Guide and Talking Points

This document will equip you with the **Demo Guide and Talking Points** to show Copilot across the following experiences:

1. Copilot Mobile App (2–5 mins)
2. Copilot in the Web scope (7–10 mins)
3. Copilot in the Work scope (7–10 mins)
4. Copilot in Teams (5–7 mins)
5. Copilot in Outlook (5–7 mins)
6. Copilot in Word (3–5 mins)
7. Copilot Studio (2–5 mins)

It also includes tips on how to effectively demonstrate AI and it provides information on the key concepts that should be communicated to customers.

# How to demonstrate AI effectively

AI is inherently unpredictable. It doesn’t always give the answers you expect. Sometimes it gives answers that are incomplete or even wrong. So, how do you demonstrate an unpredictable product to the customer effectively?

* **Be honest** about the reality of the product
* **Celebrate success**—talk about the answer Copilot gave and how it got there
* **Ask for a better answer**. Sometimes asking again in a different way, or with more detail, gives a much better answer
* **Use prompt tips** to help you get the most out of Copilot. We’ve got resources to help

**Be honest:** Copilot doesn’t always give you the answer you expect. Tell your customers up-front that this might happen. When it does happen, don’t hide it. Instead, show the customer how you respond. Show them techniques that they can use to get the most out of AI.

**Celebrate success:** When AI answers a question, it’s a new answer every time. Look at the response and find things to celebrate. Did Copilot take a novel approach to the answer? Did it add a detail you didn’t know? Did it make creative connections?

Even a wrong answer can have value. A wrong answer may help us uncover our assumptions about the question. It may point the way to a better prompt. When this happens, we say Copilot is **“usefully wrong**.”

* If a prompt isn’t giving you great answers, submit feedback.
* If you have a prompt that works really well with your audience, we encourage you to share it with your team!

**Ask for a better answer:** Don’t let a poor answer slow you down. When the answer isn’t great, ask again in a different way. Ask Copilot to do better. Sometimes, we actually get better answers when we ask again or encourage it. It’s OK to ask again and tell Copilot to “try harder” or “try again.”

**Use prompt tips:** Getting the most out of AI with prompts is not an exact science. Here are some tips to help:

* **Tell Copilot what you need.** There are a lot of different ways to ask, and some work better for different topics. Be specific. If you want Copilot to summarize content, tell it you want a summary. If you want Copilot to create something new or suggest some edits, be clear that’s what you need.
* **Include the right prompt ingredients**. Here are some of the things you can include to get great results:
  + What kind of response do you want Copilot to give you?
  + Why do you need it and how is involved?
  + What information or samples should Copilot use?
  + How can Copilot meet your expectations for an answer?

For more tips on building great prompts see the following documents:

* [The art and science of prompting](https://adoption.microsoft.com/files/copilot/Prompt-ingredients-one-pager.pdf)
* [Prompting do’s and don’ts](https://adoption.microsoft.com/files/copilot/Prompt-dos-and-donts-one-pager.pdf)

# Demo talk track and steps

## Introduction

| **What to say** | **What to do** |
| --- | --- |
| Today, I’m going to show you Microsoft Copilot *using a live account*.  I hope this will help you understand the power of Copilot and just how much positive impact it could have on your own business.  First, a disclaimer: AI doesn’t always act the way we expect it to. Sometimes, it gives answers that are surprising or even wrong.  Copilot might even show you things it’s not supposed to show you. If that happens, we’re not going to hide it. Instead, I’ll show how I work with Copilot to get the best out of it. | No click steps. |

## Copilot Mobile App (length: 2-5 minutes)

| **What to say** | **What to do** |
| --- | --- |
| Before I really jump into Copilot and what it can do, I want to show you Copilot on my mobile device.  Using Copilot, I can easily ask questions and get answers on my mobile device using the Copilot app. Right now, I’m logged in using my personal account.  I can also switch accounts quickly. Now, I’m signed in with my Microsoft account, which allows Copilot to use my work emails, documents, and more, when generating answers.  This app is easy to download from the app store on iOS and Android. | * + 1. Start in the browser window with the **Copilot Mobile** simulation open.     2. In the upper left, select the **Picker** (three horizontal lines).      * + 1. Next to **the name**, select the small right arrow.      * + 1. Select **Switch**.      * + 1. In the upper left, select the left arrow. |

## Copilot in Microsoft 365 on the web (length: 7-10 minutes)

| **What to say** | **What to do** |
| --- | --- |
| **Copilot and large language models**  Now switching to Microsoft Copilot on the web. Copilot gives you an AI-powered personal assistant that can answer questions and help with general tasks. I can ask it questions and it will give me answers similar to what any college-educated person could give.  I want to talk briefly about Commercial Data Protection. When you or your organization use Copilot with Commercial Data Protection, your chat is not saved. All data is encrypted, and Microsoft doesn’t retain any of your prompts or responses. They are not used to train the model, so you can be confident that your personal and organizational information is kept confidential.  For example, I can ask a general knowledge like this and get a lot of great information back. You can think of it as having a basic conceptual model of the world which it can use to answer questions.  **For example: *What can you tell me about elephants?***  Copilot uses large language models (LLMs) trained on huge amounts of information, including Bing searches and results.  But Copilot isn’t just a fact checker. We can use Copilot as a general reasoning engine that can take your questions and reason on them stochastically. In the industry, we call this inference.  For example, I’m going to ask Copilot a question that requires a bit more thought. ***Could an elephant pull an F150?***  *<talk about the response>*  Copilot was able to make assumptions and draw connections between bits of knowledge to give me a more nuanced answer to my question. As we improve Copilot, we’re learning a lot about what these LLMs are good at and what they’re not good about, and we’re building that knowledge into the product as we build it. | **Prompt tips:** If you want to use your own prompts, start with a topic of general knowledge that’s interesting to you or your customer.   * + 1. Switch to the Edge tab with Copilot open and the **Web** scope selected.      * + 1. In the **Ask me anything...** text box, copy and paste the prompt from the prompt library documents or type: *What can you tell me about elephants?*      * + 1. Select the **Submit** button.      * + 1. In the **Ask me anything...** text box, copy and paste the prompt: *Could an elephant pull an F150?*     2. Select the **Submit** button. |
| **Grounding**  But what takes this power to the next level is the ability to ground Copilot in external data and knowledge. Sometimes this is called Retrieval Augmented Generation (RAG). This is the process of providing additional information to the language model that’s relevant to the task at hand.  We can ground our questions in all kinds of data and documents, for example, the **Bureau of Labor Statistics jobs report.** This is a huge document, published annually, that is full of data about jobs and employment trends across the United States.  Copilot is able to go out and find that information, understand it, and give me an answer to my question in real time. It also gives me references that show me where Copilot got that information for example, the Bureau of Labor Statistics web site. This means, I can check where Copilot got its information and get more context, because this is Copilot, not autopilot. | * + 1. Start a new topic, by clicking here:      * + 1. In the **Ask me anything...** text box, copy and paste the prompt: *Can you give me a list of the labor force participation rates from the Bureau of Labor Statics over the last 5 years?*     2. Select the **Submit** button.     3. In the response, next to **Learn more** pause the mouse over one or two of the references. |
| **Skills**  This is great, but I’d really like to see a graph of this data.  Unfortunately, Copilot can’t draw a graph right now, but that doesn’t mean we’re stuck.  As we build Copilot, we’re adding different skills. Skills are ways that Copilot can draw on its reasoning power to solve problems.  Another ability that I know Copilot has is the ability to code. I’m going to remind Copilot that it knows how to code and see if I can get it to write the Python code for that graph I wanted.  *<talk about the response>*  Over time, we expect these kinds of processes to become easier and more automated.  **Optional:** Another skill that Copilot has is the ability to recognize and interpret images. I’m going to upload this image and see if Copilot can tell me what it is.  **Optional:** We’ve also given Copilot the ability to draw its own pictures. Let’s see if Copilot can show create images.  <talk about the response>  Copilot is still learning to draw, and sometimes it gets things wrong or misspells words, but there are some good ideas here.  **Optional:** We’ve even partnered with AI leaders Suno to give Copilot the ability to write a song.  *<play the song>* | **Prompt tips:** Copilot may respond by giving you an error message, drawing a picture of a graph, or finding a graph on the web. Just be ready to talk around whatever response you get.   * + 1. In the **Ask me anything...** text box, copy and paste the prompt: *Can you draw a graph of those numbers from 2019 to 2023?*     2. Select the **Submit** button.   **NOTE:** It is expected that Copilot will give an error, create an image with Designer, or give an incorrect answer.   * + 1. Start a new topic, by clicking here:      * + 1. In the **Ask me anything...** text box, copy and paste the prompt: *Can you give me a list of the labor force participation rates from the Bureau of Labor Statics over the last 5 years? I also heard that you could code. Can you grab the data from bls.gov and then write the Python code that would produce the graph I'm looking for?*     2. Select the **Submit** button.     3. **Optional:** Show how Copilot can recognize an image:     4. Start a new topic, by clicking here:      * + - 1. At the bottom of the page, select the **Add an image** icon. A screenshot of a social media post           Description automatically generated       2. Select **Upload from this device**.       3. Browse to where you unzipped the demo assets, select **What is this picture.png**, and then select **Open**.      * + - 1. In the **Ask me anything…** text box type the prompt: *What is this picture?*       2. Select the **Submit** button.     1. **Optional**: In the **Ask me anything...** text box, copy and paste the prompt: *Copilot, make a banner for a hamburger stand. Make it friendly and show people enjoying a hamburger* and then select the **Submit** button.     2. **Optional:** Show how Copilot can write a song:        1. Switch to browser session with the personal account. **(Optional step #12).**        2. In the **Ask me anything...** text box, copy and paste the prompt: *Write a country song about Microsoft Copilot, extolling its virtues as an AI companion. Make it catchy, upbeat, and a little quirky.*        3. Select the **Submit** button.        4. Minimize the browser session. |
| **Conclusion**  Copilot has the ability to reason based on general knowledge, we can ground it in data and reason on that data to extend it and find solutions to problems, and we can add skills to extend those abilities even further. Imagine what this could do in your environment on your data. | No click steps |

## Copilot in the work scope (length: 7-10 minutes)

| **What to say** | **What to do** |
| --- | --- |
| **Copilot in the work scope**  We’ve just seen Copilot on the web, now we’re going to see how Copilot can function on your data. This is what we call the work scope. We’re going to use my own account to demonstrate this, so you’ll see how Copilot functions using real data.  With Copilot for Microsoft 365 running within the work scope, Copilot uses Microsoft 365 security to protect your data and runs all its services inside your organization’s compliance boundary.  Here, in the work scope, we’re enhancing Copilot with information from the Microsoft Graph. Let’s start with some basic knowledge management.  Finding out where and from who I can get information is a perennial knowledge management challenge. Let’s see who in my organization can tell me about grounding and LLMs.  *<talk about the response>*  Now, I’m going to ask Copilot to summarize my communications and work with one of my colleagues. I’ll ask it to organize its response by emails, chats, and documents. In the work scope, Copilot can see my email messages, calendar, chats, and documents.  *<talk about the response>*  Copilot is learning how to think about your calendar. It was able to process and summarize that information and give me something useful. And it includes references so I can go look at that information and verify it or get more details.  We’re always looking at prompts and finding ways to improve how Copilot works with more complex information retrieval and automation.  **Optional:** Now let’s see how Copilot is at prioritizing my email messages.  **Optional:** Copilot can even analyze my meeting activity and provide insights I might not have come up with otherwise.  Copilot has amazing potential for knowledge management. It can help me find experts and documents, catch me up on what the people are me are doing and summarize complex documents quickly. | **Prompt tips:** To customize the prompts further, look for non-confidential emails or meetings and ask Copilot to summarize, or list action items. **Important:** When choosing people, choose people who you do not share confidential information with!   * + 1. In the top left, switch the toggle to **Work**.      * + 1. In the **Ask me anything...** text box, copy and paste the prompt: *What is "grounding" for an LLM and how does it work? If I wanted to know more about it, who would be able to help me?*     2. Select the **Submit** button.     3. In the **Ask me anything...** text box, copy and paste or type: *Can you summarize the last five emails from* “/”. **NOTE:** You must include the slash symbol.     4. Start typing the name of a colleague.   **IMPORANT: Choose a person who you do not share confidential information with.**   * + 1. Select the person’s name when it appears.     2. Copy and paste or type the rest of the prompt: *To be specific, look for the last five emails from this person over the last few days and stack rank them in order of most important to least important, based on your analysis of the contents.*     3. Select **Submit**.     4. **Optional:** In the **Ask me anything...** text box, copy and paste the prompt: *Can you summarize the last five emails from my boss? To be specific, look for the last five emails from my boss over the last few days and stack rank them in order of most important to least important, based on your analysis of the contents* and then select **Submit**.     5. **Optional:** In the **Ask me anything...** text box, copy and paste the prompt: *Review my meetings this week and create 5-7 categories that describe how I am spending my time. For each category, provide a short description and give me an approximate percentage of time I spent there* and then select **Submit**. |
| **Conclusion**  In the work scope, Copilot gives me a general-purpose reasoning engine that’s grounded on my work data.  Now we’re going to look at Copilot in Microsoft 365 products. We’re adding even more skills to Copilot that help it function in a way that includes the rich context of these products to give you the assistance and tools in the place where you work. | No click steps |

## Copilot in Teams (length: 5-7 minutes)

| **What to say** | **What to do** |
| --- | --- |
| Now, I’m going to show you what we call a meeting recap in Teams.  Here’s a meeting between me and my colleagues. We can’t show you our real meeting for confidentiality reasons, but here is a fictitious meeting that I recorded with my team where we’re talking about the launch of a fictional product called Project Avalon.  The recap was based on the recording transcription. It shows who was involved and when they were talking. There’s also a summary of what we were talking about. Copilot has organized my meeting by sections to make it easier to find what I’m looking for.  Now I can ask Copilot questions and get more information about this meeting. For example, let’s see what was discussed and what the action items are for each person.  *<talk about the response>*  Copilot doesn’t just understand the literal text, it can extract nuance based on the transcript. I’ll ask Copilot if anyone strongly opposed the decision?  *<talk about the response>*  **NOTE:** Copilot’s response is based entirely on the text transcript. Copilot does not read or analyze voices.  Now let’s ask something hard. Copilot, based on the meeting, when do you think we should launch the product?  *<talk about the response>* | **NOTE:** If you are using a simulation for this section of the demo, switch to the Edge window with the simulation open now.   * + 1. Switch to the browser tab with Microsoft Teams open to the meeting **Project Avalon launch meeting**.   **NOTE:** See the **Microsoft Sales Enablement Brownbag** document for instructions on how to create a shared meeting you can use for demo purposes. **Do not show any meetings that contain confidential data.**   * + 1. Select the **Recap** tab.      * + 1. Point out the **Speakers**.     2. Select **Topics**.      * + 1. Select **Chapters**.      * + 1. In the upper right corner, select **Copilot**.   A screenshot of a video chat  Description automatically generated   * + 1. In the **Ask me anything about this meeting** text box, copy and paste the prompt: *Can you list action items and owners in a table?*     2. Select **Send**.     3. In the **Ask my anything about this meeting** text box, copy and paste the prompt: *Did anyone strongly oppose the decision, and how do you know?*     4. Select **Send**.     5. In the **Ask my anything about this meeting** text box, copy and paste the prompt: *Based on the transcript, when would you recommend we launch the product and why?*     6. Select **Send**. |

## Copilot in Outlook (length: 5-7 minutes)

| **What to say** | **What to do** |
| --- | --- |
| Let’s take a look at an email thread. This is a fictitious discussion where my team is talking about an important blog post about Copilot. It may look a lot like email threads your see every day.  When I select the Summary by Copilot button, Copilot summarizes the thread for me and gives me the most relevant points.  *<talk about the response, note action items listed>*  That’s pretty useful. I have long email threads arrive in my inbox all the time, and it can be a chore to disentangle what’s important and what’s not.  I’m going to reply and I’ll use Copilot to help me.  We can see that Copilot has generated some suggested prompts, that’s because Copilot has read the email thread and has an understanding of the context and how I might want to reply.  This is useful, but this reply requires a custom prompt.  I can also edit this prompt to customize the tone and length of the reply.  When I select “Sound like me,” Copilot looks at my outgoing email and makes sure that its response matches my personal communication style. Let’s use that.  This is pretty good, but I think it can be better. Copilot results are based, in part, on the quality of the question asked.  OK, I’m going to keep this response. | * + 1. Switch to Outlook with the demo email thread open.   **NOTE:** See the **Microsoft Sales Enablement Brownbag** document for instructions on how to create a shared email thread you can use for demo purposes. **Do not show any email messages that contain confidential data.**   * + 1. Below the email’s subject, select **Summary by** **Copilot** and point out the results.     2. At the top of the page, select **Reply all**.     3. At the bottom of the new email field, point out the **Draft with Copilot** section and suggested prompts.     4. Select **Custom**.   A screenshot of a computer  Description automatically generated   * + 1. In the **What do you want the email to say** field, copy and paste the prompt or type: *Approve and thank the team--be warm! They worked hard. And be a little funny if you can.*     2. Select the **Edit prompt** button.   A screenshot of a social media post  Description automatically generated   * + 1. Select **Sound like me**.     2. Select **Generate**.     3. Select the **Anything you’d like to change?** Text box.     4. Copy and paste the prompt or type: *Can you make a that a bit longer? It's just a little bit too short.*     5. Select the **Generate** button.     6. **Optional:** In the **Anything you’d like to change?** Text box, type *Make it funnier* and then select **Generate**.     7. Select **Keep it**.   **NOTE:** Do not send the reply, as you may wish to re-use this email thread for future demos. |

## Copilot in Word (length: 3-5 minutes)

| **What to say** | **What to do** |
| --- | --- |
| Now let me show you what Copilot can do in Microsoft Word.  This is a transcript of the latest Microsoft earnings call. This is about 50 pages of dense discussion full of detailed analysis and financial analysis on complex topics.  First, let’s get Copilot to summarize this document. I want to understand what the main points are and who is speaking.  *<talk about the response>*  Let’s ask a more specific question about where Microsoft has seen the biggest revenue improvements.  *<talk about the response>*  Now let’s see if Copilot can digest this information and put it into a bit of a different form factor, an FAQ.  *<talk about the response>*  Based on the document, Copilot is making decisions about what information it thinks readers are most likely to ask about. This can really shorten the time and effort required to parse a big document like this and make sense of it. | * + 1. Switch to the tab with Microsoft Word open.     2. At the top right, select **Copilot**.      * + 1. In the **Ask me anything about this document** field, copy and paste the prompt or type: *Summarize this document.*     2. Select **Send**.     3. In the **Ask me anything about this document** field, copy and paste the prompt or type: *Based on the document, how did AI impact Microsoft's earnings this year?*     4. Select **Send**.     5. In the **Ask me anything about this document** field, copy and paste the prompt or type: *Copilot generate a FAQ based on this document.*     6. Select **Send**. |
| **Conclusion**  We started this session by showing you Copilot on the web with Commercial Data Protection.  Then we showed you how you can ground this in external data and in your work data through the Microsoft graph.  Now we’ve shown how, with Copilot, you’re able to take that general reasoning engine we discussed earlier and apply it to the business context to get answers solve problems.  Now we’re going to show you how you can put it to work by creating your own Copilots on your own data. |  |

## Copilot Studio (length: 2-5 minutes)

| **What to say** | **What to do** |
| --- | --- |
| Copilot is amazing in Microsoft 365 apps. But the real power comes when you start putting Copilot to work in the context of your own business.  This is Copilot Studio. It’s a low-code way to create your own AI-infused solutions. I’m going to show you how easy it is to start creating your own Copilots on your own data.  I’m going to show you how you could create your own Copilot based on your own data with just a few clicks.  I’ll use the Microsoft web site as my grounding data, specifically the Microsoft Surface site. This could be basically any data source—a SharePoint site, an external data source, or even your proprietary internal systems.  Now I’ll make a simple customization. Let’s change the message that Copilot gives the user while it’s waiting for a prompt.  When I’m done, I’ll publish it for everyone to see.  I’ve just created a new Copilot based on the GPT 4 large language mode and grounded it in the Microsoft.com website.  It’s a simple concept but it’s very powerful.  Here’s the demo web site for this Copilot. Let’s ask it about the latest Surface Pro. Now the Copilot will go through the Microsoft web site and compose a response.  *<talk about the response>*  It gives me an answer based on the grounded data. | * + 1. Switch to the browser window with the **Copilot Studio** simulation open.     2. Select the **Copilot name** text box.     3. Select the **Enter website** text box.     4. Select **Create**.     5. In the left navigation, select **Topics**.     6. In the **Topics** pane, select the **System** tab.     7. Select **Conversation start**.     8. In the message component, select the text box.     9. Select the text box again.     10. In the top right, select **Save**.     11. In the left navigation, select **Publish**.     12. Select the **Publish** button.     13. Select **Publish**.     14. In the left navigation, select **Copilots**.     15. Select **Copilot for Microsoft.com**.     16. In the top menu, select **Go to website**.     17. At the lower right, select the **Type your message** text box.     18. Select the **Submit** button. |

## Conclusion

| **What to say** | **What to do** |
| --- | --- |
| Today we’ve seen the power of Copilot acting as a personal assistant, reasoning on grounded data, applying different skill sets, helping you summarize and understand data and solve problems.  We extend that through Microsoft 365 applications, putting that power in the context of the work you do every day.  Finally, we’ve shown you how you can start putting Copilot to work creating solutions in your own environment.  And all this is built on our enterprise-grade infrastructure, so you get the power, flexibility, and security of the Microsoft platform. | No click steps |