AZ-500:** Azure Security Engineer Associate
- **SC-200:** Security Operations Analyst Associate
- **SC-100:** Cybersecurity Architect Expert
- **SC-300:** Identity and Access Administrator Associate
- **SC-401:** Information Security Administrator Associate

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Specializations

Identity and Access Management

Data Security

Cloud Security

Key incentives and investments levers

CSP Incentive
Rate: 7.00%, up to $175K
Partner eligibility: One of six Solutions Partner designations

Data Security Envisioning Workshop
Earn up to: $8K per engagement
Partner eligibility: Security Solution Partner Designation

Resources

- Microsoft Learn: Securing your Generative AI apps
- Multi-part series on AI security
- Official documentation to get started with Microsoft Purview
- Purview deployment models
- Campaign-in-a-box: Security-led secure AI
- Campaign-in-a-box: Data Security
- Responsible AI tools and practices

Build your Frontier Partner Profile