

# Customer Service Advisor

CUSTOMER SERVICE · O\*NET 43-4051.00 · CUSTOMER SERVICE REPRESENTATIVES

ANSWER FASTER AND WRITE BETTER, WITH THE CUSTOMER STILL DOING THE TALKING.

## 1 YOUR ROLE TODAY

Customer service advisors solve problems and keep people happy. The empathy and the judgement on a hard case stay human. The looking-up, the typing and the after-call notes are where AI takes the load.

### WHAT THE JOB INVOLVES

- Handle customer enquiries and complaints across channels.
- Find information and resolve problems.
- Process orders, changes and returns.
- Record details of contacts and outcomes.
- Follow up to confirm resolution.
- Refer complex cases to the right team.

### SKILLS THAT MATTER MOST

- Active listening
- Speaking
- Service orientation
- Reading comprehension
- Social perceptiveness
- Critical thinking

O\*NET job zone: Job Zone 2 — some preparation.

## 2 THE FOUR COPILOT TOOLS

<b>COPILOT CHAT</b>	Free, secure chat. Works from the open web and anything you paste or upload. No access to your internal files unless you give it.
<b>M365 COPILOT</b>	Sits inside Word, Excel, PowerPoint, Outlook and Teams. Works on your own emails, files and meetings (only what you already have permission to see).
<b>COPILOT COWORK</b>	You hand over a longer job and it works through the steps, showing progress so you can steer. Good for multi-stage work that used to eat an afternoon.
<b>COPILOT AGENTS</b>	A custom helper you (or IT) set up once to handle a specific, repeatable job — answering a common question, triaging a queue, drafting from a template.

## 3 AI OPPORTUNITY MAP

Where the four tools fit the real work — with a practical example for each.

TASK	BEST TOOL	PRACTICAL EXAMPLE
Find the answer to a customer's question fast	<b>COPILOT AGENTS</b>	An agent grounded in your knowledge base that surfaces the right answer while you talk.
Draft a clear written reply	<b>M365 COPILOT</b>	Draft the email reply in the right tone, then check and send.
Write up the call notes	<b>M365 COPILOT</b>	Use Copilot in Teams to summarise the call and log the outcome.
Reword a tricky message kindly	<b>COPILOT CHAT</b>	Get a calmer, clearer version of a difficult reply; you keep the human warmth.
Understand a long policy or T&Cs	<b>COPILOT CHAT</b>	Get a plain-English summary so you can explain it simply.
Handle a batch of similar follow-ups	<b>COPILOT COWORK</b>	Delegate first-draft follow-ups for a set of resolved tickets, for you to approve.

## 4 SKILLS TO BUILD

The AI-literacy habits this role needs.

- Checking the answer before you give it — AI can sound sure and be wrong.
- Keeping the human warmth that customers actually remember.
- Knowing when a case needs a person, not a script.
- Never sharing customer details on a tool that isn't approved.

## 5 GETTING STARTED — 3 QUICK WINS THIS WEEK

- ✓ Draft your next three written replies in Copilot, then personalise each.
- ✓ Summarise one long policy so you can explain it in a sentence.
- ✓ Use Copilot to write up your call notes for a day and compare the time.

## 6 GETTING AHEAD — YOUR 90-DAY PLAN

**Days 1–30 · Get started** Use M365 Copilot for replies and call notes. Always read the answer before you trust it.

**Days 31–60 · Build the habit** Ask for a knowledge-base agent to support live calls. Use Chat to reword hard messages.

**Days 61–90 · Get ahead** Delegate batch follow-ups to Cowork. Track handle time and first-contact resolution.

## 7 WHERE TO LEARN NEXT

Four short intro courses, in order. Start at the top.

- 01** Start with Copilot Chat  
The no-risk way in. Ask, draft, summarise, compare. One hour.
- 02** Work inside M365 Copilot  
Use it in the apps you already live in: Outlook, Word, Excel, Teams.

---

**03** Delegate with Copilot Cowork  
Hand over the multi-step jobs. Learn to brief, check and steer.

---

**04** Build a Copilot Agent  
Turn your most repeated task into a helper that runs itself.

---

Sources — Occupation overview: O\*NET 30.2, occupation 43-4051.00 ([onetonline.org/link/summary/43-4051.00](https://onetonline.org/link/summary/43-4051.00)) and the ESCO occupational profile ([esco.ec.europa.eu](https://esco.ec.europa.eu)). Copilot tool descriptions: Microsoft 365 Copilot and Copilot Cowork product documentation, Microsoft, May 2026. AI mapping and pathways: Craig Stanley Studio. Verify figures and policy against your own systems before acting.

