



WEBINAR TRAINING SERIES

MOVE365 Learn

The Basics of Copilot Chat

Empowering Financial Institutions with
AI-Powered Productivity



Agenda



MODULE 01

Get Started with Microsoft 365 Copilot Chat

Interface anatomy, secure access, and enterprise data protection fundamentals.

1

MODULE 02

Write Effective Prompts to Achieve Optimal Results

Prompt engineering patterns, best practices, and avoiding hallucinations.

2

MODULE 03

Work Smarter with Copilot Chat

File interrogation, data visualization, and mastering Copilot Pages.

3

MODULE 04

NEW

Creating Copilot Agents

Building custom agents using the 'Describe' method for automation.

4

Presenter Bio



Mohammed Arif, PhD

LEAD DATA SCIENTIST

Big Data | Machine Learning | AI

CONNECT ON LINKEDIN

 /arifmazumder

Professional Background

Mohammed Arif has more than **eighteen (18) years** of working experience in the Information Communication and Technology (ICT) industry.

The highlights of his career include more than **seven (7) years** holding various senior management and/or C-Level positions. He has gained **five (5) years** of international ICT consultancy exposure across various countries (APAC and Australia), specifically focusing on the Big Data, Data Engineering, Machine Learning, and AI arena.

He is also a Certified Trainer for Microsoft & Cloudera, bringing deep technical expertise to enterprise training environments.

Certifications & Expertise



Microsoft Certified

Azure Data Scientist Associate



Microsoft Certified

Azure Data Engineer Associate

Cloudera Certified Associate

Spark & Hadoop Developer



Microsoft Certified Trainer

MCT

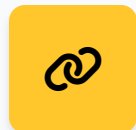
Related Resources



DIRECT ACCESS

Scan to Access Training Materials

Get instant access to the presentation slides, prompt templates, and additional learning resources for your Microsoft 365 Copilot journey.



RESOURCE URL

arif.works/copilot



Scan with mobile

iOS & Android Compatible

Operational Roadmap

From Chat to Automation



STAGE 01

Crawl

FOUNDATIONS

- ✓ Interface Anatomy
- ✓ Web vs. Work Grounding
- ✓ Enterprise Data Protection (EDP)

STAGE 02

Walk

THE SCIENCE OF PROMPTING

- ✓ Prompt Anatomy (Context/Goal)
- ✓ The Prompt Gallery
- ✓ Anti-Patterns

STAGE 03

Run

COLLABORATIVE WORKFLOWS

- ✓ File Interrogation
- ✓ Copilot Pages (Multiplayer)
- ✓ App Integration

STAGE 04

Fly

AUTOMATION

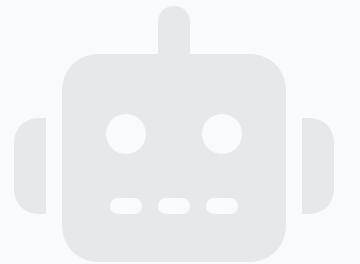
- ✓ Standard Agents
- ✓ Building Custom Agents
- ✓ The 'Describe' Method

MODULE 01

Get Started with Microsoft 365 **Copilot Chat**

Discover the fundamentals of your new AI-powered assistant. Learn interface anatomy, secure access methods, and enterprise data protection standards.

COPIL



What is Microsoft 365 Copilot Chat?



Core Capabilities

- ✓ **Enterprise-Ready AI Chat**
Available at no extra cost to your standard Microsoft 365 subscription.
- 🌐 **Web-Grounded Intelligence**
Conversations grounded in the latest Large Language Models (LLMs) and real-time web information.
- 💡 **Productivity Booster**
Designed to help you get more done, spark creativity, and deepen your knowledge instantly.



Licensed Enhancement

WORK MODE UNLOCKED

"Copilot Chat's features become even more powerful with a **Microsoft 365 Copilot license** in addition to your standard subscription."

📄 File Analysis

✉️ Email Context

👥 Meeting Recaps

🛡️ Graph Grounding

Microsoft 365 Copilot Chat Features



Key capabilities available in your subscription



SECURITY

Secure AI Chat

Enterprise-grade chat grounded in the web and powered by the latest GPT models, ensuring accurate and up-to-date responses.



INTEGRATION

Side-by-Side View

Context-aware assistance that works alongside your open content in Word, Excel, PowerPoint, OneNote, and Outlook.



EXTENSIBILITY

Pay-as-you-go Agents

Access specialized agents directly from chat, priced on a metered basis to extend capabilities as needed.



GOVERNANCE

IT Controls & EDP

Comprehensive enterprise data protection (EDP) and robust management tools for agent deployment and security policies.



PRODUCTIVITY

Advanced Capabilities

Enhanced features including Copilot Pages for collaboration, file upload for analysis, and AI image generation.

How to Access Copilot Chat



PART 1 OF 2: WEB & EDGE ACCESS



Important Requirement


You must sign in using your **work email account** to access enterprise features and data protection. Personal accounts do not have the same security coverage.

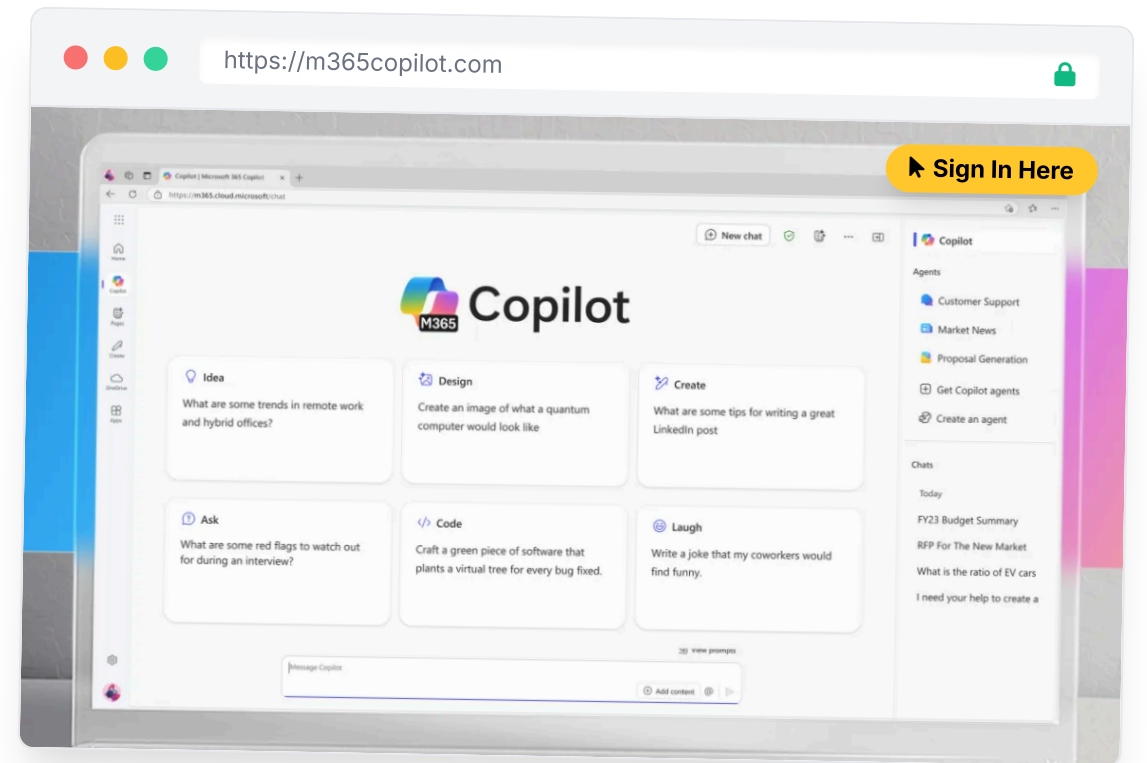
1 Web Browser Access

Navigate directly to the dedicated portal:

m365copilot.com

2 Microsoft Edge Integration

Select the  **Copilot icon** in the top right corner of the Edge browser sidebar for instant access alongside any webpage.

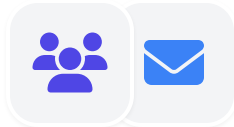


PRO TIP
Pin the tab in your browser for one-click access every morning.

How to Access Copilot Chat (2/2)



Application Integration Points



HUBS

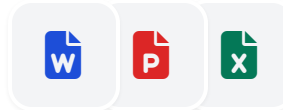
Teams & Outlook

Primary communication hubs offering integrated chat experiences.

Win Mac Web Mobile

- ✓ **Full Chat Experience**
Comprehensive chat interface
- ✓ **Side Pane**
Quick assistance panel

➤ *Select Copilot icon from left-side menu bar*



CREATION

M365 Apps

Word, PowerPoint, Excel, OneNote.
Productivity apps for content creation.

Win Mac Web Mobile

- 📄 **Side Pane Only**
Contextual assistance within document
- ✍️ **Drafting Engine**
Create, edit, and summarize content

➤ *Select Copilot icon in upper-right ribbon*



DEDICATED

Copilot App

Dedicated standalone application for focused AI interaction.

Desktop Mobile

- 🚀 **Immersive Experience**
Full-screen dedicated chat environment
- 🔄 **Cross-Device Sync**
Seamless transition between mobile & desktop

⬇️ *Download via App Store or Microsoft Store*

Microsoft 365 Copilot Chat Interface



Navigating the key elements of your AI assistant

Agents
Choose an agent from the list to chat with it, or expand the agent menu to find or create agents

Chat history
View your past conversations

Copilot Chat Pages
View your Pages that you've created

Add content
Expand to add reference files or images to your Copilot prompt

Start a new chat button
Clear your past chat and start a new conversation.

Prompt box
Start your conversation here

Dictation
Use dictation if you prefer to speak rather than type when you're chatting with Copilot

Suggested prompts
Get started with prompt suggestions personalized to you.

Copilot Prompt Gallery
Expand the suggested prompts to view the full Copilot Prompt Gallery, including saved prompts and prompts from your team

© Copyright Microsoft Corporation. All rights reserved.

How to Chat in 3 Steps

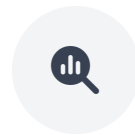
Mastering the Copilot Conversation Loop



Enter your prompt

Enter your detailed prompt in the text box at the bottom. Be specific about your context and goal.

📎 Upload reference files by selecting the **"Add content"** button.



Check sources

Copilot Chat is transparent. Always review the citations listed underneath the answer.

🛡️ Vet these sources and validate your answers for accuracy.



Continue the conversation

Ask follow-up questions to refine the output. Try prompts like "Write a shorter answer" or "Give me more detail."

💡 Select **suggested prompts** to explore new directions.

Defining the Ecosystem: Web vs. Work



UNDERSTANDING GROUNDING & CONTEXT



Web Mode

STANDARD

- ✓ **Grounded in Public Internet**
Access to real-time public data
- 🔍 **Powered by Bing Search**
Leverages search indexing for retrieval
- 🧠 **General Knowledge**
Broad world knowledge and reasoning



Work Mode

LICENSED

- ✓ **Connected to Microsoft Graph**
Emails, Chats, Files, Meetings, People
- 🏢 **Organizational Context**
Understands your specific work environment
- 🛡️ **Enterprise Data Protection**
Inherits all M365 security & compliance policies

VS

CONNECTED VIA COPILOT SEMANTIC INDEX

- ✉️ Email
- 💬 Chat
- 📄 Files
- 📅 Meetings



ACCESS POINTS

🌐 m365copilot.com 🏢 Teams / M365 App

KEY DISTINCTION













Copilot Chat
The Conversational Orchestrator

Copilot in Apps
Drafting Engines (Word/Excel/PPT)

The Ecosystem: Grounding & Licensing



Comparing Standard vs. Licensed Capabilities

COMPARISON FACTOR	Microsoft 365 Copilot Chat STANDARD	Licensed Version WORK MODE
 Grounding Source Data origin	 Web-grounded Public Internet & Bing Search	 Graph-grounded Emails, Chats, Files, Meetings
 Model Capability Processing power	 GPT-4 / GPT-5 (Turbo) High-performance conversational AI	 Full Manipulation Draft & Edit in Word, Excel, PPT, Teams
 Data Scope Context awareness	 Session-based Context Limited to current chat session	 Tenant-wide Context Access to organizational knowledge
 Agent Access Extensibility	 Metered Pay-as-you-go pricing model	 Included Full access to standard agents

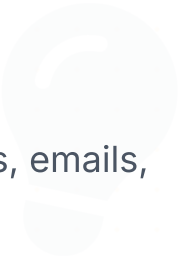
Key Takeaway

Core concepts for mastering Copilot Chat



DEFAULT BEHAVIOR

Web vs. Organizational Grounding



By default, Copilot Chat is grounded in data from the **web only**. It does not automatically scan your organizational files, emails, or chats during a standard chat session unless explicitly instructed.

⚡ TO USE ORGANIZATIONAL CONTENT, YOU MUST:



Copy & Paste



Upload File



Type '/' (ContextIQ)



Safety Mechanism: Read-Only Access

Copilot Chat **cannot directly overwrite or edit** original files in-place on your system (e.g., OneDrive). It protects your data integrity by generating updated versions for you to **download and replace manually**.

Data Security in Copilot Chat

ENTERPRISE DATA PROTECTION



Comprehensive security and privacy controls designed to safeguard your organization's data at every interaction point.



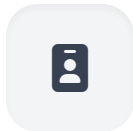
Encryption & Data Isolation

Your data is protected by enterprise-grade encryption both at rest and in transit. Strict logical isolation ensures your organization's tenant data remains separated from others.



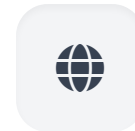
Privacy by Design

Your data remains private and is **never used to train the base AI models**. Prompts and responses are not retained for model improvement purposes.



Access Controls

Copilot automatically respects your organization's existing permissions, sensitivity labels, and retention policies. It only accesses data that the user already has permission to view.



Regional Compliance

Data processing stays within your geographical region boundaries, adhering to Microsoft's strict data residency commitments and local compliance regulations.

The Green Shield: Enterprise Data Protection

Four Pillars of Security & Compliance



No Model Training

Your data, prompts, and responses are **never** used to train the base Large Language Models (LLMs). Your IP remains yours.



Tenant Boundary

Data processing stays strictly within your specific Microsoft 365 tenant boundary. It does not leak into the public web or other tenants.



Enterprise Encryption

Your data is protected by enterprise-grade encryption both **at rest** and **in transit**, adhering to rigorous security standards.




Permissions Inheritance

Copilot automatically respects all existing permissions. It only sees and surfaces content that **you** already have permission to access.



EDP ACTIVE



Look for the  **Green Shield** icon in the top right corner of the Copilot interface to confirm protection is active.

Knowledge Check

Test your understanding with a real-time Copilot quiz



Interactive Learning

Engage directly with Copilot

Use the prompt on the right to initiate a personalized quiz session about Module 1 concepts.

- ✓ Accessing Copilot Chat
- ✓ Understanding Grounding Modes
- ✓ Enterprise Data Protection (EDP)

 Copy and paste the prompt into your Copilot Chat window to begin.



>_ Prompt to use in Microsoft Copilot Chat:

 Copy Prompt

```
"As a Microsoft Copilot Chat expert, please create three multiple-choice questions that assess knowledge of key features, including how to access Copilot Chat, its different modes, how to initiate it, and the concept of EDP. Present one question at a time and wait for my response before continuing. After each answer, provide a brief explanation of the correct choice before moving on to the next question."
```

 Generates 3 Questions

 ~5 Minutes

Module 1 Summary

Recap: Getting Started with Copilot Chat



Achievement Unlocked

Now you're ready to get started with Microsoft 365 Copilot Chat.



Describe the purpose and key features of Microsoft 365 Copilot Chat



Identify where and how to access Copilot Chat across Microsoft 365 applications



Describe how web grounding delivers real-time answers vs. work grounding



Navigate the Copilot Chat interface and how to start chatting



Describe how Enterprise Data Protection keeps your data secure while using Copilot Chat

Write Effective **Prompts** to Achieve Optimal Results

Master the art of prompt engineering. Learn the core elements of effective prompts, best practices, and how to use the Prompt Gallery for maximum productivity.

COPY



Write an Effective Prompt

The Four Essential Ingredients of a Perfect Prompt



1

Context

Why do you need it and who is involved? Provide background info to ground the AI.

THE "WHY"



2

Goal

What responses do you want from Copilot? Be clear about the specific outcome you need.

THE "WHAT"



3

Source

Which information sources or samples should Copilot use? Reference specific files or data.

THE "WHERE"



4

Expectations

How should Copilot respond? Define the format, tone, and style to best meet your needs.

THE "HOW"

Write an Effective Prompt

Dissecting a Well-Structured Request



> EXAMPLE PROMPT

I work in marketing and focus on competitor research.

Give me a concise summary of recent news about [company name].

Focus on web articles from the last 2 months.

Provide the answer in two to three paragraphs and use a business tone.



Context

Why do you need it and who is involved?

"I work in marketing..."



Goal

What responses do you want?

"Concise summary of news..."



Source

Which info sources to use?

"Web articles, last 2 months"



Expectations

How should Copilot respond?

"2-3 paragraphs, business tone"

Hover over the cards to see how they map to the prompt above.

Prompting Best Practices

DO'S AND DON'TS FOR OPTIMAL RESULTS



The Do's

RECOMMENDED

- ✓ Be clear and specific
- ✓ Keep it conversational
- ✓ Give examples to guide output
- ✓ Ask for feedback ("Did I miss anything?")
- ✓ Write legibly and use proper grammar
- ✓ Check for accuracy and validate sources
- ✓ Provide context and details
- ✓ Be polite and professional
- ✓ Iterate and refine your prompt (V1 → V2)



The Don'ts

AVOID

- ✗ **Be vague**
Avoid broad requests like "Write something about X"
- ✗ **Request unethical content**
Copilot will block inappropriate or harmful requests
- ✗ **Use slang or jargon**
Informal language can confuse the context
- ✗ **Give conflicting instructions**
E.g., "Write a long report but keep it under 50 words"
- ✗ **Interrupt abruptly**
Changing topics without context can lose the thread



PRO TIP: Treat Copilot like a new intern. Review the work, give clear feedback, and ask for revisions.

Prompting Best Practices

Detailed comparison of High-Yield Tactics vs. Common Errors



✓ High-Yield Tactics (Do)

🔄 Iterate & Critique

EXAMPLE:

"Critique your response for accuracy and tone. Does this align with a formal business context?"

🔗 Check Sources

EXAMPLE:

"Summarize the Q3 financial report. Provide live links to the official source documents."

📋 Chain of Thought

EXAMPLE:

"First, outline the main challenges. Second, propose three distinct solutions. Finally, weigh the pros and cons of each."

💬 Ask for Feedback

EXAMPLE:

"After generating the checklist, ask: Is there any critical information missing from this project plan?"

✗ Common Errors (Don't)

☁️ Vagueness

AVOID:

~~"Write a report about sales."~~

Instead: "Tell me about the sales performance for Q3."

🗨️ Slang / Jargon

AVOID:

~~"Give me the 411 on the new marketing vibes. Keep it lit."~~

Context confusion leads to poor results.

⚡ Conflicting Instructions

AVOID:

~~"Write a comprehensive analysis but keep it to a single short paragraph."~~

🔄 Topic Mixing

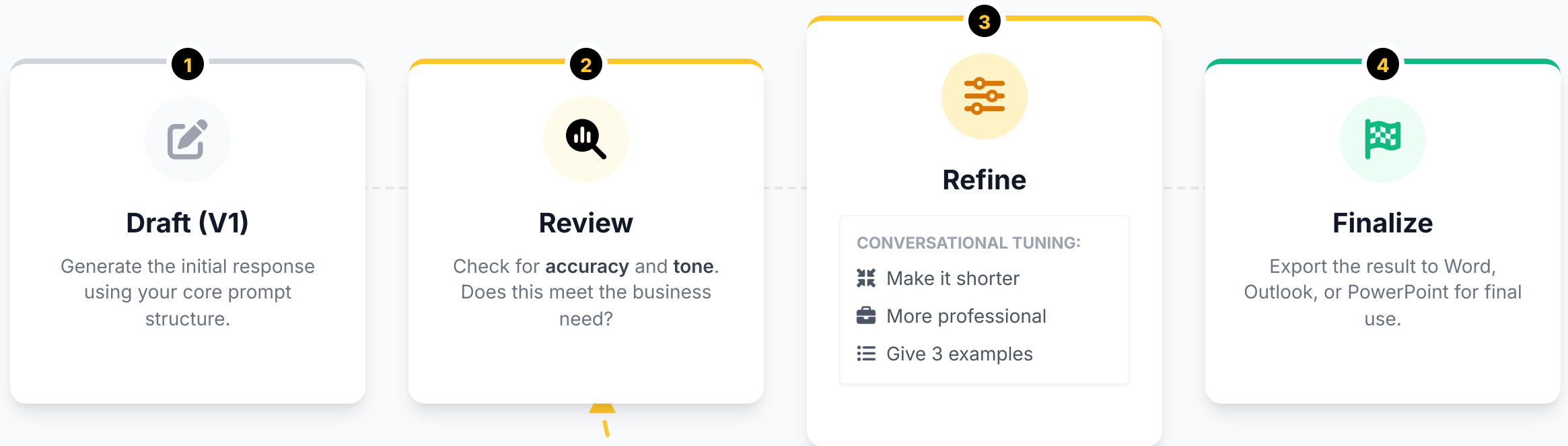
AVOID:

~~"Draft a Gantt chart. Also, what are the top 5 beaches in Hawaii?"~~

Keep chats focused on one topic.

The Art of Iteration

Don't Stop at V1: The Iterative Workflow



TRAINER TIP



"Treat Copilot like a **new intern**. You wouldn't throw a file at an intern and walk away. You review the work, give feedback, and ask for revisions. Do the same here."

Examples of Web-based Prompts



Practical applications for daily tasks using web grounding

⚡ QUICK TASKS

Fast Execution • Simple Prompts



1

Revise Content

EDITING

"Can you help me rewrite this paragraph to make it clearer and more concise?"



2

Generate Ideas

BRAINSTORMING

"List ideas for a fun remote team building event."



3

Start Research

RESEARCH

"How have world literacy rates changed in the past 30 years?"

📁 DEEP WORK

Complex Reasoning • Detailed Output



4

Code Faster

DEVELOPMENT

"Write a Python script to perform binary search."



5

Draw Conclusions

ANALYSIS

"Help me analyze the data from my experience using this /file."

Examples of Work-based Prompts

Boost productivity by grounding Copilot in your organizational data



Schedule & Meetings



Check your schedule

TRY THIS PROMPT:

"When is my next one-on-one with **/person**?"



Catch up on a meeting

TRY THIS PROMPT:

"Recap **/meeting** "



Knowledge & Inbox



Decode acronyms

TRY THIS PROMPT:

"What does **[company acronym]** stand for?"



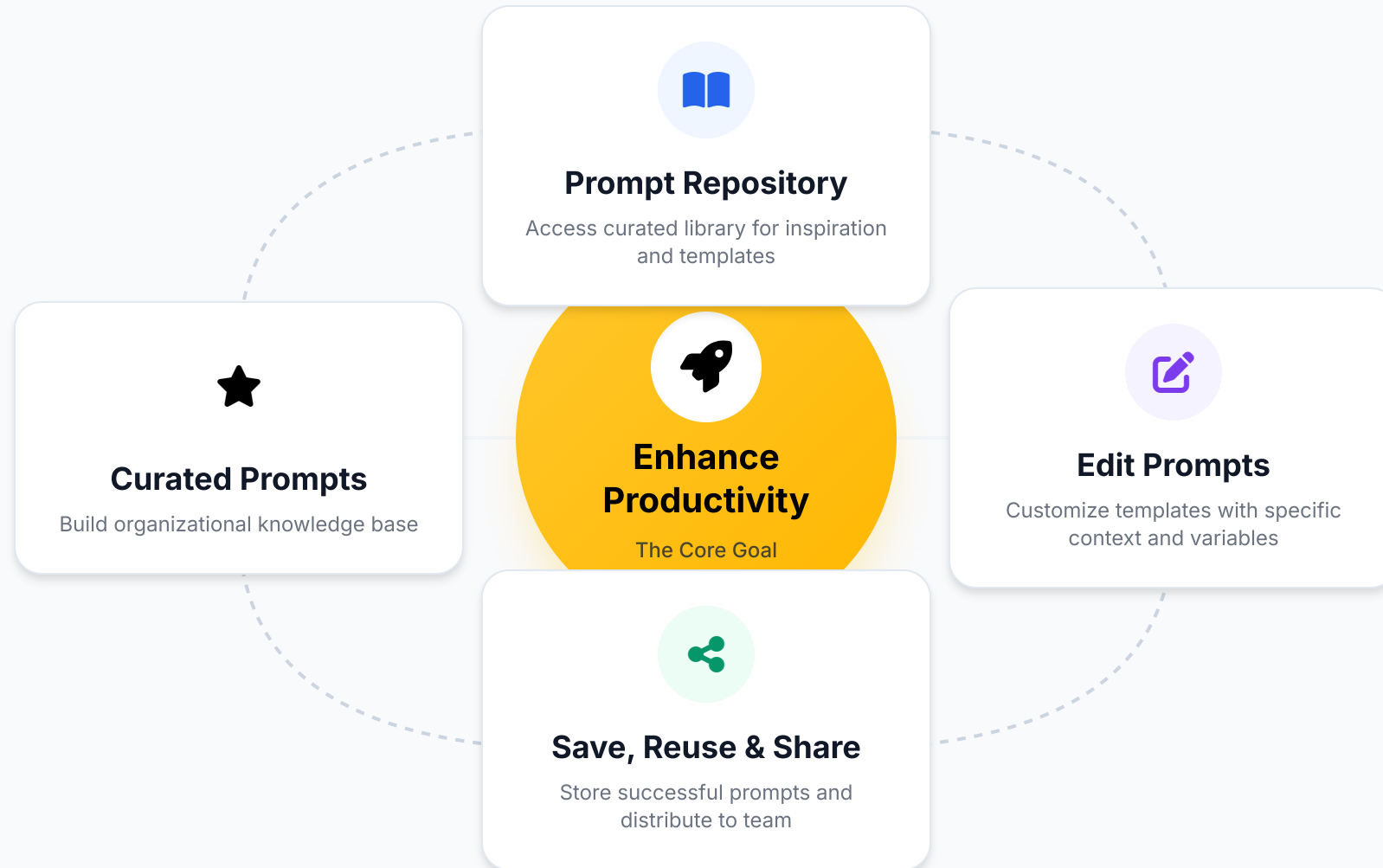
Stay on top of email

TRY THIS PROMPT:

"What should be on my radar from emails **last week**?"

Get Inspired with Copilot Prompt Gallery

The Virtuous Cycle of Productivity



How to Use the Prompt Gallery



Access & Exploration

Find prompting inspiration to take greater advantage of Copilot in your daily work.

1

Locate Suggestions

In the chat interface, look for the initial prompt suggestions.

2

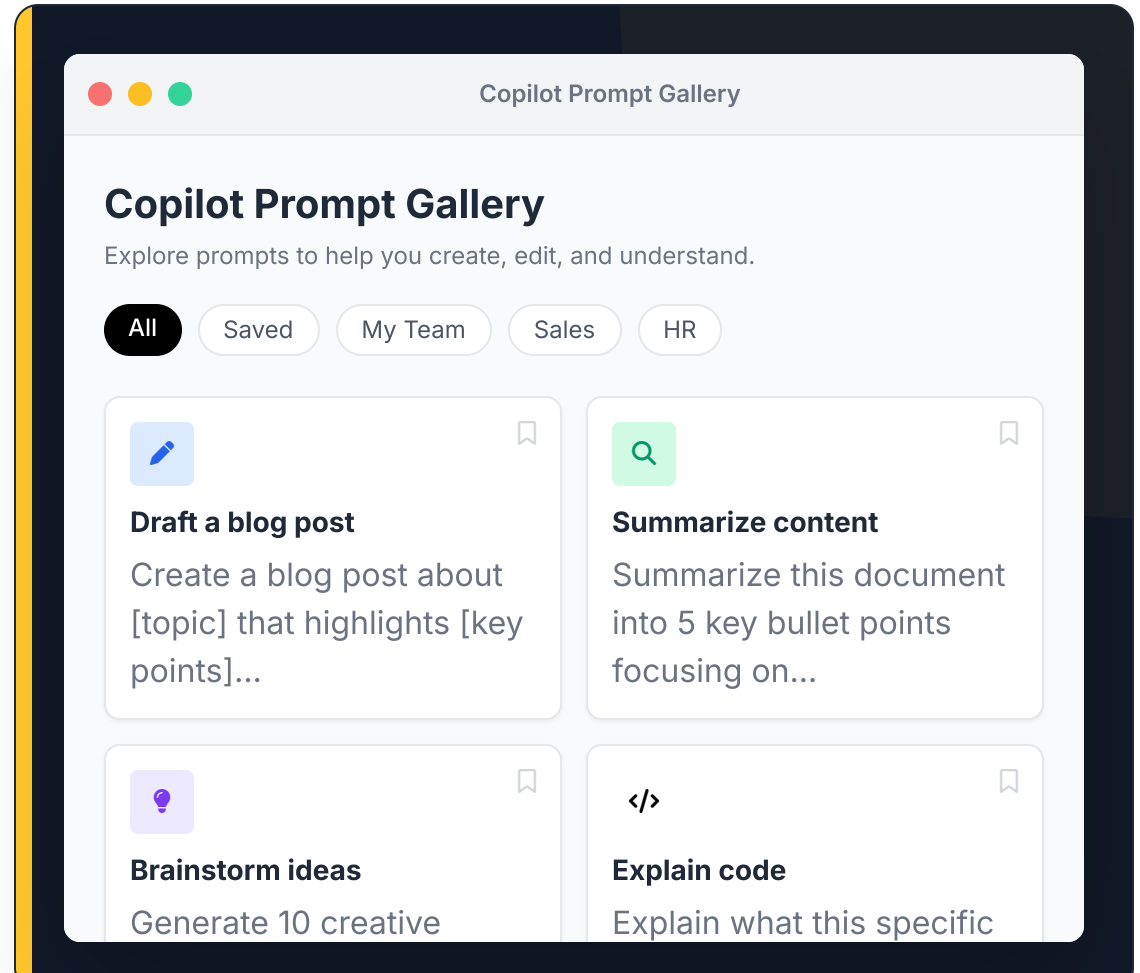
Expand View

Select [See more](#) to reveal additional options.

3

Open Gallery

Click the [Prompt Gallery](#) button at the bottom of the list.



Prompt Gallery Workflow

Creating reusable assets for your team



1



Access Gallery

Click the **Prompt Gallery** button directly within the Copilot Chat interface to browse available collections.

2



Filter by Role



Narrow down options by specific job roles or tasks to find relevant starting points.

3



Save Custom Prompts

Found something that works?
Save useful prompts to your personal collection for quick future access.

4



Name & Template

Edit the title for clarity and insert dynamic placeholders.

[Insert File Name]



KEY INSIGHT

Pro Tip: Use placeholders like [Insert File Name] to create reusable templates for your entire team.

Knowledge Check (Module 2)

Test your prompting skills with a real-time Copilot quiz



Interactive Learning

Master the art of prompting

Use the prompt on the right to initiate a personalized quiz session about Module 2 concepts.

- ✓ Elements of Effective Prompts
- ✓ Avoiding Common Mistakes
- ✓ Using the Prompt Gallery

 Copy and paste the prompt into your Copilot Chat window to begin.



>_ Prompt to use in Microsoft Copilot Chat:

 Copy Prompt

```
"As a Microsoft Copilot Chat expert, please create three multiple-choice questions focused on the elements of well-crafted prompts, common mistakes to avoid, and the purpose of the Microsoft Copilot Prompt Gallery. Present one question at a time and wait for my response before continuing. After each answer, provide a brief explanation of the correct choice before moving on to the next question."
```

 Generates 3 Questions

 ~5 Minutes

Module 2 Summary

Recap: Writing Effective Prompts



Achievement Unlocked

You're now able to write effective prompts and use the Copilot Prompt Gallery.



Identify the four elements of an effective prompt: context, goal, source, and expectations



Apply best practices for clear, concise, and well-structured prompts



Recognize common prompting mistakes and how to avoid them



Utilize the Microsoft Copilot Prompt Gallery to discover, save, edit, and share useful prompts

Work Smarter with Microsoft 365 **Copilot Chat**

Enhance your productivity within a secure, enterprise-ready environment. Learn to brainstorm, summarize, create content, visualize data, and generate code using Copilot Chat.

COPIL



Work Smarter with Copilot Chat



Productivity Unleashed

Integrated & Available

Microsoft 365 Copilot Chat is now **free inside Microsoft 365 apps**. It enhances your productivity within a secure, enterprise-ready environment.

ROLLED OUT LATE 2025

For Every Subscriber



What You Will Learn

BY THE END OF THIS MODULE

- Brainstorm & Summarize**
Generate ideas and condense information instantly.
- Create Content**
Draft, rewrite, and refine documents with ease.
- Visualize Data & Files**
Upload files to analyze insights or generate visual code.
- Generate Code**
Assist with programming tasks and scripts.

How Can I Use Copilot Chat?

Key Capabilities to Enhance Your Workflow



ANALYSIS

Get summaries and stay informed

Summarize large amounts of data, gather and analyze market trends, competitor strategies, product development or customer insights to make informed decisions faster.



CREATIVITY

Brainstorm and draft content quickly

Overcome writer's block by brainstorming ideas. Draft, rewrite, or refine content for emails, reports, and presentations with specific tone and style adjustments.



PRODUCTIVITY

Gather insights based on your files

Upload any file to the chat and ask Copilot to provide insights, summarize key points, or generate new content based directly on the file's context.



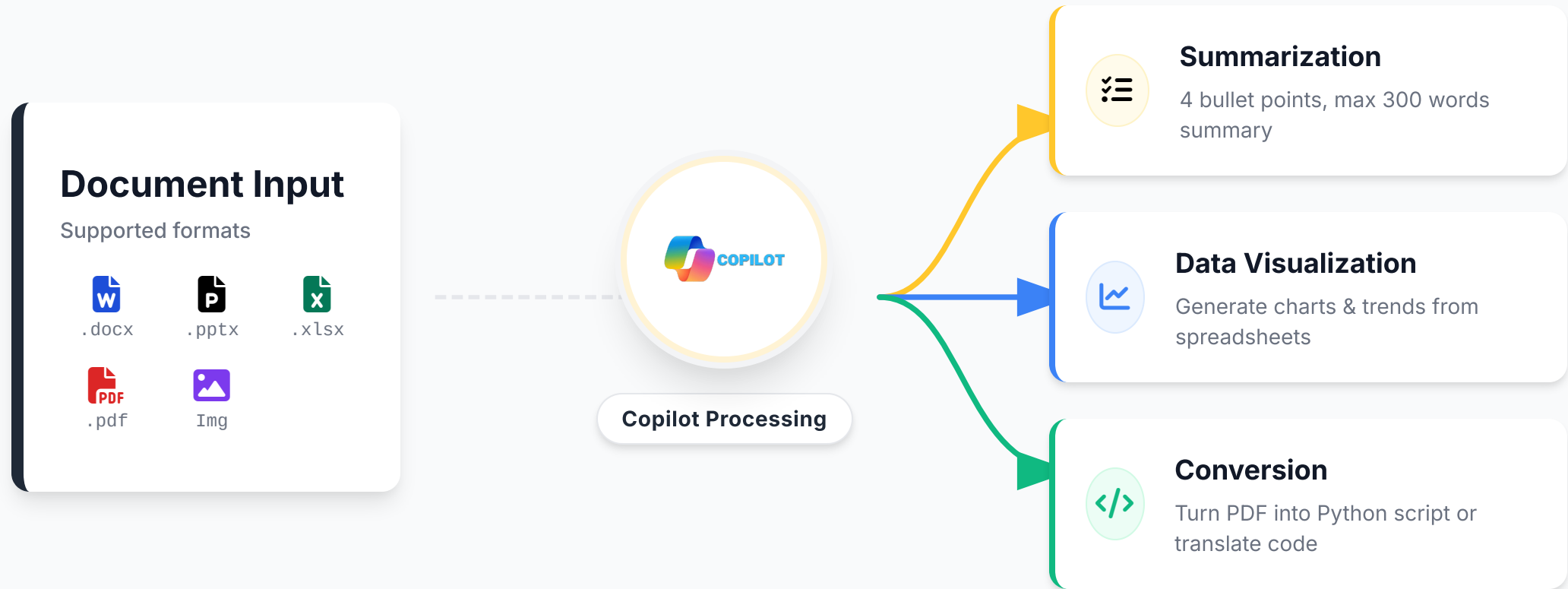
VISUALIZATION

Visualize your data

Transform your data and abstract ideas into unique, AI-generated images to enhance your presentations and storytelling capabilities.

File Interrogation & Insight Extraction

Transforming Documents into Actionable Intelligence



TRAINER TIP

"You can **upload multiple files** at once to synthesize insights. Example: 'Compare *Strategy Doc A* against *Budget Sheet B*'."

Try These Prompts (1/2)

Practical examples to get started with Copilot Chat



INFORM

Summarize & Stay Informed

"Summarize recent statements made by the CEO of [company name]."

"Prepare a daily brief of news from the [finance] industry regarding [cryptocurrency]."

"How do you say [thank you for your time] in [Japanese]?"

"Give me step-by-step instructions for [making an Instagram reel]."



CREATE

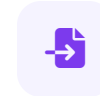
Brainstorm & Draft Content

"Rewrite this to sound more professional and less verbose: [insert content]."

"Suggest inexpensive ways to optimize our website for organic search."

"Draft a blog post about the latest on [specific topic]."

"Help me create questions for a user research survey on [specific topic]."



ANALYZE

Gather Insights from Files

"Help me rewrite the introduction paragraph to make it clearer and more concise in this document: [upload file]."

"Suggest 10 compelling titles for this blog post: [upload file]."

"Describe the image in a couple sentences: [upload file]."

"Help me analyze the data from my experiment using this: [upload file]."

Try These Prompts (2/2)

Explore advanced capabilities: Visualization & Code Generation



Visualize Data

Image Generation

PROMPT:

"Illustrate a [romantic pop art image] of [an office worker experiencing a dramatic coffee crisis]."

Data Charting

PROMPT:

"Create a line chart showing the relationship between [inflation rates] and [interest rates] over the last 20 years."

Visual Summary

PROMPT:

"Create a word cloud based on the latest [financial news]."

Generate Code

Explain & Debug

PROMPT:

"Tell me what this code does: [insert code] "

"Help me find errors in this code: [insert code] "

Generate Logic

PROMPT:

"Write a Python script to perform binary search."

Refactor & Query

PROMPT:

"Convert this code to TypeScript."

"Write a SQL query to return all columns from the table where [the sales are above 10000]."

Microsoft 365 Copilot Pages

The Multiplayer Canvas for AI Collaboration



What is Copilot Pages?

A dynamic feature in Microsoft 365 Copilot Chat that allows you to turn a fleeting chat response into a durable, **editable** and **collaborative workspace**. It bridges the gap between AI conversation and document creation.

KEY BENEFITS



Save & Edit

Don't lose insights in the chat history. Save AI-generated content to a persistent page and refine it manually.



Easy Sharing

Instantly share your Pages via Teams, Outlook, or the Microsoft 365 app to keep everyone aligned.



Real-Time Collab

Work collaboratively in real-time with your team on the same canvas, just like a shared document.



Export Anywhere

Ready to finalize? Export your finished Page directly to a Word document or PowerPoint presentation.

How Does Copilot Pages Work?



From Chat to Canvas in Three Steps

1. Create a Page

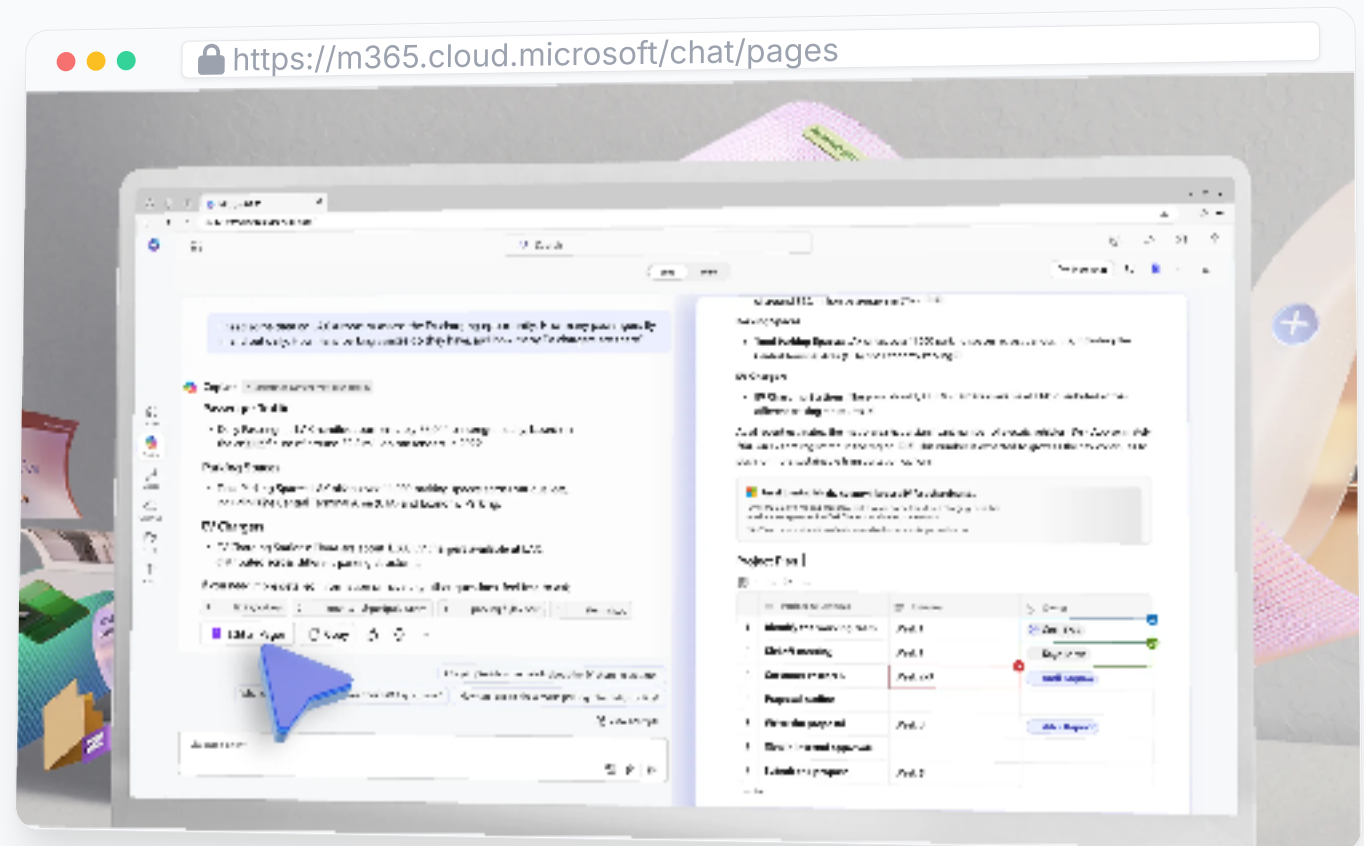
Select **Edit in Pages** to create a dedicated response page and enhance content through continued conversation.

2. Edit Instantly

Select any text or image on your page to modify and type **/** to insert elements like tables or lists.

3. Easy Access

Open pages via Chat links, the Pages icon, or find them in your recently opened documents list.



Work Smarter with Copilot for **Apps**

Explore integrated AI capabilities within your daily tools. From drafting in Word to analyzing in Excel, unlock the full power of the ecosystem.



Word
DRAFTING



Excel
ANALYSIS



PowerPoint
DECKS



Teams
RECAP

What's New in 2026

Copilot Feature Highlights

February 2026 Release



NEW MODEL

GPT-5 & Model Selector

GPT-5 is now default. Use the new selector to switch between **Quick Response** for speed and **Think Deeper (GPT-5.2)** for complex reasoning.



MAJOR UPDATE

Agent Mode & Agents

Copilot actively edits files with transparency in Word/Excel/PPT. Generate full drafts from a single prompt via Chat using specialized Agents.



UPDATED

Outlook Intelligence

Hands-free Voice Catch-up on mobile. Implicit grounding adds email context automatically. Natural-language triage and auto-replies.

ENTERPRISE READY

PowerPoint Brand Assets

Auto-integrates enterprise brand assets from SharePoint OAL or Templafy. Now works on view-only files for summarization.



WORKFLOW

Excel Local & Analysis

Copilot now supports locally stored modern workbooks. Enhanced Python integration for advanced financial analysis and visualization.



CONTROL

Admin & Governance

Custom AI disclaimers, Purview DLP integration, and granular connector controls (Google Drive, Dropbox). New Copilot Dashboard insights.

Prompt Engineering for Financial Services

The Winning Pattern for High-Fidelity Results



THE FORMULA:

ROLE + **TASK** + **CONTEXT** + **SOURCES** + **CONSTRAINTS**
Who is AI? What to do? Background Data origin Guardrails

Precision & Context

- ✓ **Be Specific on Metrics**
Clearly define period (Q2 2026), currency (MYR), and scope (SME Portfolio).
- ✓ **Ground Your Data**
Always reference specific files, emails, or Notebooks to prevent hallucinations.
- ✓ **Use Correct Mode**
Select **Think Deeper** for complex risk analysis, and **Quick Response** for simple triage.

>_ EXAMPLE PROMPT

"Act as a **Credit Risk Analyst**. Summarize the **attached Q2 SME loan report**. Focus on **NPL trends in the Manufacturing sector (MYR)**. Exclude retail exposure."

Output & Refinement

- ✓ **Define Format**
Explicitly ask for tables, bullet points, tracked changes, or executive summaries.
- ✓ **Audit-Ready**
Request citations and source links for every claim to ensure regulatory compliance.
- ✓ **Iterate & Refine**
Don't settle for the first draft. Add exclusions (e.g., "Omit retail") or refine tone.

>_ EXAMPLE PROMPT

"Format the output as a **table** with columns: Risk Factor, Impact (High/Med/Low), and Mitigation Strategy. Ensure tone is **formal and suitable for BNM submission**."

Streamlining Regulatory Documentation



RMiT Updates

AML/CFT Policy Refresh

MFRS 9 ECL Narratives

Shariah Gov. Charters

1

Enable Agent Mode

Open Word > Click Copilot in the ribbon > **Toggle Agent Mode ON** for transparent, active editing assistance.

2

Draft with Precision

Prompt: "Draft/update [policy] per BNM RMiT para X; tone formal, MY English." Be specific about regulatory clauses.

3

Ground with Files

Click "Attach" > Select prior policy documents + regulator circular PDFs to ensure **contextually accurate output**.

4

Review & Cite

Review tracked changes suggestions. Ask: "Insert citations to sources" to create an **audit trail for compliance**.

5

Summarize & Secure

Generate a 150-200 word executive summary for ExCo. Export to PDF and apply required **Sensitivity Labels**.

W Word: Minutes & Executive Summaries

Drafting High-Impact Documents with Precision



>_ Effective Prompts

MEETING MINUTES

"Draft meeting minutes from the attached transcript. Summarize key discussion points, capture all decisions made, and list action items with assigned owners."

REGULATION SUMMARY

"Summarize the attached BNM Policy Document. Focus specifically on the new reporting requirements for liquidity coverage ratios and highlight implementation deadlines."

AUDIT TRANSFORMATION

"Transform these bullet points from the internal audit findings into a formal executive summary paragraph suitable for the Board Risk Committee."

CLIENT COMMUNICATION

"Draft a formal response to [Client Name] regarding the delay in loan processing. Explain it is due to additional KYC verification. Tone should be professional, apologetic, yet firm."

🎯 Expected Outcomes

✓ Clean Formatted Drafts

Structured documents ready for review.

✓ Verified Citations

Links to source policies/files.

✓ Action Registers

Clear ownership and deadlines.

✓ Consistent Tone

Aligned with corporate standards.

💡 Pro Tips

📏 Specify Length

"Keep it under 200 words" or "Draft a 1-page summary".

👥 Define Audience

"For the Audit Committee" vs "For junior staff".

🔗 Review Helper

Use Copilot to "Review this doc for clarity".

✍️ Track Changes

Always review AI edits with Track Changes on.

Financial Modeling & Data Visualization



NII Sensitivity

OPR Shocks

SME Loan Pipeline

FX VaR Snapshots

1

Prepare Workbook

Prompt: "Convert this data range into a Table. Ensure all headers are formatted correctly for analysis."

2

Clean & Profile Data

Prompt: "Highlight duplicate entries in the 'Loan ID' column and identify any inconsistent date formats."

3

Analyze Trends

Prompt: "Analyze the quarter-over-quarter growth for 'Net Interest Income' and highlight key drivers."

4

Visualize Insights

Prompt: "Visualize the 'Non-Performing Loan' ratio by region as a clustered bar chart."

5

Forecast Future

Prompt: "Forecast the 'Operating Expenses' for the next 4 quarters based on historical trends."

x Excel: Risk & Portfolio Prompts

Advanced Analytics & Modeling for Banking Data



>_ Effective Prompts

CREDIT RISK ASSESSMENT

"Analyze the credit scores in Column D. Categorize each customer into 'Low Risk', 'Medium Risk', or 'High Risk' based on standard banking thresholds, and add this as a new column."

VARIANCE ANALYSIS

"Calculate the variance between 'Budgeted Spend' and 'Actual Spend' for Q2. Highlight any variance greater than 10% in red and explain the top 3 drivers of overspending."

RATE SENSITIVITY

"Model the impact of a 0.25%, 0.50%, and 0.75% OPR hike on the Net Interest Margin (NIM) based on the loan portfolio data in Table 1. Create a sensitivity table."

DATA INTEGRATION

"Merge the 'Customer Demographics' sheet with the 'Transaction History' sheet using CustomerID. Identify cross-selling opportunities for mortgage products for customers with high savings balances."

🎯 Expected Outcomes

- ✓ **Automated Models**
Instant formula generation & logic.
- ✓ **Visual Insights**
Charts revealing hidden patterns.
- ✓ **Scenario Tables**
What-if analysis for risk planning.
- ✓ **Annotated Insights**
Narrative explanations of data.

💡 Pro Tips

- 🗒️ **Structure Data**
Format as an Excel Table (Ctrl+T) first.
- 📉 **Specify Context**
"Analyze only the Q3 data for SME segment".
- 👁️ **Transparency**
Always ask Copilot to "Show the formula".
- 📄 **Documentation**
Insert comments to explain complex logic.

Creating High-Impact Presentations



- Board Decks
- Investment Proposals
- Quarterly Reviews
- Stakeholder Reports

1

Draft from Sources

Instantly create a draft deck from existing documents. **Prompt:** "Create a presentation from [Quarterly_Report.docx]".

2

Refine with Agent Mode

Use the side pane to restructure slides or change layouts. **Action:** "Add a slide about key risks" or "Change layout to two columns".

3

Enhance Narrative

Organize the deck logically. **Prompt:** "Organize this presentation into sections: Introduction, Financial Analysis, and Outlook".

4

Explain Complex Data

Generate explanatory notes for complex charts. **Prompt:** "Add speaker notes to explain the NPL trend on this slide".

5

Final Polish

Ensure consistency across the deck. **Prompt:** "Change all titles to Segoe UI and replace the image on slide 3".

P PowerPoint: Prompts, Outcomes & Tips

Crafting Compelling Narratives for Board & Investor Reviews



> Effective Prompts

PORTFOLIO REVIEW

"Create a presentation based on the attached 'Q3_Portfolio_Report.docx'. Summarize key performance indicators, include a slide on sector allocation, and highlighting the top 3 performing assets."

INVESTMENT PROPOSAL

"Draft a 10-slide pitch deck for the 'SME Growth Fund' proposal. Include sections on Market Opportunity, Investment Strategy, Risk Management, and Projected Returns."

PERFORMANCE UPDATE

"Add a slide summarizing the Year-to-Date financial performance. Use a bar chart to compare revenue growth against targets and bullet points for key drivers."

SIMPLIFICATION

"Reorganize this slide to reduce text density. Convert the bullet points into a visual process diagram and move the detailed explanations to the speaker notes."

🎯 Expected Outcomes

✓ **On-Brand Decks**
Aligned with corporate identity.

✓ **Structured Storylines**
Clear, logical narrative flow.

✓ **Visual Alignment**
Professional charts & layout.

✓ **Speaker Support**
Detailed notes for presenting.

💡 Pro Tips

📊 **Set Constraints**
"Create exactly 5 slides" or
"Use the corporate font".

📄 **Add/Remove**
"Add a slide about Risk" or
"Remove the appendix".

🗣️ **Speaker Notes**
Ask Copilot to generate a script for each slide.

🏃 **Action Slide**
Request a "Next Steps" or
"Summary" slide at the end.

Efficient Communication & Inbox Triage



Inbox Triage

Hands-free Catch-up

Meeting Setup

Action Tracking

1

Voice Catch-up (Mobile) 📱

Use Copilot on mobile to listen to **email summaries** and upcoming meetings hands-free while on the go.

2

Implicit Grounding 📍

Copilot automatically grounds responses in the **current email thread context** without needing to manually select files.

3

Smart Replies ↩️

Use "Draft with Copilot" to generate context-aware replies. Instantly **adjust tone and length** to fit the situation.

4

Auto-Replies Setup ✉️

Ask Copilot to "Draft an OOO message for [dates] and **block my calendar**" for seamless time-off management.

5

Meeting Scheduling 📅

Prompt: "Schedule a **follow-up with [Name]** next Tuesday regarding [Topic]" to automate calendar invites.

Outlook: Prompts, Outcomes & Tips

Efficient Email Management & Scheduling for Bankers



>_ Effective Prompts

INBOX TRIAGE

"Summarize the unread emails from the last 24 hours. Highlight any urgent requests from [Client Name] or regulatory bodies."

REGULATORY RESPONSE

"Draft a reply to this email. Confirm receipt of the audit query and state that the requested documents will be provided by EOD Friday. Tone should be formal."

THREAD SUMMARY

"Summarize this long email thread. Identify the main disagreement points and the final decision made by the Risk Committee."

AUTO-REPLY SETUP

"Draft an Out of Office message for my leave from [Date] to [Date]. Direct urgent credit approvals to [Colleague Name] and general inquiries to [Team Email]."

🎯 Expected Outcomes

✓ **Organized Inbox**
Prioritized view of critical communications.

✓ **Compliant Responses**
Audit-trailed, formal communication.

✓ **Tracked Actions**
Clear next steps from long threads.

✓ **Seamless OOO**
Professional continuity during absence.

💡 Pro Tips

📌 **Ground Replies**
Reference specific emails/files for context.

📁 **Specific Folders**
Ask to 'summarize emails in [Folder]'.

🗑️ **Tone Control**
Adjust for internal vs external audience.

🛡️ **Privacy Check**
Ensure no PII in public prompts.

Smart Meeting Summaries & Multi-Agent Workflows



Meeting Summaries

Cross-team Collab

Project Follow-ups

Multi-Agent Flows

1

Start Smart Meetings

Enable transcription to activate Copilot. Use **Intelligent Recap** to navigate recorded meetings by speakers and topics automatically.

2

Post-Meeting Action

Prompt: "Summarize the meeting and list action items for [Stakeholder Name] in a table format." ensure clear accountability.

3

Notebook Grounding

Reference OneNote or shared files in your prompts to ground answers in **project-specific context** rather than generic data.

4

Multi-Agent Power

Invoke specialized agents directly in chat (e.g., "@FinancialDataBot") to pull real-time metrics without leaving the **collaboration flow**.

5

Collaborative Tasks

Turn chat summaries into **Loop components** or Planner tasks to track remediation plans and project milestones effectively.

T Teams: Prompts, Outcomes & Tips

Streamlining Collaboration and Meeting Productivity



>_ Effective Prompts

MEETING RECAP

"Summarize this meeting. Capture key decisions regarding the quarterly portfolio review and list all action items with assigned owners."

CLIENT FOLLOW-UP

"Draft a follow-up message to the client based on this chat history. Confirm our understanding of their loan requirements and propose a timeline for the next steps."

REMEDIATION PLAN

"Based on the discussion, outline the remediation steps for the identified compliance gap. Create a table with tasks, owners, and due dates."

PROJECT MANAGEMENT

"Identify open issues from the 'System Migration' channel posts in the last week. Group them by priority (High/Medium/Low) and suggest potential resolutions based on the thread."

🎯 Expected Outcomes

✓ **Accurate Summaries**
Capture context without replay.

✓ **Action Registers**
Auto-generated task lists.

✓ **Shared Plans**
Consensus on next steps.

✓ **Channel Transparency**
Clear history for audit/review.

💡 Pro Tips

📌 **Name Meetings**
Give meetings specific titles for easier indexing.

👤 **Confirm Roles**
Explicitly state who owns which task in chat.

📌 **Pin Summary**
Pin the AI recap to the chat for team visibility.

🗨️ **Request Citations**
"Where was this discussed?" to get timestamps.

Banking Scenario Gallery



Ready-to-Use Prompts for High-Impact Workflows

Note: Customize bracketed text [] before using



RISK MANAGEMENT

Credit Risk Analysis

"Act as a Senior Credit Analyst. Evaluate the creditworthiness of [Company Name] based on the attached [financial statements/annual report]. Identify key risk factors, specifically liquidity



PORTFOLIO

Loan Portfolio Review

"Analyze the attached [Loan Portfolio Excel Sheet]. Segment the portfolio by industry and risk rating. Highlight any sectors with NPLs exceeding [5%]. Summarize the exposure to [Real Estate]



COMPLIANCE

Regulatory Documentation

"Draft a compliance memo regarding the new [BNM Policy Document Name]. Summarize the key changes required for our [Know Your Customer (KYC)] process. Reference the specific clauses from the attached PDF and



REPORTING

Financial Performance

"Compare the Q3 financial performance of [Bank A] vs [Bank B] using the attached reports. Focus on Net Interest Margin (NIM), Cost-to-Income ratio, and ROE. Presenting the findings in a table format



MARKETING

Customer Insights

"Analyze the sentiment of the attached [customer feedback/survey data]. Identify the top 3 complaints regarding our [Mobile Banking App]. Suggest 5 actionable improvements to enhance user experience



GOVERNANCE

Committee Actions

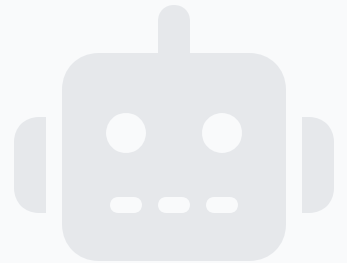
"Extract all action items from the attached [Board Risk Committee Minutes]. Organize them by owner and due date in a table. Flag any items that are overdue based on today's date [Date]."

MODULE 04

Creating Copilot **Agents**

— Overview

Build custom AI assistants directly from Copilot Chat.



What Are Copilot Agents?

Custom AI Assistants for Your Workflows



Your Custom AI Workforce

Copilot Agents are custom AI assistants you can build directly within Microsoft 365 Copilot Chat to:

- ✔ Automate specific tasks
- ✔ Answer domain-specific questions
- ✔ Streamline complex workflows



No Coding Required

Built entirely using natural language descriptions. Simply tell Copilot what you want your agent to do.



Grounded in Your Data

Connects directly to your organization's knowledge sources—files, SharePoint sites, and emails—for accurate answers.



Flexible Sharing

Create agents for your personal use or share them with specific teams and colleagues to scale expertise.



Enterprise Security

Agents run entirely within your secure Microsoft 365 environment, backed by Enterprise Data Protection (EDP).

Creating an Agent

The "Describe" Method & Workflow



TWO-STEP APPROACH

STEP 1



Describe

Tell Copilot what your agent should do using natural language. Describe its purpose, behavior, knowledge sources, and tone.



STEP 2



Configure

Fine-tune settings manually. Adjust the name, icon, detailed instructions, specific knowledge sources (files/sites), and conversation starters.

How to Get Started

- 1 Access Copilot**
Open your browser and navigate to m365copilot.com or open the Copilot app.
- 2 Navigate to Agents**
Locate the **Agents** menu in the left sidebar navigation pane.
- 3 Initiate Creation**
Click the **"Create"** or **"New Agent"** button to begin the setup wizard.
- 4 Select Method**
Choose **"Describe"** to start with AI assistance, or **"Configure"** for manual setup.
- 5 Define Purpose**
Provide a clear description of what the agent should do, who it serves, and what knowledge to reference.
- 6 Test & Publish**
Test the agent in the preview chat window, iterate on instructions, and then publish to your team.

Agent Configuration Options



Building a Custom Agent: The "Regulatory FAQ Bot"

Configuration Parameters

Identity

Name & Description: Defines how users find and understand the agent's purpose in the Copilot library.

Instructions

Behavioral guidelines. Defines tone, scope, and specific rules (e.g., "Always cite the specific clause number").

Knowledge Sources

The "brain" of the agent. Upload files, link SharePoint sites, or add URLs for grounding answers.

Conversation Starters

Pre-defined prompts to help users get started immediately with high-value queries.

Configure Agent



Agent Name

Regulatory FAQ Bot

Description

Answers BNM regulatory questions based on uploaded policy documents

Instructions

You are a compliance assistant for a financial institution. Your role is to answer questions strictly based on the provided knowledge sources.
- Maintain a formal, professional tone.

Knowledge sources + Add source



BNM RMIT Guidelines 2025.pdf



Internal AML CFT Handbook.pdf

Cancel

Using Your Agent

Workflow & Best Practices for Deployment



Operational Workflow



Locate Agent

Navigate to the **"Agents"** section in the Copilot Chat sidebar to view your available assistants.



Select from List

Click on your specific agent (e.g., "Regulatory Bot") to open its dedicated chat interface.



Start Chatting

Use the defined conversation starters or type your query. The agent will respond based on its grounded knowledge.



Share & Scale

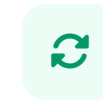
Click the share icon to send a direct link to colleagues or publish it widely to the organization

OPTIMIZATION STRATEGIES



Keep It Focused

Don't build a "do-everything" bot. Limit each agent to a specific domain or task (e.g., "HR Policy" vs "Sales Data") for higher accuracy.



Update Knowledge

Regularly review connected files. Replace outdated PDFs or docs to ensure the agent doesn't provide obsolete information.



Test Real Scenarios

Before sharing, stress-test the agent with ambiguous questions to see how it handles edge cases and refine instructions accordingly.



Gather & Iterate

Ask users for feedback on response quality. Use their input to tweak the agent's tone, scope, and source materials continuously.

Module 3 & 4 Summary

Recap: Advanced Workflows & Custom Agents



Achievement Unlocked

You have mastered advanced productivity workflows and automation with Copilot.



Leverage Copilot Chat to brainstorm, summarize, create content, visualize data, and generate code



Upload and analyze files to generate insights and create new content



Use Copilot Pages for collaborative editing and sharing



Understand Copilot capabilities across Word, Excel, PowerPoint, Outlook, and Teams



Create custom Copilot Agents using Describe and Configure

M365 Copilot Chat Basics Training Assessment

Complete your Attendance, Feedback & Assessment



Scan the QR Code

Use your mobile camera or code scanner app to access the form.

2

Complete Attendance & Feedback

Fill in your details to mark your attendance and share your thoughts on the session.



Take the Assessment

Complete the short quiz to validate your learning and finish the training module.

Scan to Start



Please complete all sections

Attendance • Feedback • Quiz



Financial Institution Training

Unlock Your Achievement

Redeem Your Microsoft Learn Badge



1

Scan the QR Code

Use your camera to access the Microsoft Learn achievement portal directly.

2

Sign In

Login to your Microsoft Learn profile using your organizational or personal account.



Enter Redemption Code

Input the specific achievement code below:

Valid Code

DLZ75M

4

Click "Redeem"

Confirm the redemption to add the badge to your profile and transcript.

Achievement Portal

Scan to access Microsoft Learn



CODE STATUS

Active

DLZ75M





Thank You!

Questions & Discussion



PRESENTER

Mohammed Arif, PhD

Lead Data Scientist



RESOURCES & LINKS

arif.works/copilot

[Access deck & materials →](#)