Microsoft

SOHO DRAGON

Microsoft 365 Copilot for Executives

Transform the way you work with the power of AI.

Agenda

Microsoft 365 Copilot Training for Executives

Time	Topic	Session
10 mins	Introduction	Introduction & workshop expectations What is Microsoft 365 Copilot?
5 mins	**Prompting basics**	Learn how to write prompts for Copilot to get the best results.
40 mins	**Demonstrations & live interactions**	Together, we'll walk through examples of how Copilot can be used to accomplish tasks large and small. We'll show executive-aligned examples in: • Outlook • Word • Microsoft 365 Pages • Excel • Teams
5 mins	**Closing**	Next steps and lesson recap

Microsoft 365 Copilot

Natural Language

Large language models (LLMs) + Your own Company data + Best in class data protection + Microsoft 365 apps

Microsoft 365 Copilot brings AI into the apps you use every day

Microsoft 365 Copilot chat experiences

Copilot Chat for Work and Web

Ground Copilot prompts in the latest web information and work data

M365

microsoft.com/copilot

Microsoft 365 Copilot app

Microsoft Teams

Copilot in Edge
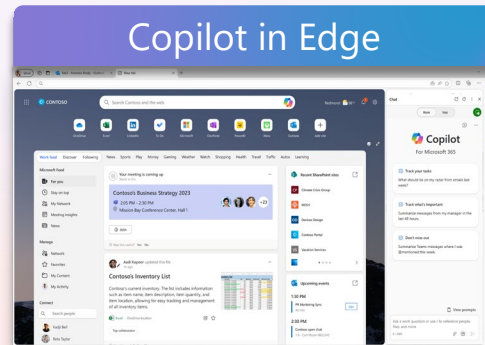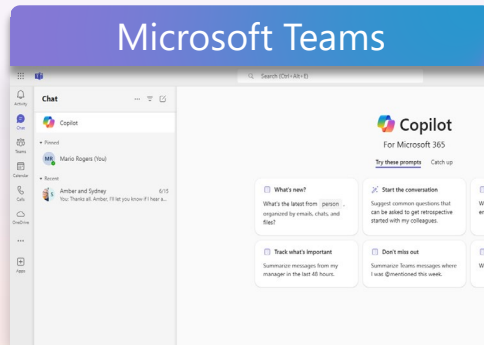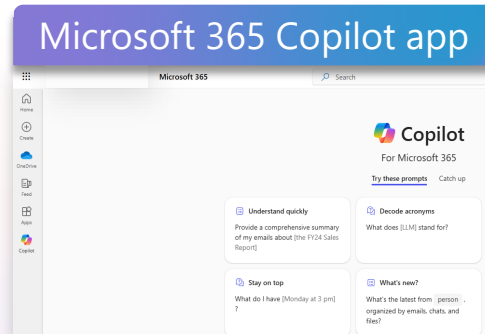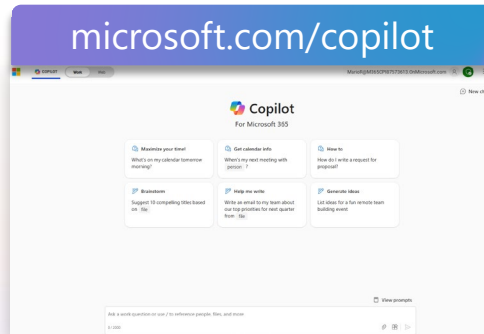
In-app Chat

Ask, create, and edit in the apps you use everyday

Teams

Outlook

PowerPoint

Word
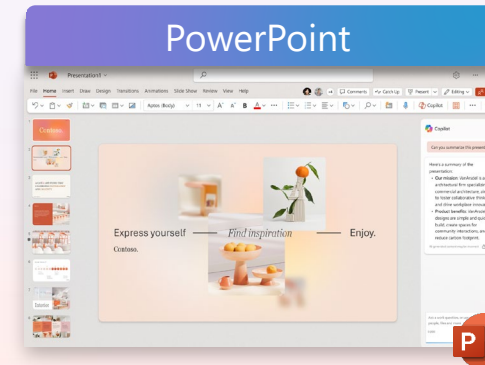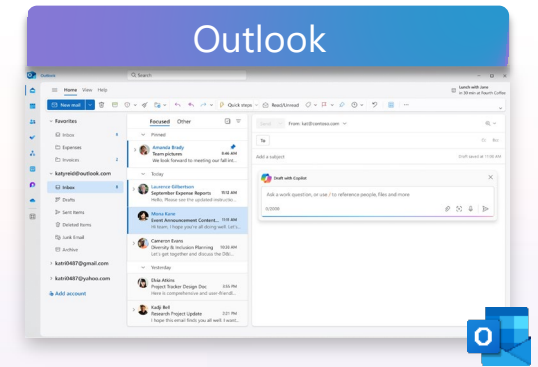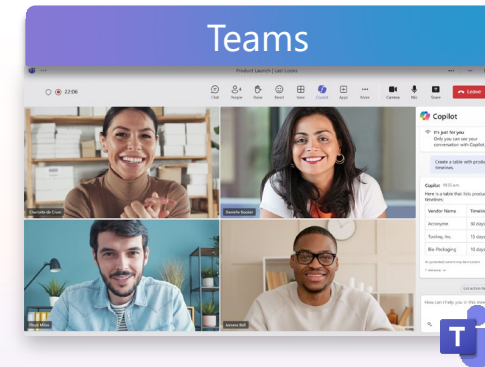
Prompting basics

Learn how to prompt Copilot

1. Tell Copilot what you need
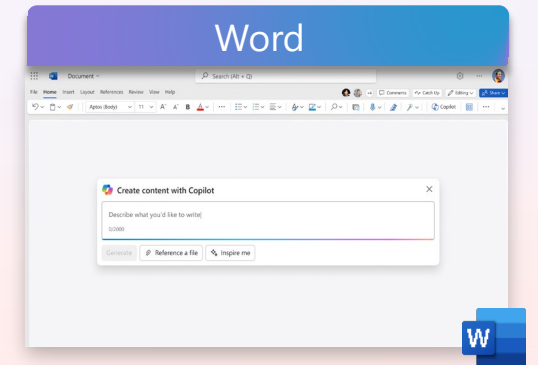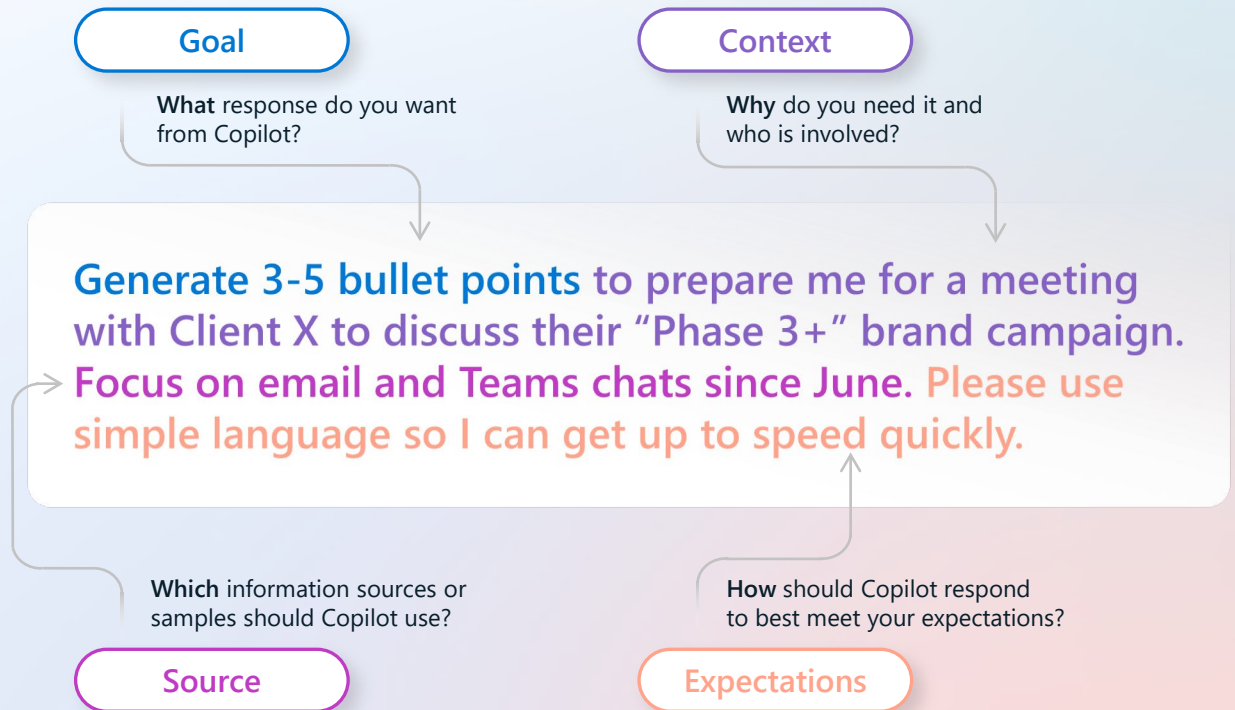
There are many types of prompts you can use depending on what task you want done.

- ✓ **Learn** about projects and concepts:
  "What is [Project X] and who are the key stakeholders working on it?"

- ✓ **Edit** text:
  "Check this product launch rationale for inconsistencies."

- ✓ **Transform** documents:
  "Transform this FAQ doc into a 10-slide onboarding guide."

- ✓ **Summarize** information:
  "Write a session abstract of this [presentation]."

- ✓ **Create** engaging content:
  "Create a value proposition for [Product X]."

- ✓ **Catch-up** on missed items:
  "Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal
What response do you want from Copilot?

Context
Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

How should Copilot respond to best meet your expectations?

Source

Expectations

Learn how to prompt Copilot

3. Keep the conversation going

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.

Generating content ideas
Lead with broader requests, then give specific details about the content.

Enabling insightful meetings
Request a meeting recap, then ask for more information about what you should know.

Storytelling assistance
Ask Copilot to write a story, then guide it by giving more specific, relevant details.

Gaining insights
Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.

Translating languages
Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.

Solving technical problems
Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations
Copilot is limited to your current conversation, so give lots of details.

Use quotation marks
This helps Copilot know what to write, modify, or replace for you.

Explore with Copilot Prompt Library
Filled with example prompts that you can edit to make your own.

Communicate clearly
Pay attention to punctuation, grammar, and capitalization.

Start fresh
Avoid interrupting and type "new topic" when switching tasks.

Be professional
Using polite language improves Copilot's response.

Saving prompts

Work | **Web**

⊕ New chat

🛡️ ⋯ ⊡

Copilot

Your AI assistant for work

✎ Stand out on socials

What are some tips for writing a great LinkedIn post?

📋 Going on holiday?

Write some funny Out of Office email responses to use while I'm on vacation from [January 25 to February 9]

⍰ Interview warning signs

What are some red flags to watch out for during an interview?

⟨⟩ Code a binary search in Python

Write a Python script to perform binary search

⟨⟩ Show me the result

Execute and explain this code...

📋 Graph the data quickly

Create a pie chart showing the market share of smartphones in the United States

✦ View prompts

Ask me anything...

0 / 16000

📎 | ➤

In **Copilot Prompt Gallery**, you can bookmark and view your saved prompts

Copilot Prompt Gallery

Suggested | **Saved**

Created by all ⌄ | Task ⌄

🎓 Find the right questions

Suggest common questions that can be asked to get a retrospective started with my colleagues

⊞ | 🔖

⍰ Interview warning signs

What are some red flags to watch out for during an interview?

⊞ | 🔖

Sharing prompts

In **Copilot Prompt Gallery**, you can copy links to prompts and share them with colleagues.

The link will open a new Copilot Chat with the prompt already filled.

Top 10 to "Try First"

with Microsoft 365 Copilot

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 Revise this content

– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

→ Rewrite with Copilot

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 Copilot Prompt Gallery at: aka.ms/CopilotLab

Let's see it in action
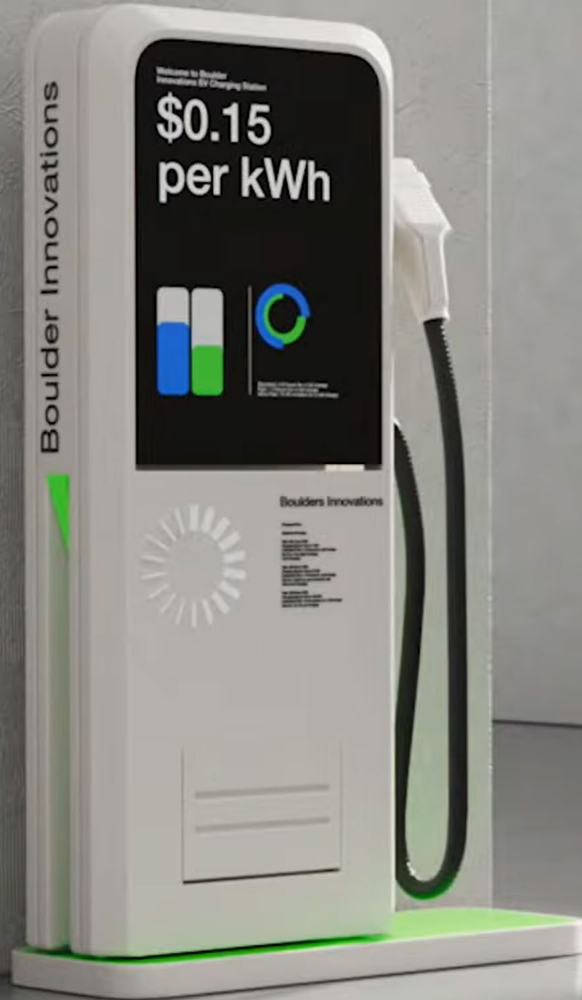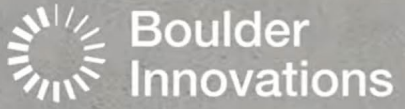
Boulder Innovations

Pioneering the Future of EV Charging Infrastructure

Mission: Accelerate the transition to sustainable transportation through accessible, reliable, and intelligent charging solutions.

- Founded in 2014 by former renewable energy engineers

- Headquarters in Boulder, CO with offices in San Francisco, Chicago, and expanding to Europe

- 850 employees across engineering, manufacturing, sales, IT, and administration

- **Flagship Product:** ChargeHub Pro - premium commercial EV charging solution

- **Strategic Initiatives:**

  - European market expansion

  - Launch of affordable residential product line (ChargeHub Home)

  - IT security improvements

  - Customer experience enhancement

Meet Maya Faye

Executive Team, Boulder Innovations
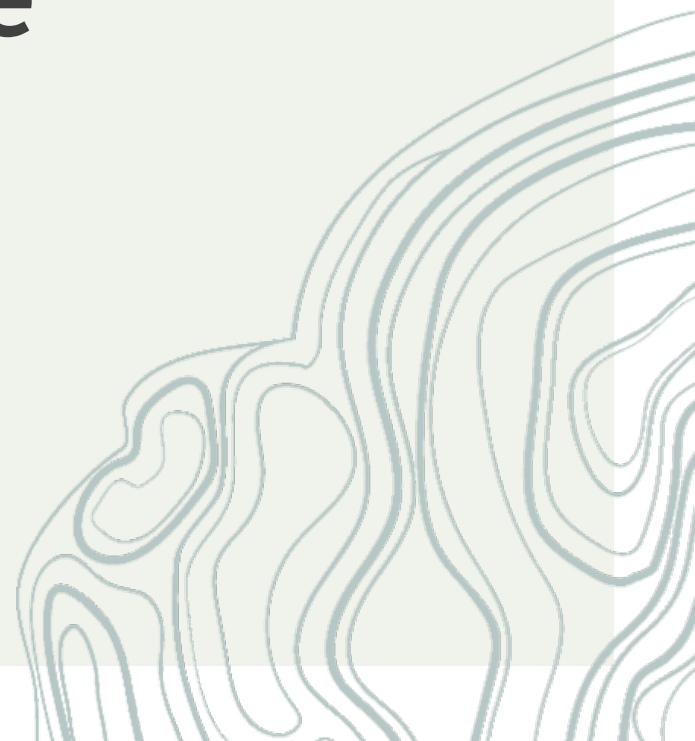
Copilot in Outlook

Email Analysis and Summary

Scenario:

Maya reviews a complex 25+ message thread with VanArsdel Ltd. about distribution partnership. She uses Copilot to get caught up quickly and gain actionable insights.

Copilot in Word

Drafting an agreement

Scenario:

Maya leverages Copilot to create a detailed legal document based on the email negotiations, without having to manually reference the complex thread or involve legal resources for the initial draft.

Microsoft 365 Pages

Collaborative research

Scenario:

Maya initiates collaborative research on EU charging regulations by creating a Microsoft 365 Page and inviting her team. Copilot helps structure comprehensive regulatory information that the team can build upon together in real-time.

Copilot in Excel

Sales analysis

Scenario:

Maya quickly gains insights from sales data without needing advanced Excel skills. The *Analyze Data* feature helps her explore relationships between different data points and identify important trends in sales channels.

Copilot in Teams Meetings

Notes and action items

Scenario:

Maya reviews a previous cross-functional meeting about residential product development. Without taking notes during the meeting, she can now generate organized departmental summaries, action items with clear ownership, and a professional follow-up email.

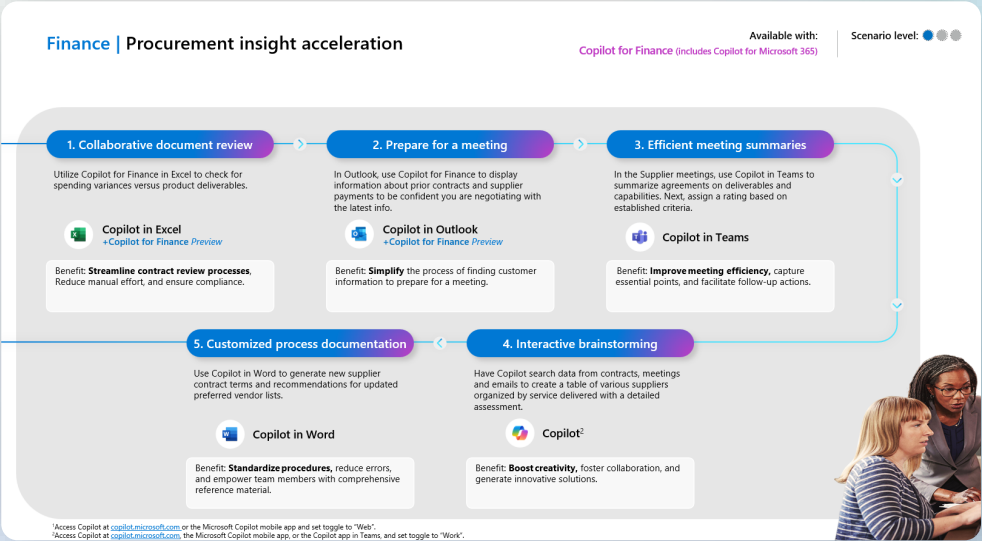Questions?

Copilot Resources

Copilot Adoption Page

adoption.microsoft.com/copilot

Copilot Scenario Library

adoption.microsoft.com/copilot-scenario-library

The Great Copilot Journey

aka.ms/greatcopilotjourney

Finance | Procurement insight acceleration

Available with: **Copilot for Finance** (includes Copilot for Microsoft 365)   Scenario level: ●○○

1. Collaborative document review
Utilize Copilot for Finance in Excel to check for spending variances versus product deliverables.

Copilot in Excel
+Copilot for Finance *Preview*

Benefit: **Streamline contract review processes**, Reduce manual effort, and ensure compliance.

2. Prepare for a meeting
In Outlook, use Copilot for Finance to display information about prior contracts and supplier payments to be confident you are negotiating with the latest info.

Copilot in Outlook
+Copilot for Finance *Preview*

Benefit: **Simplify** the process of finding customer information to prepare for a meeting.

3. Efficient meeting summaries
In the Supplier meetings, use Copilot in Teams to summarize agreements on deliverables and capabilities. Next, assign a rating based on established criteria.

Copilot in Teams

Benefit: **Improve meeting efficiency,** capture essential points, and facilitate follow-up actions.

5. Customized process documentation
Use Copilot in Word to generate new supplier contract terms and recommendations for updated preferred vendor lists.

Copilot in Word

Benefit: **Standardize procedures,** reduce errors, and empower team members with comprehensive reference material.

4. Interactive brainstorming
Have Copilot search data from contracts, meetings and emails to create a table of various suppliers organized by service delivered with a detailed assessment.

Copilot[2]

Benefit: **Boost creativity,** foster collaboration, and generate innovative solutions.

[1]Access Copilot at copilot.microsoft.com or the Microsoft Copilot mobile app and set toggle to "Web".
[2]Access Copilot at copilot.microsoft.com, the Microsoft Copilot mobile app, or the Copilot app in Teams, and set toggle to "Work".

Start using Microsoft Copilot >

Functional scenarios

Customer Service
Finance
Human Resources
Information Technology
Legal
Marketing
Marketing Communications
Operations
Sales

Looking for downloadable content?
Download our functional scenario kits, scenario guides, and day in the life guides to accelerate your Copilot implementation.

View downloads >

Using Copilot in Customer Service
Using Copilot in Finance
Using Copilot in Human Resources
Using Copilot in Information Technology
Using Copilot in Legal
Using Copilot in Marketing
Using Copilot in Marketing Communications
Using Copilot in Operations
Using Copilot in Sales

Thank you for attending