Microsoft 365 Copilot

From Information to Action



Presenter
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MCT, GenAI Architect

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.



Agent Builder

Build your own no-code agents that work on your data and tasks.



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.

M365 Copilot

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

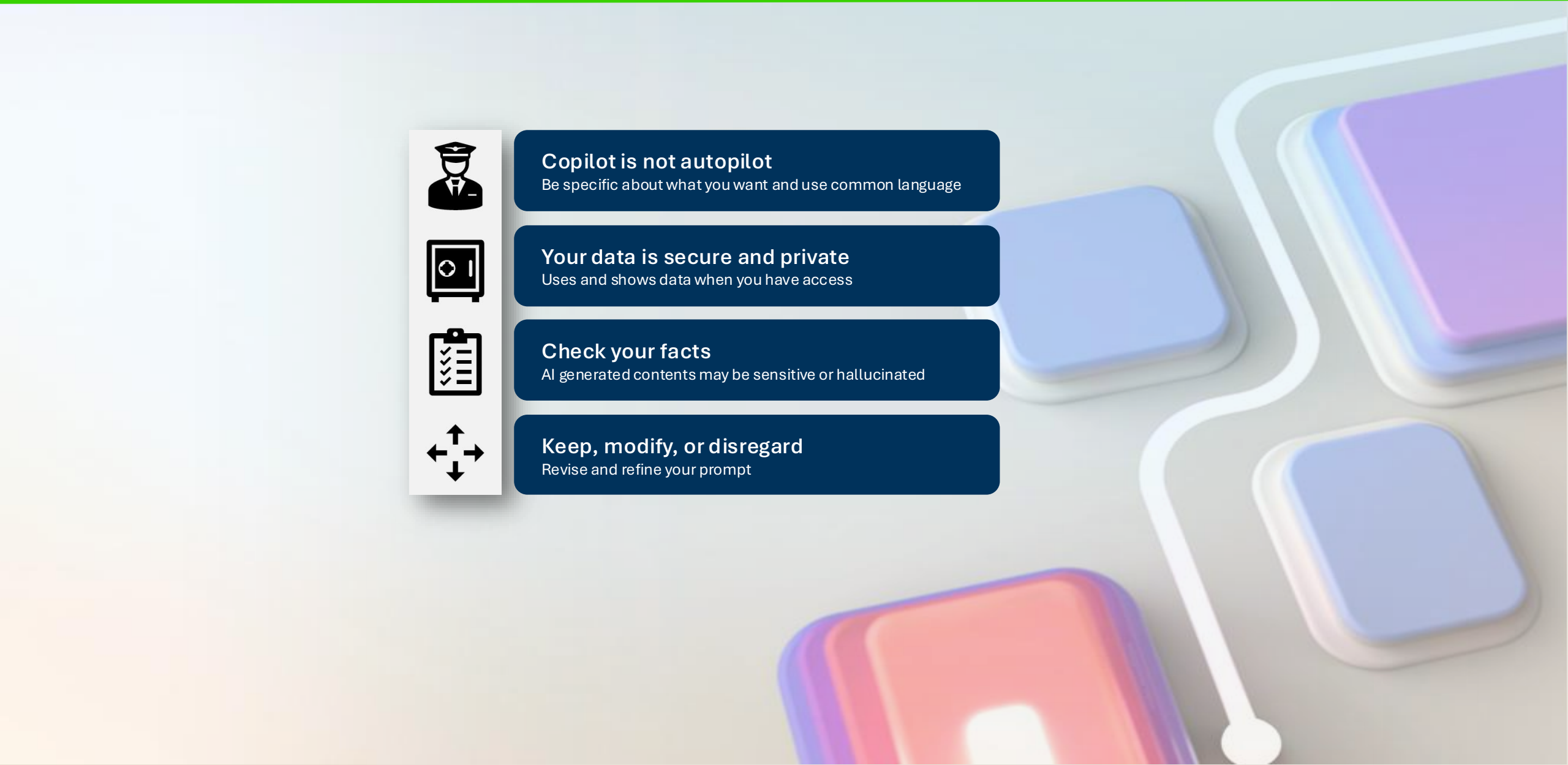


https://m365.cloud.microsoft/

M365 Copilot



M365 Copilot



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

M365 Copilot

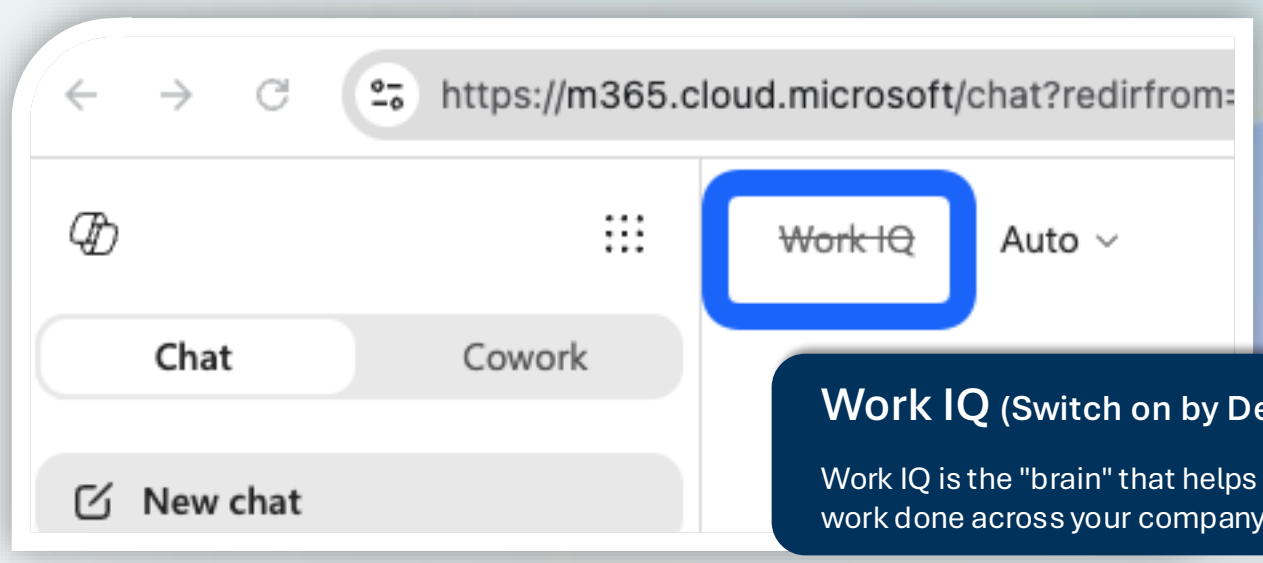
Your Brain

Experience, judgment, common sense, and final decisions.



Copilot your **Second Brain**

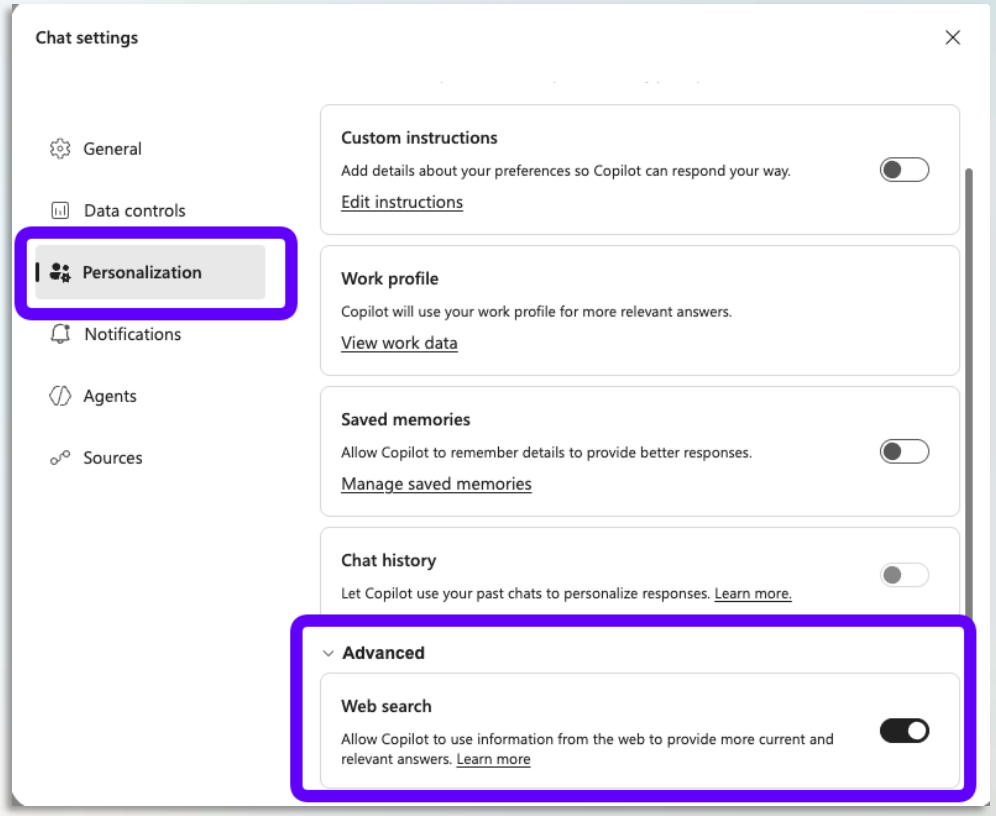
M365 Copilot



Work IQ (Switch on by Default)

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

M365 Copilot



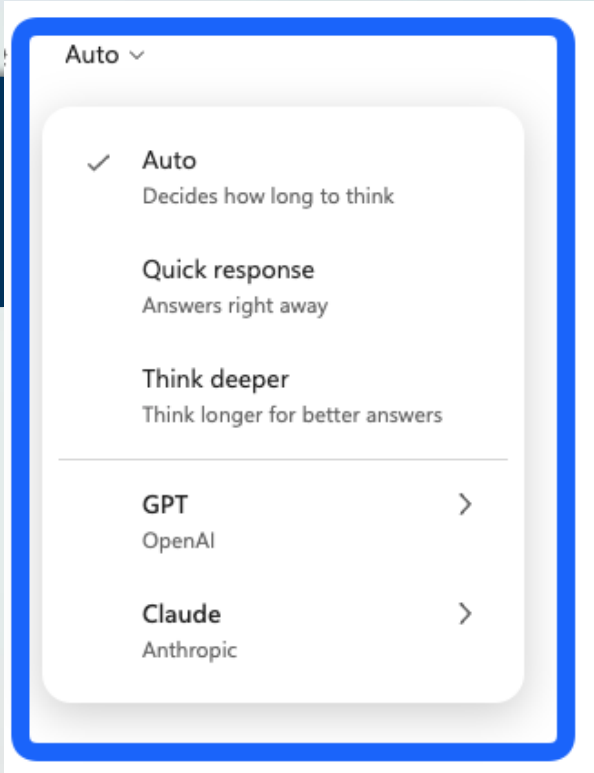
Web Search (Switch on by Default)

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

M365 Copilot

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.

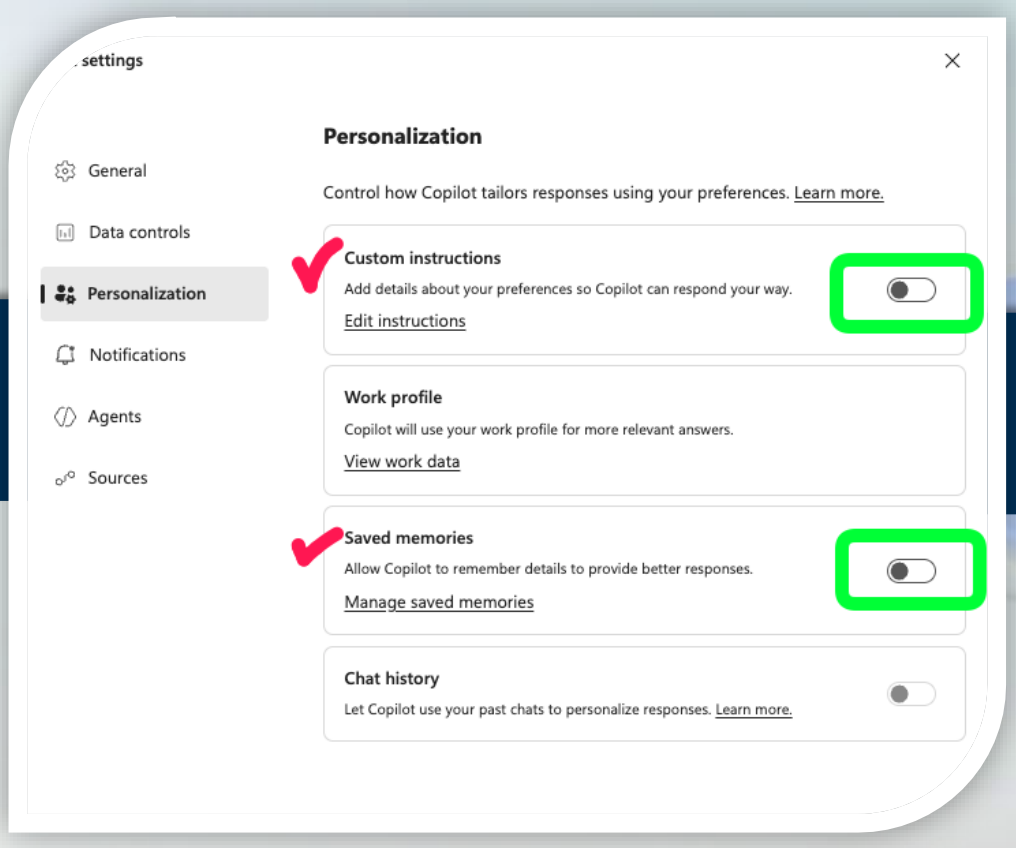
M365 Copilot



Who is the PILOT ?

M365 Copilot

Custom Instructions
Consistent style, every time



Memory
Saves time & efforts

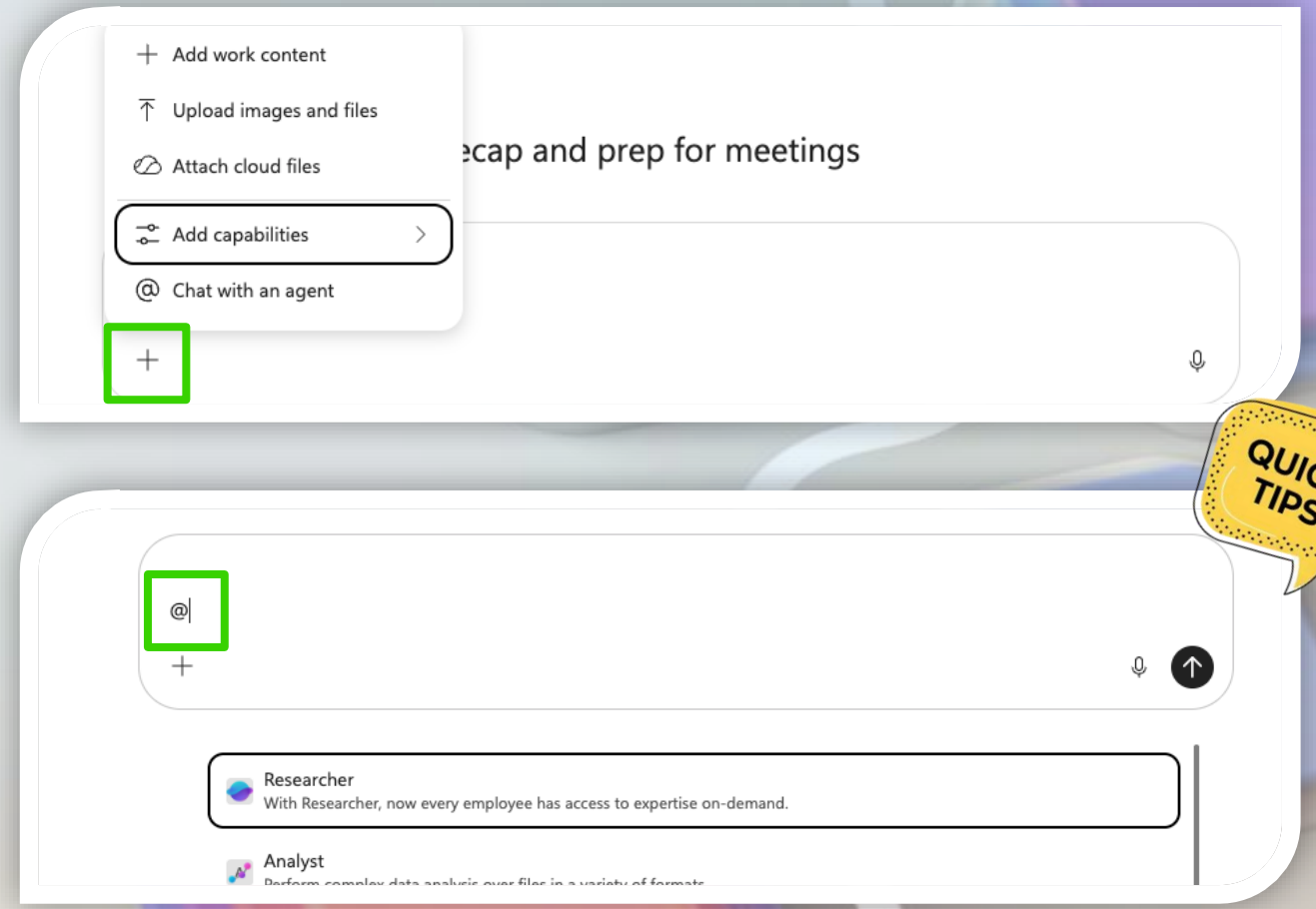
"Remember that when I write Business emails, I always want three bullet points, a clear subject line, and a call to action."

"Remember that I'm working on Project ORION, and I prefer suggestions to be relevant to that."

M365 Copilot

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

Secret ingredients of M365 Copilot

Prompt Formula

Context

C

Who are your & Why are you asking?

Goal

G

What do you want Copilot to do?

Source

S

What data should Copilot use?

Expectation

E

How should the answer be presented?

Secret ingredients of M365 Copilot

Leadership-Level Prompt

> I am the Head of Sustainability preparing for an executive sustainability review with senior leadership **(C)**. Summarize the key sustainability performance trends during the reporting period **(G)**, including greenhouse gas emissions, energy efficiency, renewable energy initiatives, ESG commitments, and regulatory compliance using the attached sustainability reports, emissions dashboard, and ESG performance metrics **(S)**. Provide a board-ready summary highlighting key achievements, emerging risks, gaps against targets, and strategic recommendations to accelerate progress toward the company's sustainability goals **(E)**.

Secret ingredients of M365 Copilot

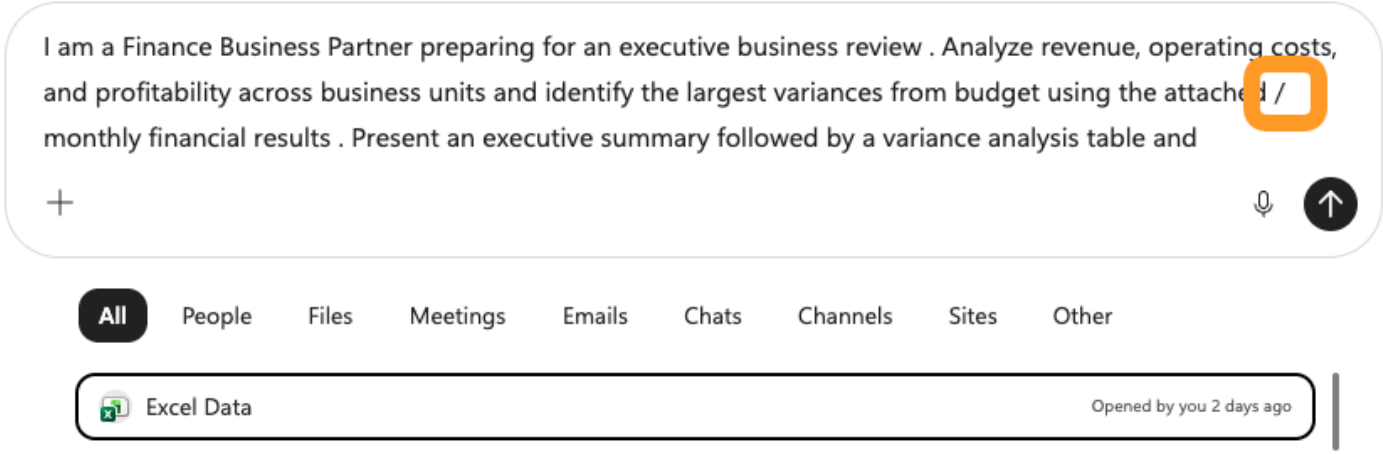
Performance & Reporting Prompt

I am a Sustainability Business Partner preparing for a quarterly performance review **(C)**. Analyze emissions performance, energy consumption, waste management, water stewardship, and progress against sustainability KPIs across business units and identify the largest variances against annual targets **(G)** using the attached sustainability dashboard, ESG scorecard, and operational performance reports **(S)**. Present an executive summary followed by a KPI variance analysis table, root causes, key risks, and recommended corrective actions to improve sustainability performance and reporting outcomes **(E)**.

Secret ingredients of M365 Copilot



Use / for quick attachment



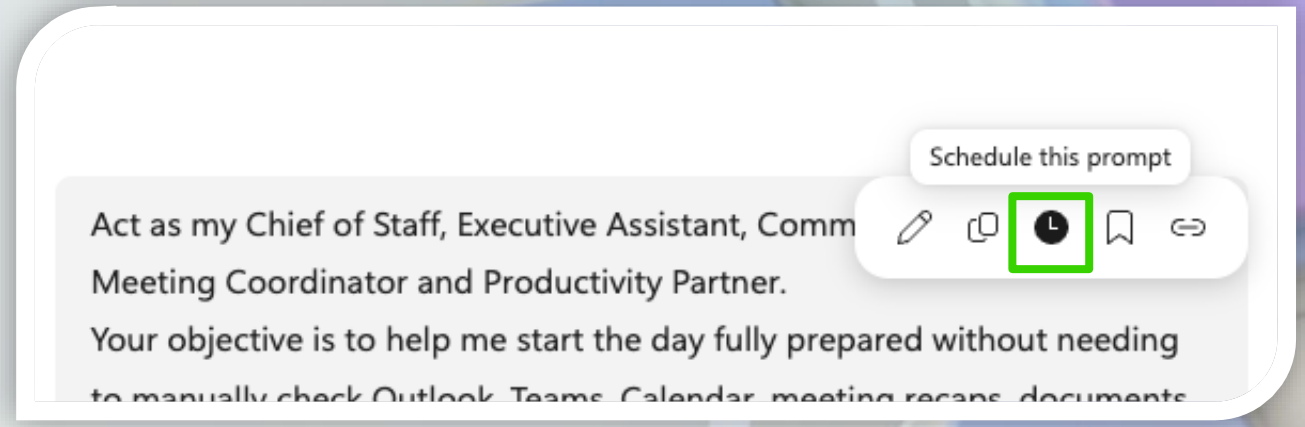
M365 Copilot

Prompt Scheduler

Schedule prompts to run automatically at the right time.

Every morning Copilot tells me what matters.

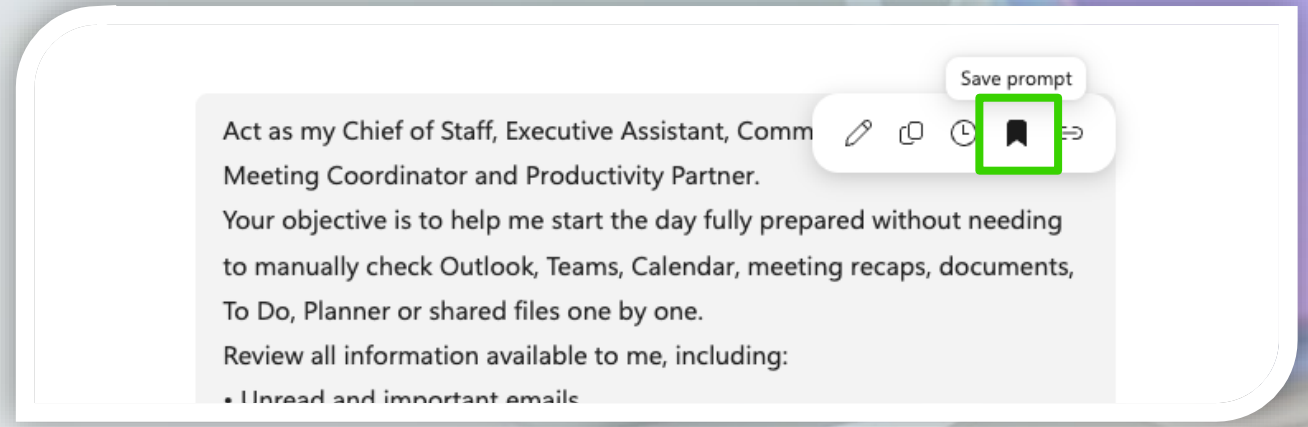
Every afternoon Copilot prepares the emails I need to send.

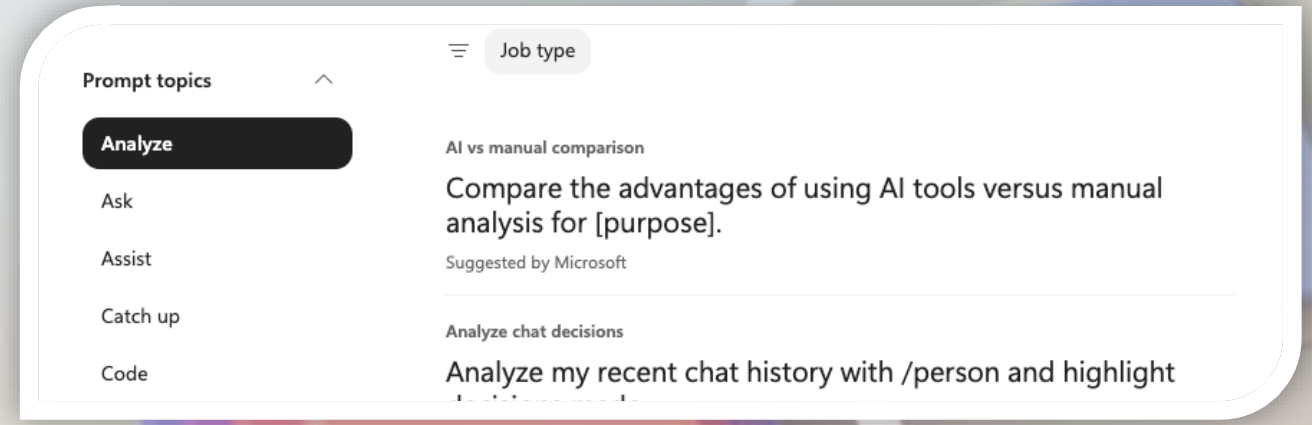


M365 Copilot

Prompt Lab

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

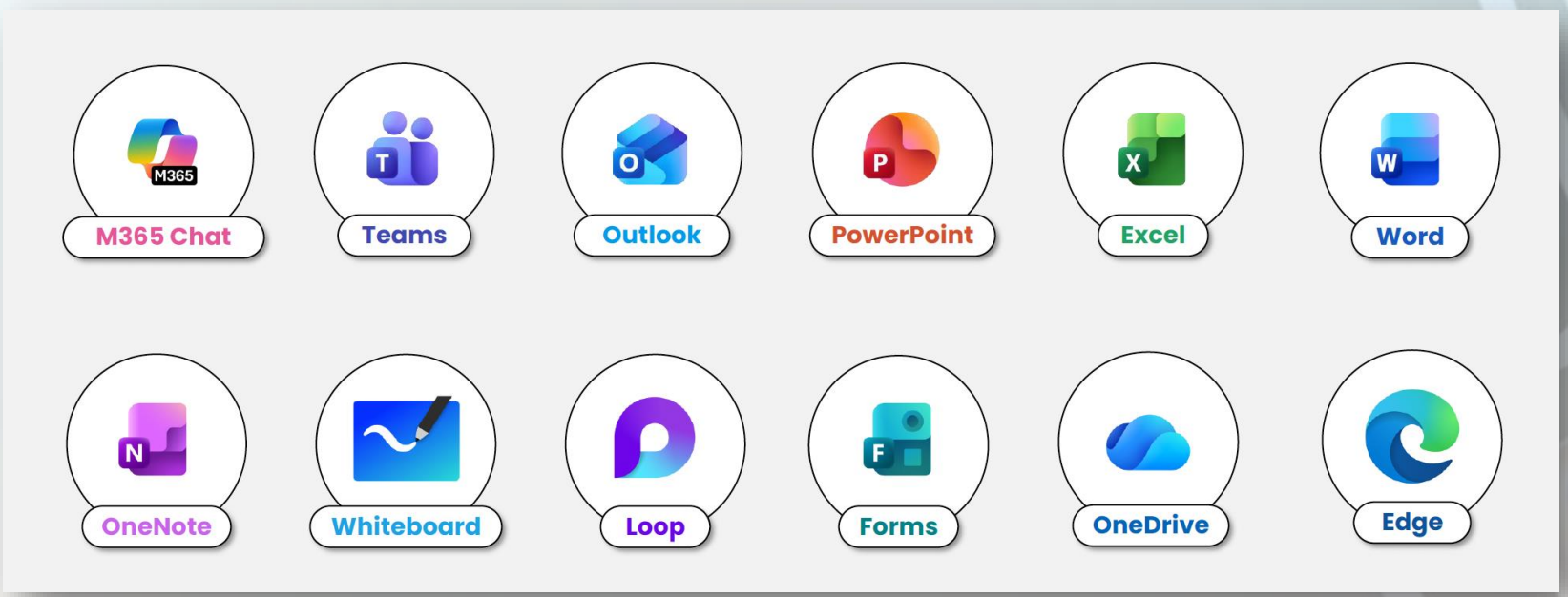




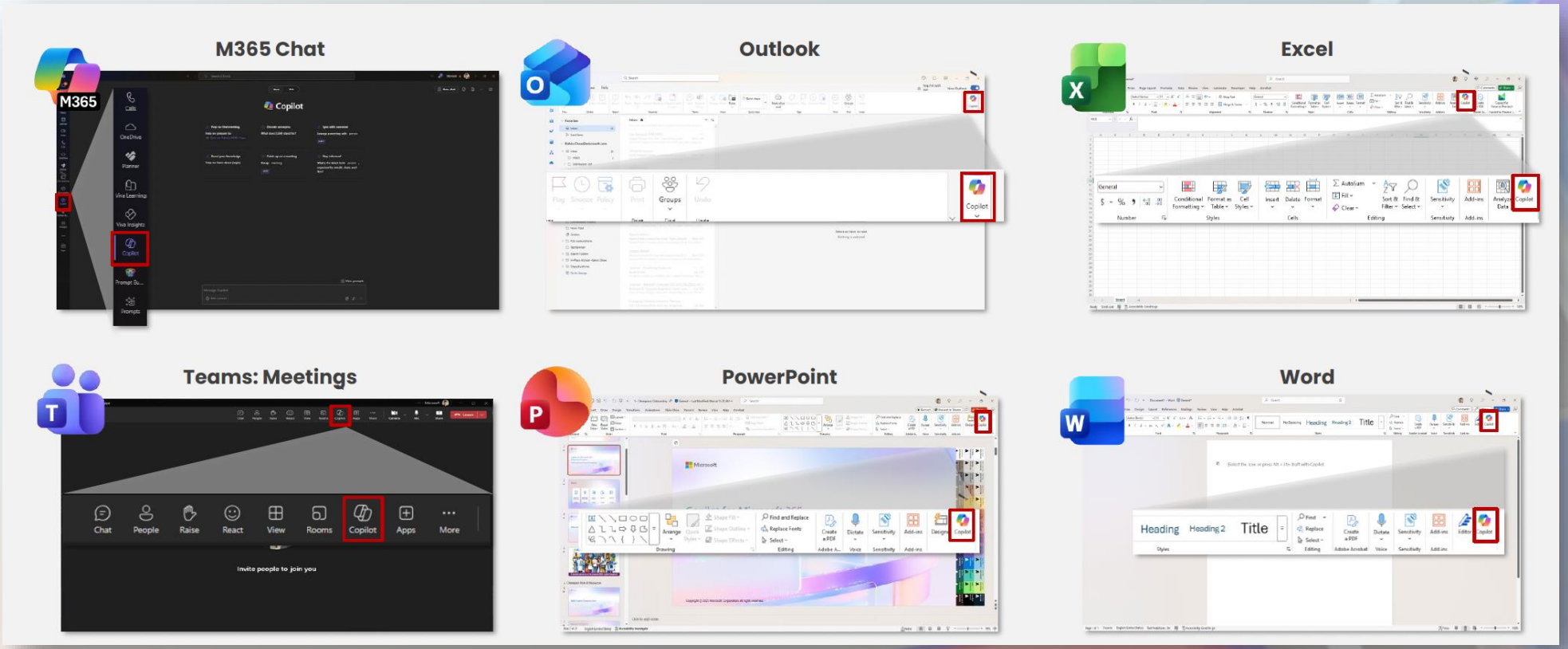
Copilot in Action

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

Applications with M365 Copilot



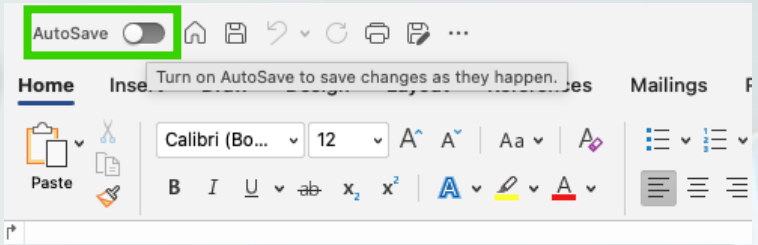
Where to access M365 Copilot?



Copilot in Apps

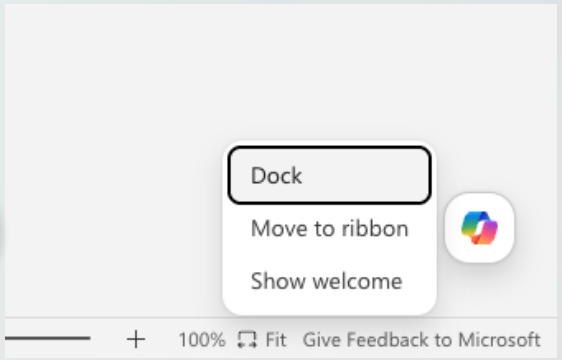
Word

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



QUICK TIPS

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

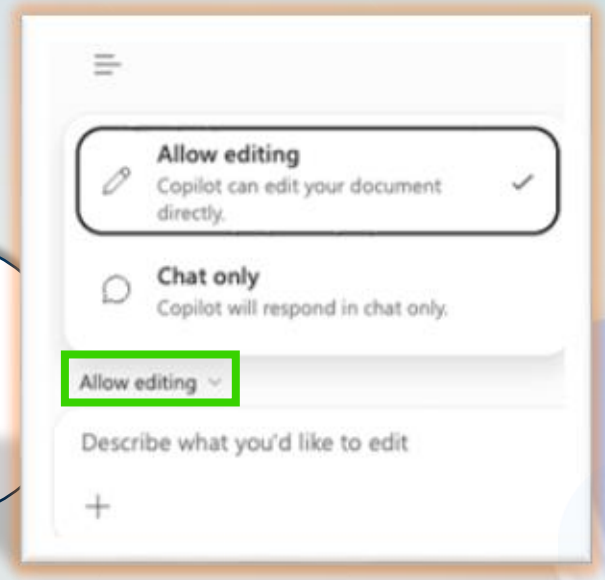


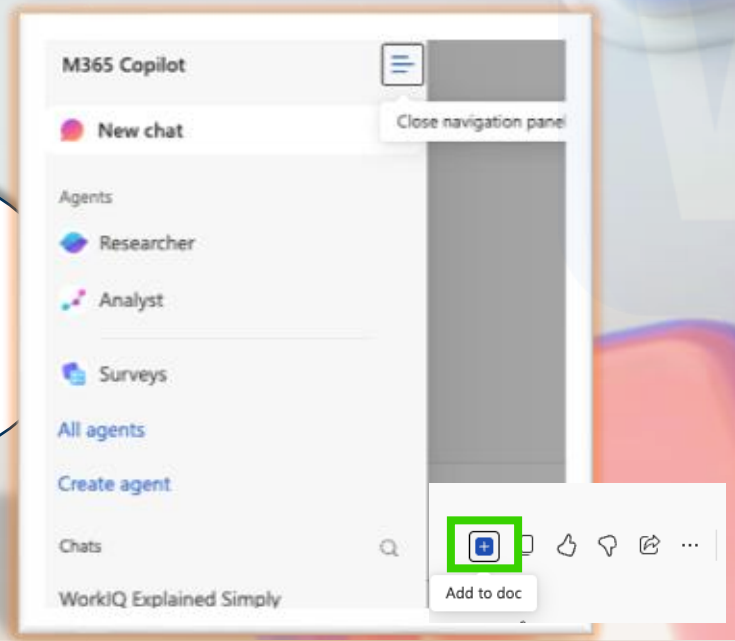
Copilot in Apps

Word

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

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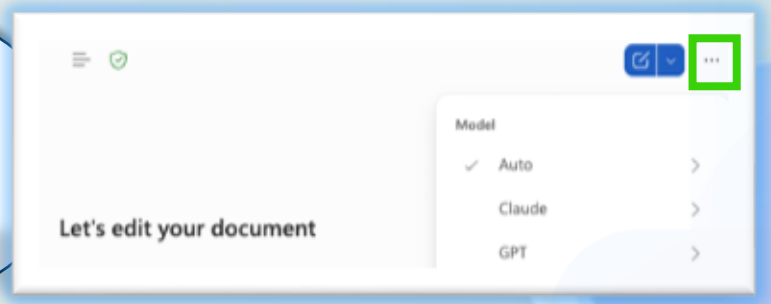
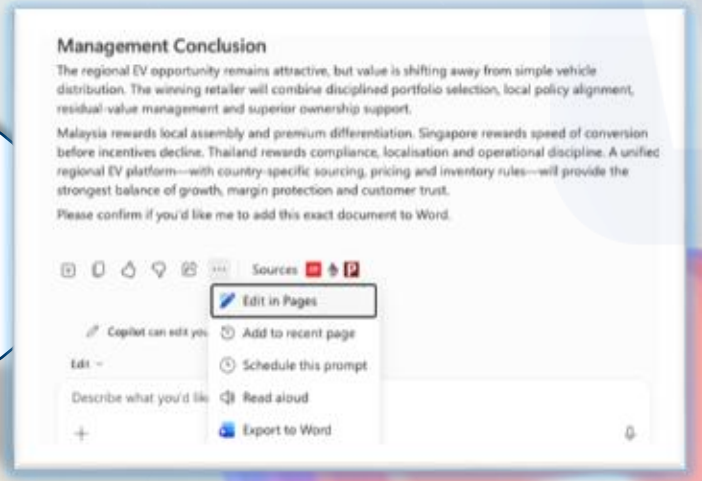


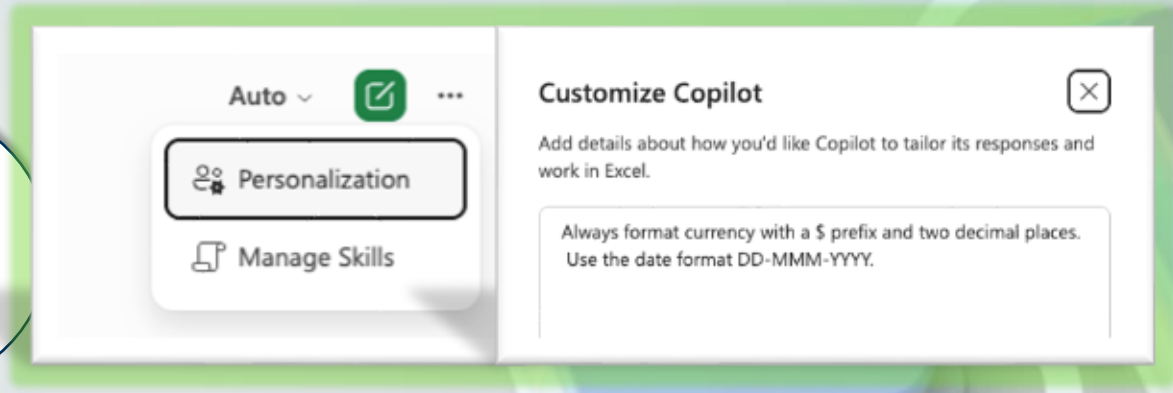
Open Copilot's response in an **editable page** where you can review, refine, and update the content before using it.



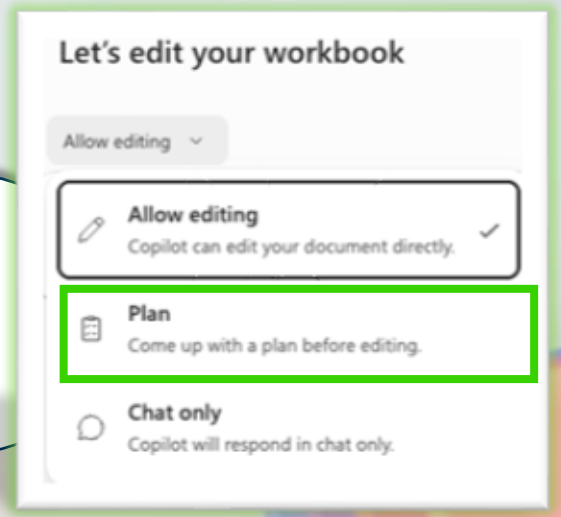
Copilot in Apps

Excel

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



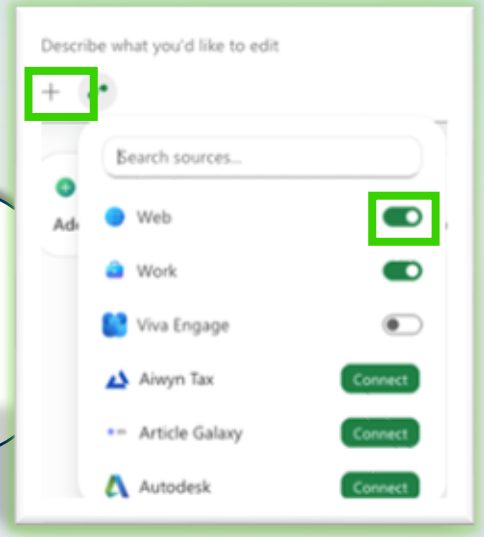
Ask Copilot to outline its recommendations and **editing strategy** before updating your workbook



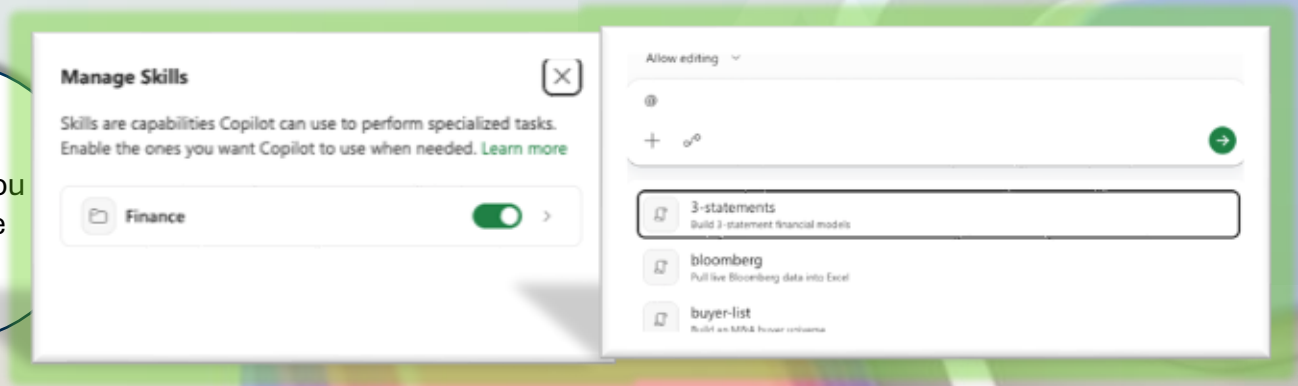
Copilot in Apps

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.



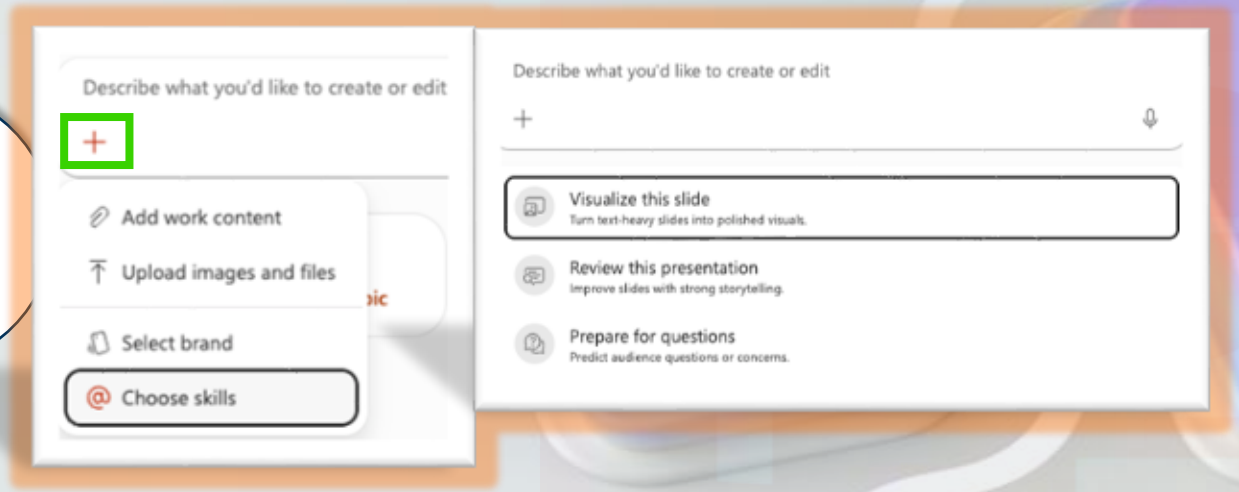
Skills are like giving Copilot a **specialist role**. Turn on the skills you need, and Copilot can provide more relevant and powerful assistance



Copilot in Apps

Powerpoint

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



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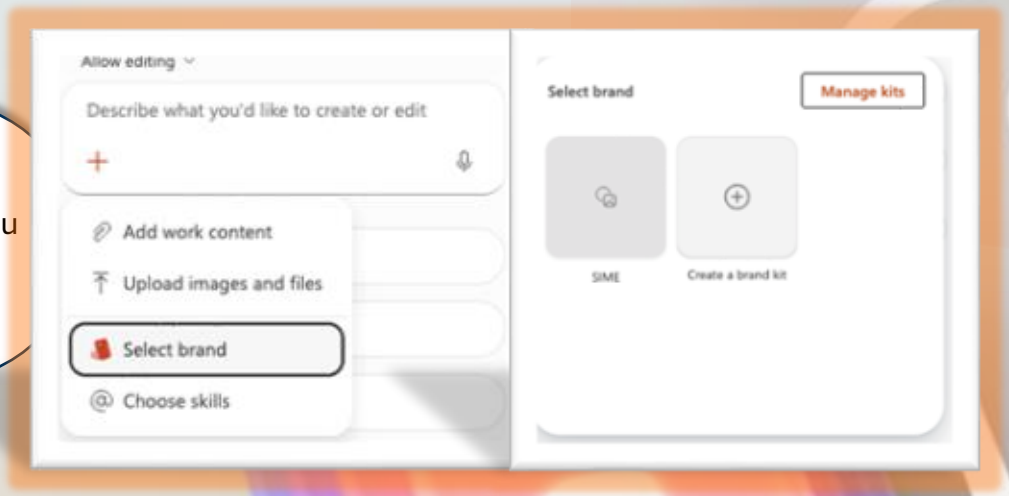


Agent Builder

No code Agent

M365 Copilot



Researcher Agent

Deep research across your work data and the web, with cited answers.

M365 Copilot



Analyst Agent

Turns files and spreadsheets into insights, showing its reasoning.

Executive

Prepare for an all-hands meeting

Microsoft 365 Copilot

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.

Copilot Chat[2]

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.

Facilitator in Teams

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.

Word Agent

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.

PowerPoint Agent

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

Get started with Word, Excel, and PowerPoint Agents

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.

Copilot Chat[2]

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

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.

Copilot in Outlook

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

KPIs impacted

- Employee satisfaction

Value benefit

- Cost savings
- Employee experience

A day in the life of an Executive

Microsoft 365 Copilot and Teams Phone

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 Chat[2]

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

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.

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 Chat[2]

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

7:00 pm – Get some writing ideas

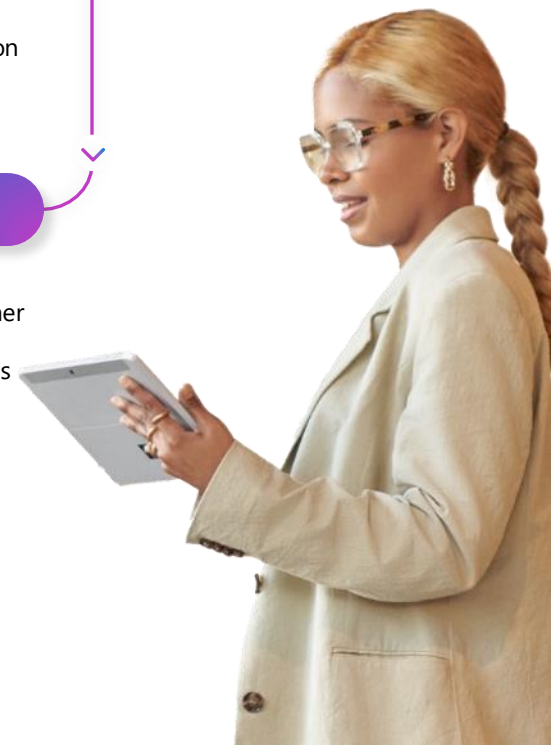
The issue is finally under control and Tanya can get back to her speech. She isn't happy with the introduction, so she asks Copilot in Word to suggest some humorous opening lines. With a few tweaks she has the perfect start.

Copilot in Word

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

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

7:30 am – Prepare for meetings

Review briefings, reports from across the organization and departments. Including updates on projects, cybersecurity alerts, performance metrics of IT services.

Copilot Chat[2]

Prompt: **Summarize my meetings for today**. For each meeting, list participants and link to relevant documents for each meeting.

9:30 am – Recap a meeting

Use Copilot in Teams to help align on daily priorities, forecast any overnight issues, and ensure projects and teams are on track with projects and tasks.

Copilot in Teams

Prompt: **Summarize the meeting, assign action items,** and list the key issues and suggestions from last week's IT department heads meetings.

10:00 am – Summarize data

Working on long-term IT strategies aligned with government policies and objectives, including stakeholders from budget, exec branch, and core IT leadership.

Copilot Chat[2]

Prompt: Based on last month's strategic planning meeting, provide a summary of the budget constraints discussed.

2:00 pm – Create a presentation

Use PowerPoint Agent to review cybersecurity updates from the past month and draft a PowerPoint presentation that summarizes key risks, response measures, and progress for executive reporting.

PowerPoint Agent

Prompt: **Create a PowerPoint presentation** from our quarterly cybersecurity report including a visual of resources targeted and types of attacks.

Get started with Word, Excel, and PowerPoint Agents

3:30 pm – Summarize a discussion

Discuss ongoing services, evaluate new solutions, and negotiate terms that best meet the needs of the business.

Copilot in Teams

Prompt: **Summarize discussions** with Vendor X, Vendor Y and Vendor Z related to price, solution and upcoming deadlines.

4:30 pm – Analyze a budget

Collaborate with budget analysts to review financial reports and cost planning activities, leveraging Analyst to interpret data.

Analyst

Prompt: **Based on the quarterly budget**, show me suggested areas to reduce operating expenditures.

Get started with Analyst

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.

[Open]

Achievement Code



Code : 54GKVN

Thank you

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

Questions are welcome — and keep practising your prompts.

