Introduction

Welcome to a book on AI, written by a human! It's about Microsoft 365 Copilot, the Generative AI tool that can help you ideate, prepare, create, communicate, and stay ahead at work.[1]

If you are reading this, you're aware that GenAI can enhance your productivity, creativity, and knowledge. You are not alone. When ChatGPT launched, it attracted 100 million users in only two months.

AI has had fits and starts since 1956, when John McCarthy first coined the term at a conference at Dartmouth College. There have been breakthroughs in those 60 years, mainly in labs and universities where machines learned to master chess, or map the human genome. Then in 2023, AI assistants exploded, becoming widely available to individuals and organizations everywhere. At long last, the age of AI is upon us.

At work, AI is changing interactions with data, documents, presentations, emails, and meetings. Curious people are learning to be on the upside of the curve. Kudos for being one of them!

The Reason for a Book

But there must be a reason for a book, and a reason that you're about to read this one. Perhaps it's because:

➢ Copilot works differently than ChatGPT, Gemini, or Claude.
➢ Some prompts yield some unexpected responses.
➢ Sensitive organizational data may be unintentionally exposed.
➢ Machines may put jobs, and humans, at risk.

These are things I needed to know, and why in March 2023, I set out to learn how organizations could prepare to use Copilot in the workplace. Since then, my firm has helped over 300 organizations get started. Now I am sharing my detailed findings about how to use Copilot, how to securely operate it at scale, and how to plan for the organizational impacts of AI.

This is a Pivotal Time

Moreover, this is an important time. Many consider these next years to be transformative, not unlike the advent of the Internet or the smartphone. Bill Gates said, "Generative AI has the potential to change the world in ways that we can't even imagine."

Is it overhyped to think that the next industrial revolution is starting? And is everything that is about to unfold a positive for humanity? While researching the topic's tentacles, it became clear that there are mixed feelings about the future.

Some are willing

Mark Andreessen has run a successful venture capital firm since selling Netscape. He's so bullish about AI that he wrote an essay, "Why AI Will Save the World." On Lex Fridman's podcast, Mark wondered, "What if every person has an assistant, and the assistant is 140 IQ, and you happen to be 110 IQ? You have something that is infinitely patient, knows everything about you, and wants you to be successful. Anytime you find anything confusing, or want to learn anything, or want to figure out what to do in a situation, it will help you do it. **The combination will effectively raise your IQ and raise the odds of successful life outcomes**." [2]

Satya Nadella shares that worldly optimism, saying "Just imagine if 8 billion people always had access to a personalized tutor, a doctor that provided them medical guidance, a mentor that gave advice for anything they need."[3] AI can be a win/win, because as society gets smarter, we live longer and more comfortably.

Others are wary

Other experts in the field have a much more cautious view, like author, physicist, and MIT professor Max Tegmark. He surmised that "If we succeed in building machines that are smarter than us in all ways, **it's going to be either the best thing to ever happen to humanity or the worst thing**."[4]

DeepMind co-founder Mustafa Suleyman (and current CEO, Microsoft AI) wrote, "Over time, the implications of **these technologies will push humanity to navigate a path between the poles of catastrophe and dystopia.** This is the essential dilemma of our age."[5]

The pundits are extrapolating from where AI is today, seeing the pace at which it's moving, and acknowledging that humans don't always make good choices with technology.

Some are still wondering

Others see both sides, like tech billionaire Mark Cuban, who said, "There'll be a time when people take AI and its impact for granted, but **if you don't know how to use it and you don't have a basic understanding** of the different approaches and how the algorithms work, **you can be blindsided** in ways you couldn't possibly imagine."

That's the intent of this book - to provide an **eyes-wide open look** at how Copilot works, *and* to provide you with knowledge to make it work better.

Copilot, like any GenAI assistant, can be wrong. Computers don't share human judgment, intuition, or ethics. They do not intuitively understand intent, context, or goals. No GenAI tool can guarantee the quality, accuracy, or appropriateness of what it generates or suggests.

Yet, you can - and will - overcome, with the skills learned in this book.

Slow Down to Speed Up

The wary Tegmark said, "Humanity is racing toward a cliff, but there's still time for us to slow down, change course and avoid falling off."[6] Taking the time to read this book will help you slow down and think. Think about why Copilot is doing what it does. Think about what it knows and what you need to tell it. Think about what to do if it goes off course.

Taking that time will ultimately provide a positive outcome, saving you even more cycles (and some frustration). Then, like the rest of its early adopters, you'll be ready to contribute to the ~$2.6 trillion+ that McKinsey predicts AI will add - *annually* - to the global economy.[7]

Tegmark spoke specifically of Copilot saying "Microsoft is rolling out the new Office Suite, where you go into Word and give it a prompt, and it writes the whole text for you, and then you edit it. You can debate the economic impact of it, and whether society is prepared to deal with this disruption. **But that's not the elephant in the room that keeps me awake at night for wiping out humanity.**"[8]

So there's no reason to lose sleep about Copilot. In fact, you may get more sleep from getting your work done smarter!

With some context and caution out of the way, let's begin!

Suggestions to Use this Book

It was a breeze to start using ChatGPT. It's also easy for an IT Pro to activate a license and unleash people to Copilot. But why might that not be the best idea?

1) **People should have their expectations set** and have a baseline of knowledge for the best experience.
2) For secure, trustworthy operation, data should be protected and accurate.
3) For sustainable organizational success, **leaders should create policies, strategies, and plans to reskill the team** to tackle new tasks, roles, and even careers.

This book is written for those who wish to pursue success in every facet. **It's divided into three parts; each intended for a specific audience.**

Part I covers the end user experience and is written for anyone using Microsoft 365 Copilot. It begins with a high-level explanation about how large language models work and importantly, why they behave in the way that they do. Then, it gives tips and tricks to get the best outcomes while using Copilot within specific applications. Opening the app, clicking on Copilot, and **following along is the best way to get familiar** with the prompts.

Power users may even find parts of Part I useful. When experiencing some trouble using Copilot within a specific app, navigate to that chapter, and in the left-hand column of the table, scan for the function that's not working. Then, look over at the center column of the table, where a caveat or constraint may be noted. **There are Pro Tips at the end of each chapter, and a Pro Tip chapter** at the beginning of Part I, including **how to make Copilot sound like you!**

Part II covers how Copilot works in detail. It's meant for the more technical reader, an AI student, or anyone who's curious about the technology and its capabilities and constraints. It covers **how to secure content, minimize privileges, monitor usage, and customize the experience**. It will also articulate the differences between Microsoft 365 Copilot and the well-known public models.

Part III is written for business executives or others interested in operationalizing the use of Copilot, at scale. CIOs and Chief Information Security Officers are the target audience of the first half, which covers policy and oversight. The second half has information pertinent to HR leaders and other senior managers who care about employee wellbeing, and future-proofing the workplace. Part III will help executives grapple with the fact that **amongst all the technical zeal, there are real impacts coming to the workforce amid this new industrial revolution.**

1 "Copilot" is a brand name covering many Microsoft products. You'll see a public and free Microsoft Copilot at www.bing.com/chat, too. This book is about the paid work/school "Microsoft 365 Copilot," which is referred to as "Copilot" within.

2 **#386 – Marc Andreessen: Future of the Internet, Technology, and AI | Lex Fridman Podcast**

3 **The age of copilots | LinkedIn**

4 **Life 3.0 - Future of Life Institute**

5 **The Coming Wave Quotes by Mustafa Suleyman (goodreads.com)**

6 **The 'Don't Look Up' Thinking That Could Doom Us With AI | TIME**

7 **Economic potential of generative AI | McKinsey**

8 **#371 – Max Tegmark: The Case for Halting AI Development | Transcript (transcriptforest.com)**