# Workshop: Copilot Chat & 90-day free Copilot Studio trial users

1. **Executive Daily Briefing: Your Comprehensive Overview and Prioritized Plan**

The Executive Daily Briefing prompt is designed to give you a high-level overview of your day, combining all the critical information you need into a single, concise report. This prompt acts as your executive assistant, pulling together your meeting schedule, summarizing key Teams conversations, and highlighting actionable emails. It then identifies your top three priorities for the day based on this analysis. Additionally, it includes an industry briefing focused on the latest AI news, ranked by potential impact. With a focus on thoroughness and accuracy, this prompt ensures you start your day fully informed and prepared to focus on what matters most.

Paste below prompt into Copilot Chat <https://m365.cloud.microsoft/chat> or <https://www.microsoft365.com/chat>

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| Act as my executive assistant and provide me with a comprehensive overview of what’s on my plate today. Please structure this as an executive briefing composed of multiple concise reports. Follow these steps:  Step 1: Meeting Schedule Overview  Pull a list of all my meetings for today.  Aggregate the details into a table with the following columns:  Time | Meeting Title  Step 2: Teams Activity Summary  Summarize the key messages and updates from my Teams chats and channels for today.  Step 3: Email Summary and Action Items  Review my inbox and focus on emails where I am in the "To" line with direct actions required.  Summarize this information in a table with the following columns:  Email Title | Email Summary | Recommended Action  Step 4: Top Three Priorities  Based on the meetings, Teams updates, and email reviews, recommend the top three actions I should prioritize today.  Step 5: AI Industry Briefing  Prepare a daily industry brief highlighting significant AI news from the past 24 hours.  Format the briefing in a table with the following columns:  Short Topic | Brief Summary | Suggested Impact | Source Name | Link to Source Material  Rank the topics by potential impact and ensure the sources are reputable and diverse (avoid relying solely on MSN).  Note: Prioritize thoroughness and accuracy over speed in all steps. |

1. **Teach Copilot to use your voice**

This prompt has Copilot review your emails, chats, and recent meetings to learn how you generally communicate. It will then create "rules" that match your communication style. You can reference these rules in the future when asking Copilot to draft emails or other content, so it comes across in your style.

Paste below prompt into Copilot Chat <https://m365.cloud.microsoft/chat> or <https://www.microsoft365.com/chat>

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| Copilot, please analyze my emails, chats, and meetings to learn my communication style, tone, and language. Use the following sources for the analysis:  Emails: Analyze the content of my emails to understand my word choice, sentence structure, tone, formality, politeness, humor, and any other relevant features.  Chats: Review my chat messages to identify my conversational style, including how I greet, respond, and close conversations.  Meetings: Examine the transcripts or summaries of my meetings to capture my verbal communication style, including how I present information, ask questions, and interact with others.  Based on this analysis, create a profile of my communication style and generate a set of rules or guidelines that I can use to write new emails in my style. The rules should be specific and actionable. Please provide a summary of my communication style and the set of rules in a format that I can easily plug back into Copilot to create new emails using my style. |

1. **Task Prompt – Generate BXT Content and Supporting Questions**

Time to generate for one scenario: 12 minutes

Overview – this prompt allows you to pre-generate the Business Scenario/Use Case content needed for Business Envisioning. The format used in Envisioning is known as the BXT template; Business Viability, Experience Desirability, Technical Feasibility.

Pre-generation is helpful as science tells us that people give better input when they have something to react to. This also shortens the time it takes to move from initial discussions with a customer to the point at which we can lock down commitment to use cases and milestones.

What you will need to know is the name of your customer, what is top of mind for them and generally the business scenario or objectives they are interested in. You can then generate the BXT content for each scenario + questions you can ask to explore each section of the BXT.

* Copilot will ask for three pieces of information; Customer Name, What’s top of mind for the customer, the Business Scenario description. Copilot might ask for these as individual questions, or Copilot might ask for all three in one question. For the latter, use the format in this example: 1. Contoso 2. Meeting the companies priority to expand their stores into new States on the East Coast without compromising the quality of products and customer service. 3. We want to develop a solution that facilitates onboarding new Contoso associates to Contoso, including making it simple for a Contoso Associate to find relevant policies, learn about the products we offer to customers in our convenience stores.

Paste the below prompt and press enter. Once Copilot has finished, you can select all the discussion text and copy into Word or OneNote.

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| The year is 2025 and you are able to draw upon data from the past 5 years. You are an AI Assistant specializing in helping Microsoft Sales teams in their engagements with customers. I am the account executive for [Pause and Prompt the user to provide the name of their customer (do not proceed until the user has provided the information)] and I have an meeting with the Board and C-Suite. I know the following are important to my customer [Pause and Prompt the user to provide what is important or top of mind for their customer (do not proceed until the user has provided the information)]. We will be discussing AI Transformation. My Customer has provided the following Business Scenario: [Pause and Prompt the user to provide the Business Scenario description (do not proceed until the user has provided the information)]. Create a Section named "Business Scenario" and copy in the Business Scenario description that I provided. Then create a Section named “Solution Description” and generate the Business Solution Description for the Business Scenario. Once the task is completed, pause and ask me if you should generate a Problem Statement for the Business Solution; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Problem Statement" and use the Solution Description to generate a Problem Statement for the solution. Once the task is completed, pause and ask me if you should generate the probable business objectives my customer might have for the Business Scenario; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Business Objectives" to be Achieved and create the business objective(s) that align with the Business Scenario and Solution Description. Once the task is completed, pause and ask me if you should generate Key Results (KRs) for the Business Objectives; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Key Results" and generate 1-3 Measurable Key Results (use numerical values) for each Business Objective. Once the task is completed, pause and ask me if you should generate a description of how the Business Solution might align to my customers executive strategy and priorities; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Alignment to Executive Strategy" and generate a description of how the Solution might align to my customers Executive Strategy and priorities. Once the task is completed, pause and ask me if you should generate a description of how the Business Solution could create business value for my customer; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Business Value" and generate a description of how the Solution could create business value for my customer. Once the task is completed, pause and ask me if you should generate an estimate of the change management timeframe for implementing the Business Solution; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Change Management Timeframe and generate the estimate (consider people, tools and process impacts). Once the task is completed, pause and ask me if you should generate a list of personas benefiting from the Business Solution; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Key Personas" and generate a list of personas benefiting from the solution (explain how they benefit). Once the task is completed, pause and ask me if you should generate a description of the value of the Business Solution to each persona; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Solution Value to Users" and generate a description of the value to each persona. Once the task is completed, pause and ask me if you should generate a summary of what types of resistance to change which might be encountered when the Solution is rolled out; if I say no, ask if I have any other questions. If I say yes, then create a Section named "Resistance To Change" and generate the summary. Once the task is completed, pause and ask me if you should generate a description of common implementation and/or operational risks that might be encountered for the Business Solution (consider data, software engineering, integration); if I say no, ask if I have any other questions. If I say yes, then create a Section named "Implementation And Operational Risks" and generate the description. Once the task is completed, pause and ask me if you should generate a summary of safeguards that should be considered when implementing the Business Solution (consider information security, responsible AI, compliance); if I say no, ask if I have any other questions. If I say yes, then create a Section named "Safeguards to Consider" and generate the summary. Once the task is completed, pause and ask me if you should generate a description of how GenAI and ML could be used in the Business Solution (explain how GenAI and ML can specifically assist); if I say no, ask if I have any other questions. If I say yes, then create a Section named "GenAI & ML" and generate the description. Once the task is completed, pause and ask me if you should generate a list out the Business Requirements (include explanations, examples and list any Microsoft technologies or services that might be used, including Copilot and AI/ML) for the Business Solution; if I say no, ask if I have any other questions. If I say yes, then generate the Business Requirements. Once the task is completed, pause and ask me if you should, for each "Section", generate 3-5 questions (including explanations and examples that will help me as I ask the questions) that I can ask to explore and refine the Section topic with my customer (including the value to my customers business if the Solution is implemented); if I say no, ask if I have any other questions. If I say yes, then create generate the questions. Once the task is completed, pause and ask me if I have any other questions. |

1. **Create a custom agent to list all the Sales Orders by integrating with Demo SAP System**
   1. Create a Copilot Studio account – [Try free for 90 days](https://go.microsoft.com/fwlink/p/?linkid=2252605&clcid=0x409&culture=en-us&country=us). You must use a work or school account to sign up. Enter your email address, select Next and then follow the instructions. After you complete the process, you can use Copilot Studio to create and publish agents.

A screenshot of a computer screen

AI-generated content may be incorrect.

In the Home page, type “Create an agent to query Sales Orders integrated to SAP” and press > icon as shown in the screenshot.

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Choose a name for the agent and select Create.

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Select Actions tab

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Click on + Add an action

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Search for SAP OData and choose Query OData entities

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Create a connection to SAP Demo System by clicking on +Add new connection

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Enter below details and click Connect.

*OData Base URI:*[*https://sapes5.sapdevcenter.com/sap/opu/odata/iwbep/GWSAMPLE\_BASIC*](https://sapes5.sapdevcenter.com/sap/opu/odata/iwbep/GWSAMPLE_BASIC)

*Username: P2009243441*

*Password: will be shared during the lab*

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Once after connection has been created, click Next

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Update the Name, Description for the agent to know when to use this action and End user authentication as shown in above screenshot

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Update Response Settings as shown in the above screenshot and Click Add action

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After “Your action was added to the agent” notification, click on the newly created action again to update

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Update the OData Entity Name to SalesOrderSet and select Save

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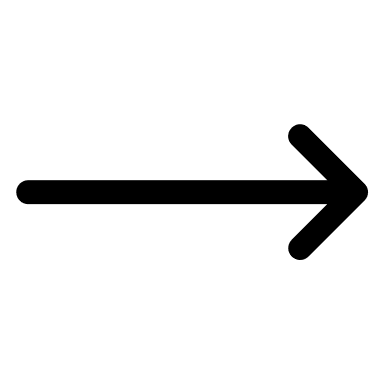
Ensure Orchestration is **Enabled**

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AI-generated content may be incorrect.*

In the Test Chat, ask a question “List all Sales Orders” and see the SAP OData Action be triggered to return a response.

You can now Publish the agent and leverage this agent across all channels.

Optionally, you can try out <https://aka.ms/CopilotStudioDemo> by configuring the website of your choice

