



Microsoft 365 Copilot

Precision Prompting

for Productivity



Presenter



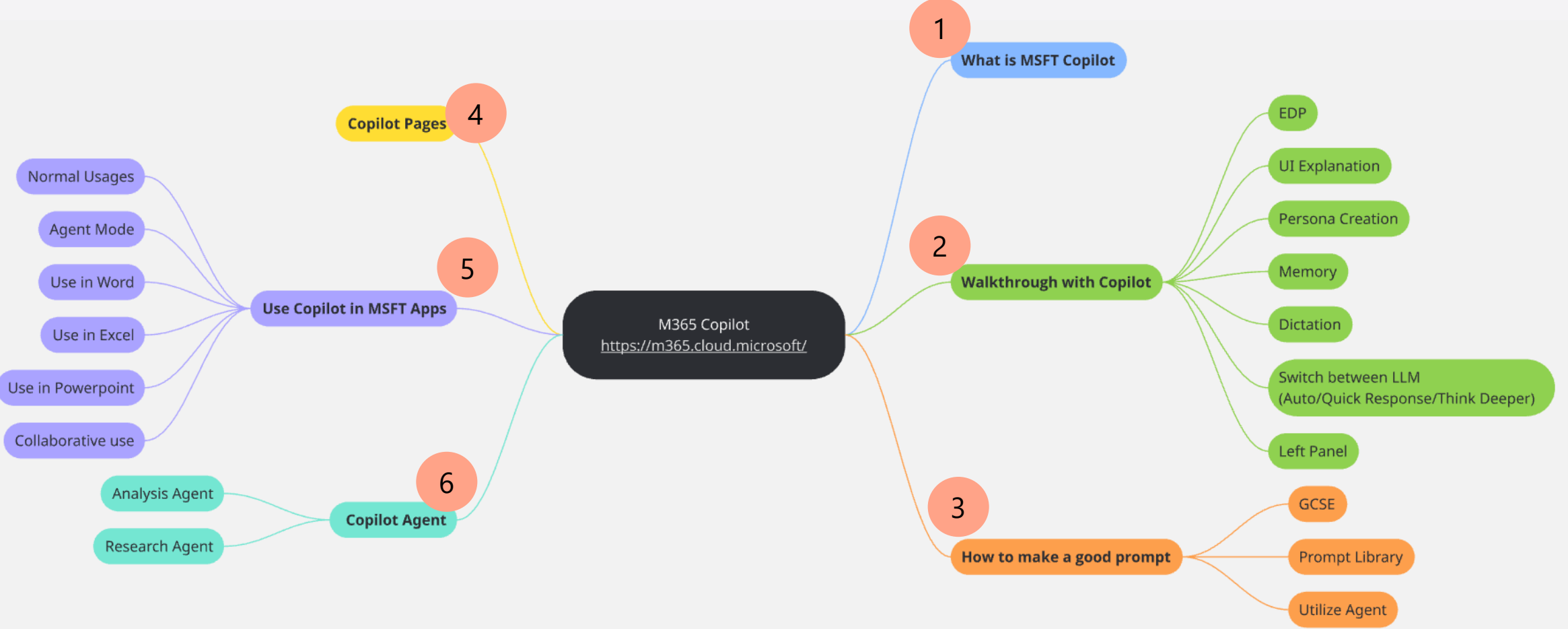
Mohammed Arif, ^{PhD}
GenAI Architect & Lead Data Scientist

Resources

<https://arif.works/petronas>

Learning objectives

After completing this module, you will be able to:



The importance of user enablement



Help employees use new AI technology effectively.



Maximize the transformational capabilities of AI by investing in the human side of change.



Ensure successful adoption of Microsoft 365 Copilot and more meaningful contributions to organizational success and innovation.

Describe the journey to becoming an AI-powered organization



Leadership. Develop leadership capabilities to leverage AI for business outcomes



Human change. Manage the human transformation through robust user enablement programs



Technical Readiness. Build and iterate technical skills to deliver on business results

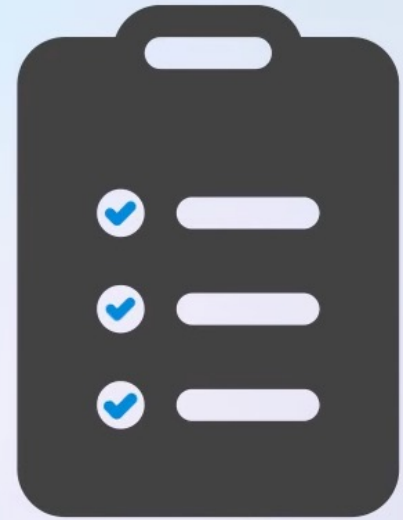
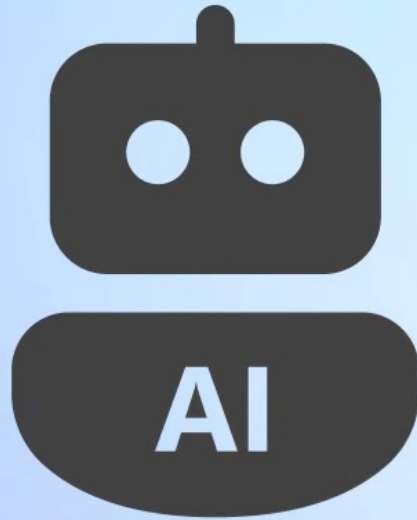
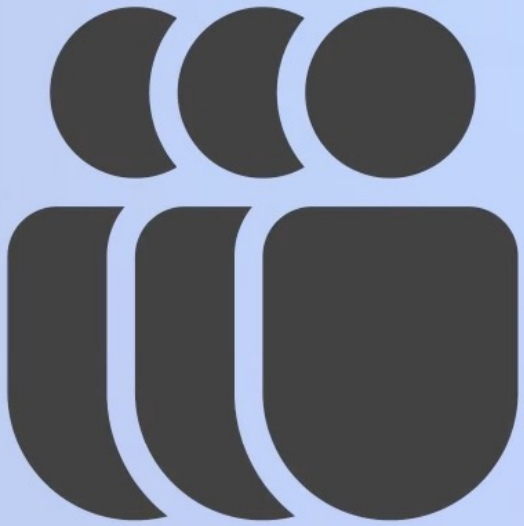


Microsoft 365 Copilot



What is Microsoft 365 Copilot?







Brainstorming



Streamlining
tasks



Creating
documents



And more!

Real time content

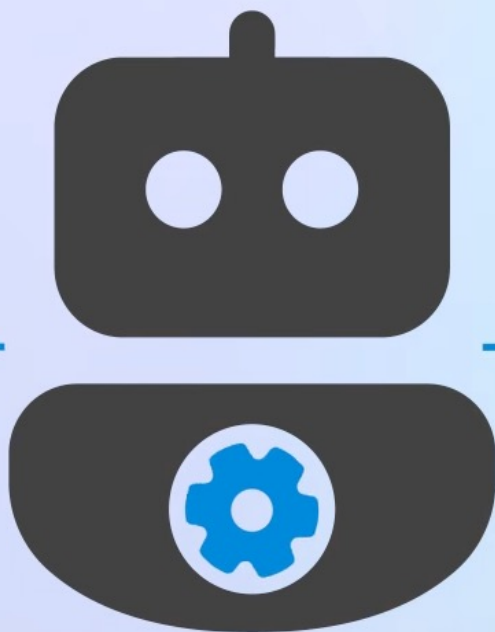




Create an onboarding plan for new employees



Web-based
information



Organizational
data



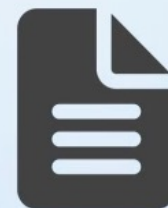


Summarize recent data for the Fabrikam project|





What roles and responsibilities does an analyst have?





Create an update email for each person in the Contoso group





Draft a document



Suggest formulas



Summarize an email thread



Build a PowerPoint deck



Identify key meeting points

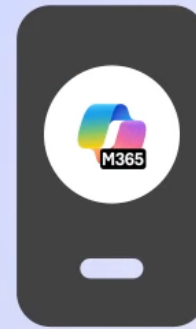
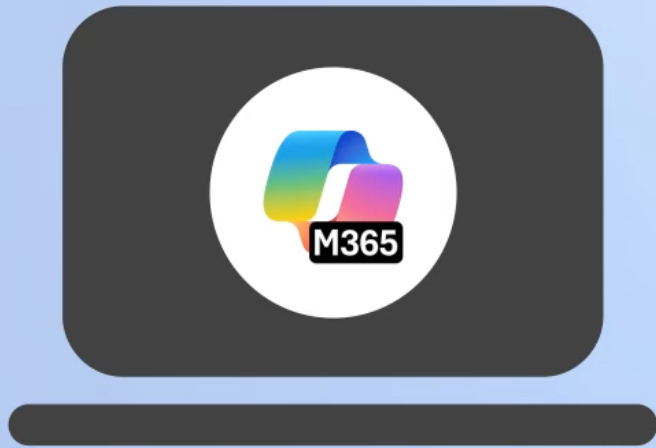




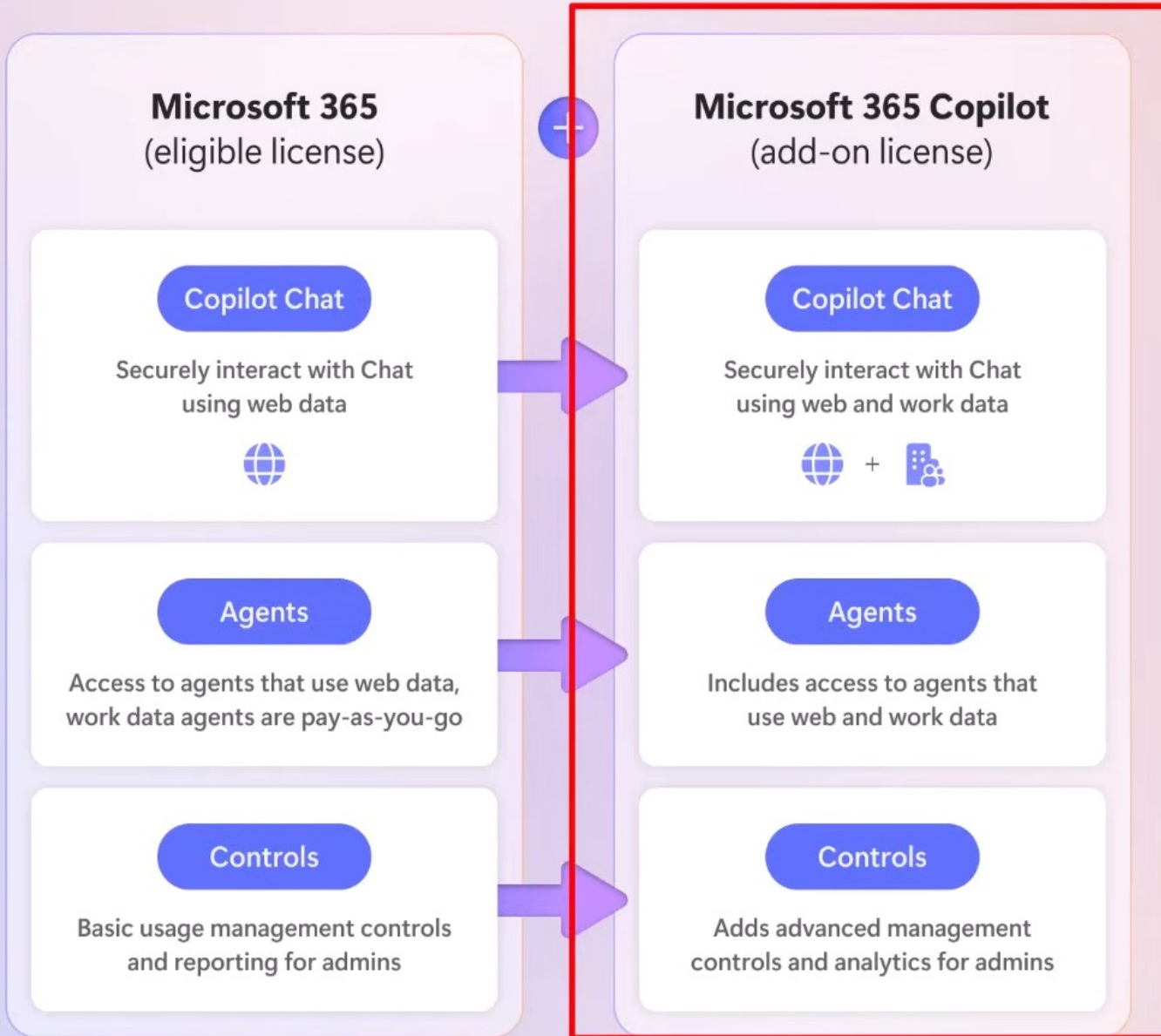
Agent







Compare key Copilot features between Microsoft 365 licenses



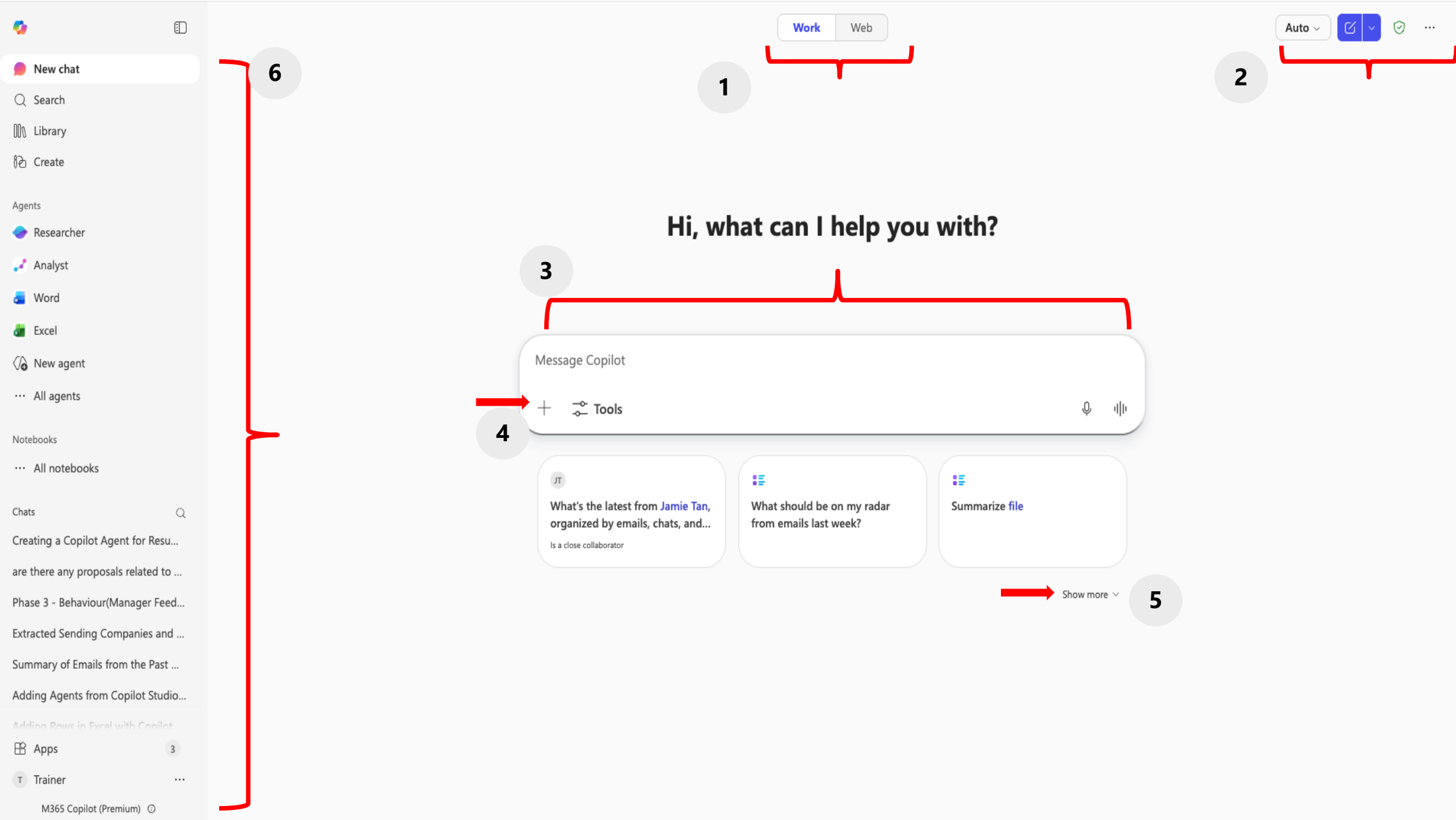




Microsoft 365 Copilot

Walkthrough with Microsoft 365 Copilot





6

1

2

Hi, what can I help you with?

3

Message Copilot

+ Tools

4

JT

What's the latest from **Jamie Tan**, organized by emails, chats, and...

Is a close collaborator

☰

What should be on my radar from emails last week?

☰

Summarize **file**

Show more ▾

5

Top 10 to "Try First"

with Microsoft 365 Copilot

Foundational skills for new users



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from meeting



2

Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon



3

Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from file



5

Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about topic organized by emails, chats, and files?



6

Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on file



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did person say about topic



9

How do I ...

– let Copilot help you build or fix formulas in Excel.

→ How do I sum values that are greater than 0?



10

Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

For more prompts, visit Prompt Gallery at: aka.ms/prompts



Microsoft 365 Copilot

How to make an effective PROMPT



The C.G.S.E Prompt Formula



Context — Who you are and the situation you're in

e.g. I am a Relationship Manager preparing for a quarterly review meeting with a corporate client in the manufacturing sector.



Goal — What you want Copilot to do

e.g. Summarize the key financial risks I should discuss with the client and suggest 3 talking points.



Source — Data or reference to use (optional)

e.g. Use the uploaded Q3 financial report and recent news about supply chain disruptions.



Expectation — Format, length, tone of the output

e.g. Respond in bullet points, professional tone, no longer than 200 words.



Microsoft 365 Copilot

Copilot Pages – A new way of Collaboration





Microsoft 365 Copilot

Use Microsoft Copilot in Apps





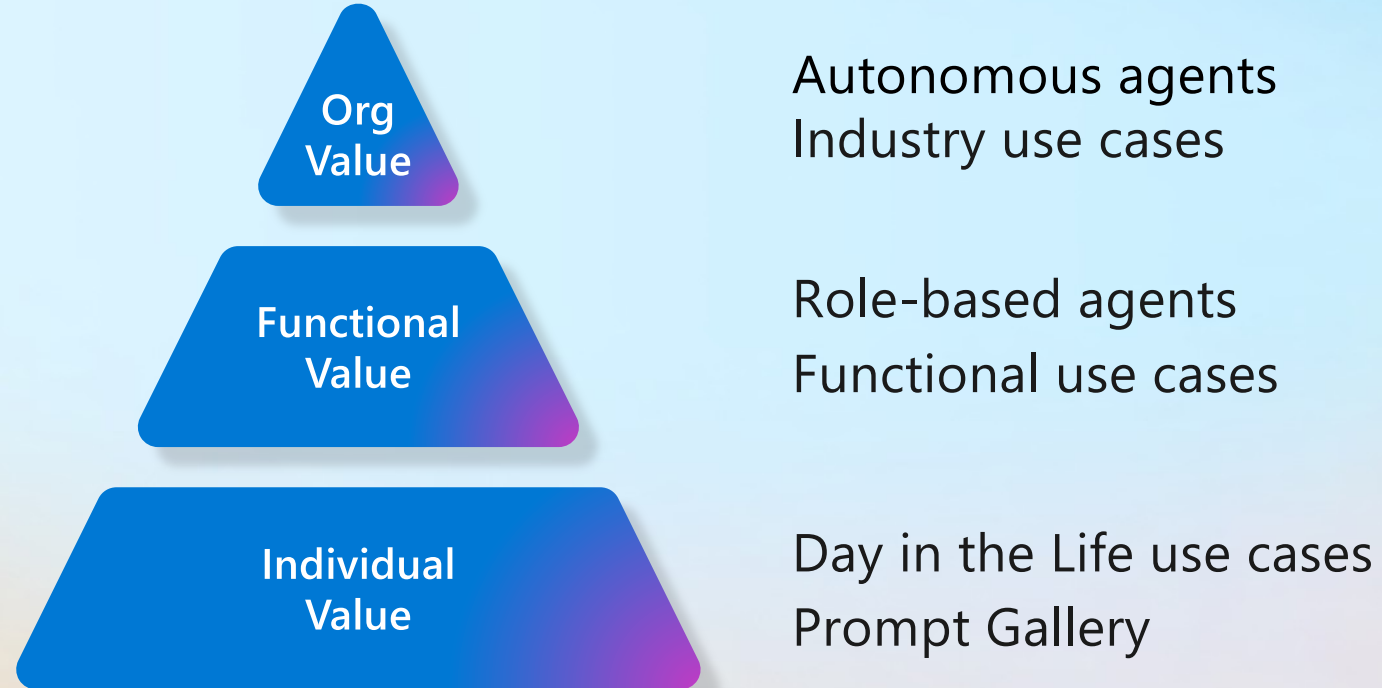
Microsoft 365 Copilot

Agents



AI value journey

Grow value from a base of solid usage and individual productivity and then extend through agents to impact organizational KPIs.





AI use cases for Energy and Resources



KPI – Employee satisfaction



Energy workers face high operational complexity, dynamic field conditions, and heavy documentation demands. Copilot helps teams work more efficiently, stay connected, and focus their time on higher-value tasks. By easing administrative burden and improving service delivery, Copilot strengthens workplace experience.

How AI can help improve employee satisfaction

Improve collaboration

- Generate tailored learning materials
- Strengthen support for field workers
- Enable more confident decision-making with AI-generated insights
- Synthesize customer inquiries, requests, or outage updates

Streamline workflows

- Automate shift handovers, incident summaries, and repetitive reporting
- Retrieve procedures, maintenance steps, and technical guidance instantly
- Summarize alerts, tasks, and operational demands

Value Calculation

- **Employee Net Promoter Score (eNPS):** Measures how likely employees are to recommend the organization as a workplace.
- **Productivity per Employee (hours or output):** Quantifies the impact of reduced administrative workload.
- **Workload Reduction (hours saved):** Tracks time saved from automation of routine tasks.
- **Training and Onboarding Time:** Measures how quickly new employees reach operational readiness.
- **Collaboration Efficiency Index:** Reflects how effectively teams exchange information and complete cross-functional tasks.
- **First-Time Resolution for Internal Requests:** Measures how efficiently employees can resolve operational questions without escalation

Example

Before AI, field technicians spent 3.5 hours per shift on documentation, searching for procedures, and preparing service updates. After adopting Copilot to generate summaries, retrieve technical information, and draft communications, time spent dropped to 1.9 hours per shift.

Result:

1.6 hours saved per shift, contributing to significantly higher satisfaction, reduced stress, and improved service delivery.

KPI – Market development



As energy systems diversify and new technologies emerge, successful market development requires rapid insight generation and strategic agility. Copilot accelerates growth by analyzing market trends, synthesizing competitive intelligence, and helping teams optimize strategies for new products and markets.

How AI can help drive market development

Stronger market insights and product strategy

- Identify emerging opportunities
- Generate insights from internal data to guide product direction
- Provide scenario analysis for new product launches, pricing strategies, and go-to-market planning

Optimized business strategy and faster market execution

- Identify bottlenecks in commercial workflows
- Align cross-functional inputs
- Generate tailored communications
- Draft proposals, investor-ready narratives from complex datasets

Value Calculation

- **New Market Entry Lead Time:** Measures how quickly new markets can be assessed, validated, and entered.
- **New Product Development Cycle Time:** Tracks the speed of developing and commercializing new offerings.
- **Market Opportunity Pipeline Value:** Quantifies total value of new market/product opportunities identified.
- **Strategic Proposal Win Rate:** Measures success in competitive bids or new market tenders.
- **Revenue from New Products / New Markets:** Shows financial impact of expansion activities.
- **Competitive Intelligence Utilization Rate:** Measures how effectively insights are used in strategy decisions.

Example

A utility sought to enter a new distributed energy market but required 7 months to complete research, competitive analysis, and business case development.

By using Copilot to summarize market data, model scenarios, and produce strategy documents, the cycle dropped to 3.5 months. This enables earlier market entry and faster revenue capture from new offerings.

Copilot Chat can help empower control room teams to quickly synthesize operational data, prioritize risks, and ensure seamless shift handovers. This streamlines situational awareness, boosts accountability, and supports compliance, saving time and reducing the risk of missed critical issues.

1. Create situation briefs

A control room manager can use Copilot Chat to compile and structure a shift brief from inputs he provides (e.g., pasted notes, exported tickets/alerts, policy text, or links to public advisories).



Sample prompt: *Summarize overnight incidents, open tickets, and planned maintenance from the text pasted below.*

2. List top risks and incidents

After receiving the initial summary, the manager can use Copilot Chat to identify the most critical risks and flag any incidents that lack an assigned owner.



Sample prompt: *From the summary you created, list the top 5 risks and any incidents missing an owner.*

3. Draft a record of status

After identifying key risks and unresolved issues, the manager generates a formal summary of the day's operational status and copies into Word. By archiving this summary, the team ensures all critical information is documented and easily retrievable for audits or future reference.



Sample prompt: *Draft today's operational status, including incidents, actions taken, and unresolved issues, in 3 sections: Overview, Risks, Next Actions.*

5. Prepare to distribute to the team

Last, the manager prepares the information for distribution. This involves organizing the summary into a concise, actionable format that can be easily be copied and shared via email or Teams to update the incoming shift or relevant stakeholders.



Sample prompt: *Format the handover as a short email I can paste into Outlook with a clear subject line and call-to-action.*

4. Create a concise handover note

With the key risks and unresolved issues identified, the manager requests a shift handover note. Copilot Chat organizes the information into a clear, actionable summary that can be shared with the incoming team.



Sample prompt: *Turn this into a one-page handover for the incoming shift. Use bullets and a 'Who/What/When' table.*

KPIs impacted

✓ Operational efficiency

✓ Employee satisfaction

Value benefit

✓ Cost savings

✓ Employee experience

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The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.

Frontline workers and safety managers need to quickly update safety plans and checklists to reflect new regulations, site conditions, or lessons learned. Copilot Chat can streamline this process by summarizing relevant documents, extracting required steps, and generating tailored checklists and briefings.

1. Request a summary of current safety plan

A safety manager can use Copilot Chat to ask for a summary of the existing safety plan, focusing on sections relevant to new regulatory requirements.



Sample prompt: *Summarize the safety plan sections relevant to today's tasks and highlight any recent updates.*

2. Extract applicable procedures

Next, Copilot Chat can help review the summarized plan and identify specific procedures, PPE requirements, and hazard controls that apply to a job at hand.



Sample prompt: *List the procedures and PPE requirements for today's work based on the safety plan.*

3. Generate a tailored checklist for the job

Using the extracted information, Copilot Chat creates a site-specific checklist that includes all necessary steps, controls, and compliance points.



Sample prompt: *Create a checklist for today's job, including hazard controls and compliance steps.*

5. Prepare the checklist for distribution

Last, the safety manager uses Copilot Chat to format the checklist and briefing so they can be easily shared with the team via email.



Sample prompt: *Format the checklist and briefing for easy sharing and suggest a way to track completion.*

4. Draft a pre-job safety briefing for the crew

Copilot Chat is used to draft a briefing document for the crew, summarizing critical safety reminders, compliance points, and any new procedures.



Sample prompt: *Draft a safety briefing for the crew, highlighting key reminders and new procedures.*

KPIs impacted

Operational efficiency

Employee satisfaction

Value benefit

Cost savings

Reduce risk incidents

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With Copilot Chat, energy and resources teams are empowered to move beyond reactive reporting to proactively identify, prioritize, safety, and operational excellence.

1. Surface emerging patterns and anomalies

A planner can ask Copilot Chat to scan recent operational data for patterns, anomalies, or trends that may signal emerging risks or reliability issues. This helps teams proactively spot weak signals before they become major problems.



Sample prompt: *Analyze this week's operational data and highlight any unusual patterns or anomalies in outages or asset performance.*

2. Identify top risks and reliability issues

Copilot Chat helps the planner to analyze the gathered data and highlights the most significant risks, recurring reliability issues, and any trends that could impact operations in the coming week.



Sample prompt: *Hypothesize what might lead to top reliability issues across all sites and assets this week and identify any recurring risks or systemic problems.*

3. Prioritize risks by impact and urgency

The planner asks Copilot Chat to rank the identified risks and reliability issues by their potential impact and urgency. This helps teams focus resources on the most critical threats and plan mitigations effectively.



Sample prompt: *Prioritize the top risks and reliability issues from this week's analysis by impact and urgency.*

5. Summarize and communicate insights

Finally, use Copilot Chat to draft a summary of key findings, recommended actions, and next steps, formatted for easy sharing with leadership or cross-functional teams. This ensures alignment and supports informed decision-making



Sample prompt: *Draft a summary of this week's risk and reliability insights*

4. Recommend mitigation actions and owners

Leverage Copilot Chat to suggest actionable mitigation steps for each priority.



Sample prompt: *Recommend mitigation actions for each high-priority risk.*

KPIs impacted

Operational efficiency

Employee satisfaction

Value benefit

Cost savings

Employee experience

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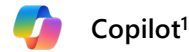
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Use AI to assist with health and safety inspections to help reduce workplace incidents. Copilot can assist with understanding rules, analyzing images, and creating reports.

1. Analyze new safety rules

There is a new local safety regulation, and the inspector asks Copilot to summarize the document. The inspector asks questions to Copilot to better understand how the new regulation will impact safety inspections on worksites.



Benefit: Quickly get up to speed with new regulations and ask Copilot the impact

2. Prepare the checklist

The inspector asks Copilot in Forms to update the existing safety checklist with new steps and checks to be compliant with new regulation.



Benefit: Quickly modify an existing checklist

3. H&S risks detection

The inspector takes a picture of workers performing activities in proximity to high voltage equipment. The inspector asks Copilot to describe the picture for anything dangerous and include the picture and generated comments into the checklist.



Benefit: Using Copilot multi-modality, ask to analyze pictures to identify workers at risk

6. Draft an urgent email

Given the severity of the safety violations, the inspector asks Copilot to draft an urgent message to the head of H&S and asks Copilot to create a bullet items list with all violations found during the worksite inspection.



Benefit: Draft emails and schedule meetings for relevant stakeholders with appropriate information and tone for audience

5. Create a safety violations report

Using the checklist, notes, scope of work, and pictures taken, the inspector asks Copilot to provide summaries of safety violations on the site and generate a draft safety violations report.



Benefit: Retrieve relevant documents, notes and emails faster and quickly generate a report

4. Review contractor's H&S safety plan

The inspector asks Copilot to retrieve information about the Project Health & Safety Plan for the worksite being executed. Using this data, the inspector asks Copilot to summarize the Scope of Work to ensure compliance and identify potential safety violations.



Benefit: Save time reviewing long Scope of Work documents asking Copilot to pull out the essential information

KPIs impacted

✓ Safety & compliance

Value benefit

✓ Cost savings

✓ Reduce risks

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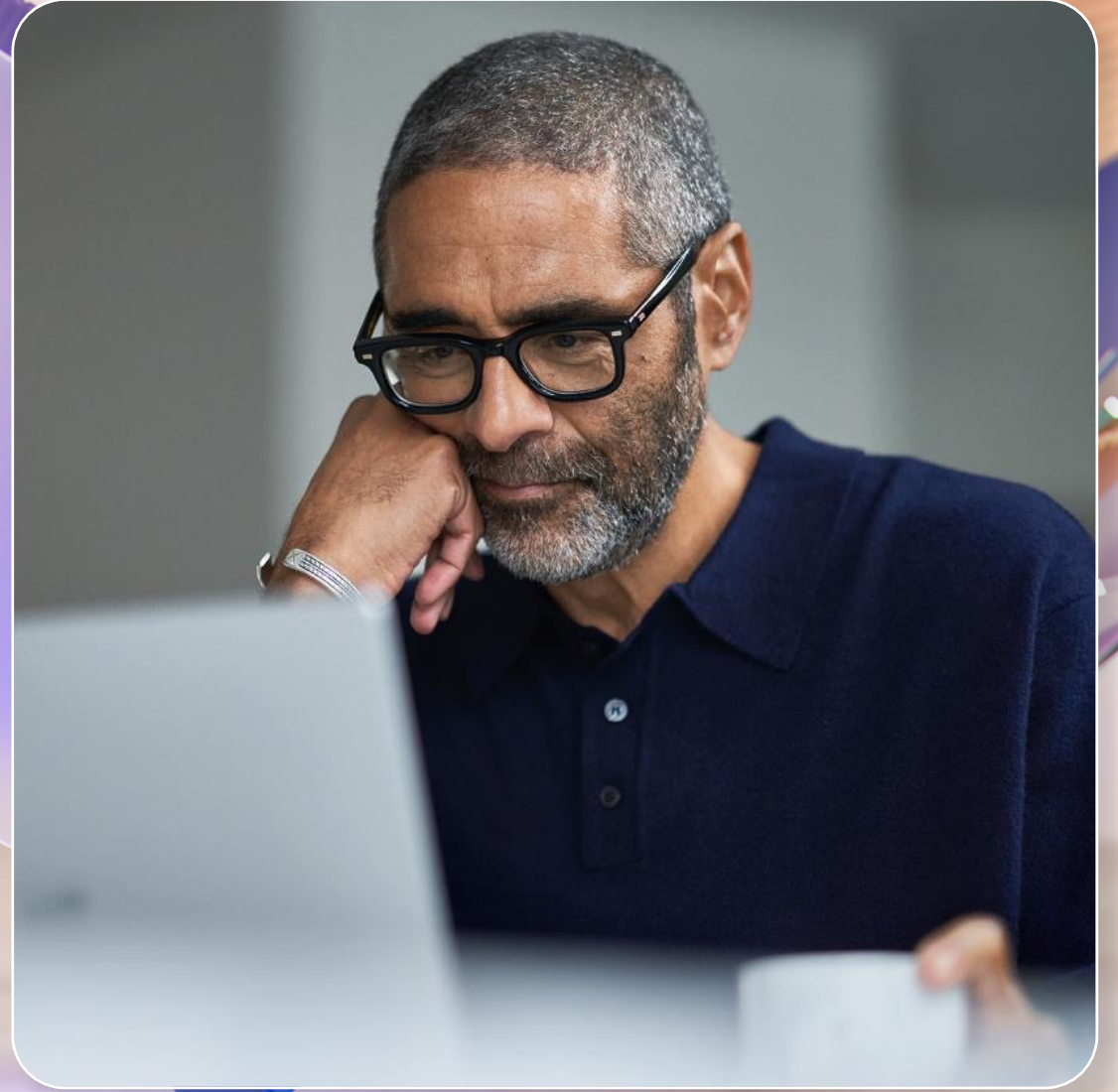
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AI use cases for Executives



Copilot can help executives and their teams with all aspects of communicating a message to employees.

1. Gather key points

Quickly catch up on the latest developments related to the announcement by prompting Copilot to summarize email threads and chat conversations.



Rapidly get up to speed to focus on key issues and concerns. Have additional time to identify key pain points for customer.

2. Rally the team

Meet with the executive team to review each business unit's results. During the meeting, Facilitator in Teams will take notes, create action items from the conversation, and assign owners.



Document and socialize the action items to keep the preparation process moving forward towards a successful close. **Interpreter** will translate the conversation to each participant's preferred language in real time.

3. Draft the speech

Use Word Agent to create a draft of the speech in Word, specifying tone and content to make it resonate more with the workers at the speech location.



Sample Prompt: *Generate a speech for the meeting based on announcements made during the past quarter and the quarterly financial results that explains these highlights in a clear, engaging tone.*

[Get started with Word, Excel, and PowerPoint Agents](#)

4. Create presentation

Ask PowerPoint Agent to create a presentation based on your speech.

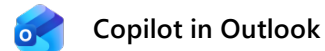


Create presentation from your speech document to present at the meeting about the new organizational metrics.

[Get started with Word, Excel, and PowerPoint Agents](#)

6. Send thank you

Thank the team for watching the address by asking Copilot in Outlook to draft a response that can be personalized in tone and length.



Create recap in record time by relying on Copilot in Outlook to draft the message along with your notes from the Teams recording recap.

5. Review previous session

Review last quarter's address by prompting Copilot to summarize the meeting and highlight the numbers that were presented to ensure consistency.



Avoid listening to meeting recordings and instead rely on generated summaries, freeing up more time to focus on the speech at hand.

KPIs impacted

✓ Employee satisfaction

Value benefit

✓ Cost savings

✓ Employee experience

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A day in the life of an Executive

Available with:
Microsoft 365 Copilot and Teams Phone

Scenario level:
Buy

Benefits

~1 hour

Areas of investment: Analysis

★ Team communications

7:00 am – Suggestions for questions

Tanya starts the day with a customer call in her hotel room. She uses Copilot in Teams Phone to suggest follow up questions to ask the customer.



Copilot in Teams Phone

Prompt: **What are some good follow up questions** to make sure I understand the customer's issue with the last delivery?

8:30 am – Draft an email

After the call, Tanya summarizes her email threads from the day before and uses Copilot in Outlook to create replies, getting through all of her email in only 20 minutes.



Copilot in Outlook

Prompt: **Reply in a professional tone** with a short email saying that I am sorry for the issue with the product and we will have a response by 3 pm this afternoon.

9:00 am – Get the main idea

Tanya has a few more minutes so she uses Copilot to catch up on the meetings she missed while flying in. She sends a few chats to provide instructions on the critical issues.



Copilot Chat²

Prompt: **What was the main issue** faced by the marketing team and what was the proposed solution and timing?

7:00 pm – Get some writing ideas

The issue is finally under control and Tanya can get back to her speech. She isn't happy with the introduction, so she asks Copilot in Word to suggest some humorous opening lines. With a few tweaks she has the perfect start.



Copilot in Word

Prompt: **Give me some suggestions** of humorous ways to begin this speech.

3:00 pm – Summarize communications

A critical production issue has occurred at a manufacturing site and Tanya needs to get up to speed quickly. She asks Copilot for a summary of the emails and chats related to the issue.



Copilot Chat²

Prompt: **Summarize** all of the email and chats that mention the melt shop from the past two hours.

2:00 pm – Draft content

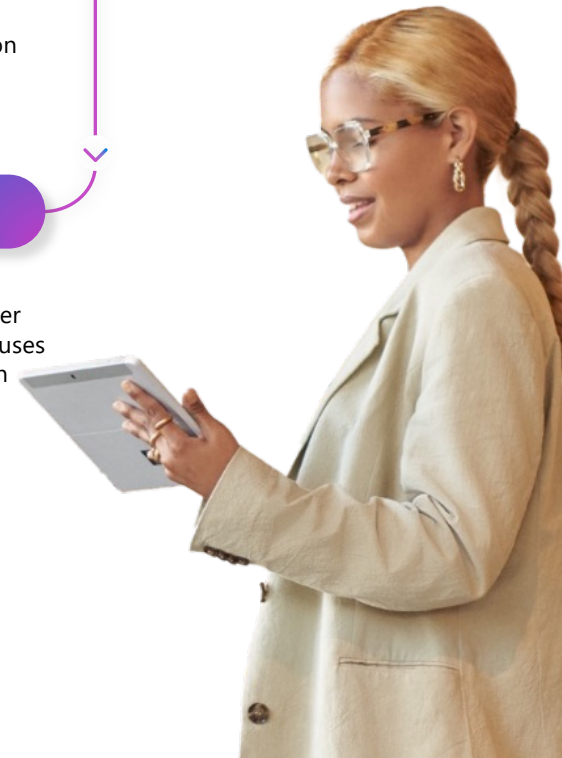
After a long session of customer meetings at the conference, Tanya gets a chance to have a look at her speech for tomorrow and make a few updates. She uses Copilot in Word to add a new section on bonus plan updates.



Copilot in Word

Prompt: **Add a new paragraph** based on /Contoso Bonus Plan for FY23.

Tanya
is a CEO traveling to give a speech at a conference.



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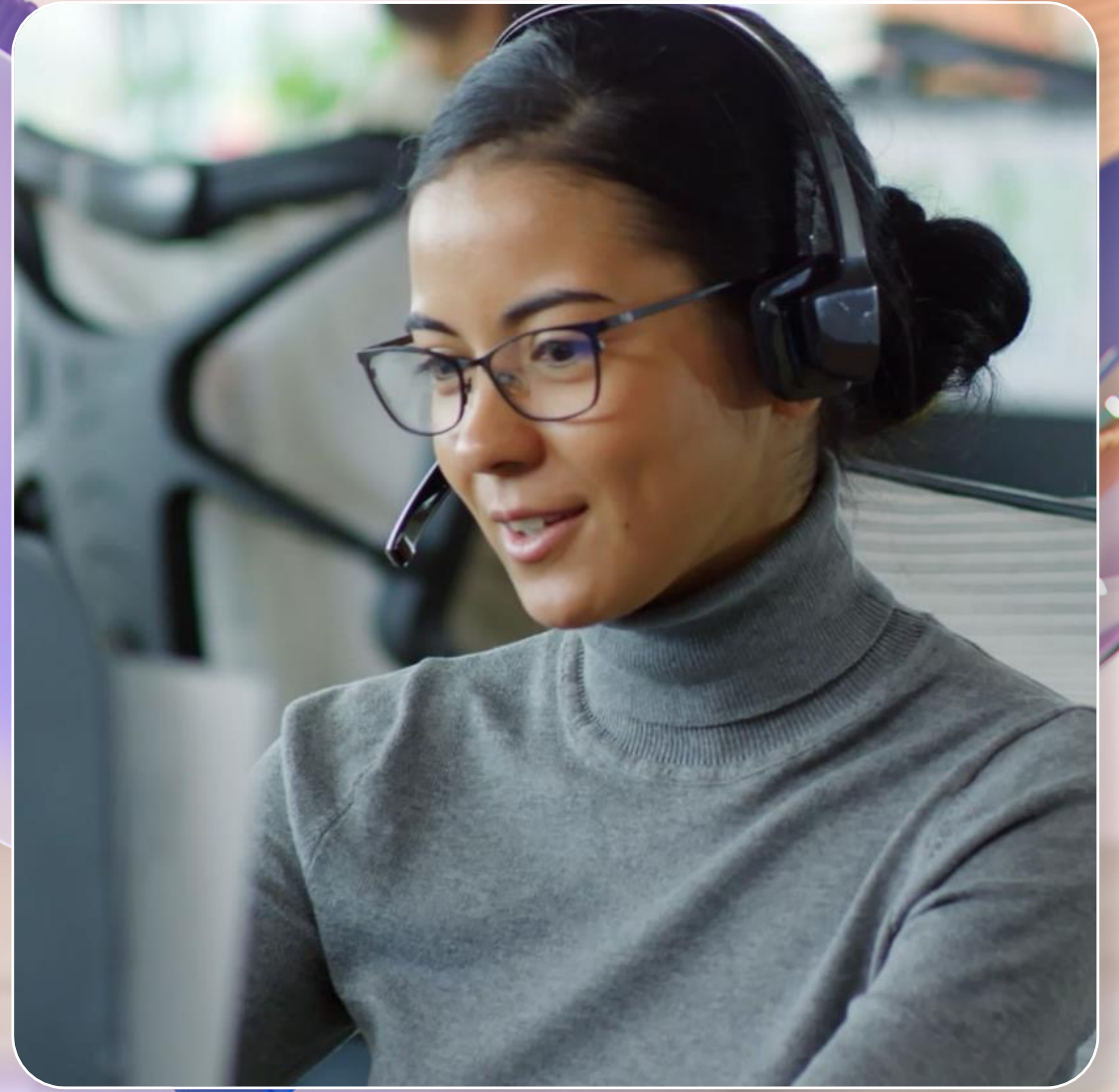
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AI use cases for Sales



A day in the life of an Account Manager

Available with:
Microsoft 365 Copilot

Scenario level:
Extend

Benefits

~1 hour per week

Areas of investment: Customer engagement

Wellbeing & communication

8:00 am – Summarize communications

Cassandra needs to prepare for her big pitch to Contoso so she uses Copilot to summarize emails and chats. Copilot for Sales provides a summary of the opportunity for more context.

 Copilot Chat²
+ Copilot for Sales

Example prompt: Summarize all the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

[Try in Prompt Gallery: Prep for that meeting](#)

8:15 am – Draft an email

Cassandra asks Copilot in Outlook to create a message to confirm the meeting. Copilot for Sales includes relevant product and pricing details from her CRM system.

 Copilot in Outlook
+ Copilot for Sales

Example prompt: Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 am – Show data insights

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot in Excel to create some amazing charts to showcase the value of the offer.

 Copilot in Excel

Action: Show all data insights.

[Try in Prompt Gallery: Find insights](#)

4:00 pm – Catch up on the day

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and asks Copilot to summarize the conversation to quickly catch up.

 Copilot Chat²

Example prompt: Summarize team chat and make sure to include the key points and who made them.

[Try in Prompt Gallery: Get the gist](#)

2:00 pm – Recap a meeting

It's time for the pitch. Cassandra can focus on her presentation. Copilot for Sales in Teams captures meeting notes, outstanding questions, and sales keywords and KPIs.


 Copilot in Teams
+ Copilot for Sales

Example prompt: What questions were asked during the meeting that have not been answered?

[Try in Prompt Gallery: Summarize meetings and videos](#)

11:00 am – Add a slide

Cassandra puts the final touches on the pitch presentation by using Copilot in PowerPoint to create a slide based on a summary of the annual report.

 Copilot in PowerPoint

Example prompt: Add a slide based on [copy in annual report summary].

Cassandra
is a Sales Lead
at Contoso.



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AI use cases for Marketing



A day in the life of a Marketing Manager (Copilot Studio)

Available with:
Microsoft 365 Copilot and Copilot Studio

Scenario level:
Extend

Benefits

~1 hour per week

Areas of investment: Strategic programs

Campaign management & communication

8:00 am – Prepare a brief

Mio uses Word Agent to prepare a brief in Word to give to the agencies bidding on a new advertising campaign. He can refine it further using Copilot in Word.



Word Agent

Example prompt: Prepare a brief outlining the advertising strategy from [Contoso widget marketing plan]. Include sections on target market, pricing, tone, imagery, and taglines.

[Get started with Word, Excel, and PowerPoint Agents](#)

8:30 am – Categorize ideas

Mio meets with the team to brainstorm feature enhancements based on customer feedback. Copilot in Whiteboard categorizes the ideas for easier discussion.



Copilot in Whiteboard

Action: Categorize the ideas.

10:00 am – Show data insights

Using agents made in Copilot Studio, Copilot provides a list of active campaigns, pulling data from their email marketing platform. Mio uses Copilot in Excel to prepare charts that show data trends.



AI Agent³
+ Connection to
SharePoint



Copilot in
Excel

Action: Show all data insights.

4:00 pm – Summarize email

Mio needs to catch up on email and chats before end of day. Copilot speeds up the work by summarizing recent email and chat threads.



Copilot Chat²

Action: In the Copilot Teams app select –
Summarize latest emails.

2:00 pm – Add a slide

Mio uses Copilot in PowerPoint to update the roadmap deck to reflect the commitments from the engineering team meeting.



Copilot in PowerPoint

Example prompt: Add a slide based on [copy in bulleted list of roadmap updates]

11:00 am – Categorize information

Mio meets with the engineering team to plan the development of new features. During the meeting, Mio uses Copilot in Teams to take meeting notes, noting prioritized features.



Copilot in Teams

Example prompt: Create a table to categorize the features discussed so far by priority.

Mio
is a Marketing
Manager at Contoso.



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AI use cases for Legal



A day in the life of a Corporate Counsel

Available with:
Microsoft 365 Copilot

Scenario level:
Buy

Benefits

~1 hour per week

Areas of investment: Strategic insights

Faster analysis and delivery

7:00 am – Summarize a newsletter

Amanda needs insights from industry analyst coverage provided in email newsletters heading into the day and uses the Outlook mobile application to get ahead on the train ride to the office.



Copilot in Outlook

Action: **Summarize** in Outlook Mobile with one click.

8:00 am – Catch up on email

Amanda uses Copilot to catch up on the status of a project with teammates who start their day six hours ahead of her local time.



Copilot Chat²

Example prompt: **Summarize** the recent emails regarding “Fabrikam Premium for AI.” Flag any where I am specifically mentioned highlighting any action items requested of me.

9:00 am – Create a presentation

Amanda needs to generate training materials for client meetings to prepare them for the risks of a new product business space and wants some ideas to get started.



Copilot in PowerPoint

Example prompt: **Create a slide** summarizing the arguments made by the US Department of Justice against Adatum Technologies in its antitrust case.

4:00 pm – Draft a status message

Amanda uses Copilot to generate an update for the team that summarizing the day’s progress and current project status.



Copilot Chat²

Example prompt: **Draft a message to my team** with the current status [items opened/items outstanding/items closed] of Fabrikam Premium for AI based upon the emails and Teams messages received in the last 24 hours.

2:00 pm – Draft a memo

Amanda attends a client meeting on an upcoming product release and uses OneNote to turn her notes into an action focused memorandum for her teammates.



Copilot in OneNote

Example prompt: **Clean up my meeting notes** and produce a memo for my team. Flag action items noted for follow up and note any person who should engage.

11:00 am – Get information

Amanda must analyze the terms of a new regulation to understand how it impacts what the organization can charge its customers for its new cloud services.



Copilot Chat in Word

Example prompt: What limitations does the regulation in this document create that might limit my ability to charge customers fees for cloud services? **Provide references** to specific elements of the document describing these limitations.

Amanda
is a Corporate
Counsel.



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AI use cases for Finance



A day in the life of an Income Tax Compliance Manager

Available with:
Microsoft 365 Copilot

Scenario level:
Extend

Benefits

~1 hour per week

Areas of investment: Learning new skills

Focus on improving accuracy

8:00 am – Summarize emails

Emma has several new emails from 3rd parties in relation to tax returns. Instead of reading through each email, she uses Copilot to summarize recent emails about tax returns.



Copilot Chat²

Example prompt: Summarize recent email threads about tax returns and list action items.

8:30 am – Explain a formula

Emma reviews the final tax analysis using Copilot for Finance in Excel to check for any inconsistent formulas.



Copilot in Excel

Example prompt: Explain the formula used to calculate depreciation for Contoso.

9:00 am – Summarize a topic

Emma requests Copilot to create a list of all the emails and chats related to the Contoso tax return. She uses Copilot in Outlook to draft replies to an email thread with the tax preparation team.



Copilot Chat²



Copilot in Outlook

Example prompt: Summarize all the conversations about the Contoso return in my emails and Teams messages.

4:00 pm – Search for information

Emma uses Copilot in SharePoint to get answers about previous tax returns without having to open the large pdf files.



AI Agent³
+ Connection to SharePoint

Example prompt: What was the opening cash balance on the US income tax return for Contoso?

2:00 pm – Add a calculation

Emma uses Copilot for Finance in Excel to highlight any differences between the financial analysis and tax return. She asks it to highlight the variances and then adds the table to an email.



Copilot in Excel
+ Copilot for Finance

Example prompt: Add a formula column in 'Section D: Total Assets' showing the difference between the financial analysis and tax return data.

11:00 am – Extract information

Emma receives an email to say the Tax Returns are ready for her review. Emma verifies the accuracy of tax return data using an OCR model she built in AI Builder instead of manually retyping it.



Copilot in Power Automate

Example prompt: Extract the information from a structured document.

Emma works in Tax & Customs.



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A day in the life of a Vendor Engagement Manager

Available with:
Microsoft 365 Copilot

Scenario level:
Buy

- Benefits
- ~1 hour per week
- Areas of investment: Vendor meetings
- Vendor evaluations

8:00 am – Summarize emails

Kim has several new emails from vendor companies and internal teams. Instead of reading through each email, he uses Copilot to summarize recent emails.



Action: Summarize this thread.

9:30 am – Suggest formulas

Kim uses Copilot for Finance in Excel to analyze a vendor's compliance data.



Example prompt: Suggest formulas for this column. Show insights in charts.

10:00 am – Get key points

During a meeting with the vendor, Kim uses Copilot in Teams to keep track of the discussion. After the meeting, Copilot helps identify next steps.



Example prompt: Summarize key discussion points. Identify agreed-upon next steps.

4:00 pm – Create an agenda

Kim uses Copilot to manage his tasks. He creates a meeting agenda based on this chat history to prepare for his meetings.



Example prompt: Create a meeting agenda based on this chat history.

2:00 pm – Create a presentation

Kim needs to create a presentation for a potential vendor. He uses PowerPoint Agent to create a new PowerPoint presentation from this Word file, and he uses Copilot in PowerPoint to improve the layout of his slides.



Example prompt: Create a new presentation from this Word file.

[Get started with Word, Excel, and PowerPoint Agents](#)

11:00 am – Draft a report

Kim uses Word Agent to draft a report in Word, prompting it to bring in specific information from other documents. He then uses Copilot in Word to improve the clarity of his report.



Example prompt: Draft content from these documents. Suggest ways to rewrite this content.

[Get started with Word, Excel, and PowerPoint Agents](#)

Kim is a Vendor Engagement Manager in Finance.



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A day in the life of a Financial Analyst

Available with:
Microsoft 365 Copilot

Scenario level:
Buy

Benefits

~1 hour per week

Areas of investment: Learning

Handling more cases

8:00 am – Sort data

Hillary begins her day using Agent Mode in Excel looking at the latest COGS estimates for a new product. She uses it to filter the data to get the view she wants.

 Copilot in Excel

Example prompt: **Sort the data** by product feature and then filter out the Priority 2 features.

9:30 am – Recap a meeting

She later meets with her manager and IT to discuss reporting requirements updates from the sales organization. She asks Copilot in Teams to summarize the requirements.

 Copilot in Teams

Example prompt: **Summarize the meeting** and be sure to list all the reporting requirements that were mentioned.

10:00 am – Summarize a document

Hillary finally gets to her main project for the day and reviews the due diligence information on a potential acquisition target. She asks Copilot to create a summary of the content.

 Copilot Chat²

Example prompt: **Summarize the information in** [Fabrikam financial data], [Fabrikam operations analysis], [Fabrikam integration plan].

4:00 pm – Get insights

Hillary heads back into Agent Mode in Excel to update the acquisition numbers with the latest what-if scenarios and create some charts to go into the business planning presentation.

 Copilot in Excel

Example prompt: **What is the impact of doubling the** IT integration budget on the revenue per month?

2:00 pm – Summarize a chat

Hillary needs to catch up on a chat she started in the morning. She prompts Copilot to summarize the thread.

 Copilot Chat²

Example prompt: **Summarize this thread** calling out where my name was mentioned and any action items for me.

11:00 am – Create a presentation

After creating an overview of the acquisition in Word, she asks PowerPoint Agent to turn the document into a PowerPoint presentation for the business development team.

 PowerPoint Agent

Example prompt: **Create a presentation from** [Fabrikam acquisition overview.docx]
[Get started with Word, Excel, and PowerPoint Agents](#)

Hillary
is a Financial Analyst
at Contoso.



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AI use cases for HR



A day in the life of a HR Manager

Available with:
Microsoft 365 Copilot and Copilot Studio

Scenario level:
Extend

Benefits

~1 hour per week

Areas of investment: Creative solutions

★ Job satisfaction and output

8:00 am – Research companies

Omar starts the day at home with an interview for a new bank teller candidate. He uses Copilot to research the candidate's previous companies.

 Copilot Chat¹

Example prompt: **What are some good follow up questions** to learn more about this person's skills and experience?

9:35 am – Summarize chats

At the office, Omar uses Copilot in Teams to summarize some chat threads that occurred overnight and can quickly assess the situation and provide guidance to his team to address the issue.

 Copilot in Teams

Example prompt: **Summarize this thread** and include the key issues and suggestions for resolution along with who had the suggestions.

10:00 am – Get key points

Omar asks Copilot in Word to summarize the organization's new compliance handbook to ensure it has the key points. He then uses Copilot to fill in the missing sections.

 Copilot in Word

Example prompt: **Summarize** the [Contoso Compliance Handbook] in about four paragraphs for an executive and provide a list of key points.

4:00 pm – Catch up on comms


Omar has missed a few calls and emails. He prompts Copilot to summarize recent email threads and calls and then uses Copilot in Outlook to draft email responses.

 Copilot Chat²  Copilot in Outlook

Action: **Summarize this thread.**

2:00 pm – Add a slide

Omar commands Copilot in PowerPoint to add a slide to his presentation that can be used to explain the team's initiatives.

 Copilot in PowerPoint

Example prompt: **Add a slide about potential HR initiatives.**

1:00 pm – Pull required data

Omar prompts Copilot for details about open headcount, using an AI Agent to pull in HR system data.

 AI Agent³
+ Connection to HR system

Example prompt: **Add a column that averages the other columns** for each month.

Omar leads HR for a regional bank.



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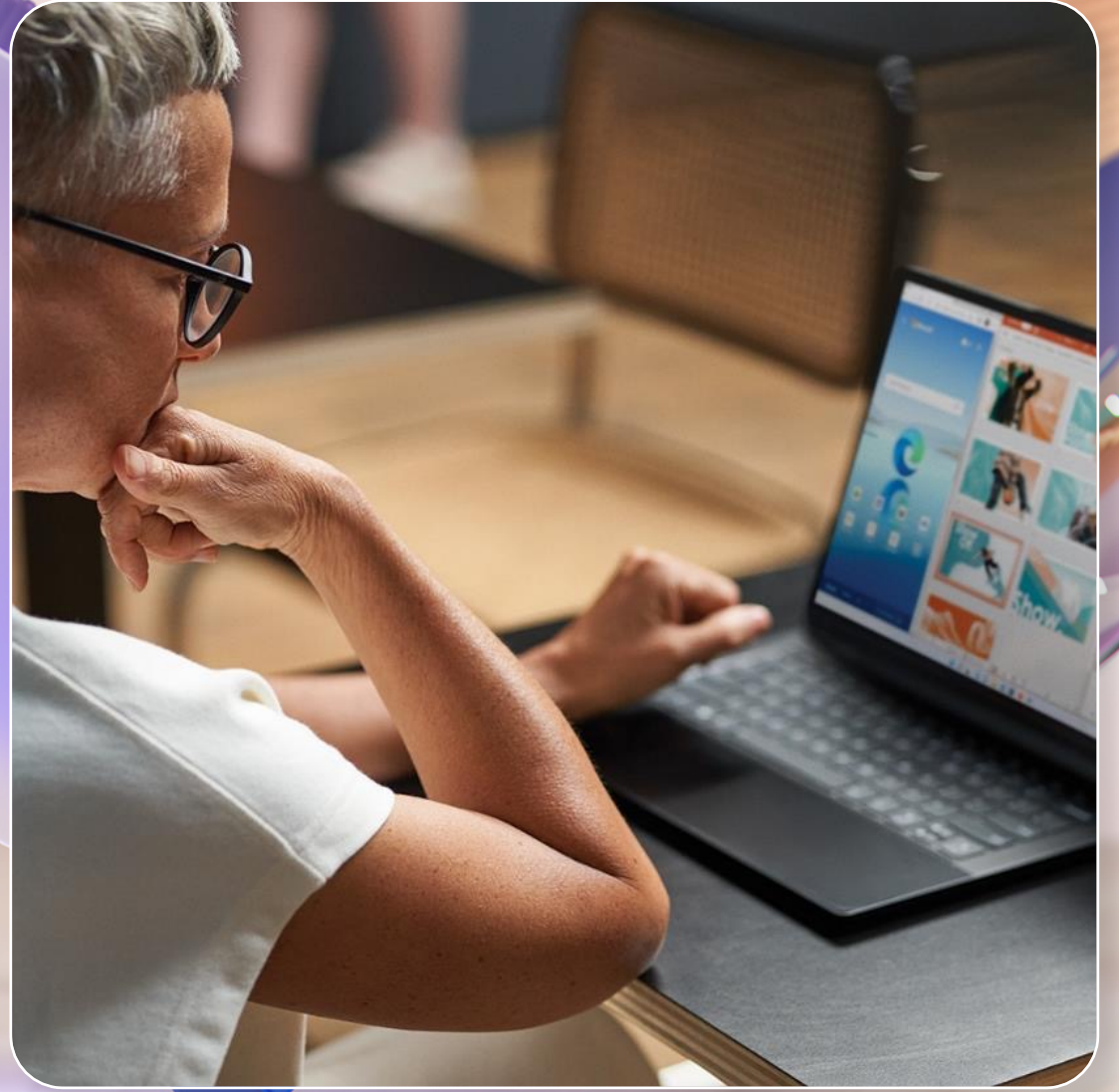
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AI use cases for Communications



A day in the life of an Issues Management Manager

Available with:
Microsoft 365 Copilot

Scenario level:
Buy

Benefits

~1 hour per week

Faster, more thoughtful, responses

Alignment and rapid response

8:00 am – Prepare for the day

Abigail needs to prepare for her day, so she summarizes emails and chats from yesterday. Copilot provides a summary of the messages along with her action items.



Copilot Chat²

Sample prompt: **Summarize** all the emails and Teams chats in the past day highlighting the primary asks and open items.

8:15 am – Draft an email

Abigail receives a request from a media reporter inquiring about a rumor related to a new product. She uses Copilot in Outlook to respond to the email.



Copilot in Outlook

Sample prompt: **Draft an email** to confirm the receipt of this mail. Highlight how we are looking into the rumor and will respond with a statement. Use a formal tone and keep the email concise.

9:00 am – Organize ideas

Abigail coordinates a meeting with SMEs and senior leaders to brainstorm responses. They use Copilot in Loop to help generate and organize ideas, and Facilitator in Teams to guide the discussion and capture meeting notes.



Copilot in Loop



Facilitator in Teams

Action: **Conduct a meeting in Teams** to gather facts and get input to draft the potential statements. **Facilitator** in Teams keeps track of the notes and action items.

3:00 pm – Draft an email

Abigail uses Copilot in Outlook to respond back to the media reporter with the approved statement.



Copilot in Outlook

Sample prompt: **Draft a response** and make sure to include a polite introduction, a copy of the statement, and the name and title of spokesperson.

1:00 pm – Recap a meeting

Abigail shares the final statement with senior leaders to approve on Teams. Based on the Copilot-generated meeting notes, Abigail makes updates directly to the statement in Word.



Copilot in Teams

Action: **Summarize feedback** from the meeting in Teams and include action items.

11:00 am – Draft a message

Abigail drafts a statement by having Copilot generate a response based off the meeting notes and Loop workspace. She pastes the response in a Word document.



Copilot Chat²

Sample prompt: **Draft a response** based on the meeting notes and the loop summary highlighting our position.

Abigail
is a Communications
Manager at a product
company.



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AI use cases for Operations



A day in the life of an Operations PM

Available with:
Microsoft 365 Copilot

Scenario level:
Buy

Benefits

🕒 ~1 hour saved per week

🔄 Areas of investment: higher priority projects

★ Better communication with colleagues

8:00 am – Catch up

Cassandra, an Operations PM, uses Copilot to summarize her emails and Teams messages from overnight and draft responses to urgent items leveraging the drafting feature.



Copilot Chat²

Sample prompt: **Summarize** all the emails and Teams chats in the past day, highlighting the primary asks and open items.

8:15 am – Prepare for a meeting

To make sure she is ready for her meeting, she uses Copilot to search for information on the project looking across past emails, meetings, files, internal, and external articles.



Copilot Chat²

Sample prompt: **Find information** on [project x].

9:00 am – Recap a meeting

To focus on the meeting instead of taking notes, Cassandra uses the transcribe feature during the project team meeting to capture a summary of the conversation and key actions.



Copilot in Teams

Sample prompt: **Summarize key discussion points.** Identify agreed-upon next steps.

4:00 pm – Create a presentation

Cassandra prepares a PowerPoint presentation on the readiness plan, using PowerPoint Agent to generate the content based on the whiteboarding session.



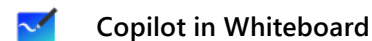
PowerPoint Agent

Sample prompt: **Create a new presentation** from this Word file. Change the layout of this slide.

[Get started with Word, Excel, and PowerPoint Agents](#)

2:00 pm – Get creative

Cassandra joins her colleagues to brainstorm the change management and readiness plan for an upcoming project using Copilot in Whiteboard to capture key project needs.



Copilot in Whiteboard

Sample prompt: **Organize thoughts** into logical categories and simplify complex projects for better collaboration.

11:00 am – Analyze data

Following the meeting, she utilizes Agent Mode in Excel to review and analyze the project data and generate reports. She shares key insights and meeting actions to all the attendees.



Agent Mode in Excel

Sample prompt: **Suggest formulas** for this column. Show insights in charts.

Cassandra
is an Operations
lead at Contoso.



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AI use cases for Accessibility



A day in the life of a person with a mobility disability

Available with:
Microsoft 365 Copilot

Scenario level:
Buy

Benefits

Areas of investment: Reduced keystrokes

★ Team collaboration

8:30 am – Summarize a topic

In preparation for a customer meeting, Jordan uses Copilot to find all emails, teams chats, documents, and presentations related to that customer, significantly reducing keystrokes.



Copilot Chat²

Sample Prompt: Find all my conversations about [customer].

9:00 am – Recap a meeting

Jordan joins the Teams call with his customer but is not able to type meetings notes during the call, so he leverages Teams Meeting Recap to capture meeting notes and action items.



Copilot in Teams

Sample Prompt: Following the meeting, Jordan selects **View Recap** to review meeting notes and follow-up tasks.

9:30 am – Draft an email

Following the meeting, Jordan needs to send a message to the customer with a summary of the meetings and next steps using Copilot in Outlook.



Copilot in Outlook

Sample Prompt: **Draft email to [customer]** summarizing the meeting with next steps and request a date for the next meeting.

4:00 pm – Research a customer

Jordan needs to create an account plan for a new customer. He uses Copilot to research his new customer.



Copilot Chat²

Sample Prompt: **Provide a one paragraph commercial summary** about [customer].

2:00 pm – Create a presentation

After refining the outline, Jordan now needs to create a PowerPoint file. He uses PowerPoint Agent to create a new presentation based on the Word document.



PowerPoint Agent

Sample Prompt: **Create a presentation from /[[file].**
[Get started with Word, Excel, and PowerPoint Agents](#)

10:30 am – Create an outline

Jordan needs to create a presentation for his customer about the benefits of an inclusive environment for employees with disabilities. He leverages prompts to reduce the amount of dictation required.



Agent Mode in Word

Sample Prompt: **Draft an outline** about the benefits of an inclusive environment for employees with disabilities.

Jordan
uses his voice to
navigate his
computer and create
content.



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Q&A Session

