

Topic 1: Microsoft Copilot

Audience: Existing Microsoft 365 customers, UCaaS/Teams/Webex customers, IT decision-makers (CIO, IT Director), Business leaders (Ops, Sales, Marketing)

Goal: Educate → Engage → Qualify → Convert

Format: 4-email campaign with progressive funnel depth

Cadence Recommendation: 5–7 days between sends

Partner Best Practices: How to Run This Campaign Successfully

1. Campaign Setup & Tools

Partners can deploy this campaign using common email and CRM tools, including:

- **Email platforms:** HubSpot, Mailchimp, Constant Contact, Marketo
- **CRM integrations:** Salesforce, Microsoft Dynamics, HubSpot CRM
- **Landing pages:** Native tools in your email platform

Setup tips

- Create **one master workflow** with conditional branching (opens/clicks)
- Personalize with:
 - First name
 - Company name
 - Industry (if available)
- Use **plain-text buttons** or strong hyperlinked CTAs (often perform better in B2B)

2. Targeting & List Strategy

- Start with **existing customers or warm prospects**
- Suppress:
 - Competitors
 - Internal domains
- Segment if possible:
 - Microsoft-heavy organizations
 - Remote/hybrid workforces
 - IT-managed environments

3. Optimization & Testing

- A/B test:

- Subject lines (clarity vs. curiosity)
 - CTA phrasing (Learn More vs. Watch Now)
- Send emails during:
 - Tuesday–Thursday
 - 9–11 AM local time

4. KPIs to Track

Funnel Stage	Key Metrics
Awareness	Open Rate, Bounce Rate
Engagement	Click-Through Rate, Content Downloads
Consideration	Time on Page, Webinar Views
Conversion	Demo Requests, Meetings Booked

Use click behavior to **trigger sales follow-up** after Emails 3 and 4.

The 4-Email Drip Campaign

Email 1 – Awareness

Funnel Stage: Top of Funnel (Education)

Subject: Microsoft Copilot: AI Built for Everyday Work

Preheader: A simple way to boost productivity inside Microsoft 365

Body:

Hi {{First Name}},

AI is no longer “coming soon,” it’s already embedded in the tools people use every day. Microsoft Copilot brings generative AI into Microsoft 365 to help users:

- Draft content faster
- Summarize information
- Uncover insights

All without changing how they work.

For organizations already standardized on Microsoft, Copilot is a practical next step toward modern productivity, especially for teams juggling meetings, email, documents, and data all day.

If you’re curious what Copilot is (and why it matters now), start here.

CTA: Learn More

Suggested link: [Transform Your Team Collaboration and Productivity with Microsoft Copilot](#)

Best regards,
{{Sender Name}}

Email 2 – Engagement

Funnel Stage: Early-Mid Funnel

Subject: Practical Copilot Use Cases Your Teams Will Actually Use

Preheader: Real examples in Teams, Outlook, Word, and Excel

Body:

Hi {{First Name}},

The fastest way to understand Microsoft Copilot is to see it in action.

- Inside Teams, Copilot can help
 - Summarize long threads and meetings
 - Highlight decisions
 - Surface next steps
- In Outlook and Word, it can accelerate drafting and polishing communications.
- Across Microsoft 365, it's designed to reduce time spent on repetitive work so teams can focus on higher-value tasks.

If you're exploring where Copilot fits, these examples can help you identify quick wins for different roles and departments and spark internal momentum with minimal disruption.

CTA: Watch the Overview

Suggested link: [Navigating MS Copilot and Teams](#)

Best regards,
{{Sender Name}}

Email 3 – Consideration

Funnel Stage: Mid Funnel (Problem/Solution Validation)

Subject: Copilot Readiness: What to Know Before You Turn It On

Preheader: Adoption, enablement, and the path to real outcomes

Body:

Hi {{First Name}},

Copilot success isn't just licensing; it's enablement and readiness. Organizations see better results when they align Copilot with business goals, prepare users to work confidently with AI, and establish a plan for measuring adoption and impact.

CallTower's Microsoft 365 Copilot Success Guide outlines a structured approach, including:

- Leadership alignment
- Technical readiness
- Change management
- Ways to track usage trends and outcomes over time

If you're evaluating Copilot seriously, this is a strong next step to move from interest to a practical rollout plan.

CTA: Explore the Copilot Advantage

Suggested link: [Microsoft 365 Copilot Success Guide](#)

Best regards,

{{Sender Name}}

Email 4 – Conversion

Funnel Stage: Bottom of Funnel (Action)

Subject: Ready to Activate Copilot with Confidence?

Preheader: Talk to CallTower about a Copilot consultation

Body:

Hi {{First Name}},

If Copilot is on your roadmap, the next step is a guided plan that fits your environment and goals. CallTower offers Microsoft Copilot consultations designed to help organizations unlock value faster with:

- Tailored recommendations
- Implementation guidance
- Ongoing support

Whether you're starting from scratch or optimizing an existing setup, a short conversation can clarify the best path forward and identify where Copilot can drive the biggest impact quickly.

If you'd like help turning interest into action, let's schedule time and map out next steps.

CTA: Book a Copilot Consultation

Suggested link: [Let's Connect](#)

Best regards,
{{Sender Name}}

Final Notes for Partners

- All copy is **fully editable**
- CTAs can be swapped for:
 - Partner-branded landing pages
 - Shared CallTower assets
 - Partner-hosted webinars or demos
- Sales teams should engage **after Email 3 or 4 clicks**