



# Microsoft 365 Copilot for Leadership

From Information to Action



Presenter

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MCT, GenAI Architect



Mark your presence



## Today's Agenda



### Setting the Context

What Copilot is, how it thinks, and how it uses your data.

Security, privacy, and good habits.



### Prompting

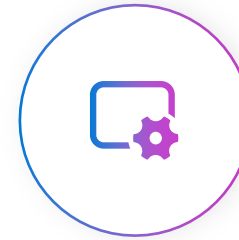
The prompt formula: Context, Goal, Source, Expectation.

Leadership prompts for reviews and financials.



### Copilot in Action

Drafting, analysis, and research across Word, Excel, PowerPoint.



### A Day in the Life

Executive and CIO scenarios showing where Copilot saves real hours.



### Your Turn

Hands-on practice with your own work. Wrap-up, next steps, and Q&A.



# Setting the Context

Understanding Microsoft 365 Copilot — what it is, how it thinks, and how to talk to it effectively.



An **AI assistant** built into the Microsoft 365 apps you already use — grounded in your organization's own data, with permissions you already have.



<https://m365.cloud.microsoft/>



**Documents  
must be  
stored in the  
cloud**



## Copilot is not autopilot

Be specific about what you want and use common language



## Your data is secure and private

Uses and shows data when you have access



## Check your facts

AI generated contents may be sensitive or hallucinated



## Keep, modify, or disregard

Revise and refine your prompt

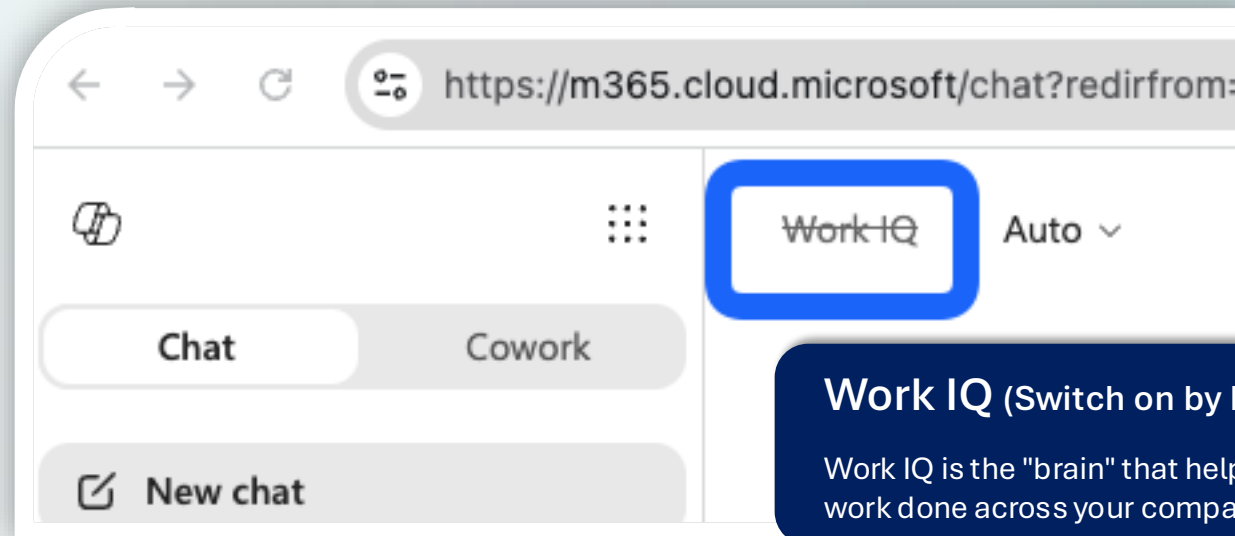


## Your Brain

Experience, judgment, common sense, and final decisions.

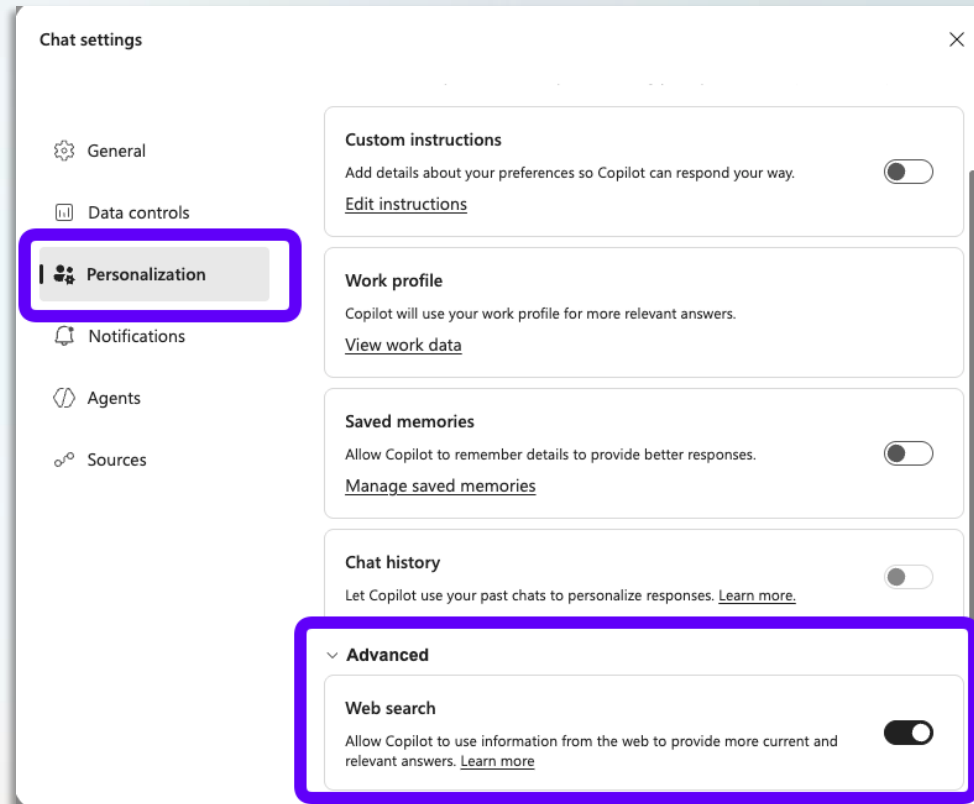


Copilot your **Second Brain**



## Work IQ (Switch on by Default)

Work IQ is the "brain" that helps AI find information and get work done across your company systems.

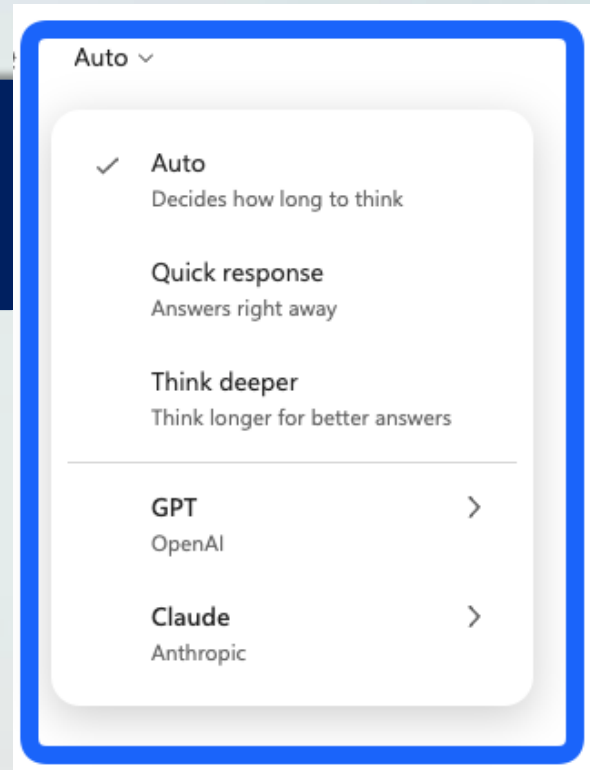


## Web Search (Switch on by Default)

Turn ON for current information; turn OFF when you only want answers based on existing knowledge and work data.

## AI Mode

Choose how the AI thinks and responds, Select the AI thinking style that fits your task



- ✓ **Auto** – Let the AI decide the best way to answer.
- ✓ **Quick Response** – Get a fast answer for simple questions.
- ✓ **Think Deeper** – Get a more detailed answer for complex tasks.
- ✓ **GPT** – Best for everyday work, creativity, and problem-solving.
- ✓ **Claude** – Best for reading, summarizing, and analyzing long documents.



Who is the **PILOT** ?



## Custom Instructions

Consistent style, every time

settings

General

Data controls

Personalization

Notifications

Agents

Sources

Personalization

Control how Copilot tailors responses using your preferences. [Learn more.](#)

✓ Custom instructions

Add details about your preferences so Copilot can respond your way.

[Edit instructions](#)

☒

Work profile

Copilot will use your work profile for more relevant answers.

[View work data](#)

✓ Saved memories

Allow Copilot to remember details to provide better responses.

[Manage saved memories](#)

☒

Chat history

Let Copilot use your past chats to personalize responses. [Learn more.](#)

☐



## Memory

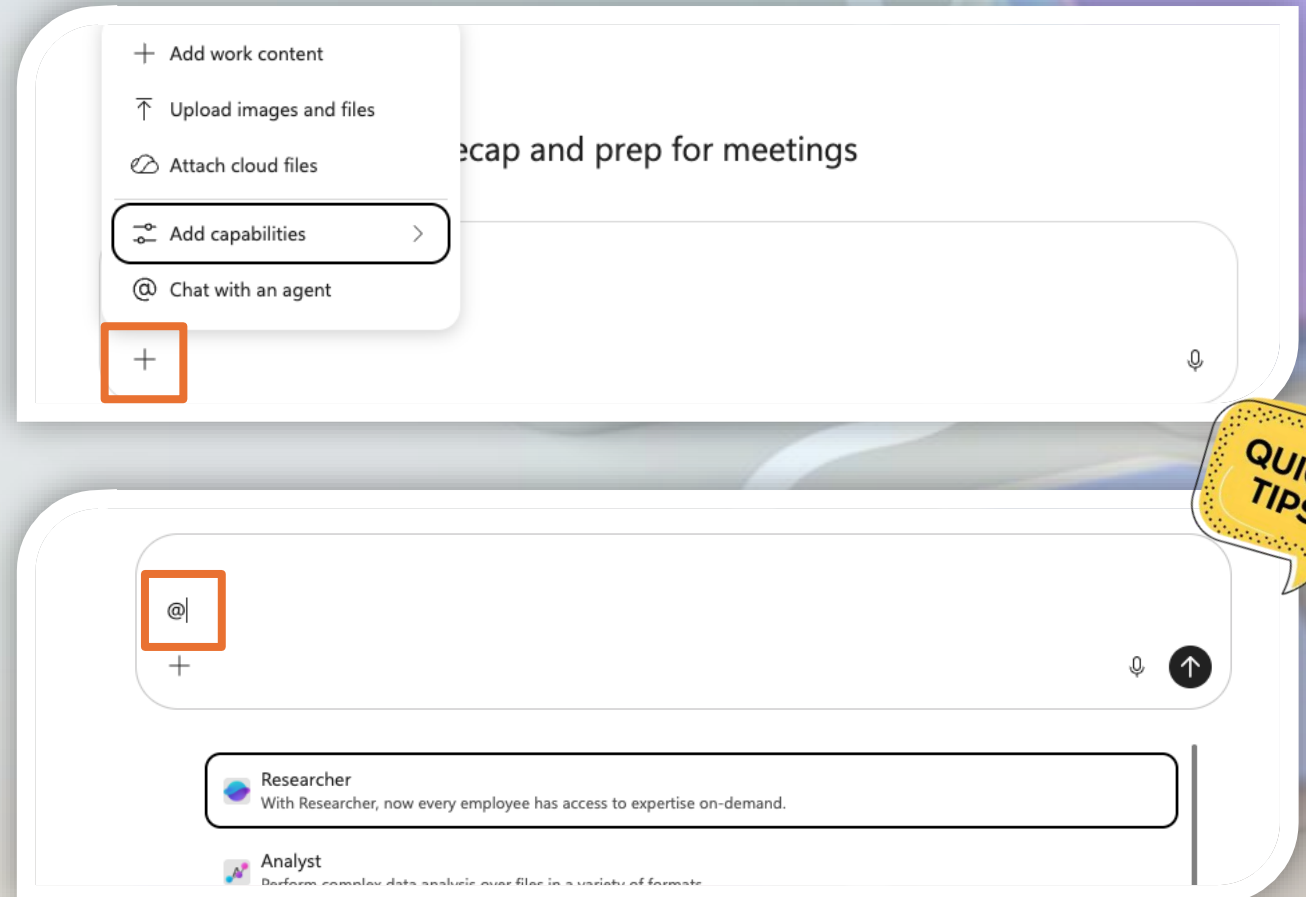
Saves time & efforts

*“Remember that when I write Business emails, I always want three bullet points, a clear subject line, and a call to action.”*

*“Remember that I’m working on Project ORION, and I prefer suggestions to be relevant to that.”*

## Add Capabilities

Extend Copilot with specialized skills and agents to perform specific tasks more effectively





# Prompting

How to prompt effectively to get most out of Copilot

## Prompt Formula

Context



Who are you & Why are you asking?

Goal



What do you want Copilot to do?

Source



What data should Copilot use?

Expectation



How should the answer be presented?

## Leadership-Level Prompt

*I am a Country Managing Director preparing for a business performance review with senior leadership (C). Summarize the key operational, sales, and customer service trends impacting business performance during the quarter (G) using the attached operational reports, sales dashboard, and customer satisfaction survey results (S). Provide a board-ready summary with top opportunities, top risks, and recommended actions for the next quarter (E).*

## Dealer Performance Review

*I am a Sales Manager preparing for a monthly dealership performance meeting (C). Compare vehicle sales performance across regions and identify the top-performing and underperforming dealerships (G) using the attached Sales Dashboard (S). Provide a summary of key insights and a ranked table showing sales volume, growth rate, and recommended actions (E).*

## Monthly Financial Performance

*I am a Finance Business Partner preparing for an executive business review (C). Analyze revenue, operating costs, and profitability across business units and identify the largest variances from budget (G) using the attached monthly financial results (S). Present an executive summary followed by a variance analysis table and recommended management actions (E).*

# Secret ingredients of M365 Copilot



Use / for quick attachment

I am a Finance Business Partner preparing for an executive business review . Analyze revenue, operating costs, and profitability across business units and identify the largest variances from budget using the attached /

+



All

People

Files

Meetings

Emails

Chats

Channels

Sites

Other



Excel Data

Opened by you 2 days ago



## Prompt Scheduler

Schedule prompts to run automatically at the right time.

Every morning Copilot tells me what matters.

Every afternoon Copilot prepares the emails I need to send.

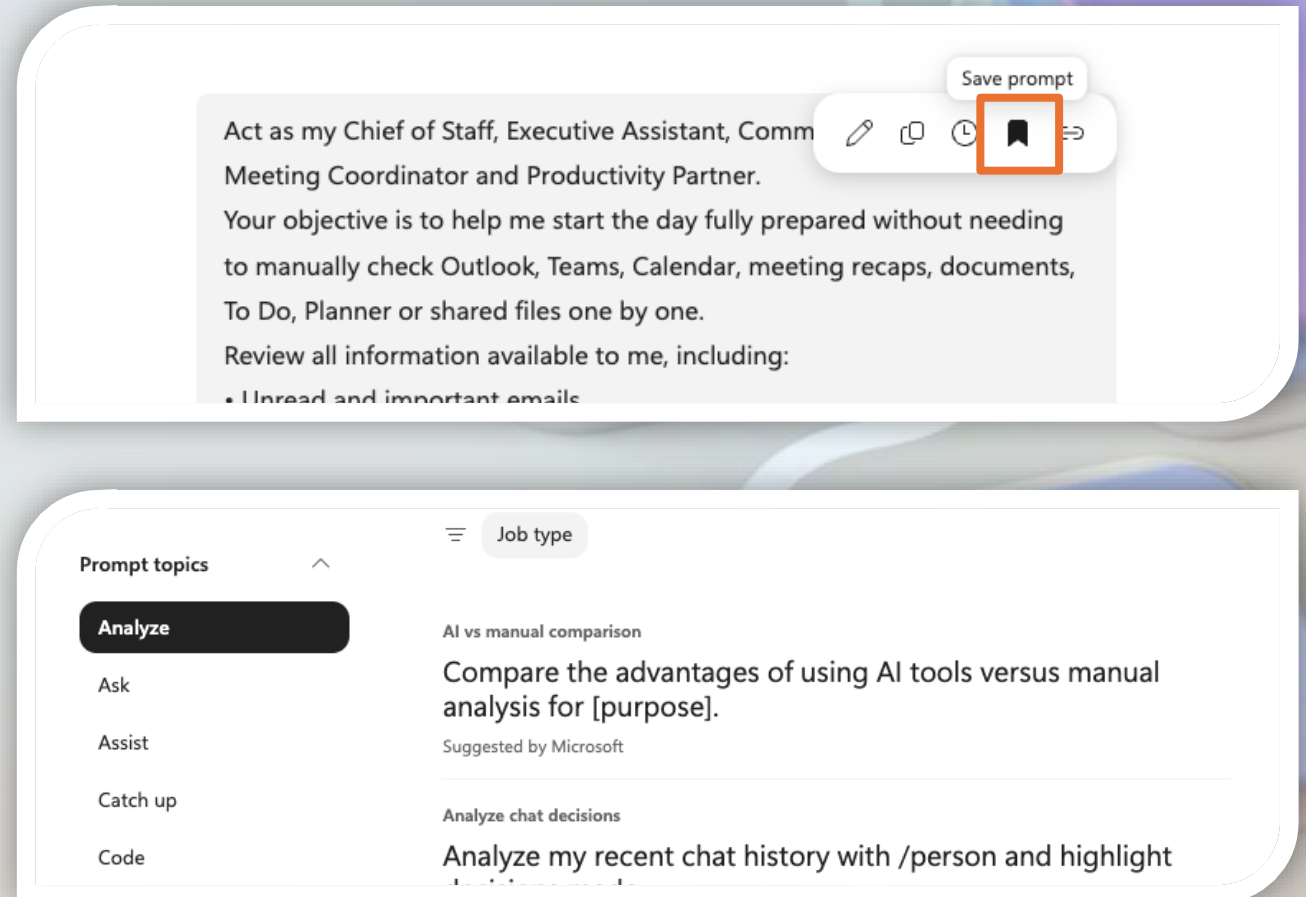
Schedule this prompt

Act as my Chief of Staff, Executive Assistant, Communication Coordinator, Meeting Coordinator and Productivity Partner.  
Your objective is to help me start the day fully prepared without needing to manually check Outlook, Teams, Calendar, meeting recaps, documents

## Prompt Lab

A collection of reusable prompts, including templates and your own creations.

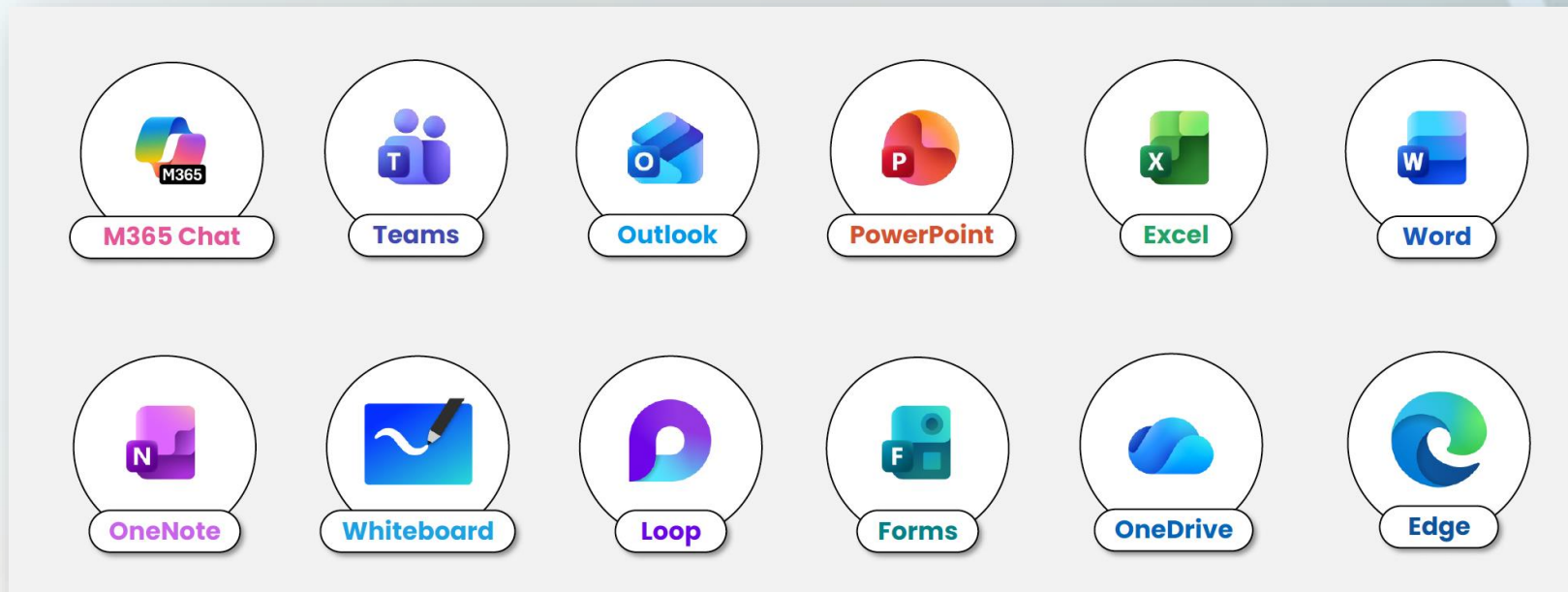




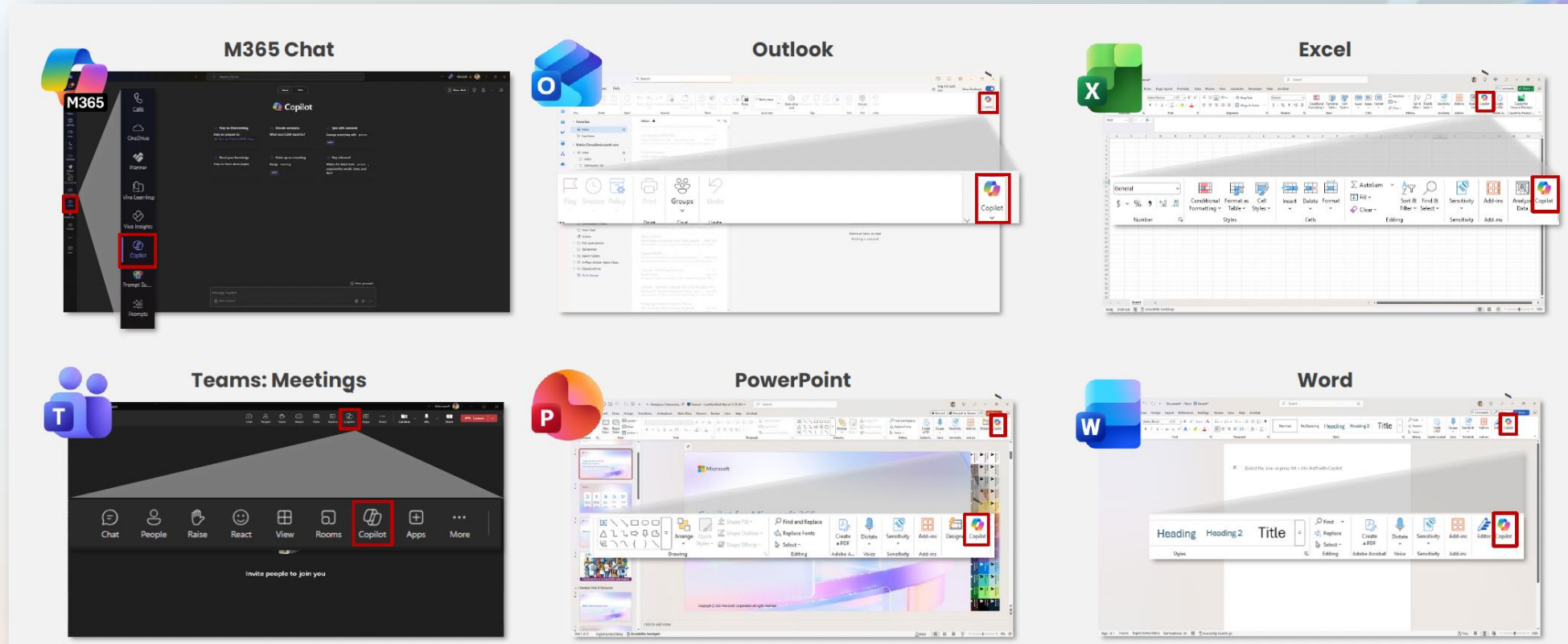
# Copilot in Action

Using Copilot for drafting, data analysis, and research in Microsoft Apps

# Applications with M365 Copilot



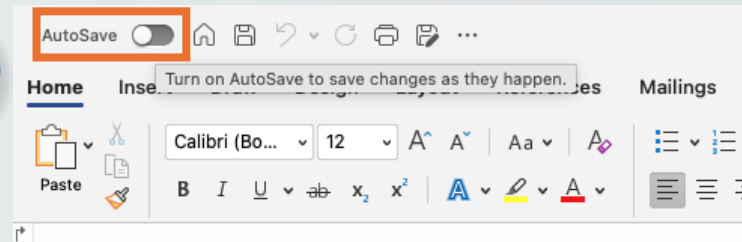
# Where to access M365 Copilot?



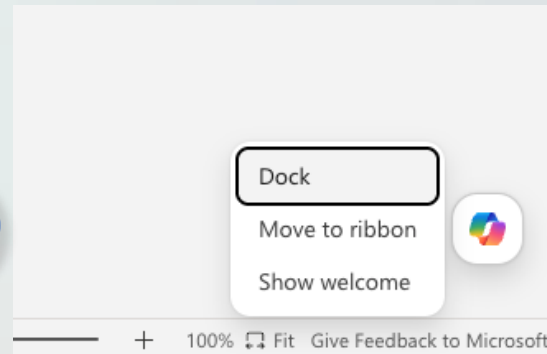
# Copilot in Apps



Switch on AutoSave so Copilot can work with the most up-to-date version of your file.



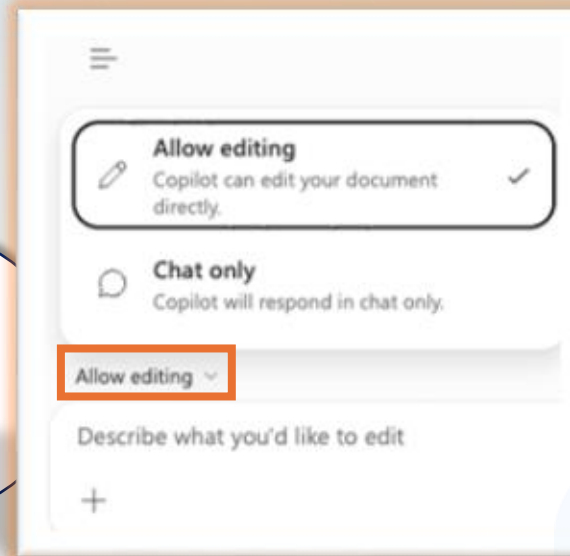
Pin Copilot where it's most convenient so help is always within reach.



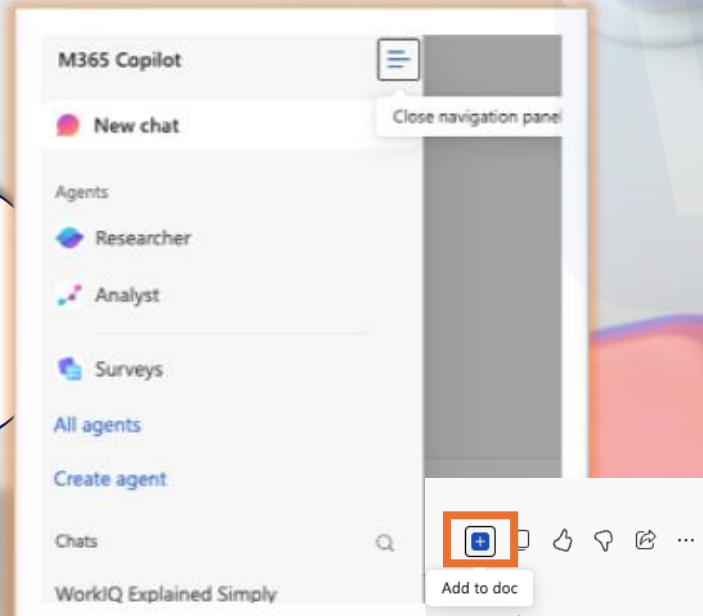
# Copilot in Apps



Choose which **AI model** powers Copilot, or use Auto and let Copilot decide for you.



View and continue **previous Copilot conversations** to save time and maintain context.

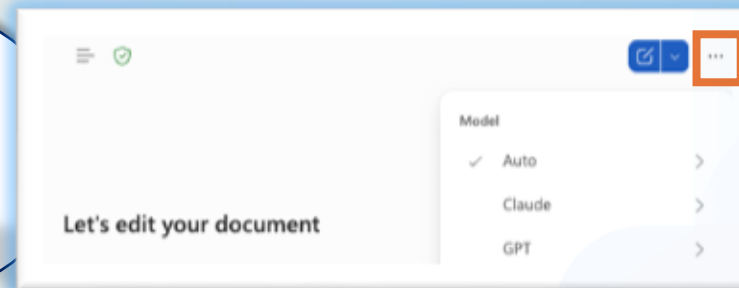


# Copilot in Apps

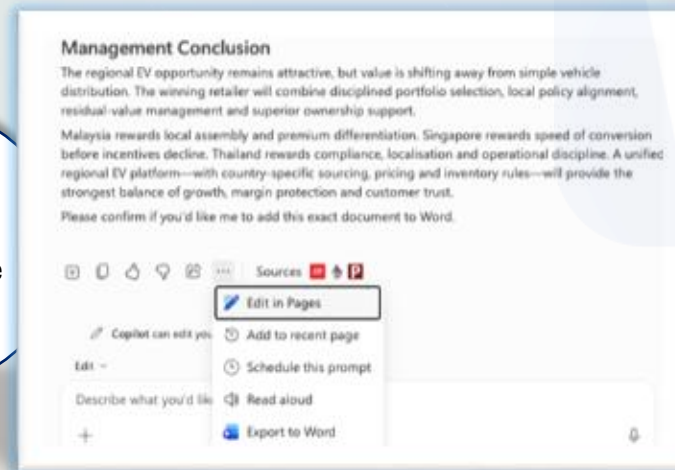


Word

Choose which **AI model** powers Copilot, or use Auto and let Copilot decide for you.



Open Copilot's response in an **editable page** where you can review, refine, and update the content before using it.

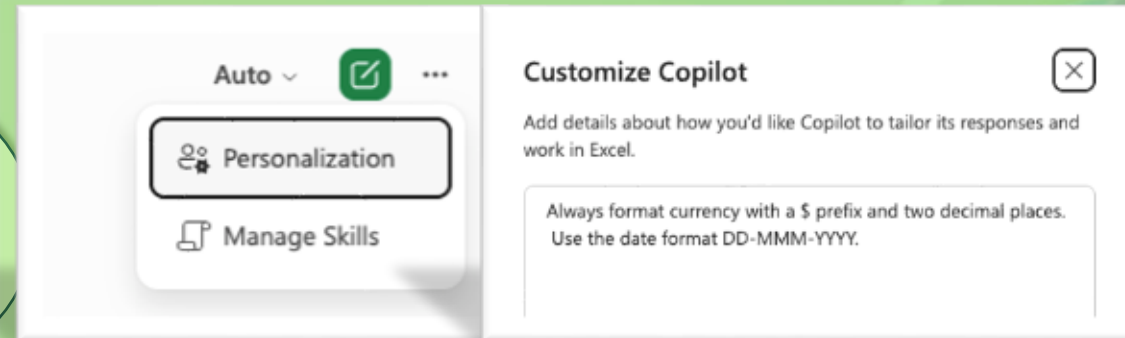


# Copilot in Apps

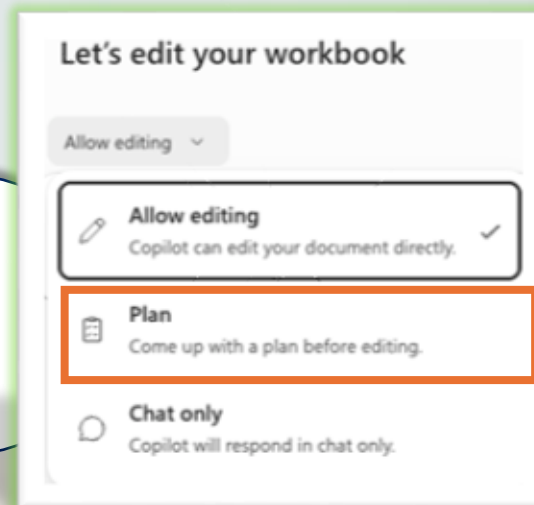


Excel

Tell Copilot your **preferred** formatting, style, and work preferences so you don't have to repeat them every time.



Ask Copilot to outline its recommendations and **editing strategy** before updating your workbook

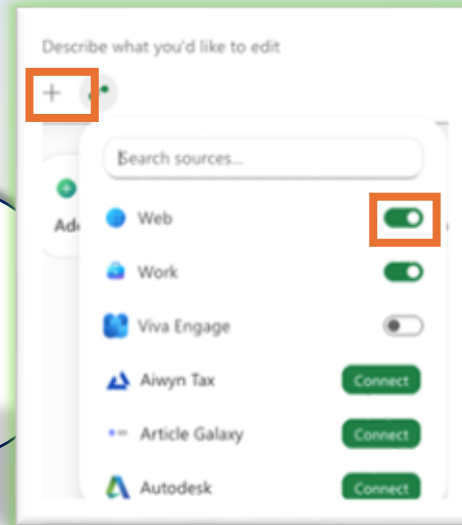


# Copilot in Apps

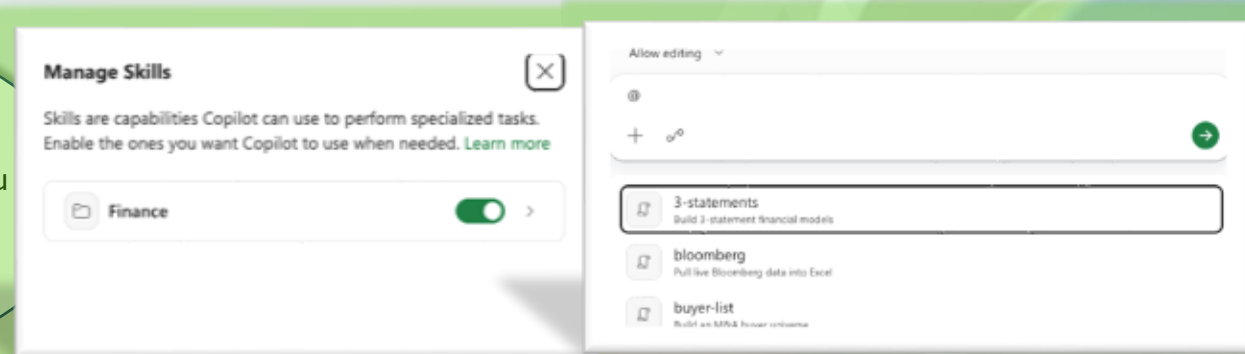


Excel

Turn Web ON when you need up-to-date information. Turn it OFF when you want Copilot to **focus** only on your company data and workbook content.



Skills are like giving Copilot a **specialist role**. Turn on the skills you need, and Copilot can provide more relevant and powerful assistance

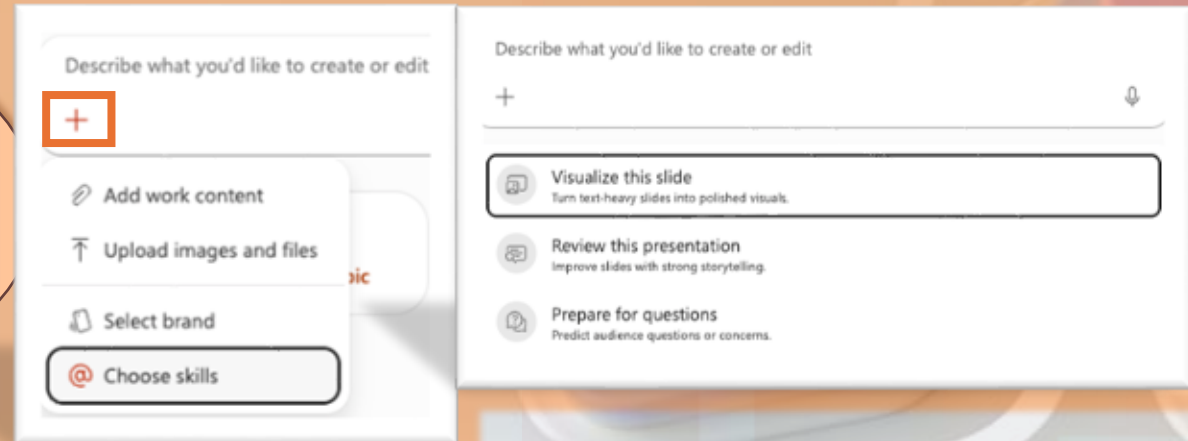


# Copilot in Apps

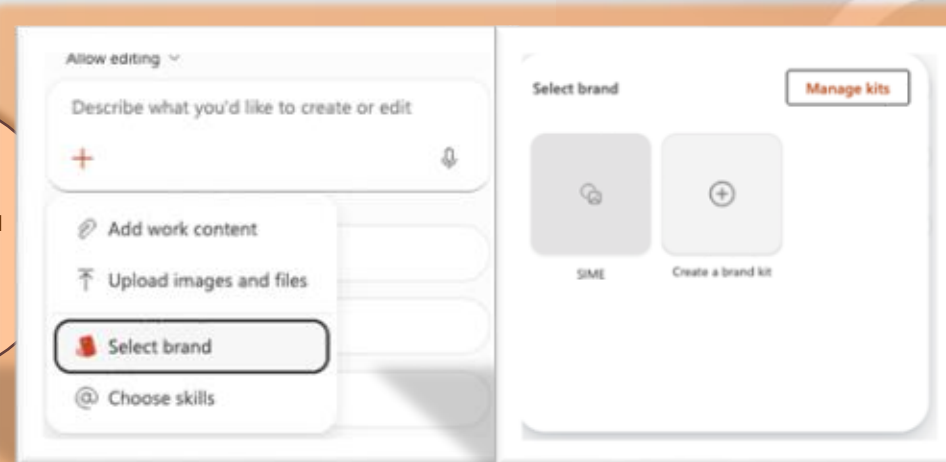


Powerpoint

Choose a skill when you want Copilot to perform a **specialized** presentation task beyond basic slide creation.



Skills are like giving Copilot a **specialist role**. Turn on the skills you need, and Copilot can provide more relevant and powerful assistance





# AI use cases for Executive

Scenarios showing how copilot can save real hours

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

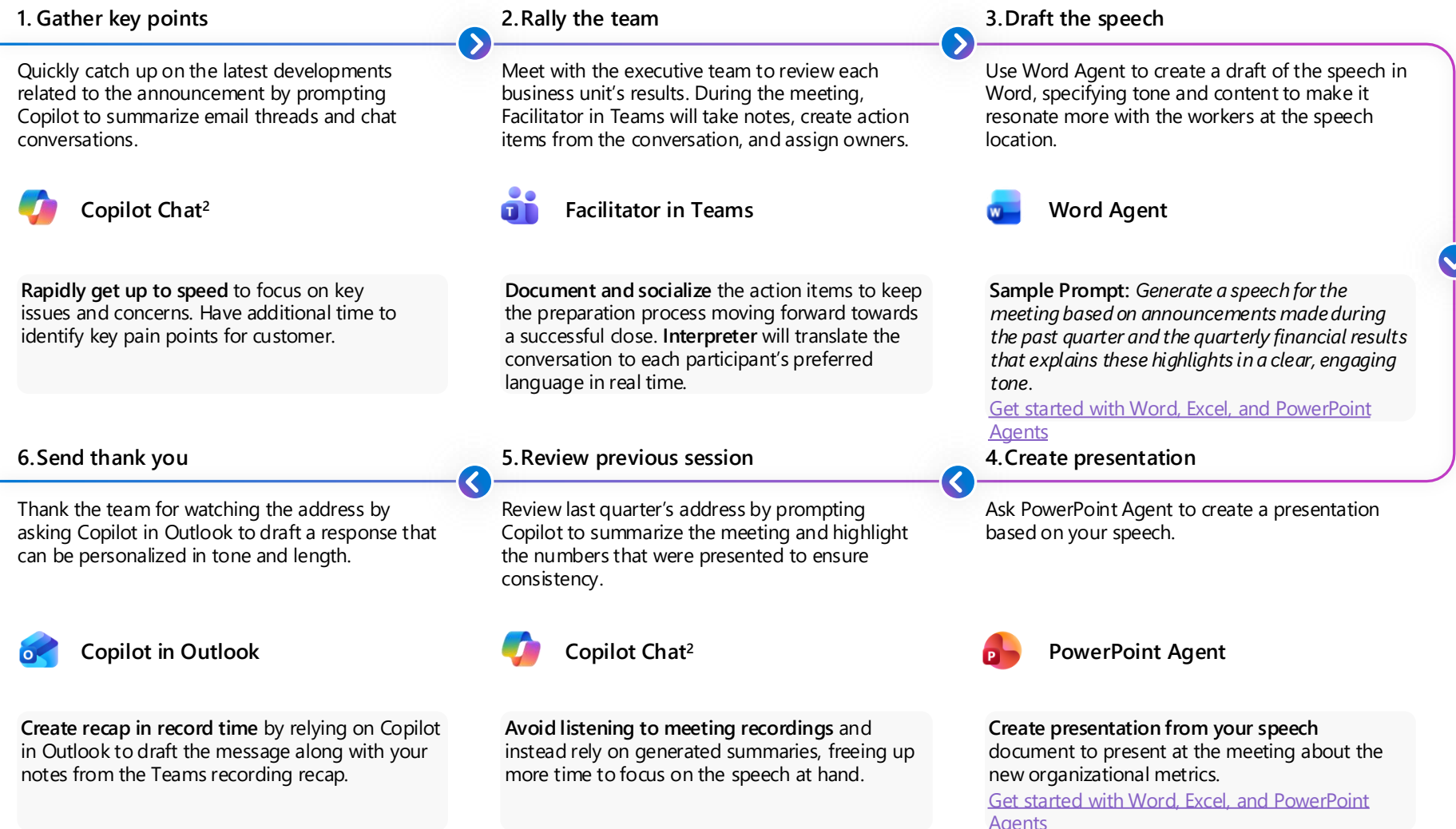
KPIs impacted

✓ Employee satisfaction

Value benefit

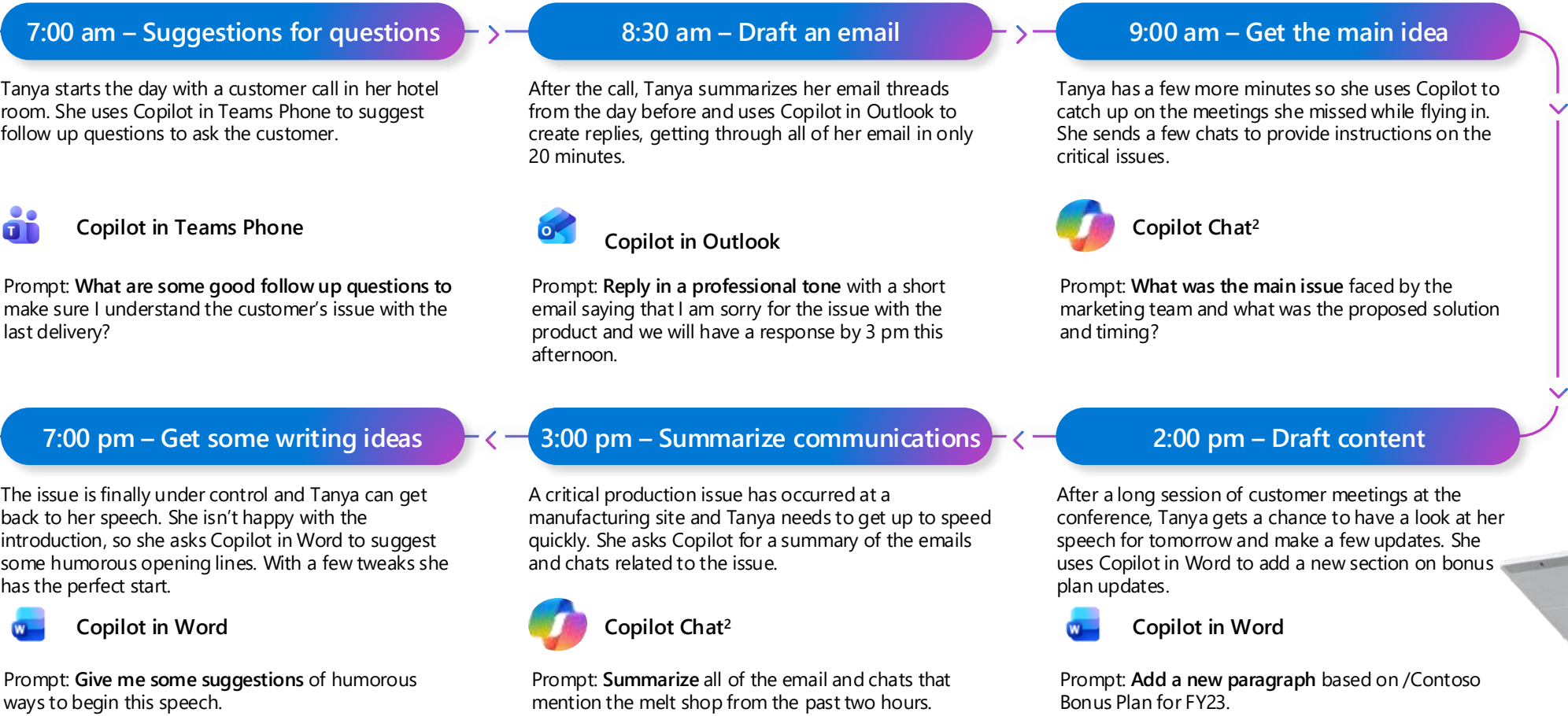
✓ Cost savings

✓ Employee experience



# A day in the life of an Executive

- Benefits
- ⌚ ~1 hour
- 🔄 Areas of investment: Analysis
- ★ Team communications



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

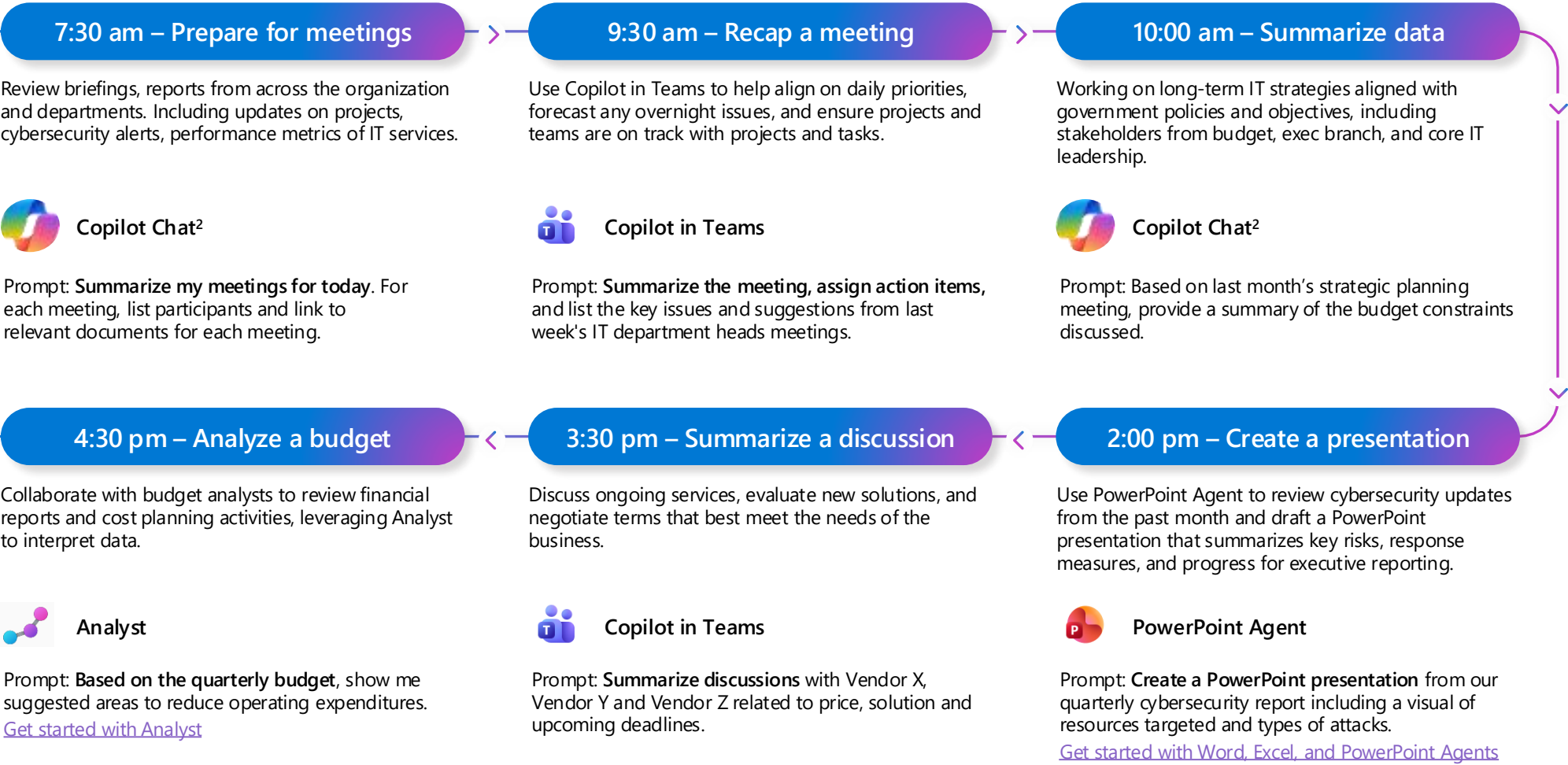


# A day in the life of a Chief Information Officer

Microsoft 365 Copilot



- Benefits
- ⌚ ~1 hour
- 🔄 Areas of investment: Strategy
- ★ Vendor management



**Ava**  
is a CIO who seeks insights on the status of programs, projects, stakeholder insights and daily agendas.



# Summary

What we learned today — four habits that make Copilot proactive and productive

## 01

MINDSET

### Copilot is not autopilot

- You keep the judgment and the final call.
- Check the facts, then keep, modify, or refine.

## 02

TRUST

### Grounded in your own data

- Answers come from content you already access.
- Work IQ and web search shape what Copilot sees.

## 03

CRAFT

### Prompt like a pro

- Context, Goal, Source, Expectation.
- Memory and custom instructions keep your style.

## 04

IMPACT

### About an hour back a day

- Proven in the executive and CIO scenarios.
- Scale with Prompt Lab, Scheduler and agents.



# Thank you

**Now it's your turn — pick one task this week and let Copilot help.**

Questions are welcome — and keep practising your prompts.

