



# Level Up CSP Microsoft 365 and Copilot

In person series

Modern Work & Business Applications





# Introduction



# Earn the new CSP Copilot Badges in the digital or in person series!

Score 80% or higher on the knowledge check and earn your Level Up CSP Copilot badges!



**Level Up CSP Copilot Sales Badge:**  
[aka.ms/Level-UpSalesAssessment](https://aka.ms/Level-UpSalesAssessment)  
Access Code: XBXD-JDSA



**Level Up CSP Copilot Technical Badge:**  
[aka.ms/Level-UpTechnicalAssessment](https://aka.ms/Level-UpTechnicalAssessment)  
Access Code: FOCF-QJEK

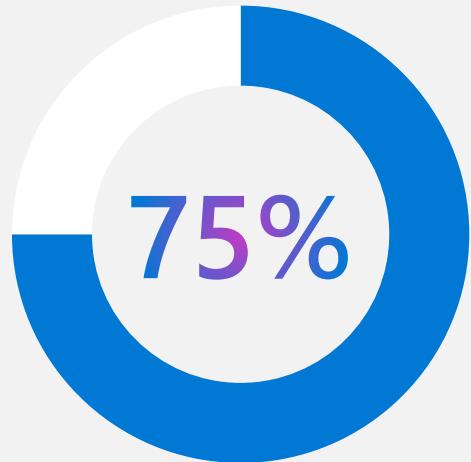
## Steps to access:

1. You must log in to access the training and then add your access code. If you have log in difficulties, please sign up and log in with new credentials.
2. Badges are delivered in the assessment tool if you score 80% or above. You will receive a Microsoft verified Copilot badge to share on LinkedIn.  
Please contact [support@get365ready.com](mailto:support@get365ready.com) if you have any questions.

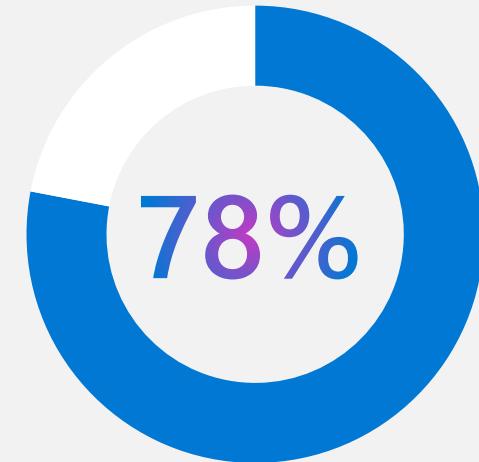
**87%**

of organizations believe AI will  
give them a **competitive edge**

## People are ready for AI at work

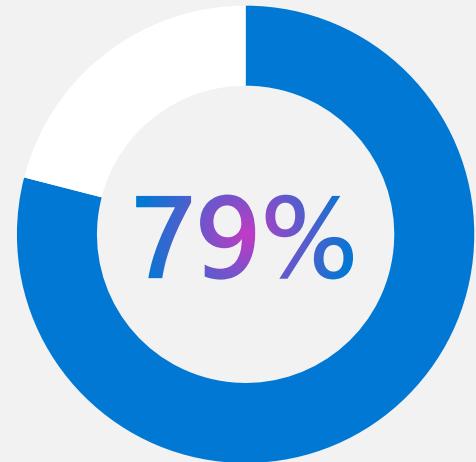


of knowledge workers use  
generative AI at work

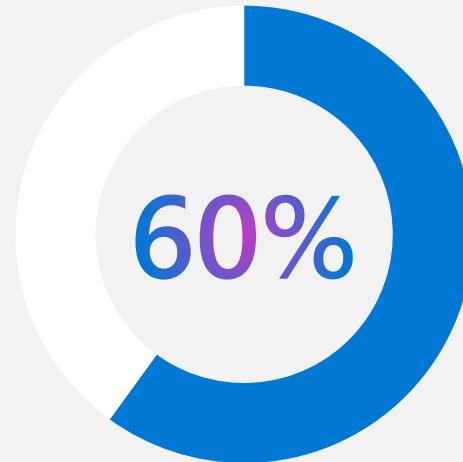


of AI users are bringing  
their own AI to work

## AI is here



of leaders believe their company needs to adopt AI to stay competitive

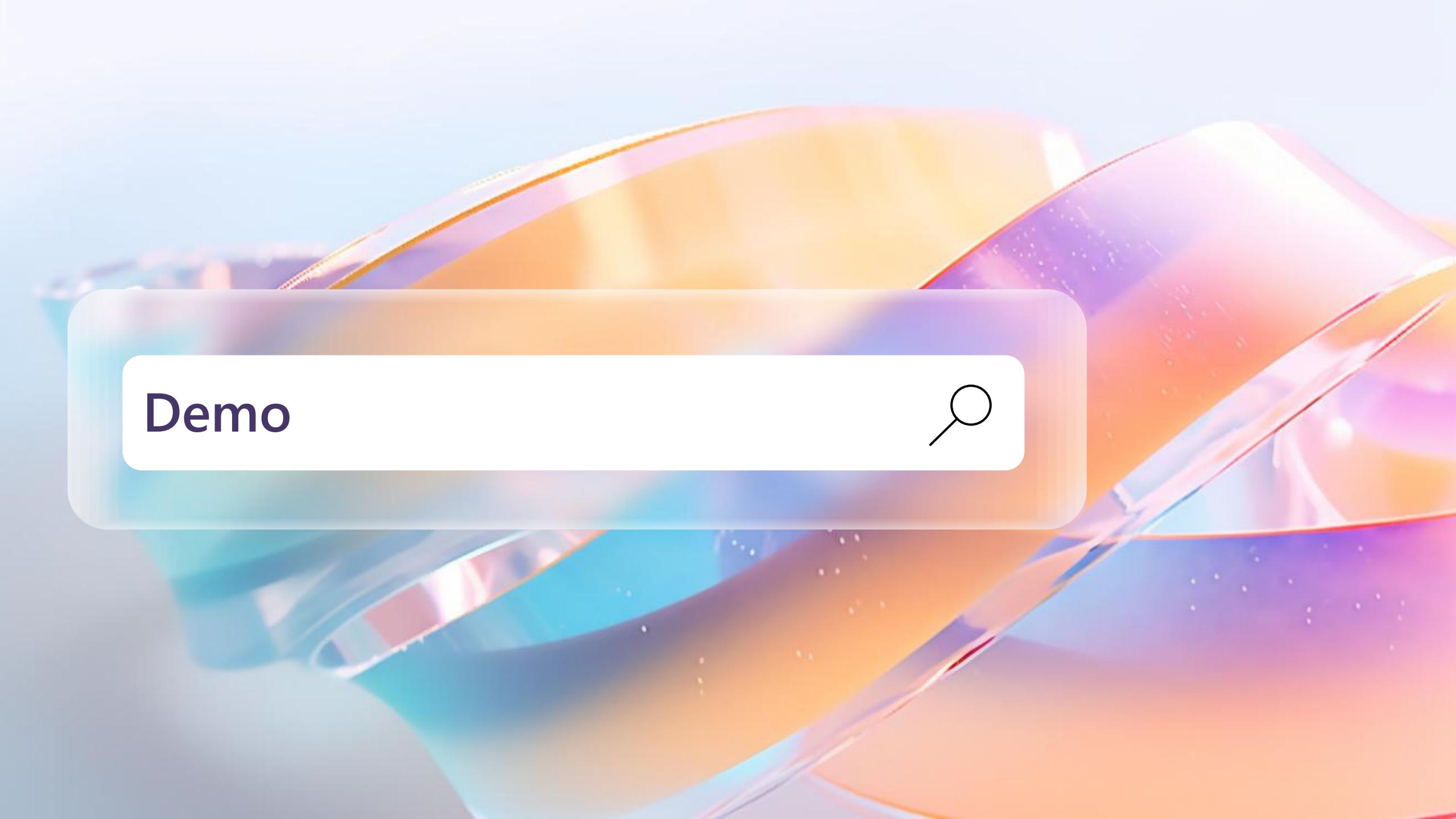


worry their organization lacks a plan and vision to implement AI

# ChatGPT



Generative Pre-trained Transformer



Demo



# ChatGPT

## Settings

X

### Improve the model for everyone



Allow your content to be used to train our models, which makes ChatGPT better for you and everyone who uses it. We take steps to protect your privacy. [Learn more.](#)

Others

\* Claude



Perplexity

Gemini

Demo



# AI Intro related to how Copilot works



01

Large Language  
Models and Deep  
Learning concepts



02

How Copilot for  
Microsoft 365  
actually works



03

With this context:  
why prompt  
engineering is so  
important

# Large Language Models (LLMs)



# What's a LLM

LLM, Large language model

Trained on gigantic corpus of data,  
billions of parameters

## Concepts

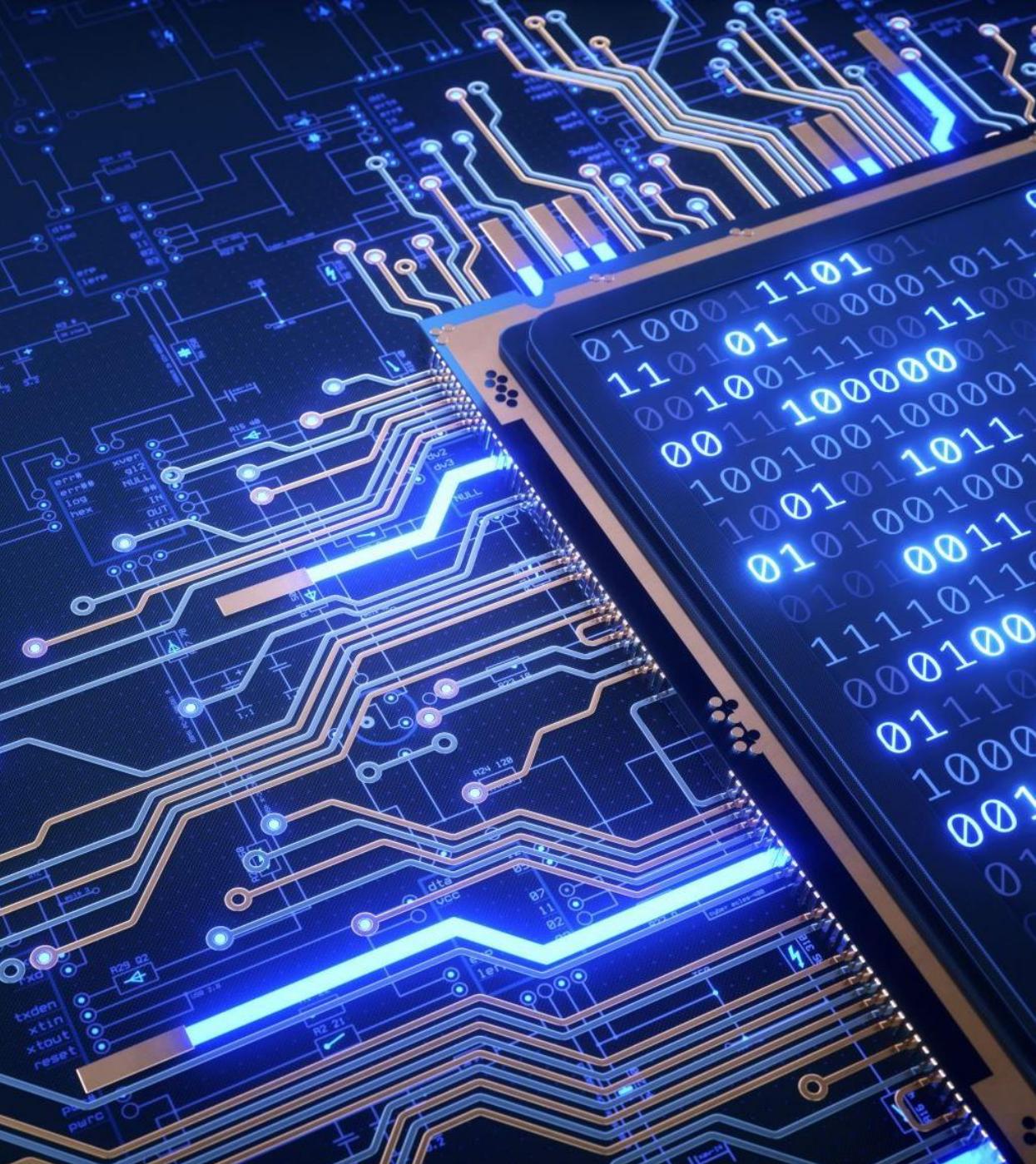
- Transformers
- Parameters
- Nodes

“Computes result” over “looking up facts”

Non-deterministic, even if you can control  
it somewhat

Input, uses natural language to interact

Understands many spoken languages



# LLM, parameters

Based on neural networks, layer of Nodes

A model that predicts the next word in a sequence of words

## Parameters

- Each Node has a weight (parameter), adjusts during training process
- Bias (parameter) also used
- Parameters = rough indicator of size and complexity
- More parameters = can learn more complex patterns



# LLM model types

BERT, RoBERTa, RoBERT, ALBERTA

T5

XLNet

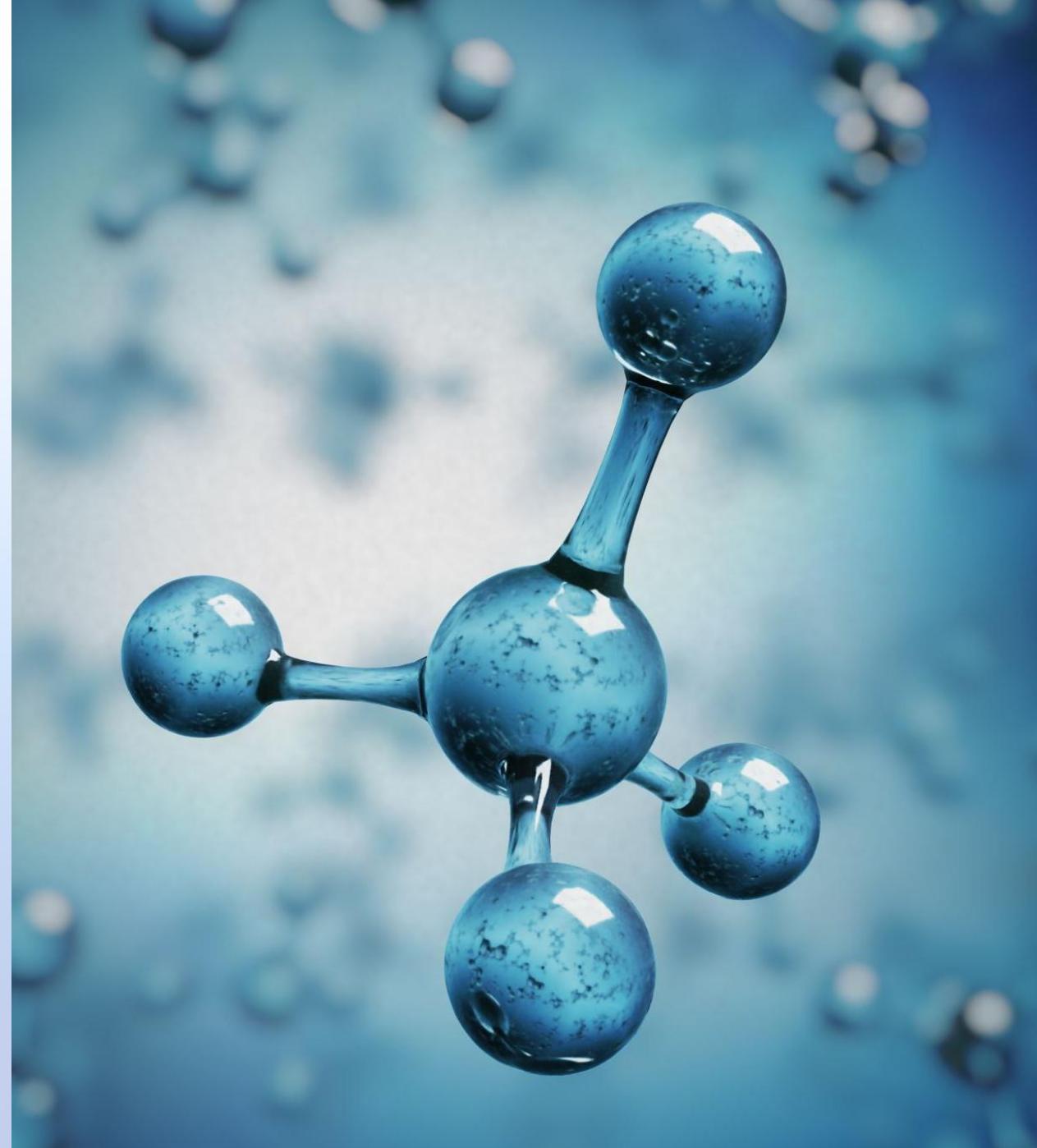
ELECTRA

LLAMA by Meta

GPT, Generative Pretrained Transformer

GPT series

- GPT-1, 117 million parameters
- GPT-2, 1.5 billion parameters
- GPT-3, 175 billion parameters
- GPT-4 176 trillion parameters



# Chat GPT

Type a prompt:  
text response

Advanced version:  
multi modal response

The image displays two views of the ChatGPT interface. On the left, a mobile phone screen shows a conversation where a user asks for brunch suggestions. The AI responds with a list of 10 items, ranging from fresh fruit salad to freshly squeezed orange juice. It also suggests these options complement a frittata and mimosas. On the right, a desktop browser window shows a user asking for feedback on a short story. The AI provides a detailed response, praising the writing for its engagement and descriptive language, while also identifying areas for improvement such as punctuation, clarity, and narrative immersion. The overall theme is the multi-modal response capability of ChatGPT.

Me  
I am hosting my friends for brunch on Sunday and they are asking what to bring. Could you give me a list of suggestions? I'll be making a frittata and mimosas.

ChatGPT  
Certainly! Here's a list of brunch items your friends could bring:

1. Fresh fruit salad or a fruit platter
2. Pastries or croissants
3. Bagels with cream cheese and smoked salmon
4. Yogurt with granola and berries
5. Breakfast potatoes or hash browns
6. Sausages or bacon
7. Quiches or savory tarts
8. Pancakes or waffles with syrup
9. Coffee or tea
10. Freshly squeezed orange juice

These options can complement your frittata and mimosas nicely and provide a variety of flavors for your brunch gathering. ●

send a message... NEW

ChatGPT 3.5

was quiet for a moment and then he started again.

Can you give me feedback on my short story?

ChatGPT

Your writing is engaging and provides insight into the protagonist's feelings and past experiences. You effectively use descriptive language to paint a picture of the setting and the characters. The dialogue between the protagonist and their father feels natural and adds depth to the story. Additionally, your writing style is clear and easy to follow. However, there are a few areas where you could improve:

1. Punctuation and grammar: There are some minor punctuation and grammar issues throughout the text that could be polished for a smoother reading experience.
2. Clarity: Some parts of the story could benefit from a bit more clarity or elaboration, especially in the transition between scenes and the protagonist's internal thoughts.
3. Show, don't tell: While you do a good job of describing the physical setting, there are moments where you tell the reader about the character's feelings and past experiences. Consider showing these emotions through actions, dialogue, or internal monologue to make the narrative more immersive.

Overall, your writing is well-crafted and engaging, with room for minor improvements in mechanics and clarity. Keep up the good work! ●

Message ChatGPT...

ChatGPT can make mistakes. Consider checking important information.

# Fine-tuning LLMs for Specialized Tasks

LLMs can be fine-tuned on specific datasets to perform specialized tasks

Fine-tuning process allows LLMs to become more accurate in domain-specific areas



# What is GitHub Copilot?

The brand name of GitHub's AI for developers

Available for many editors and as an extension  
for VS Code

Currently powered by OpenAI's Codex model

## COST

- 10\$ per month (first 2 months free)
- Free for verified students, teachers, and maintainers  
of large open-source projects ([link](#))

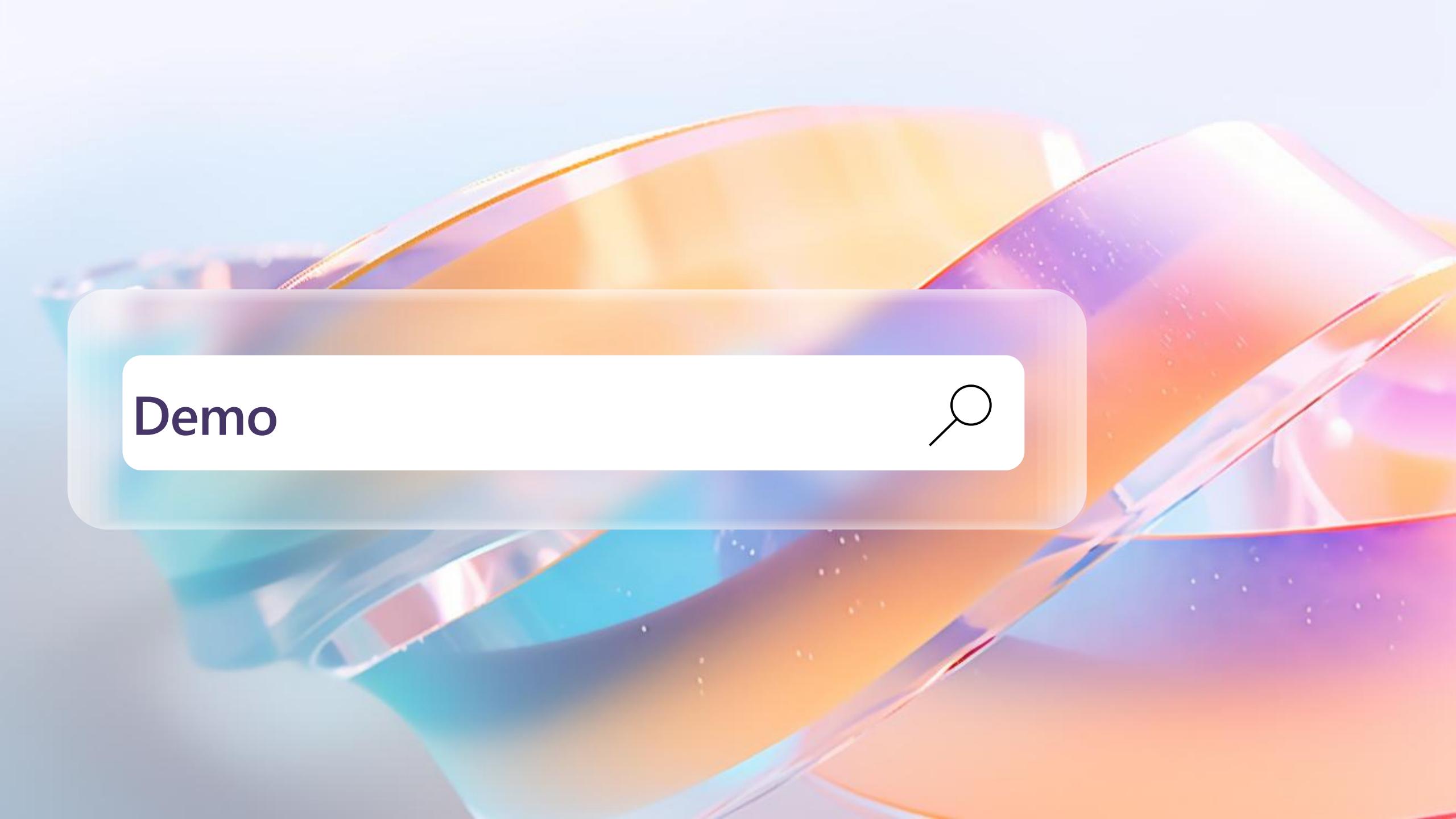


**GitHub Copilot**

GitHub ⚡ | 3,451,383 installs | ★★★★☆ (804) | Free Trial

Your AI pair programmer

[Install](#) [Trouble Installing?](#)



Demo



# The subtleties of prompting (prompt design)

Prompt

 Copy

Please give me the history of humans.

Prompt

 Copy

Please give me the history of humans in 3 sentences.

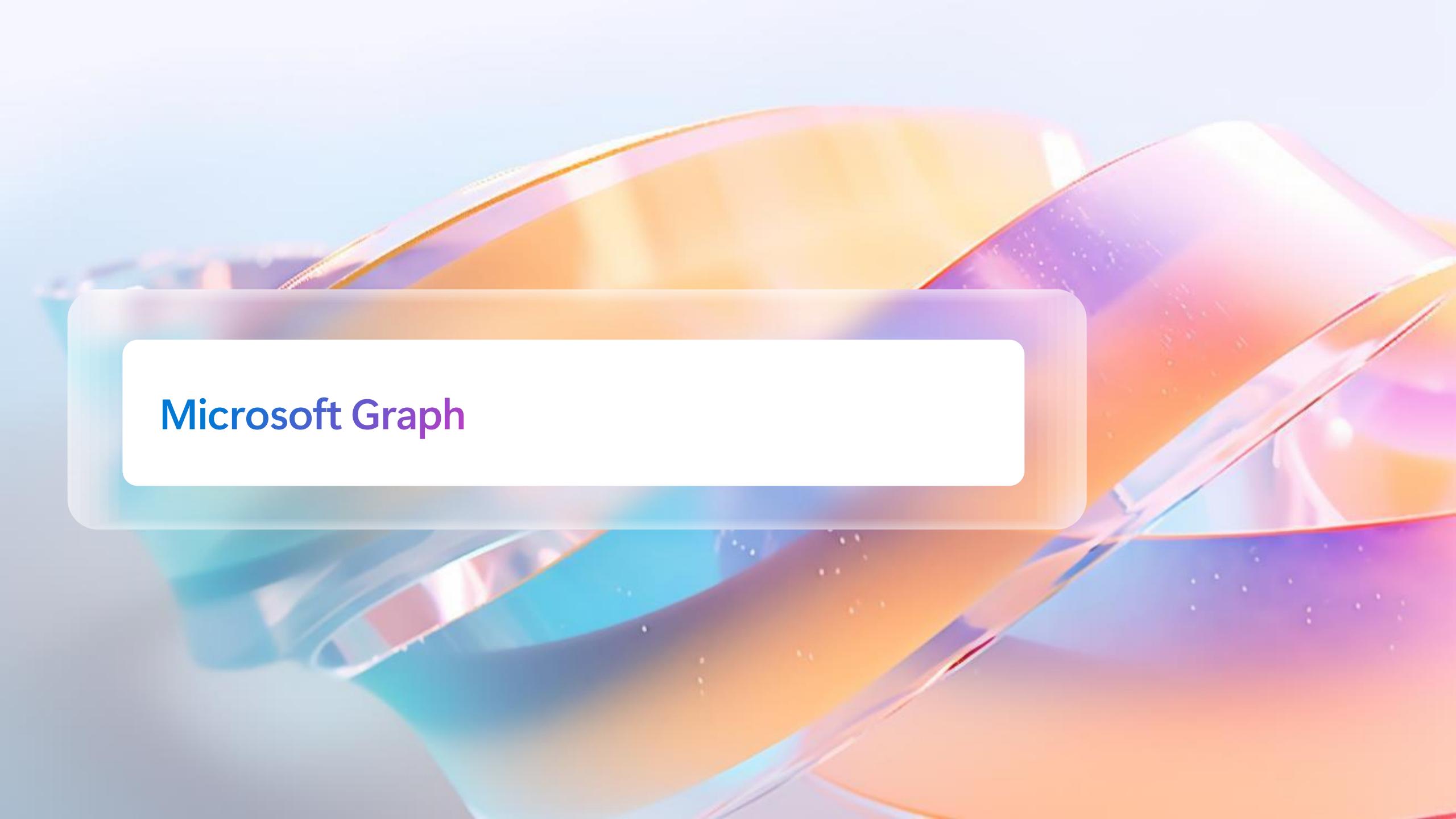
# Why is prompt engineering important?

Prompt engineering is a critical skill for anyone working with LLM AI models

A good prompt produces the desired outputs

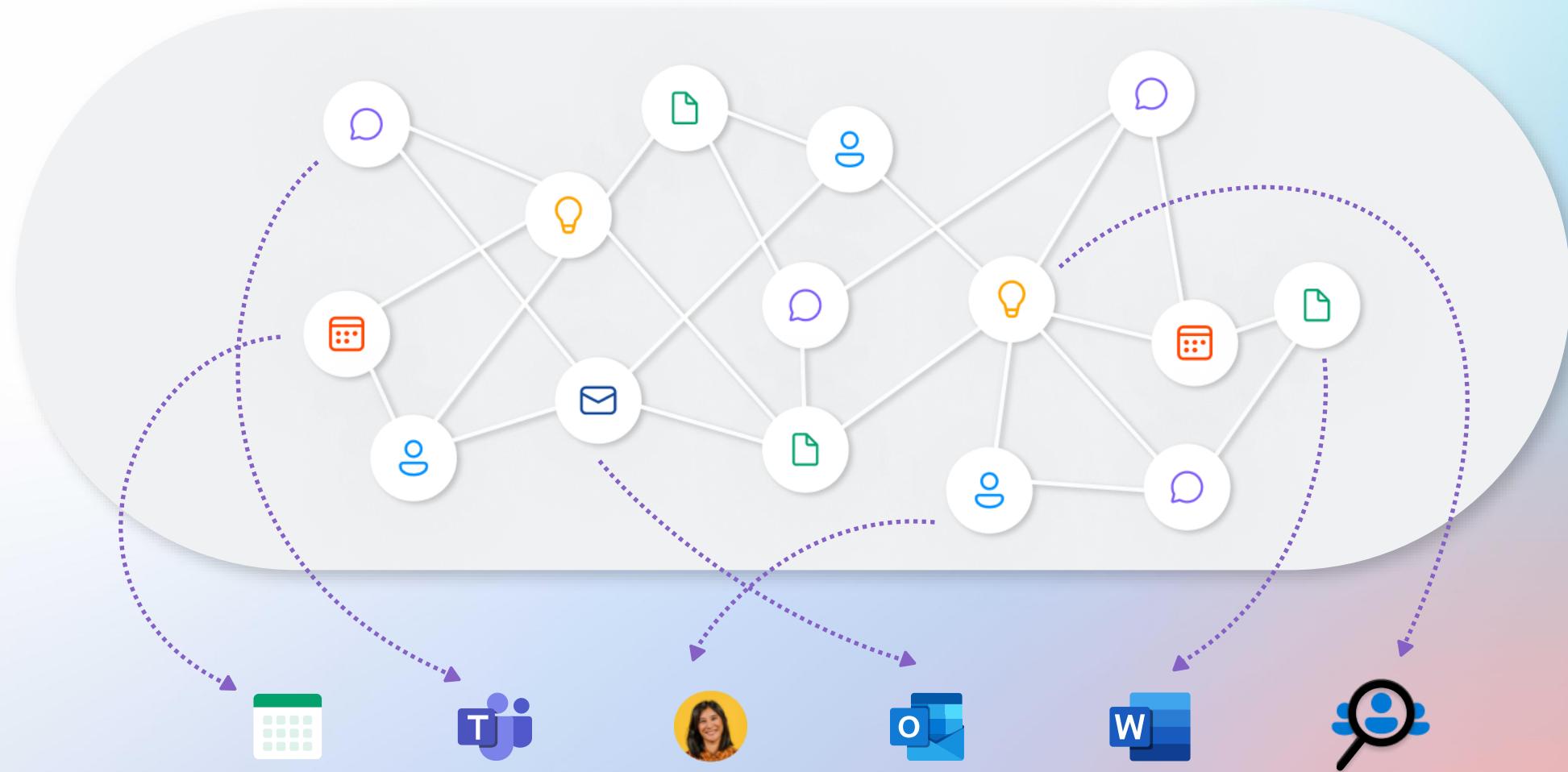
Improvements you can perform to make the results more predictable:

- Make the prompt more specific
- Add structure to the output with formatting
- Provide examples with few-shot prompting
- Tell the AI what to do to avoid doing something wrong
- Provide context to the AI
- Using message roles in chat completion prompts
- Give your AI words of encouragement



**Microsoft Graph**

# Microsoft Graph



Knowledge & Insights via Microsoft Search

Embeddings for all Microsoft 365 entities

# Retrieval Augmented Generation

# Retrieval Augmented Generation

Search finds grounding data

We don't "train" on your tenant data



User prompt + Grounding data + Chat history + System prompt

# Copilot



Your AI assistant



# Microsoft Copilot for business functions

Your AI assistant for [business functions]

Copilot for Microsoft 365



Role-based extensions

Natural Language



Large Language  
Models (LLMs)



Web + Graph + Dataverse  
or 3P CRM/ERP grounding



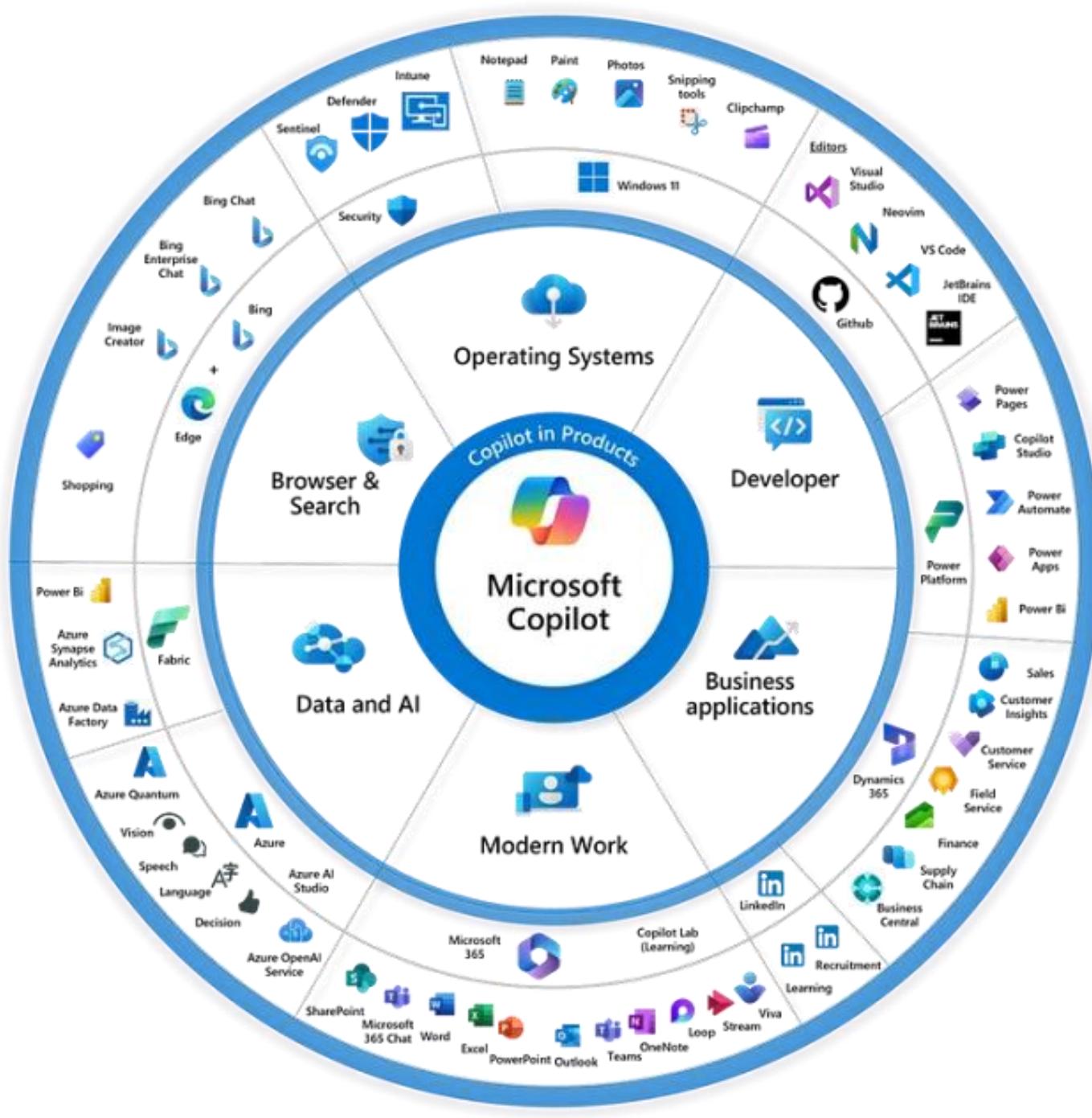
Enterprise-grade  
data protection



Microsoft 365 + Dynamics  
365 + 3<sup>rd</sup>-party apps



Copilot  
Studio





# The Extended Copilot Family

Azure & AI

Copilot

OpenAI



Power  
Platform



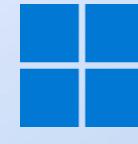
D365



M365



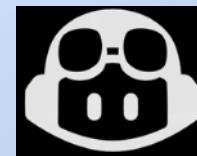
Security



Windows



Bing



GitHub



Azure OpenAI  
Service



Cognitive  
Services

# Good morning, Robert



Copilot Daily

Boeing machinists vote on new contract, and more

 Listen



Three plants for the beginning of a garden



Need a writing template?



Message Copilot



Sign in 

# Good morning, Robert



Copilot Daily

Boeing machinists vote on new contract, and more

 Listen



Three plants for the beginning of a garden



Need a writing template?



Create an account or sign in to keep all your conversations and to generate images

[Sign in](#)

Name ROBERT

Voice GROVE

Language EN

Theme NIGHT

About

[Privacy](#) [Terms](#) [FAQ](#)



Message Copilot





## Let's build an app. What should it do?

Collect RSVPs

Track sales leads

List inventory

Manage inspections

Use everyday words to describe what your app should collect, track, list, or manage ...



This feature uses generative AI. [See terms](#)

## Create your automation with Copilot

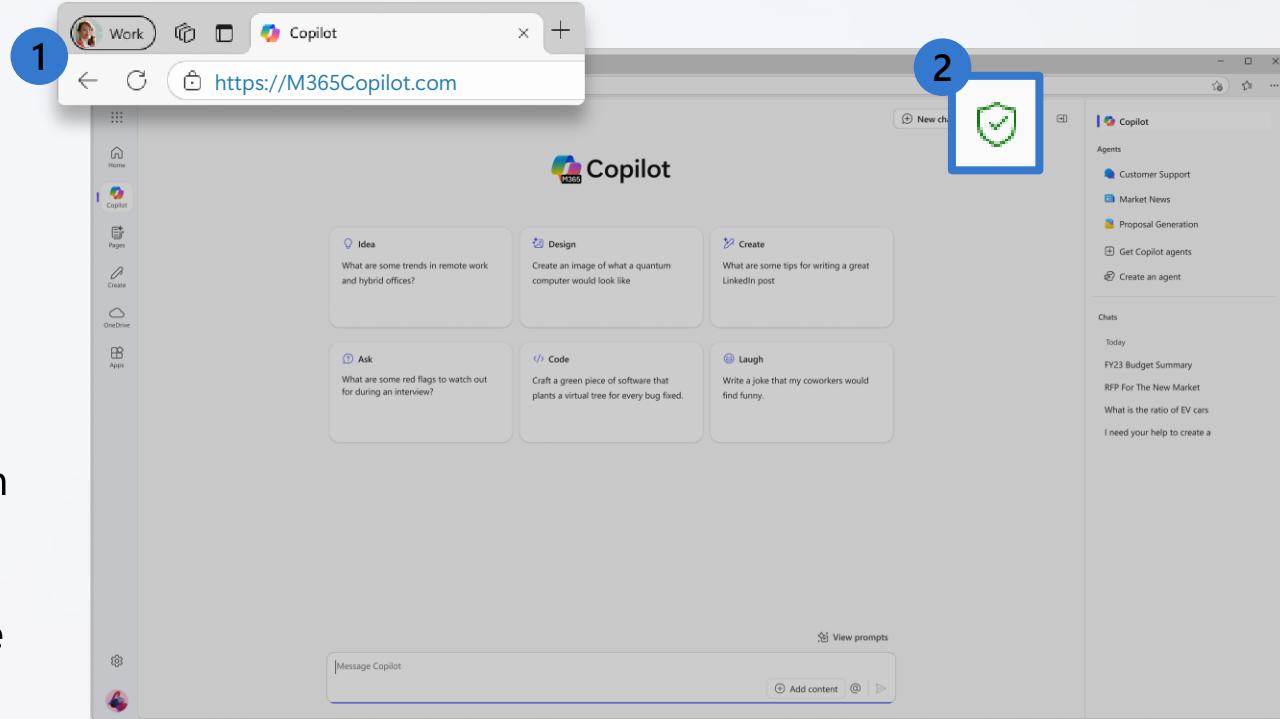
Describe in detail how you want your automation to work



# Sign in with your work account

- 1 Navigate to [M365Copilot.com](https://M365Copilot.com) on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



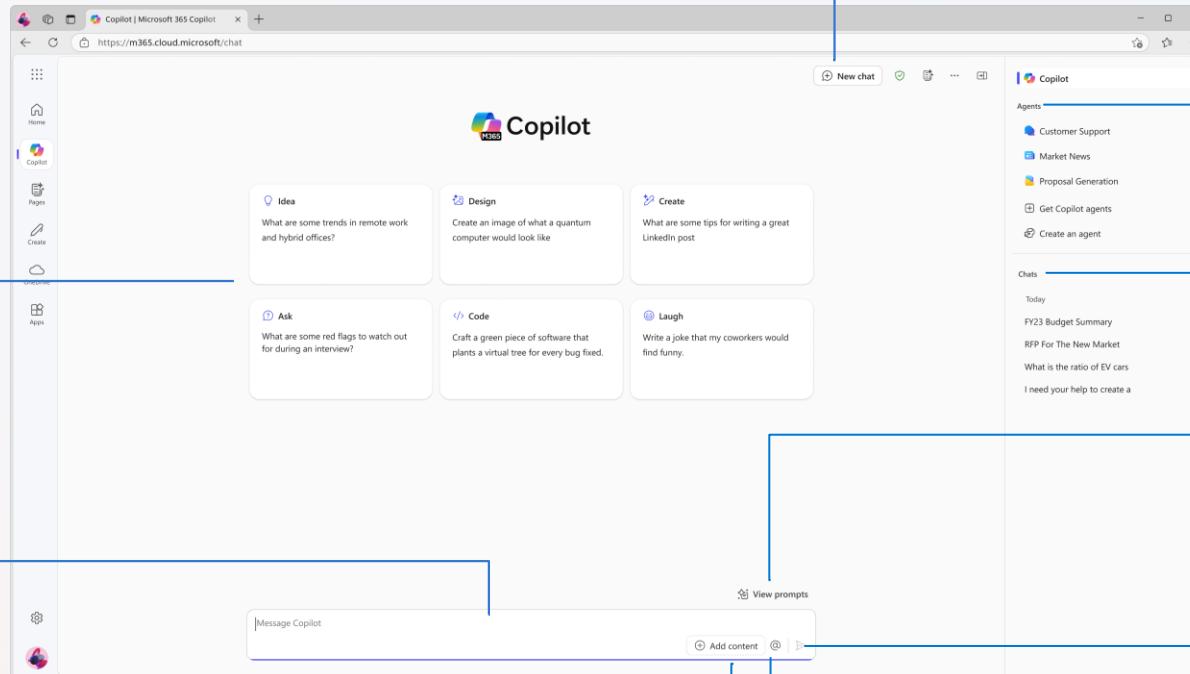
 If you are not signed in with your work account, Enterprise Data Protection does not apply.

# Get to know Copilot Chat

Start at

[M365Copilot.com](https://M365Copilot.com)

Here is a visual tour of Copilot Chat:



**Suggested prompts**

If you're not sure what to ask, try or modify a sample prompt!

**Prompt box**

Start your conversation here.

**Upload files**

If you'd like Copilot to source responses from information in specific files, add them here.

**Start a new chat button**

Clear your past chat and start a new conversation.

**Agents**

Use existing agents or create new ones<sup>1</sup>. Learn more about agents in [slide 17](#).

**Recent chats**

Return to a previous chat to continue the conversation

**Copilot Prompt Gallery**

View additional prompt suggestions, including saved prompts.

**Send your prompt!**

**Chat with an agent**

Add an agent to your Copilot prompt to chat with it.

# Introducing Copilot Chat



## Copilot Chat

Free AI chat with pay-as-you-go agents

Web Chat

Pages

Agents (pay-as-you go)

IT controls



## Microsoft 365 Copilot

Your AI assistant for work (\$)

- Copilot chat
- + Agents (included)
- + Personal Assistant
- + Advanced Management
- + Copilot Analytics

		<span style="color: blue;">●</span> Included	<span style="color: red;">▲</span> Included — Metered	Microsoft 365 Copilot Chat	Microsoft 365 Copilot
		Free + Consumption			\$30 pum
<b>Chat</b>	Copilot Chat – Web grounded (powered by GPT-4o)	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot Chat – Work grounded (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot Pages	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	File upload <sup>1</sup>	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Code Interpreter <sup>1</sup>	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Image generation <sup>1</sup>	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
<b>Agents<sup>2</sup></b>	Create agents using Copilot Studio <sup>3</sup> , including SharePoint agents	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Discover and pin agents	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Use agents grounded in Web data	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Use agents grounded in work data (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)		<span style="color: red;">▲</span>	<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Use agents that act independently using autonomous actions	<span style="color: red;">▲</span>		<span style="color: red;">▲</span>	<span style="color: red;">▲</span>
<b>Personal assistant</b>	Copilot reasons over personal work data (e.g., Outlook, OneDrive, Teams meeting transcripts and chats)	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot in Teams			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot in Outlook	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot in Word			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot in Excel			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot in PowerPoint			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot Actions				In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)				In preview
<b>Copilot Control System</b>	Enterprise Data Protection (EDP)	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	IT management controls	<span style="color: blue;">●</span>		<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Agent management			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	SharePoint Advanced Management			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Copilot Analytics to measure usage and adoption <sup>4</sup>			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>
	Pre-built reports and advanced analytics to measure ROI			<span style="color: blue;">●</span>	<span style="color: blue;">●</span>

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio: aka.ms/CopilotStudioCapabilities. 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.

# New: Microsoft 365 Copilot Chat



We secure your data at rest and in transit

You control your data

Your data is not used to train or enrich foundation models

You're protected against AI security and copyright risks



**Microsoft 365  
Copilot is built  
on trust**

# Top security and governance concerns about generative AI

## Data oversharing and data leaks

**80%**

of leaders cited  
leakage of sensitive  
data as their main  
concern<sup>1</sup>

## Identification of risky AI use

**41%**

of security leaders cited that  
the identification of risky users  
based on queries into AI was  
one of the top AI controls they  
want to implement<sup>2</sup>

## AI governance and risk visibility

**84%**

Want to feel more confident  
about managing and  
discovering data input into AI  
apps and tools<sup>2</sup>

1. First Annual Generative AI study: Business Rewards vs. Security Risks, Q3 2023, ISMG, N=400

2. [Microsoft data security index 2024 report](#)

# Tools to secure and govern your Copilot use



## Address oversharing concerns

- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot from processing sensitive files



## Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and Copilot interactions
- Dynamically apply security policies based on risky actions



## Govern AI use to meet regulations & policies

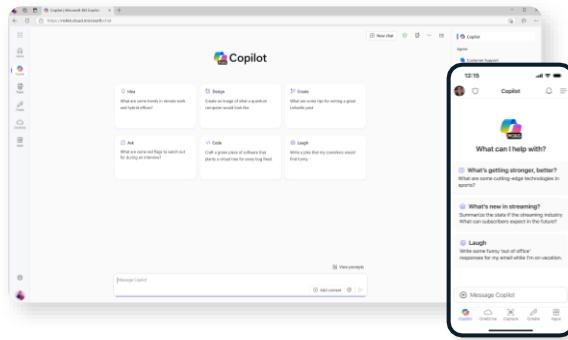
- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Secure

Govern



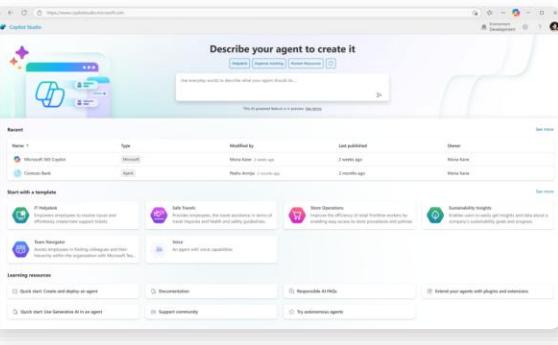
# Microsoft 365 Copilot Chat



## Chat

Free, secure AI chat –  
powered by GPT-4o and web grounded

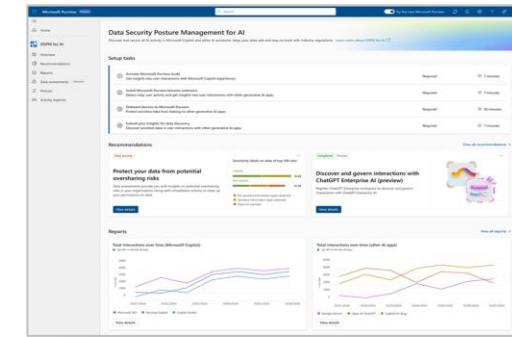
+



## Agents

Integrated into the chat experience and  
paid for on a consumption basis

+



## IT Controls

Enterprise Data Protection  
and agent management

# Copilot Chat demos

# Microsoft 365 Copilot Chat

## Enterprise-ready web chat

Copilot

What is the ratio of EV cars to EV chargers by region in the US for the past 3 years? Please show it in a table organized by region.

January 7, 2025 at 02:11 PM

Here's a table showing the ratio of electric vehicles (EVs) to EV chargers by region in the US for the past three years:

Region	Year	EVs per Charger
Northeast	2022	14:1
	2023	12:1
	2024	10:1
Midwest	2022	18:1
	2023	16:1
	2024	14:1
South	2022	20:1
	2023	18:1
	2024	15:1
West	2022	12:1
	2023	10:1
	2024	8:1

These ratios reflect the increasing number of EV chargers being installed across the country, particularly in regions like the West and Northeast, which have seen significant growth in EV infrastructure.

Is there anything else you'd like to know about EVs or their infrastructure?

Electric Vehicle Charging 5... Electric Vehicle Charging 1...

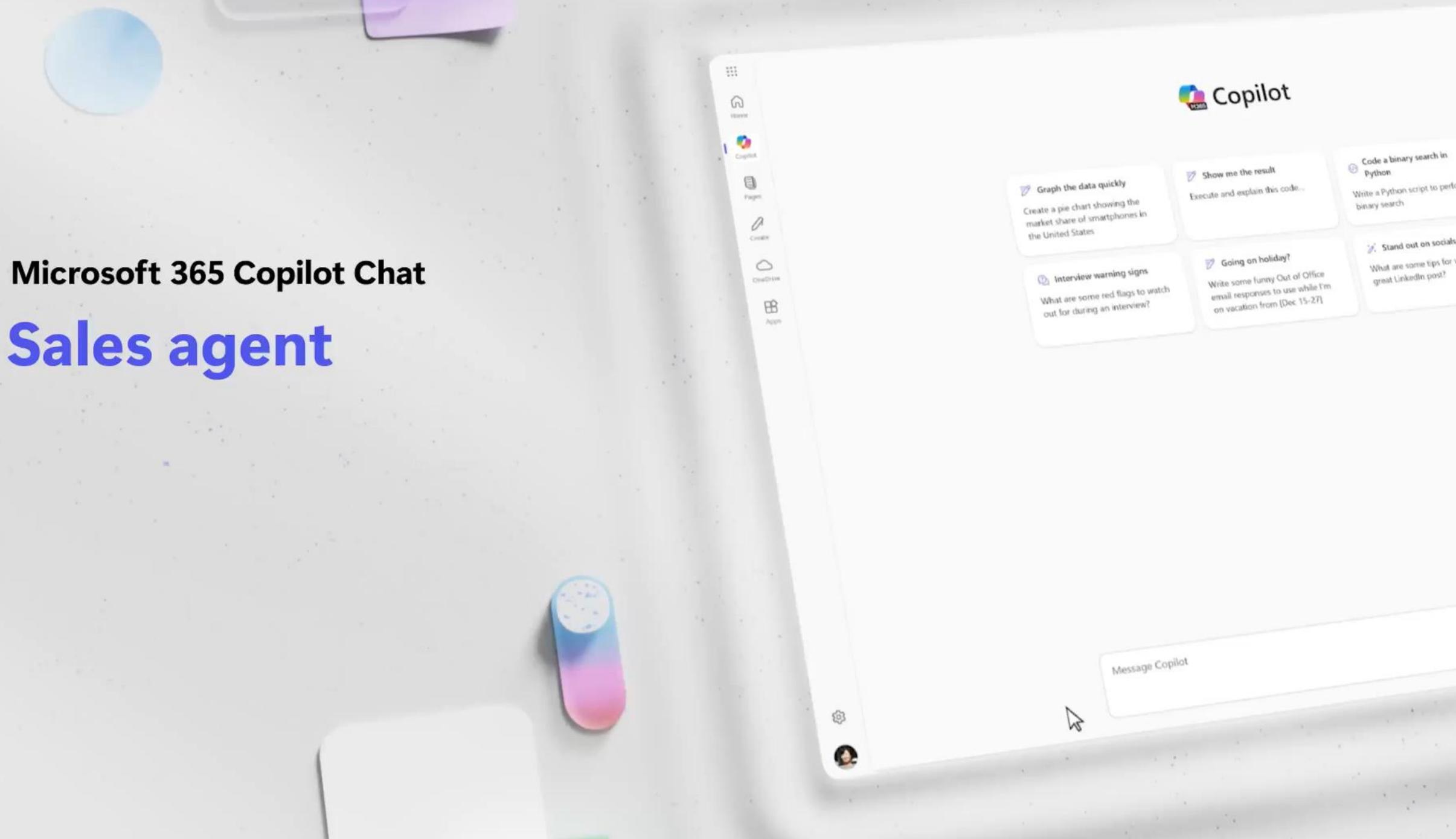
All generated content may be incorrect

Edit in Pages Copy

Ask me anything...

0 / 10000

What factors influence these ratios? How does this compare to other countries?



## Microsoft 365 Copilot Chat

# Customer service agent

A screenshot of a Microsoft 365 Copilot Chat window. The URL in the address bar is <https://www.m365.cloud.microsoft.chat>. The sidebar on the left includes icons for Home, Copilot (highlighted), Pages, Create, OneDrive, and Apps. The main chat area shows a message from a user: "Hi, I received an error code E-1023 on one of the chargers. Can you provide the right documentation and provide a step-by-step guide to so". A Copilot response follows: "Field Service agent All-generated content may be incorrect. Absolutely, let's get this sorted out. I'll look up the documentation for you. Error Code: E-1023 - Charger Overheating Step-by-Step Guide to Resolve the Issue:

1. Initial Inspection:
  - Check the charger for any visible signs of damage or obstruction.
  - Ensure the ventilation around the charger is not blocked.
2. Cooling System Check:
  - Inspect the cooling fans for any dust or debris. Clean them if necessary.
  - Verify that the cooling system is operational. Listen for the sound of the fans running.
3. Firmware Update:
  - Connect the charger to a computer using the provided USB cable.
  - Open the Boulder Innovations Charger Management Software.
  - Check for any available firmware updates and install them.
4. Restart and Test:
  - Reconnect the charger to the power source.
  - Restart the charger and monitor it for any error codes.
  - Test the charger with a vehicle to ensure it is functioning correctly.

" At the bottom of the chat window, there are links to "Boulder Innovations Charger Safety Guidelines" and "Cooling System Maintenance Manual". Action buttons include "Edit in Pages", "Copy", and "Message Copilot".

# Microsoft 365 Copilot Chat

## Agent builder in Copilot Chat

The screenshot shows a Microsoft Edge browser window with the URL <https://www.microsoft365.com/M365/Chat>. The page title is "Copilot Studio" and the subtitle is "Field Service agent". A "Describe" button is visible. The date and time are September 13, 2024, 10:12 AM. The main content area has the following text:

Hi, I'm here to help you build an agent.  
Describe what you'd like your agent to do, and I will help create a name, description, and instructions.  
Remember: You can change these at any time.

Your name is "Field Service agent" and you assist with on-site repair visits. You provide step-by-step instructions based on product knowledge.

Great! I'll use the name you provided.  
Where can I get information?  
<boulderinnovations.sharepoint.com/sites/productinformation>

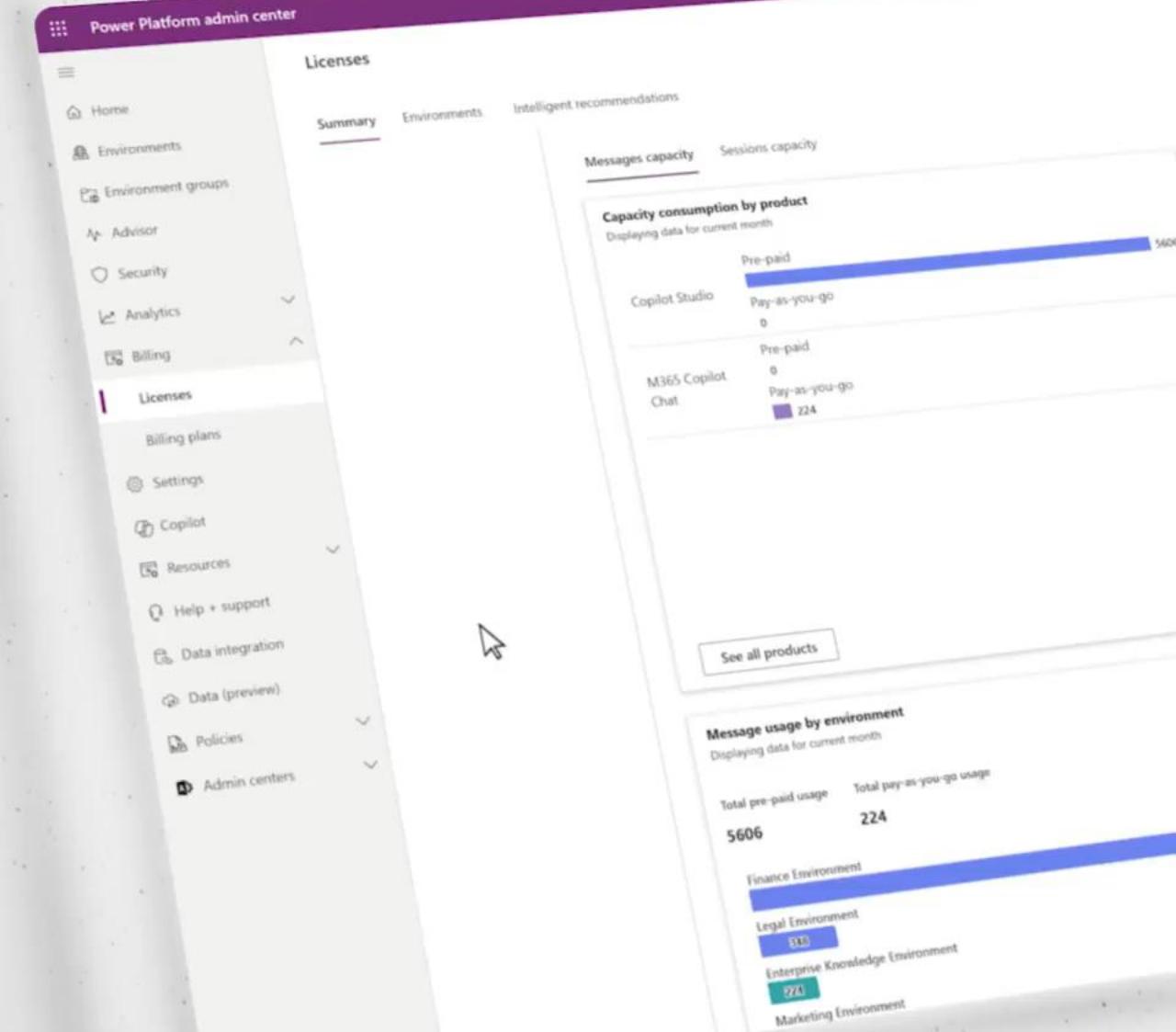
Great! Do you have any instructions for how your copilot should assist, for example a specific tone?

Describe how your agent should behave

The browser's address bar shows the URL: https://www.microsoft365.com/M365/Chat

## Microsoft 365 Copilot Chat

# Manage agents used in Copilot Chat





## Copilot Chat

Free, secure AI chat

### Chat

Web-grounded

Agents

IT controls



# Microsoft 365 Copilot

Your AI assistant for work

\$30

## Copilot Chat

Free, secure AI chat



## Chat

Work-grounded

## Copilot in M365 apps

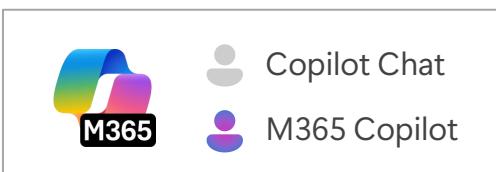
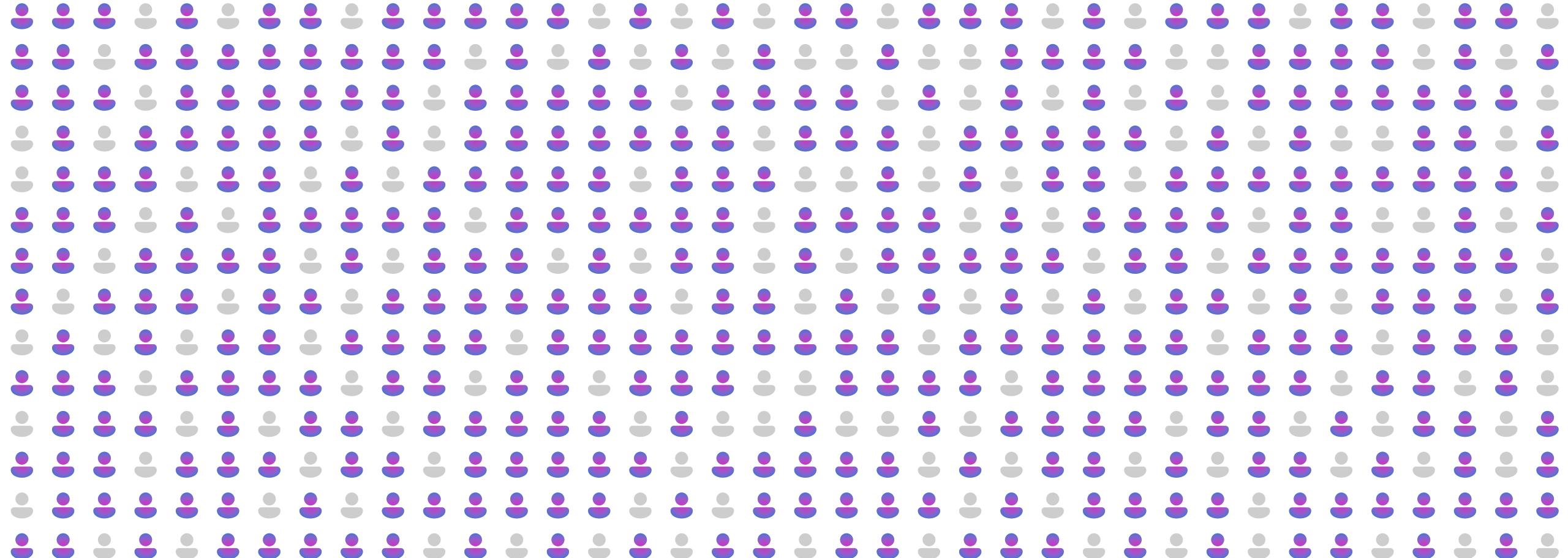
Teams, Outlook, Word, Excel, PowerPoint

## Agents

## Copilot Control System

## Copilot Analytics

# Scaling AI Transformation





Search



Work

Web

New chat



# Copilot

Your AI assistant for work

## Get calendar info

When's my next meeting with  
G Geoff Smith ?

## Stay informed

What's the latest from  
E Ella Marsden , organized by  
emails, chats, and files?

## Find the right questions

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

## Understand the main points

Give me a bulleted list of key  
points from file

## Bring your ideas to life

Design an image of a drawing of a  
database in colored pencil

## Express it visually

Create a Gumby-style clay model  
image of the polluted Earth

View prompts

Message Copilot

Add people, files, and more for better results

0 / 16000

@ |

# Extend the power of Copilot end-users with agents

Create Copilot agents from the apps you use every day



Build an agent directly from Microsoft 365 Copilot Chat and seamlessly integrate your organization's knowledge



Create agents in SharePoint based on select SharePoint files scoped for specific business needs

Native access to your Microsoft 365 data sources

Adheres to Microsoft 365 security, permissions, policies and admin controls

Grounded solely in your selected content

# Copilot Studio is the platform for Copilot agents

## Deploy and use Copilot agents in any system



### Microsoft 365

Add Copilot agents that give Copilot focused knowledge and new skills.



### Build and customize

your agents using  
Copilot Studio



### Your applications

Deploy Copilot agents to your website and other line of business applications.



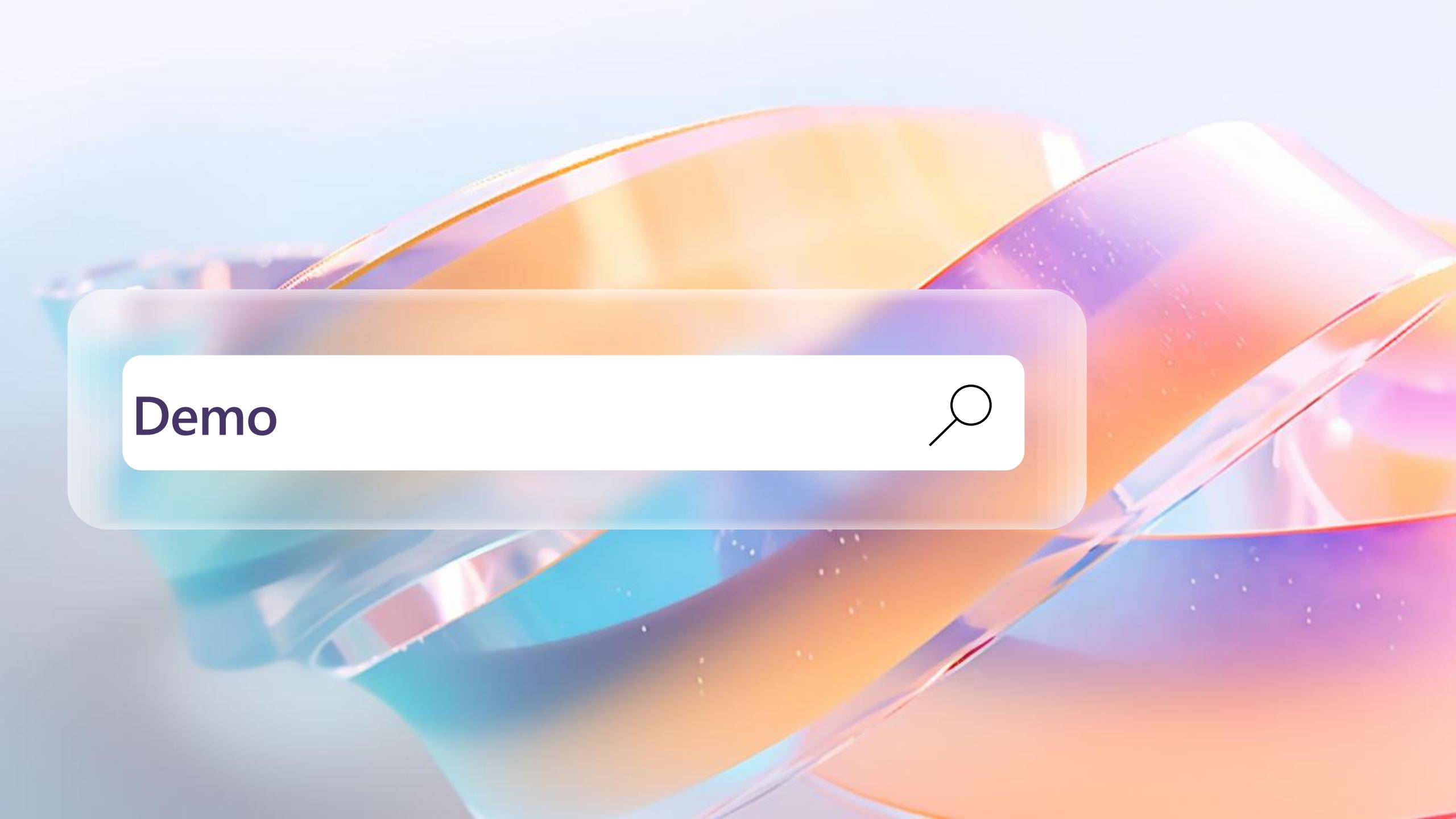
### Dynamics 365

Build Copilot agents that integrate and improve business processes.



### Power Platform

Extend Power Platform with Copilot agents that transform your low code apps and pages.



Demo



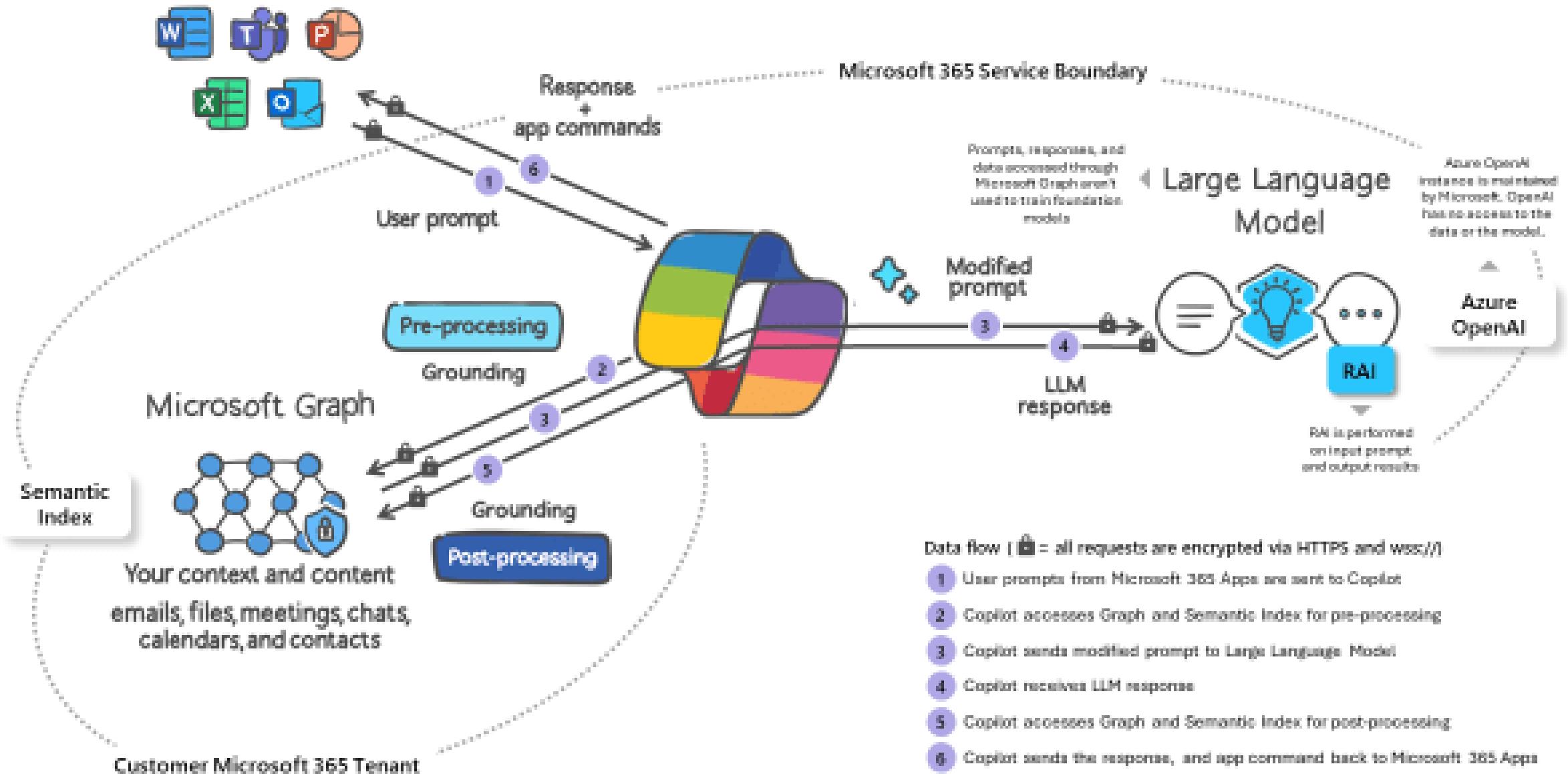
# Microsoft 365 Copilot



Your AI assistant at work

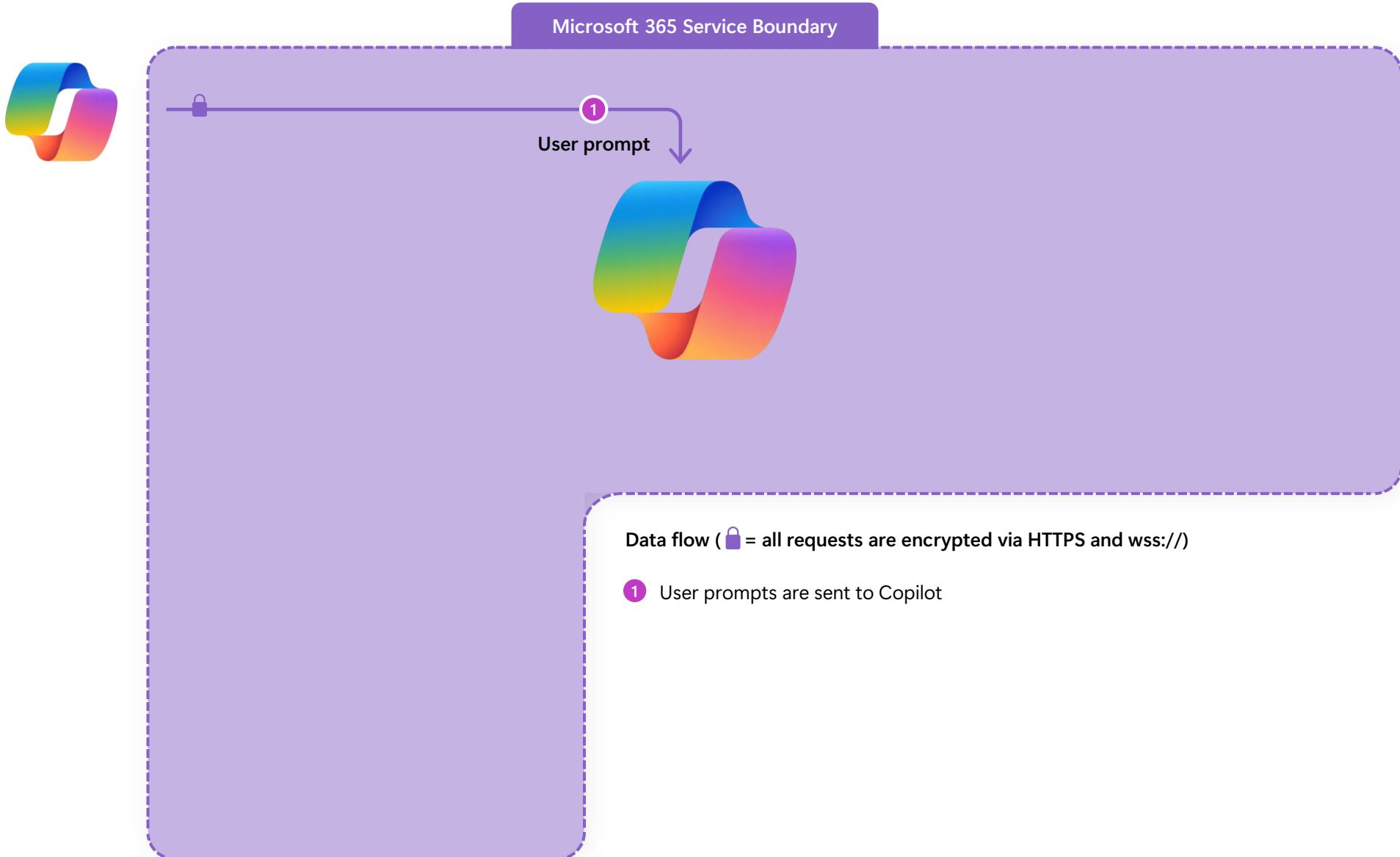
## Microsoft 365 Apps

# Microsoft 365 Copilot

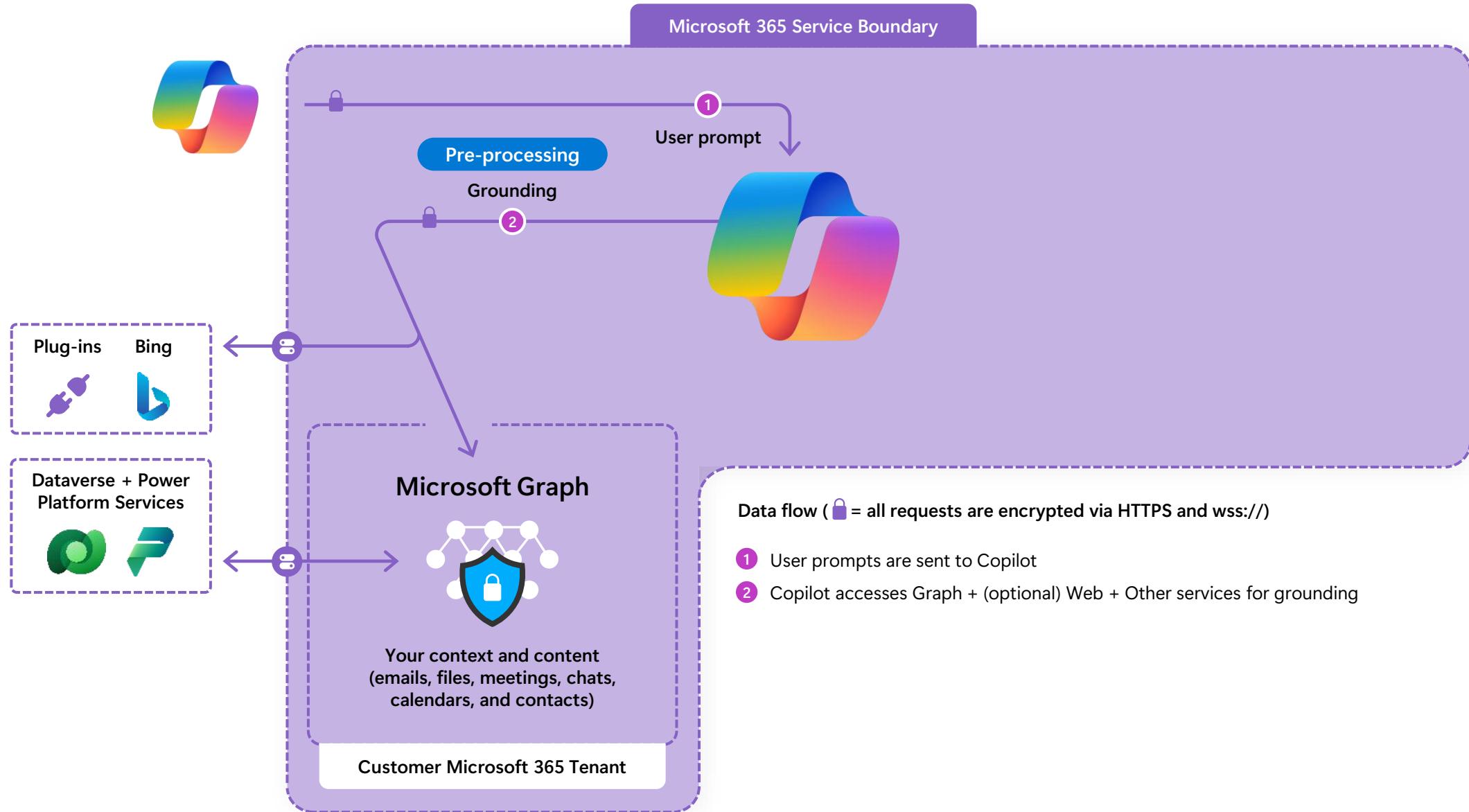


# Copilot for Microsoft 365 Architecture

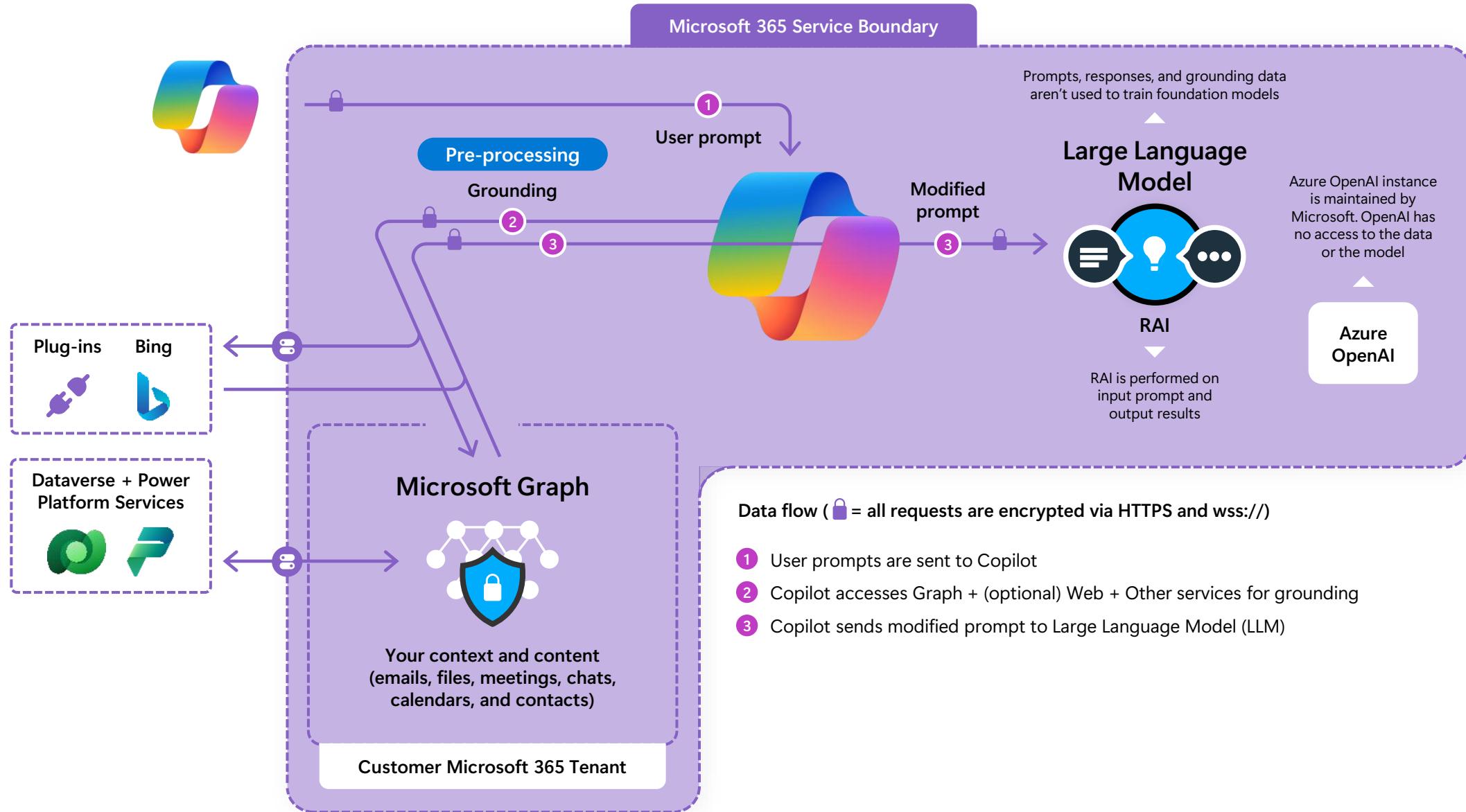
# Microsoft Copilot for Microsoft 365 architecture



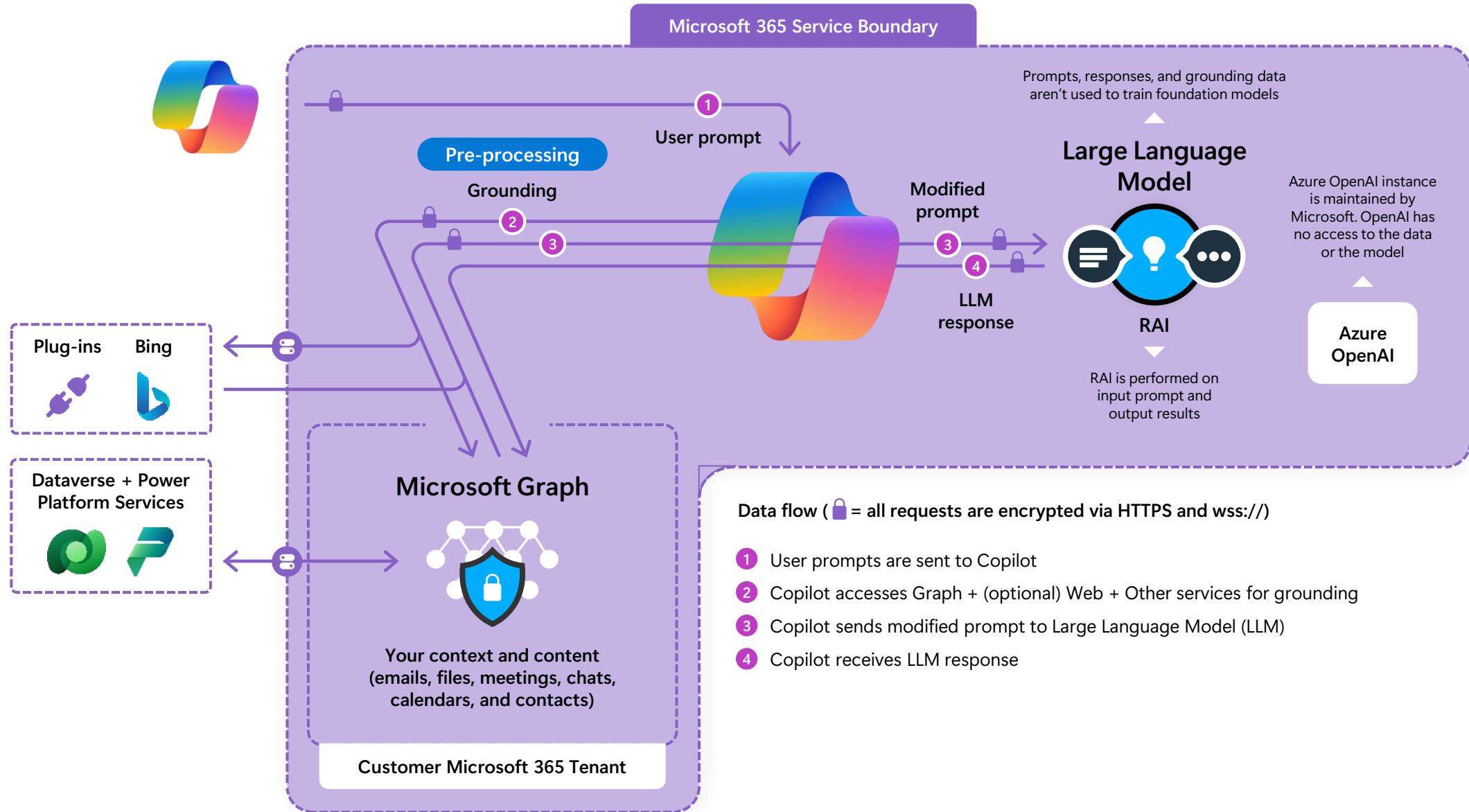
# Microsoft Copilot for Microsoft 365 architecture



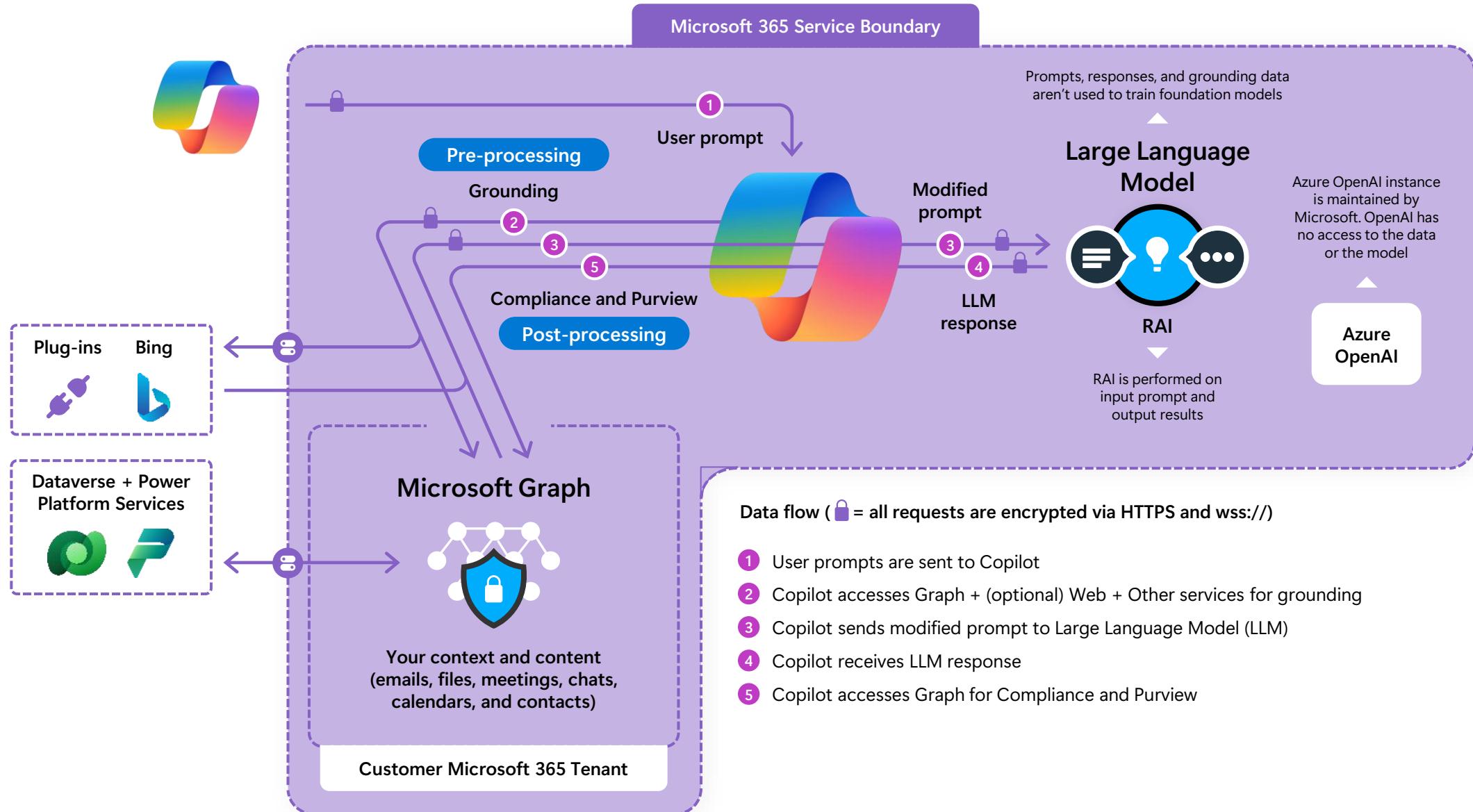
# Microsoft Copilot for Microsoft 365 architecture



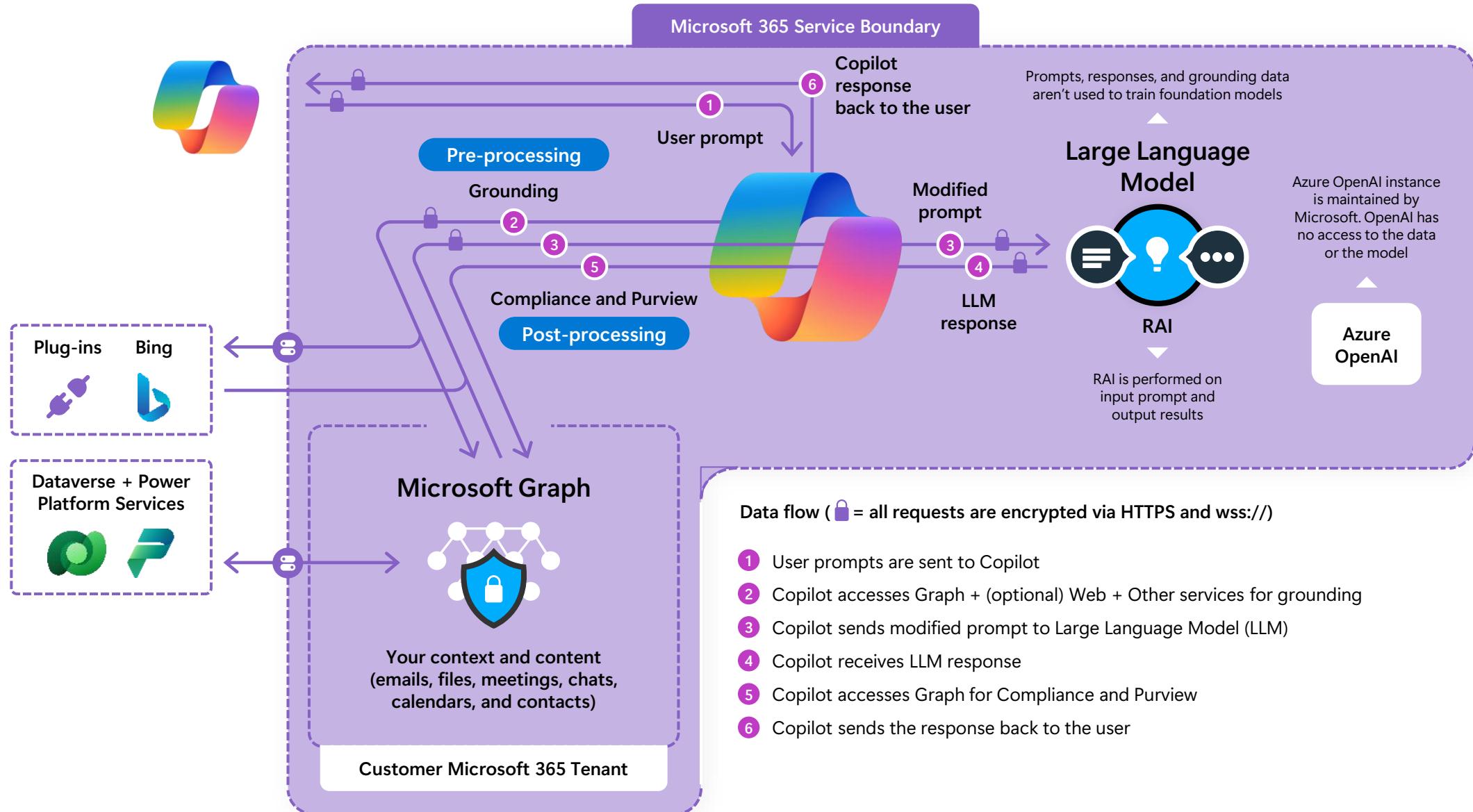
# Microsoft Copilot for Microsoft 365 architecture



# Microsoft Copilot for Microsoft 365 architecture



# Microsoft Copilot for Microsoft 365 architecture



# Announced on Jan 16, 2024

Copilot for Microsoft 365 now available in CSP for customers of all sizes

## Channel

All channels (EA, CSP, Direct)

## Pre-reqs

Business Standard, Business Premium,  
Office 365 A3/A5\* and E3/E5  
Microsoft 365 A3/A5\* and E3/E5

## Order size

No minimum license purchase size requirements.

A customer cannot purchase more licenses of the Copilot add-on than the collective sum of their prerequisite SKUs.

\*Customers with Academic SKUs are not currently eligible to purchase Copilot for Microsoft 365 through CSP. They are only available through Enrollment for Education Solutions (EES). We plan to gradually extend access and more details will be shared in the coming months.

# Prerequisites for using Copilot for Microsoft 365

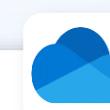
Contoso Life uses Microsoft 365 Business Premium today, they already meet most of these prerequisites.



Microsoft 365 Apps  
for enterprise



Microsoft Entra ID



Microsoft OneDrive



Microsoft Outlook



Microsoft Teams



Microsoft Loop



Microsoft  
Whiteboard

# Technical requirements for Copilot for Microsoft 365

- ✓ Microsoft 365 E3 or E5  
Microsoft 365 Business Premium or Business Standard
- ✓ Microsoft Entra ID account (Entra ID)<sup>1</sup>
- ✓ Some features (file restore, management, etc.) require a OneDrive account
- ✓ WebSockets (wss://) allowed to endpoints in ID #46 in the section for [Microsoft 365 Common and Office Online](#)
- ✓ Word, Excel, and PowerPoint: first available in web versions and later in Desktop (Current Channel)
- ✓ Outlook: Users need to be using the new Outlook for [Windows](#) or [MacOS](#)
- ✓ Teams: Users must be using Teams desktop or the web app. Both current and new versions of Teams supported<sup>2</sup>
- ✓ Loop: Tenants must have Loop enabled. [Learn more how to enable Loop.](#) [Manage Loop Workspaces.](#)
- ✓ Cross-app experience depends on indexed data; tenants with the richest data get the best results

Please note this is an early version of the technical requirements for Copilot for Microsoft 365 EAP and subject to change

<sup>1</sup>Currently there is no obstacle to a hybrid solution such as using AAD as well a third-party single sign-on solution (e.g., Okta)

<sup>2</sup>Once Business Chat is configured in the Teams desktop client, users can access it in the mobile client.



# Microsoft 365 Copilot

Unlock productivity and unleash creativity

## Natural language



Large Language  
Models



Microsoft Graph  
- Your Data -



Microsoft 365  
Apps



The  
Internet

+

+

+



# Microsoft 365 Copilot

Embedded across Microsoft 365 apps



# Impact by Workflow



## Effective meetings

- Quickly catch up on meetings you missed
- Summarize a meeting and identify next steps
- Run a more effective meeting



## Data analysis

- Get answers from across all your data
- Instantly uncover key insights
- Create powerful and professional visualizations



## Content creation

- Jumpstart creativity, and write and edit like a pro
- Quickly catch up on the key points of a document or presentation
- Create documents, presentations, charts, and tables



## Email processing

- Draft email replies instantly
- Personalize the tone and length even on the go
- Quickly summarize a long email thread

# Impact by Function



## HR

- Communicate policies and draft job descriptions
- Create stunning training materials
- Easily respond to job applicants' or employees' emails



## Marketing

- Identify relevant market trends and segments
- Create the first draft for a project
- Summarize campaign results with powerful visuals



## Sales

- Have better sales conversations and close more deals
- Create sales presentations and proposals
- Analyze sales data from previous quarters



## IT

- Create a project plan for a product roll-out
- Stay up to date on various project calls and chats
- Identify patterns in data and solve issues faster



## Finance

- Simplify financial reporting and planning
- Identify performance improvements
- Report metrics using professional charts



# Microsoft 365 Copilot

1

Consistent UI for AI

2

Integrated in the tools  
millions use every day

3

Platform for agents  
and extensibility

4

Enterprise-grade security,  
privacy, and compliance

5

Flexible purchasing  
and deployment options

6

Measure AI impact  
and business value

# Microsoft 365 Copilot is the AI assistant you can trust



## Security

Honors your existing permissions

Persistent label inheritance and DLP policies

Risk-based conditional access and endpoint management



## Governance & Compliance

Ramp your data preparedness for AI

Detect and investigate non-compliant usage

Granular controls and transparency for web queries



## Privacy

You control your data

You control your data location

Your data isn't used to train foundation models

**Your Microsoft 365 security, governance, compliance, and privacy policies**

# Secure and govern Copilot with Microsoft Security



## Baseline

### Essential security controls

- Multi-factor Authentication
- Audit logging
- Basic content and keyword search

Microsoft 365 Copilot +  
Microsoft 365 Business Standard



## Core

### Comprehensive security controls

Everything in Microsoft 365 Business Standard, plus:

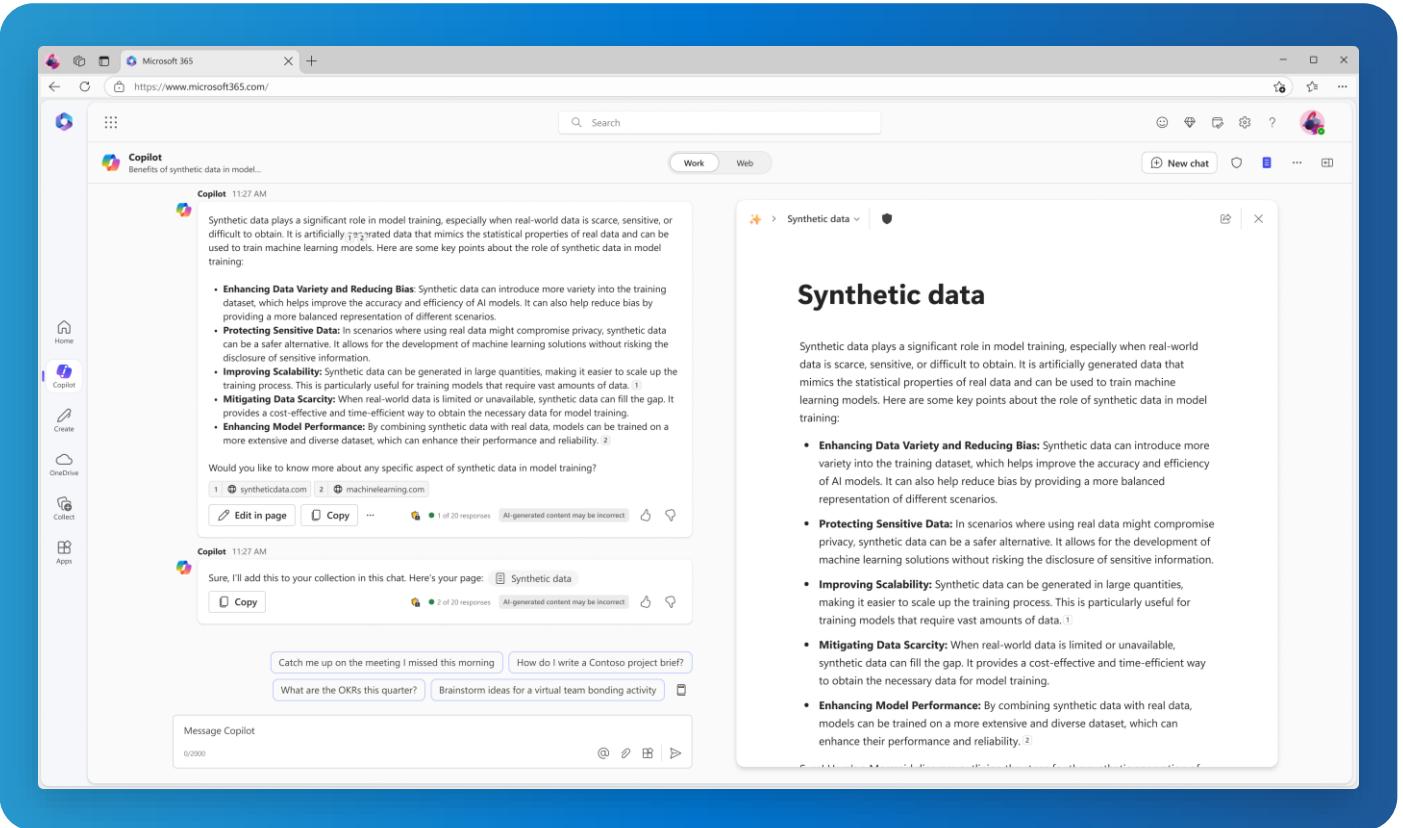
- Conditional Access
- Sensitivity labels
- Data loss prevention policies
- Unified endpoint management
- eDiscovery, litigation hold and retention policies

Microsoft 365 Copilot +  
Microsoft 365 Business Premium

Note: Not all features/products shown.

# Copilot Pages

Quickly pull a hathat response into a sharable canvas built for real-time multiplayer collaboration with AI; use Copilot to improve and expand upon subject matter, build visualizations, and bring in additional content.





Search



**Copilot**  
Look through my recent emails ...

Work

Web

New chat



Edit in Pages

Copy

...

1 of 30 responses

AI-generated content may be incorrect



We had a similar issue last year when another competitor lowered prices. I remember a document was written where we explored possible actions we could take. What were those actions?

I found the document titled Market Strategy 2023 that outlines the actions considered when a competitor lowered prices last year. Here are the three strategic options that were explored:

1. **Price Reduction:** This option involved reducing our product prices by 15% to match or undercut the competitor. The goal was to maintain market share by making our products more attractive to price-sensitive customers. This strategy required a comprehensive market analysis to understand the competitor's pricing and identify the optimal price point for our products. Additionally, it involved reviewing and potentially reducing operational costs to maintain profitability despite the reduced prices. This included negotiating with suppliers to reduce material costs, optimizing production processes, and reducing overheads [1](#) [2](#).
2. **Promotional Offers:** Another option was to introduce promotional offers to attract customers without permanently lowering prices. This could include limited-time discounts, bundling products with additional services or accessories, and offering loyalty rewards. The idea was to provide added value to customers and incentivize purchases while maintaining the perceived value of our products [1](#) [2](#).
3. **Advertising Campaign:** The third option was to launch an advertising campaign to highlight the unique features and benefits of our products compared to the competitor's offerings. This strategy aimed to reinforce the value proposition of our products and differentiate them in the market. The campaign would focus on the superior quality, innovative features, and long-term benefits of our products to justify the premium pricing [1](#) [2](#).

These strategies were designed to address the competitive pricing challenge and maintain our market position. Would you like to discuss any of these options in more detail or explore new strategies for the current situation?

1 Market Strategy 2023

2 RapidCharge Promo May2...

Edit in Pages

Copy

...

2 of 30 responses

AI-generated content may be incorrect

Can you provide more details on the promotional offers?

What was the outcome of the price reduction strategy?

How effective was the advertising campaign?

View prompts

Message Copilot

Add people, files, and more for better results



# Copilot for Microsoft 365



## Supercharged Productivity

Unlock access to data and knowledge across your organization



## Amplified Creativity

Amplify human ingenuity and innovation with AI



## Trusted Security

Count on responsible, secure AI from a partner you can trust

# Copilot for Microsoft 365



## Supercharged Productivity

**Unlock access to data and knowledge across your organization**

Microsoft 365 Copilot turns your words into the most powerful productivity tool on the planet

Because Copilot is integrated into the apps you use every day, you will spend less time focused on the tools, and more time focused on what really matters – serving your customers and growing your business



## Amplified Creativity

Amplify human ingenuity and innovation with AI



## Trusted Security

Count on responsible, secure AI from a partner you can trust

# Copilot for Microsoft 365



## Supercharged Productivity

**Take productivity to the next level by unlocking access to data and knowledge across your organization**

Microsoft 365 Copilot turns your words into the most powerful productivity tool on the planet. Because Copilot is integrated into the apps you use every day, you will spend less time focused on the tools, and more time focused on what really matters – serving your customers and growing your business

### Lighten the load in Outlook

- Clear your inbox in minutes, not hours, by summarizing long messages and generate suggest action items and replies
- Create impactful communications by leveraging coaching tips to help you hit just the right note

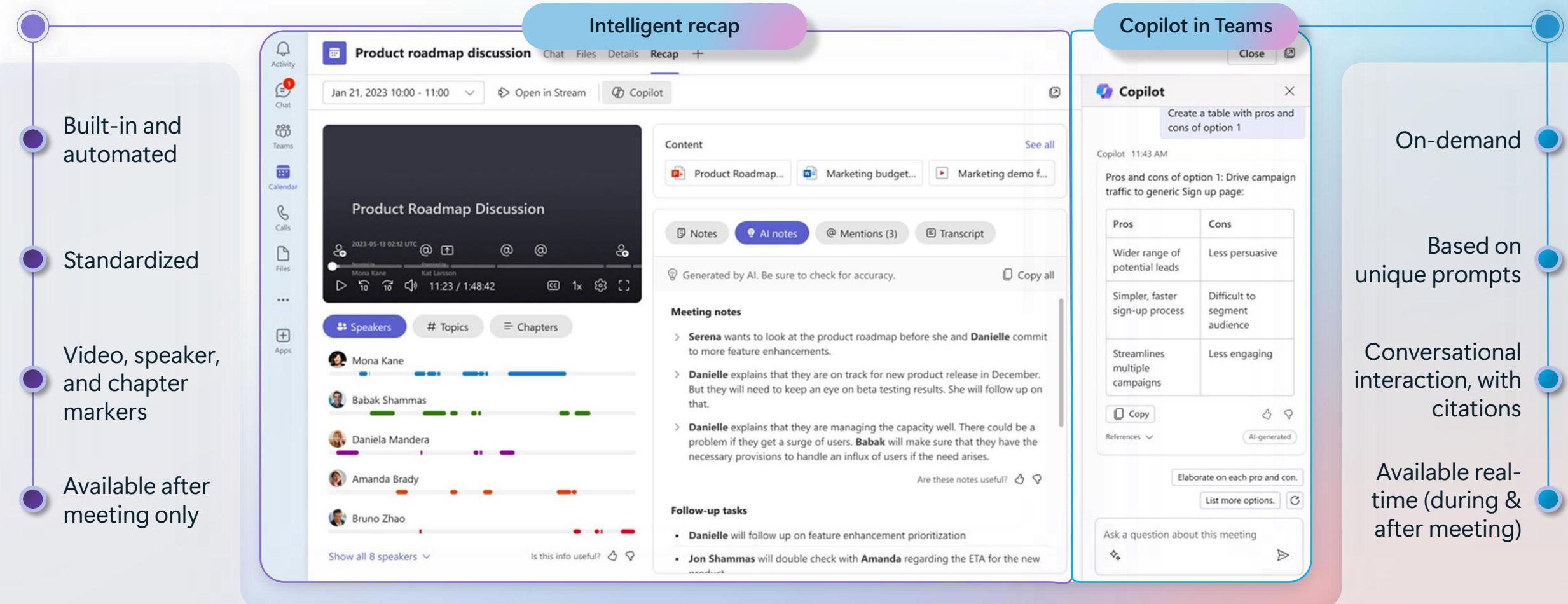
### Stay caught up with Teams

- Easily track discussions and suggested action items in real time
- Produce conversation summaries with citations to keep you up to speed and organized

### Laser focus on what matters most

- Get up to speed and complete tasks in no time with integrated cross-application intelligence working across all your data
- Quickly pull together information from multiple sources

# Intelligent recap in Copilot



Use **built-in meeting summaries** and ask any question about the meeting

\*Intelligent recap is also available in Teams Premium

# Copilot for Microsoft 365



## Supercharged Productivity

Unlock access to data and knowledge across your organization



## Amplified Creativity

**Amplify human ingenuity and innovation with AI**

Microsoft 365 Copilot is designed to help get your creative juices flowing, so you never have to start from scratch again

Copilot will help you turn your ideas into the masterpieces you envision, while making it easier to collaborate with your team



## Trusted Security

Count on responsible, secure AI from a partner you can trust

# Copilot for Microsoft 365



## Amplified Creativity

### Amplify human ingenuity and innovation with AI

Microsoft 365 Copilot is designed to help you get your creative juices flowing, so you never have to start from scratch again. Copilot will help you turn your ideas into the masterpieces you, while making it easier to collaborate with your team.

#### Be more creative in Word and PowerPoint

- Partner with Copilot in Word to write, edit, and summarize content
- Transform written content into compelling presentations with a single command
- Create custom graphics right in your document with Microsoft Designer

#### Think faster by analyzing trends and creating data visuals in Excel

- Enjoy all the rich capabilities of Excel at your fingertips
- Create powerful, professional visualizations
- Explore your data without modifying it

#### Make meetings more creative with Whiteboard

- Ask Copilot to turn ideas into designs and summarize whiteboard content
- Gather ideas on specific topics and run more creative and efficient meetings
- Create original images in Whiteboard with Microsoft Designer

# Copilot for Microsoft 365



## Supercharged Productivity

Unlock access to data and knowledge across your organization



## Amplified Creativity

Amplify human ingenuity and innovation with AI



## Trusted Security

**Count on responsible, secure AI from a partner you can trust**

Microsoft 365 Copilot is committed to advancing AI with an approach driven by ethical principles that put people first

Copilot is designed to protect your data and puts your admins and individual users in control

# Copilot for Microsoft 365



Trusted  
Security

**Count on responsible, secure AI from a partner you can trust**

Microsoft 365 Copilot is committed to advancing AI with an approach guided by ethical principles that put people first.

## Remain in control

- Individual users and admins are always in control as Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365
- Copilot respects individual and group permission policies

## Stay grounded and protected

- Copilot is architected to protect data. Your data never leaves its secure partition, and it is never used for training purposes

## Access better answers more efficiently and securely

- Copilot delivers real-time access to both your content and context in the Microsoft Graph
- Get accurate, relevant answers anchored in your business content and working context
- Microsoft 365 Business Standard and Business Premium customers can leverage Copilot now to access the power of an AI-powered chat for work with commercial data protection



# Copilot for Microsoft 365

Built on Microsoft's **comprehensive approach**



**Security**

+



**Compliance**

+



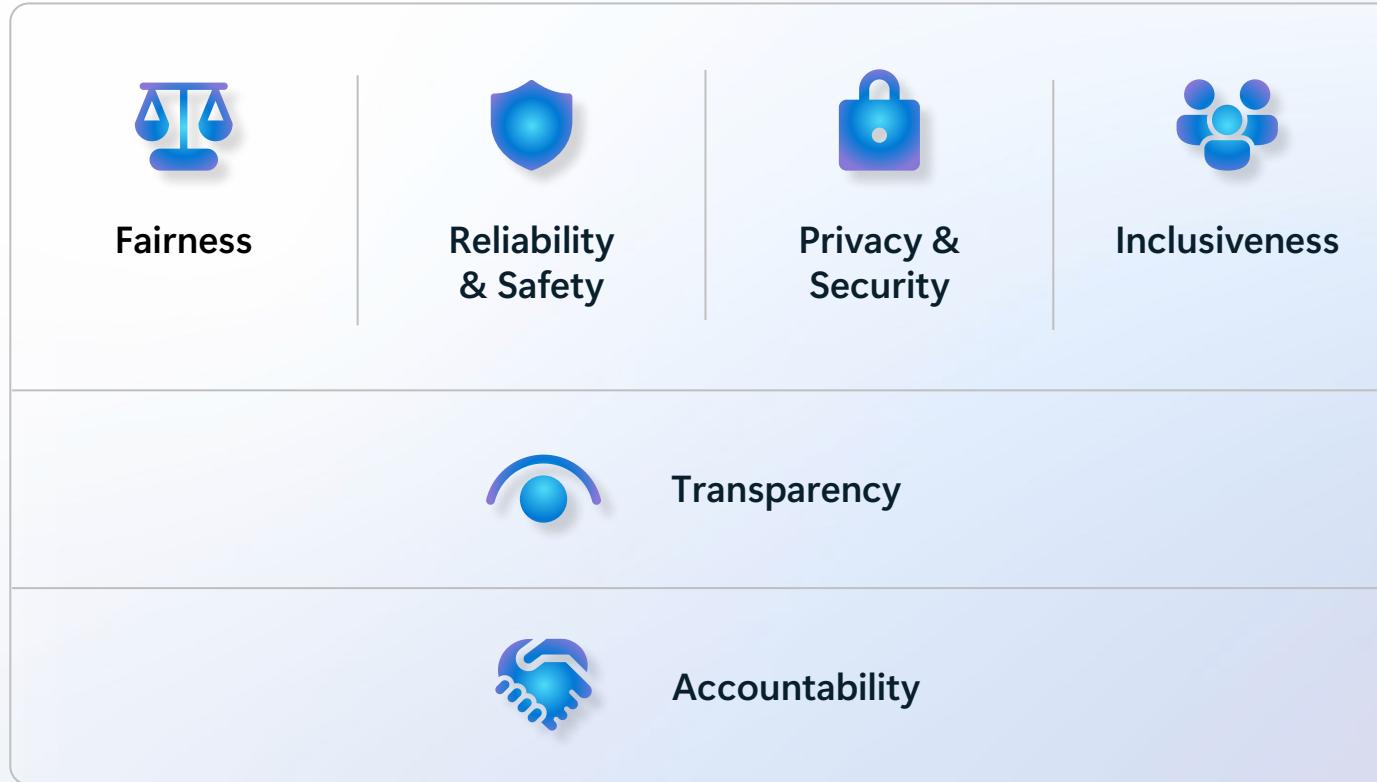
**Privacy**

+



**Responsible AI**

# Microsoft's AI principles



Microsoft Cloud — AI  
you can trust

Your data is **your** data.

Your data is **not** used to  
train the OpenAI foundation  
models without permission.

Your data is **protected** by  
the most comprehensive  
enterprise compliance and  
security controls.

# Customer Copyright Commitment

Use Copilot services with **confidence**

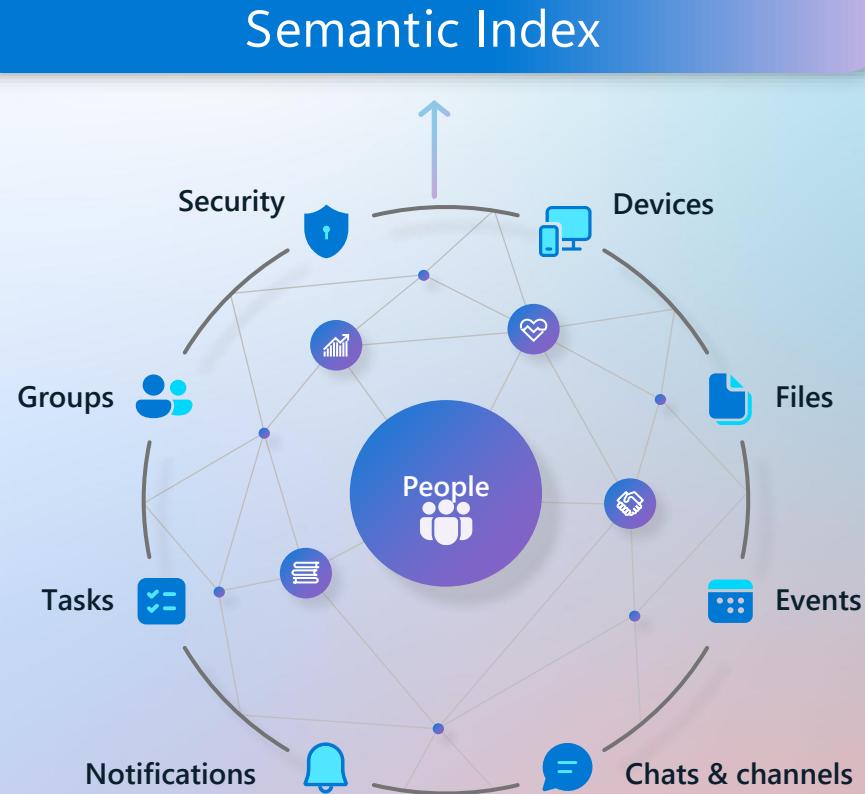
We stand behind  
our Copilot  
customers

We are sensitive  
to the concerns  
of authors

Copyright  
guardrails are built  
into the product

# Copilot for Microsoft 365

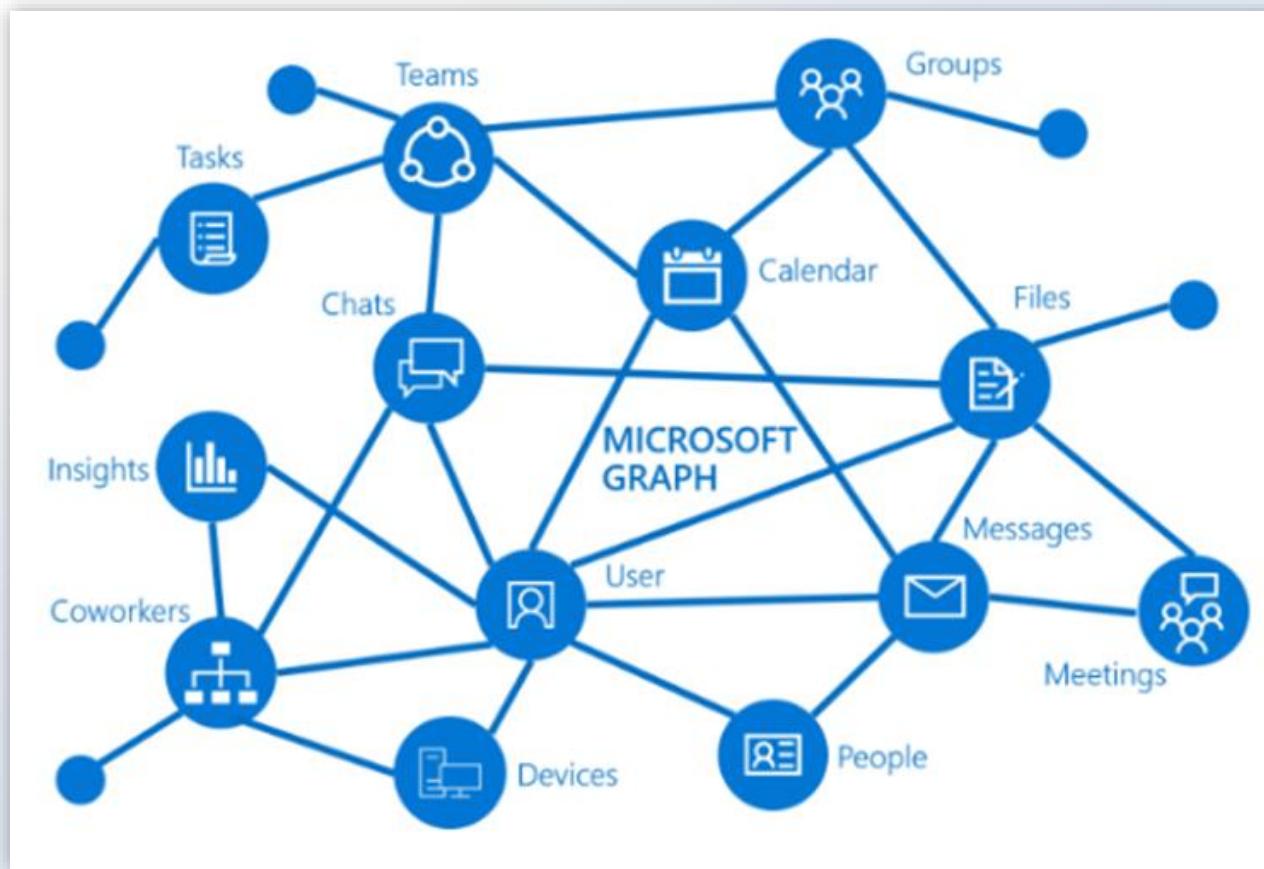
Architected to access to  
your **business content**  
and **context**



**Microsoft Graph**  
Graph API, Connectors, & Data Connect

# The Microsoft Graph

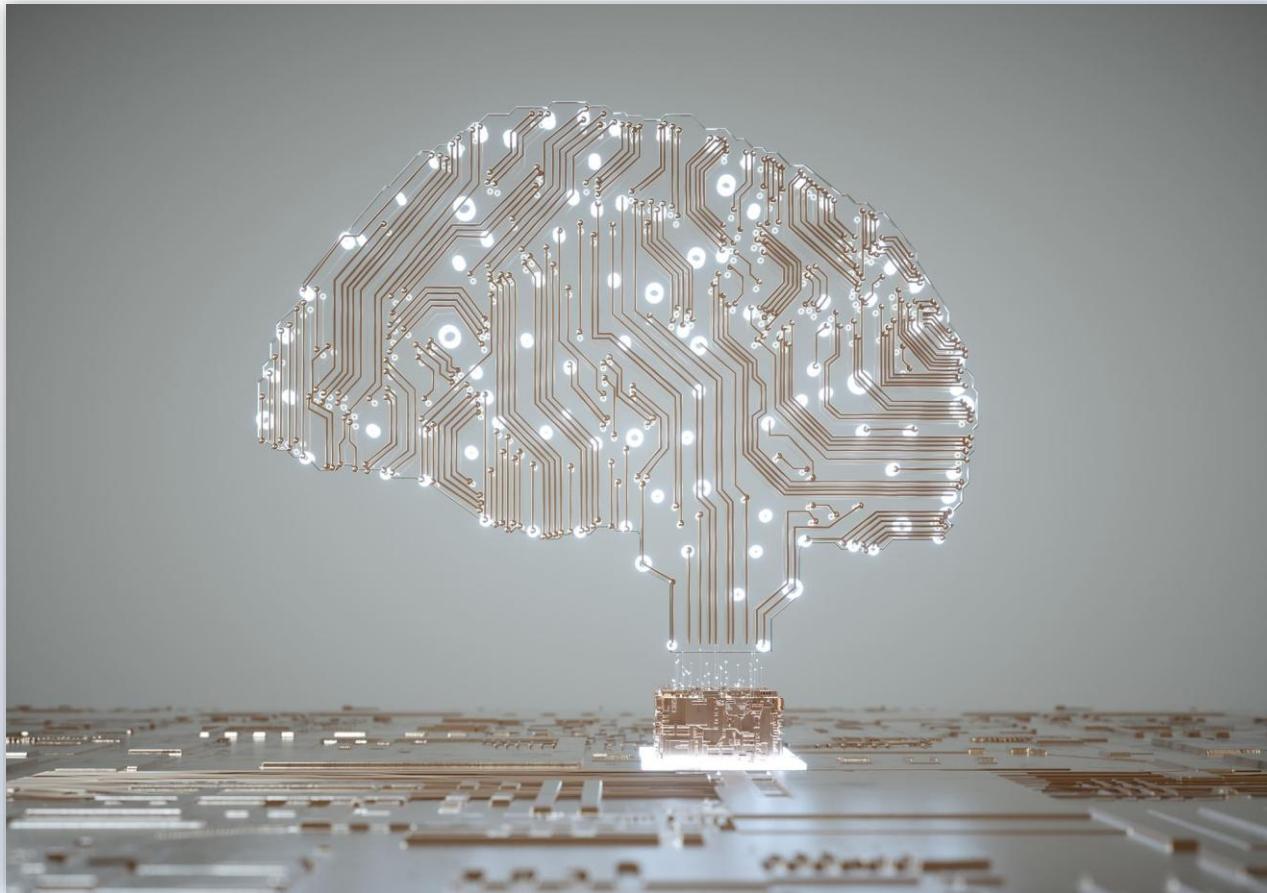
The Microsoft Graph is the **gateway to data and intelligence in Microsoft 365**. The Graph uses a unified programmability model to access data across Microsoft Cloud Services including Microsoft 365 core services, Enterprise Mobility + Security, Windows services, and Dynamics Business Central



- **Graph API** - single endpoint for real-time access to internal data
- **Graph Connectors** - delivers external data to the Microsoft graph (e.g. Salesforce, Jira, etc)
- **Graph Data Connect** – Secure and scalable bulk data access to the Azure AI platform to enable insights and analytics

# Semantic Index

The semantic index **sits on top of the Microsoft Graph** to interpret user queries and to produce sophisticated, meaningful, and multilingual responses that help you to be more productive.



- Technology that powers the search functionality in Copilot for Microsoft 365
- Uses artificial intelligence and natural language processing to understand the meaning behind the words used in search queries, allowing for more accurate and efficient search results
- Able to recognize synonyms, related concepts, and other factors that can help refine search results, making it easier for users to find the information they need

# Semantic Index for Microsoft 365

keyword matched  
results &  
suggestions

The screenshot shows a search interface for 'Project Melbourne Shiroom'. The search bar at the top contains the query 'Project Melbourne Shiroom'. Below the search bar, there are filters for 'All', 'Files', 'Sites', 'People', 'Messages', 'Images', and '2 more'. A 'Did you mean' suggestion 'project melbourne show room?' is displayed. The search results list several items:

- Melbourne - Upcoming Workshops**  
Project Melbourne  
Jodine Lingle modified on 1 March 2020  
Project Melbourne is an ambitious and innovative endeavour aimed at transforming the technology...Project Melbourne focuses on lev...
- Blog Strategy - Project Melbourne**  
Project Melbourne Blog  
Youngji Kim modified on 12 October 2022  
...address key challenges faced by hybrid work. The blog strategy envisions a holistic approach that integrates various aspects of...
- Melbourne phase 3 office build out**  
Melbourne Office  
Clodagh Fitzpatrick modified on 25 March 2017  
Sustainability is a key pillar of the Melbourne office. We should aim to reduce carbon emissions, enhance energy efficiency, and promote renewable energy sources throughout...
- Facts About Melbourne**  
Time and Places  
Jodine Lingle modified on February 16, 2018  
Founded in 1975, **Melbourne** is the worldwide leader in manufacturing, sales, services, devices and solutions that help...
- A New Life for Old Projects**  
DCX Managed Service

Without Semantic Index for Copilot

The screenshot shows the same search interface for 'Project Melbourne Shiroom' but with Semantic Index for Copilot enabled. The search bar remains the same. The search results are identical to the first screenshot, but additional context is provided through callouts and expanded items.

- Including results for 'Project Melbourne Shiproom'**  
Search only for 'Project Melbourne Shiroom'

Project Melbourne is a forward-thinking and comprehensive urban development initiative that envisions a sustainable, technologically advanced, and inclusive future for the organisation.
- PM Specification Document**  
<https://microsoft.sharepoint.com/teams/SalesAndAccounts/Profiles/Melbourne/>
- PM Shiproom June 2023**  
Project Melbourne  
Jodine Lingle modified on 1 December 2021  
Project Melbourne is an ambitious and innovative endeavour aimed at transforming the technology...Project Melbourne focuses on lev...

Karin Blair shared this with you 5 days ago
- Frequently Asked Questions**
  - What are the dependencies on Project Melbourne?
  - When is project Melbourne expected to finish?
  - What is the budget for project Melbourne?
- PM Quarterly Newsletter**

With Semantic Index for Copilot

autocorrected  
spelling  
of organizational  
jargon

informative answers  
directly from  
documents

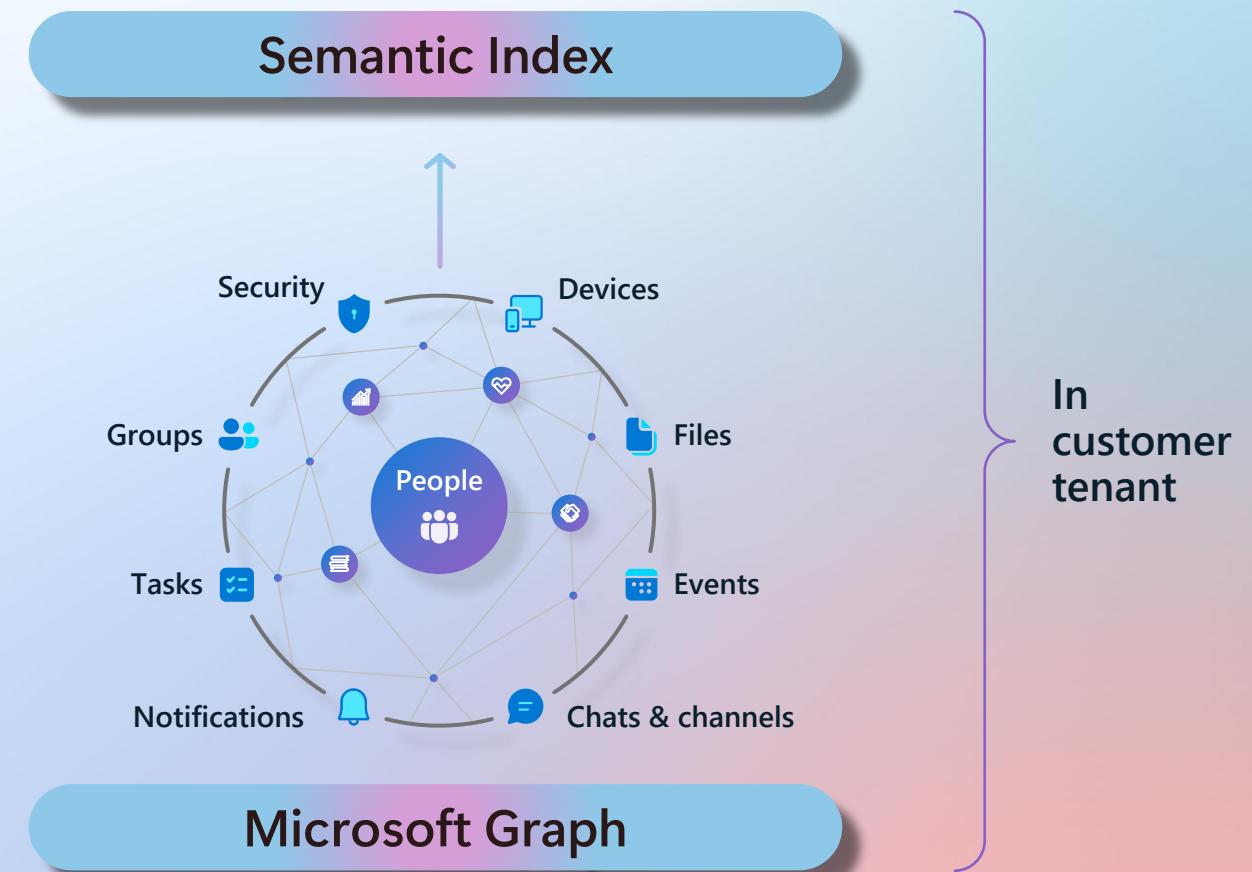
more relevant  
results, based on  
search intent

enhanced content  
sharing insights

AI generated  
questions and  
answers on topic

# Semantic Index

- Tenant-wide and user-scoped vector indices
- User and tenant signals & relationships
- Semantics and similarities around content and users
- Ranking and relevance
- Security and permissions
- Across documents, chats, emails, people, projects, meetings, & more



## Semantic Index for Copilot



Microsoft

<https://www.youtube.com/watch?v=KtsVRCsdvoU>

## The Copilot System



Microsoft

<https://www.youtube.com/watch?v=E5g20qmeKpg>

MICROSOFT 365

# Copilot in Outlook

The screenshot shows the Microsoft Outlook interface. On the left is a sidebar with icons for Mail, Calendar, Contacts, Tasks, and more. The main area displays a meeting summary for "Marketing Sync - meganb@contoso.com". The event title is "Profitable Projects Pitch & Plan" and it took place on "Wednesday 9/8/2023, from 11:00 AM to 12:00 PM". Below the title is a grid of six video thumbnails of participants. At the bottom of the grid are controls for "Speakers", "# Topics", and "Chapters". A footer at the bottom right shows a profile picture of "Serena Davis". To the right of the main content area is a sidebar titled "Content" which includes a "Product Roadmap..." button, a "Notes" button, and an "AI notes" button. Below the sidebar, a note states "AI-generated content may be incorrect". At the very bottom right, there is a section titled "Meeting notes" with two bullet points: one about Daniela highlighting before-and-after images and another about Babak suggesting a prosperous home improvement.

Marketing Sync - meganb@contoso.com

Event Meeting recap

Profitable Projects Pitch & Plan | Wednesday 9/8/2023, from 11:00 AM to 12:00 PM

Content

Product Roadmap...

Notes AI notes

AI-generated content may be incorrect

Meeting notes

- > **Daniela** highlighted the s before-and-after images i their effectiveness. **Seren** suggestion into the team'
- > **Babak** suggested conduc prosperous home improv

Speakers # Topics Chapters

Serena Davis

# Copilot works with you in cleaning your inbox and messages



## Copilot in Outlook

Some example prompts you can ask **Copilot**:

- Summarize the emails I missed while I was out. Flag important items.
- Draft a response thanking them and asking for more details; shorten this draft and make the tone professional.
- Invite everyone to a “lunch and learn” about new product launches next Thursday at noon.

The screenshot shows the Microsoft Outlook interface. On the left, the ribbon navigation bar includes Home, View, Help, New Mail, Delete, Archive, Sweep, Move to, Quick steps, Read/Unread, and various icons for search, reply, forward, etc. Below the ribbon is the 'Favorites' sidebar with links to Contoso Reports, lilly@contoso.com, and the current 'Inbox' folder, which contains 14 items. The main pane displays a list of emails from various users. A prominent 'Catchup with Copilot' card is overlaid on the list, showing a summary of the email from Maya Robinson and a 'Next' button. The main email list includes:

- Maya Robinson (@ FW: Update on manufacturing...) 12:35 PM Dear @Lilly and Team, I hope this email fin...
- Hayden Cook (@ FW: Update on manufacturing...) 10:35 AM Hi you two, I'm hoping you can help me
- Maya Robinson (@ Fw: Volunteers Needed) 10:02 AM Hey Alumn! We're looking for volunteers Honeybee Pr... +1
- Shai Shemesh (@ Presenting at the All-Hands) 9:48 AM Hi Lilly, Apologies for the short notice but...
- Maya Robinson (@ FW: Update on manufacturing...) 12:35 PM Dear @Lilly and Team, I hope this email fin...

To the right of the inbox, there's a 'Conversation summary' section for the Maya Robinson email, showing her message and a response from Hayden Cook. At the bottom, there's a 'Draft with Copilot' section with buttons for 'Accept invitation thankfully', 'Decline gracefully', 'Might make it, will confirm later', and 'Custom'. The overall theme is the integration of AI (Copilot) to assist with managing and responding to emails.

# Copilot in Teams Meetings

The screenshot shows a Microsoft Teams meeting interface. The top navigation bar includes a search bar and tabs for Chat, Details, Files, Recap, and a plus sign. The main content area displays a meeting titled "Core accounts business review" from March 16, 10:00 AM. A "Shared content" section shows a file named "Proseware Proposal.pptx". Below it is a video thumbnail with a play button and the duration "48m 42s". The sidebar on the left lists Activity, Chat (with 1 unread message), Teams, Calendar, Calls, Files, and Apps. The "Copilot" icon is visible in the Apps section. The recap pane on the right shows a summary of the meeting, mentioning "Core accounts.loop" and "Quarterly results and forecasts for Core Accour". It includes a "Summary" section with a list of points based on attendee input, and a "Notes" section with bullet points about Proseware's negotiation strategy and a new opportunity.

Core accounts business review Chat Details Files Recap +

Mar 16, 10:00 AM ▾ Open in Stream

Shared content

Proseware Proposal.pptx

Core accounts.loop

Quarterly results and forecasts for Core Accour

**Summary**

Based on what attendees said in the meeting

- \$230K revenue shortfall in this quarter
- Inventory 15% surplus (renewable products and recycled)
- Account leads to propose discounting scenarios to lower i
- Proseware was discussed as a leading opportunity

**Notes**

Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal. ↗

- The team identified a new opportunity with Proseware th

# Intelligent recap in Copilot

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only

The screenshot shows two main interface sections. On the left, a 'Product roadmap discussion' meeting summary is displayed. It includes a timeline with speaker markers for Mona Kane, Babak Shamma, Daniela Mandera, Amanda Brady, and Bruno Zhao. Below the timeline, there are sections for 'Content' (Product Roadmap, Marketing budget, Marketing demo), 'Meeting notes' (with a list of points from the meeting), and 'Follow-up tasks' (a list of actions). A prominent 'Copilot' button is at the top right of this section. On the right, a separate window titled 'Copilot in Teams' shows a table comparing 'Pros' and 'Cons' for a campaign strategy. The 'Pros' column includes 'Wider range of potential leads', 'Simpler, faster sign-up process', and 'Streamlines multiple campaigns'. The 'Cons' column includes 'Less persuasive', 'Difficult to segment audience', and 'Less engaging'. At the bottom of this window is a text input field: 'Ask a question about this meeting'.

Use **built-in meeting summaries** and **ask any question** about the meeting

\*Intelligent recap is also available in Teams Premium

On-demand

Based on unique prompts

Conversational interaction, with citations

Available real-time (during & after meeting)

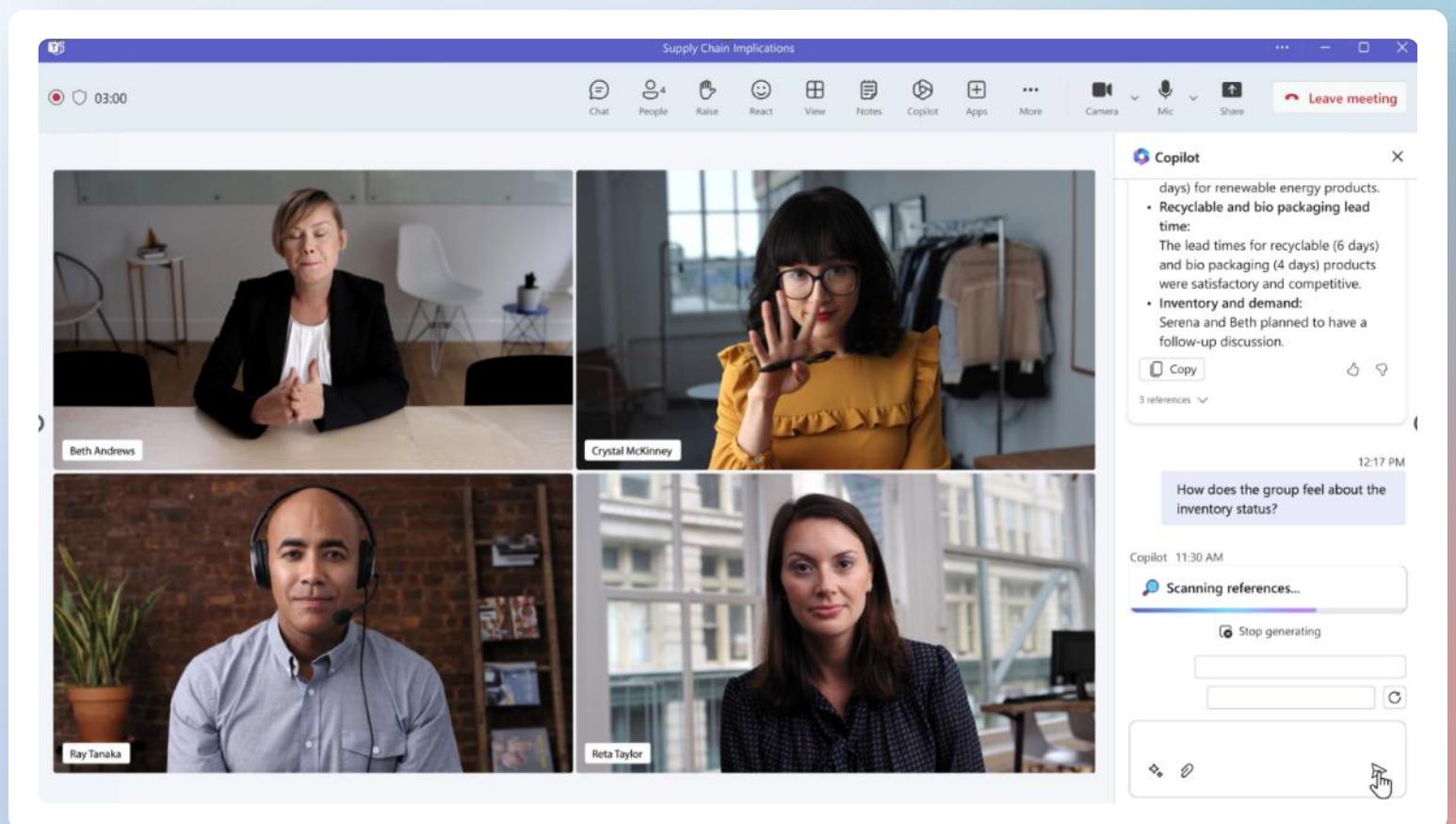
# Copilot helps you run effective meetings, get up to speed, organize key discussion points, and summarize actions



## Copilot in Teams Meetings

Some example prompts you can ask **Copilot**:

- Summarize what I've missed in the meeting.
- Create a table of pros and cons for [\[topic\]](#).
- What decisions were made, and what are some suggested next steps?



MICROSOFT 365

# Copilot in Chat and Loop

The screenshot shows the Microsoft Teams application interface. On the left, there's a vertical navigation bar with icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main area is titled "Teams" and shows a list of teams under "Pinned": "Business Development" (Wide World Importers) and "Wide World Importers" (General). Below this, under "Your teams", are "NAM Sales Team", "Business Development", "Performance", "Shiproom", "Telemetry", and "See all channels". Other listed teams include "Fabrikam" and "Account Teams". To the right of the Teams list, there's a search bar and a "Wide World" section featuring a green leaf and a small tree icon. At the bottom, there are sections for "Team: Daisy Samantha", "To-Dos", and a task list.

Search

Activity

Chat

Teams

Calendar

Calls

Files

...

Apps

Teams

Pinned

- Business Development  
Wide World Importers
- Wide World Importers

Your teams

- General
- NAM Sales Team
- Business Development
- Performance
- Shiproom
- Telemetry
- See all channels

- Fabrikam
- General
- Account Teams

Wide World

Team: Daisy Samantha

To-Dos

Task Name

MICROSOFT 365

# Copilot in Word

A screenshot of the Microsoft Word application window titled "Go to Market Plan - Saved". The document contains a paragraph of text: "Our target audience encompasses three key segments: h enthusiasts, contractors and builders seeking quality sup at large. By catering to these distinct groups, we aim to es hub for all home improvement needs in Maricopa." Below this paragraph, a section titled "Messaging and Value Proposition" is present. A blue callout box highlights the text: "Our grand opening messaging will be built upon three fur guidance, an extensive product selection, and unwaverin spotlight our proficient staff who are poised to provide e customers make well-informed decisions. The wide rang premium brands, will be showcased as a testament to o solution for home improvement. Moreover, we will emph community through collaborative partnerships and initia". At the bottom of the screen, a blue bar displays the text: "Rewrite with Copilot Preview < 1 of 3 >". The main text in the document is partially redacted with placeholder text: "We plan to base our grand opening messaging on three key p broad selection of products, and a strong commitment to the staf will be highlighted as experts who can provide valuable a make informed choices. We will also showcase our extensive r brands, to demonstrate that we are a one-stop-shop for all hc we will emphasize our dedication to the local community thro".



Document



Search for tools, help, and more (Alt + Q)



File Home Insert Layout References Review View Help

Comments Catch up Editing Share

Font Size: 12pt | Font: Aptos (Body) | Paragraph: Normal | Search: | Microphone: | Editor: | Copilot: | More:



Write a whitepaper based on file

Summarize this doc file

Write a proposal document based on file

Describe what you'd like Copilot to write

... ⚡



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# Copilot in Excel

Q1 Performance • Saved

Search

File Home Insert Formulas Data Review View Automate Help

Aptos (Body) 11 B C D E F G H I J

A B C D E F G H I J

Sales growth over time for Proseware

The chart shows a single data series representing sales growth percentage over five quarters. The data points are: Q1-22 (8%), Q2-22 (11%), Q3-22 (11%), Q4-22 (8%), and Q1-23 (1%).

Quarter	Growth (%)
Q1-22	8%
Q2-22	11%
Q3-22	11%
Q4-22	8%
Q1-23	1%

Projected Sales growth over time

This chart is a projection based on the historical data. It shows a projected line starting at 8% in Q1-22, rising to approximately 11% in Q2-22, peaking around 11.5% in Q3-22, and then slightly decreasing to about 10.5% in Q4-22 and 10% in Q1-23.

Model: 'Reusable Containers' with Q1-22

Product	Q1-22	Q2-22	Q3-22	Q4-22	Q1-23
Biodegradable Cleaning Products	3	4	6	10	5
Compostable Food Packaging	9	11	15	5	13
Reusable Containers	7	10	11	6	-9%
Reusable Water Bottles	15	18	18	10	17
Natural Personal Care Products	10	14	9	5	33

Product Q1-22

Product	Q1-22
Biodegradable Cleaning Products	3
Compostable Food Packaging	9
Reusable Containers	7
Reusable Water Bottles	15
Natural Personal Care Products	10

# Copilot works alongside you to help analyze and explore your data



Some example prompts you can ask **Copilot**:

- Give a breakdown of the sales by type and channel. Insert a table.
- Project the impact of **[variable]** and generate a chart to help visualize it.
- Model how a change to the growth rate for **[variable]** would impact my gross margin.

A screenshot of Microsoft Excel showing a data table titled "Q1 Performance". The table has columns for Country, Customer, Product, Discount Band, Units Sold, Manufacturing Price, Sale Price, and Gross Sales. The Copilot feature is open on the right side of the screen, displaying a summary of key trends:

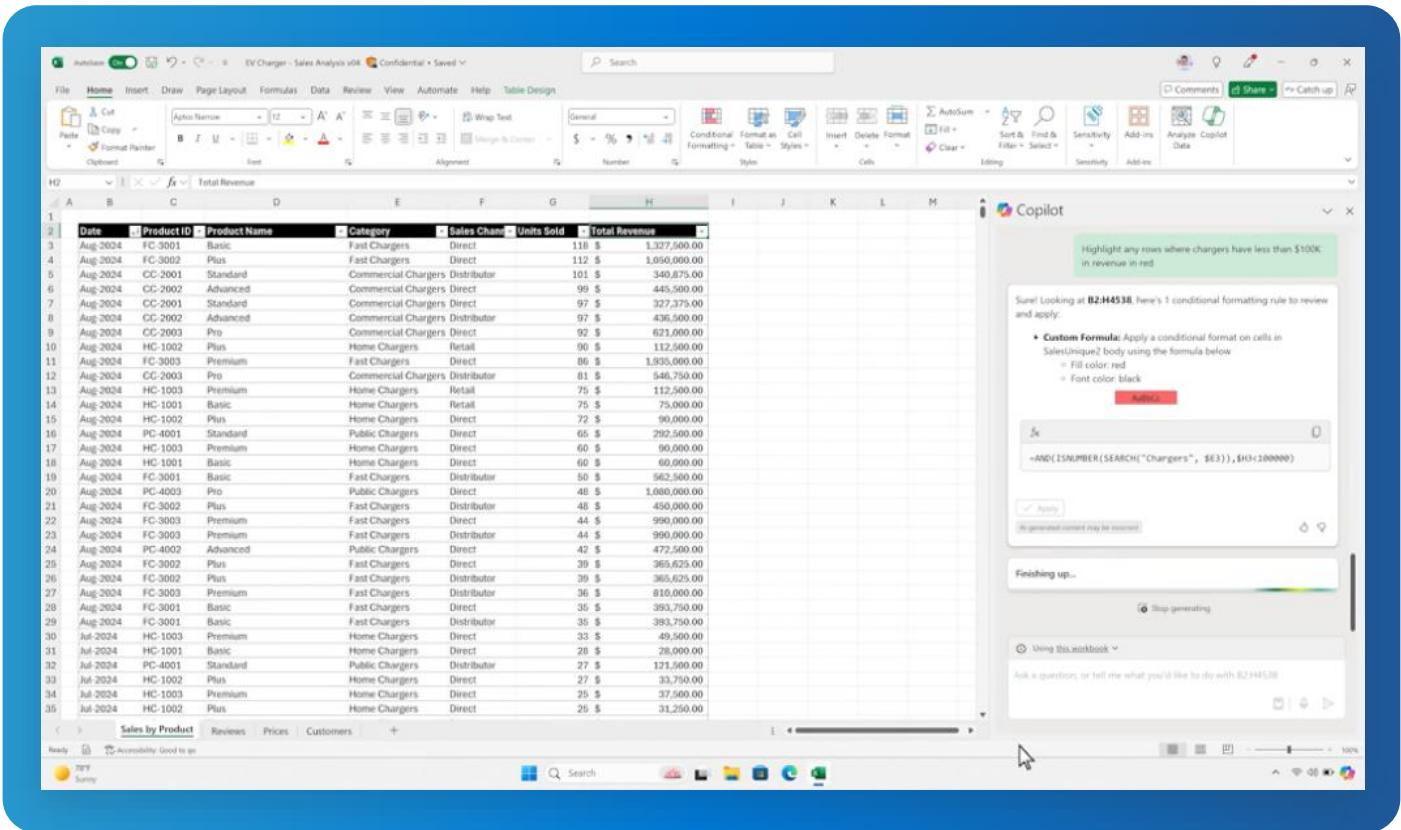
- Sales are trending up for all customers, except Proseware which is down this quarter.
- Manufacturing costs are down this quarter after an increase in Q3.
- Low discount products made up nearly half of total sales last month.

A callout box labeled "Explain" is shown, and a text input field at the bottom says "Describe what you'd like to create, or type / for suggestions".

Country	Customer	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales
France	VanArtsdel	Biodegradable Cleaning Products	Low	4345	\$10	\$352	\$12,620
USA	VanArtsdel	Biodegradable Cleaning Products	Low	4245	\$10	\$352	\$12,620
Australia	VanArtsdel	Biodegradable Cleaning Products	None	4124	\$10	\$352	\$12,620
Mexico	VanArtsdel	Biodegradable Cleaning Products	Medium	3954	\$10	\$352	\$12,620
France	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	4952	\$10	\$127	\$12,620
France	Contoso Pharmaceuticals	Recycled Can	Low	4903	\$5	\$127	\$12,620
Canada	Proseware	Natural Personal Care Products	Low	1954	\$270	\$302	\$12,620
Canada	Proseware	Biodegradable Cleaning Products	High	1990	\$220	\$302	\$12,620
USA	VanArtsdel	Compostable Food Packaging	Low	1254	\$3	\$380	\$12,620
USA	Proseware	Natural Personal Care Products	Medium	1465	\$224	\$302	\$12,620
USA	Proseware	Sustainable Snack Packaging	Medium	1410	\$120	\$302	\$12,620
Australia	Proseware	Natural Personal Care Products	Medium	1369	\$224	\$302	\$12,620
USA	VanArtsdel	Compostable Food Packaging	Medium	1052	\$3	\$380	\$12,620
Canada	VanArtsdel	Compostable Food Packaging	Low	980	\$312	\$380	\$12,620
Australia	Proseware	Sustainable Snack Packaging	Medium	1298	\$120	\$302	\$12,620
Australia	VanArtsdel	Compostable Food Packaging	None	954	\$3	\$380	\$12,620
Canada	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	2785	\$110	\$127	\$12,620

# Copilot in Excel

Using natural language as an input, Copilot simplifies common tasks, like removing duplicates or splitting text, applying formulas, like VLOOKUP and SUMIF, and creating compelling visuals, like bar charts, scatter plots, and Pivot Tables.



The screenshot shows a Microsoft Excel spreadsheet titled "EV Charger - Sales Analysis.xlsx". The spreadsheet contains a table of sales data with columns: Date, Product ID, Product Name, Category, Sales Channel, Units Sold, and Total Revenue. The data spans from row 3 to 35, showing various products across different categories and channels over time.

The Copilot ribbon tab is selected, displaying several cards:

- Highlight any rows where chargers have less than \$100K in revenue in red:** A card with a green background and a red highlight on row 10.
- Sure! Looking at B2:H453R, here's 1 conditional formatting rule to review and apply:**
  - Custom Formula:** Apply a conditional format on cells in SalesUnique? body using the formula below:
    - = Fill color: red
    - = Font color: black
- Finishing up...**
- Using this workbook:** A card with a question: "Ask a question, or tell me what you'd like to do with B2:H453R".

AutoSave On

EV Charger - Sales Analysis v05 Confidential • Saved

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Cut Copy Format Painter

Aptos Narrow 12 A A Wrap Text General

Font Alignment Number

Conditional Formatting Styles Cells

AutoSum Fill Sort & Filter Find & Select

Format Painter

Comments Share Catch up

Clipboard

Font Alignment Number

Styles Cells

Editing

Sensitivity Add-ins Analyze Copilot Data

A1	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	Date	Product ID	Product Name	Category	Sales Chan	Units Sold															
2	Aug-2024	FC-3001	Basic	Fast Chargers	Direct	118															
3	Aug-2024	FC-3002	Plus	Fast Chargers	Direct	112															
4	Aug-2024	CC-2001	Standard	Commercial Chargers	Distributor	101															
5	Aug-2024	CC-2002	Advanced	Commercial Chargers	Direct	99															
6	Aug-2024	CC-2001	Standard	Commercial Chargers	Direct	97															
7	Aug-2024	CC-2002	Advanced	Commercial Chargers	Distributor	97															
8	Aug-2024	CC-2003	Pro	Commercial Chargers	Direct	92															
9	Aug-2024	HC-1002	Plus	Home Chargers	Retail	90															
10	Aug-2024	FC-3003	Premium	Fast Chargers	Direct	86															
11	Aug-2024	CC-2003	Pro	Commercial Chargers	Distributor	81															
12	Aug-2024	HC-1003	Premium	Home Chargers	Retail	75															
13	Aug-2024	HC-1001	Basic	Home Chargers	Retail	75															
14	Aug-2024	HC-1002	Plus	Home Chargers	Direct	72															
15	Aug-2024	PC-4001	Standard	Public Chargers	Direct	65															
16	Aug-2024	HC-1003	Premium	Home Chargers	Direct	60															
17	Aug-2024	HC-1001	Basic	Home Chargers	Direct	60															
18	Aug-2024	FC-3001	Basic	Fast Chargers	Distributor	50															
19	Aug-2024	PC-4003	Pro	Public Chargers	Direct	48															
20	Aug-2024	FC-3002	Plus	Fast Chargers	Distributor	48															
21	Aug-2024	FC-3003	Premium	Fast Chargers	Direct	44															
22	Aug-2024	FC-3003	Premium	Fast Chargers	Direct	44															
23	Aug-2024	FC-3003	Premium	Fast Chargers	Distributor	44															
24	Aug-2024	PC-4002	Advanced	Public Chargers	Direct	42															
25	Aug-2024	FC-3002	Plus	Fast Chargers	Direct	39															
26	Aug-2024	FC-3002	Plus	Fast Chargers	Distributor	39															
27	Aug-2024	FC-3003	Premium	Fast Chargers	Distributor	36															
28	Aug-2024	FC-3001	Basic	Fast Chargers	Direct	35															
29	Aug-2024	FC-3001	Basic	Fast Chargers	Distributor	35															
30	Jul-2024	HC-1003	Premium	Home Chargers	Direct	33															
31	Jul-2024	HC-1001	Basic	Home Chargers	Direct	28															
32	Jul-2024	PC-4001	Standard	Public Chargers	Distributor	27															
33	Jul-2024	HC-1002	Plus	Home Chargers	Direct	27															
34	Jul-2024	HC-1003	Premium	Home Chargers	Direct	25															
35	Jul-2024	HC-1002	Plus	Home Chargers	Direct	25															

MICROSOFT 365

# Copilot in M365 Chat

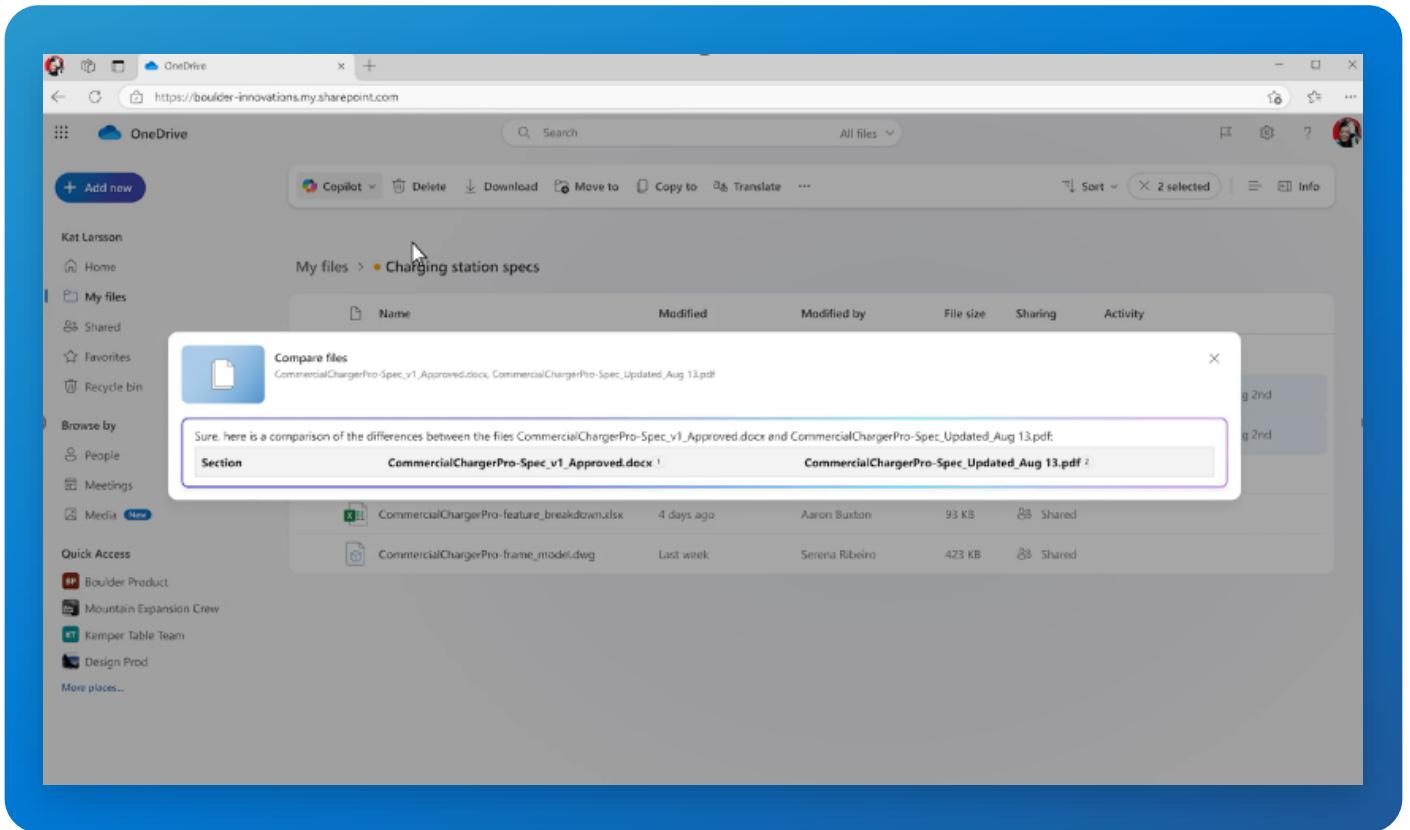
The screenshot shows a Microsoft 365 Copilot interface. At the top, there's a navigation bar with a user profile icon, a back arrow, a refresh button, and a search bar containing the URL <https://www.microsoft365.com/copilot>. To the right of the search bar is a "Search" button. Below the navigation bar is a sidebar with icons for Home, Create, My Content, Feed, Apps, Copilot (which is highlighted), Outlook, Teams, and Word.

The main content area features a "Copilot" logo with the text "Microsoft 365 Chat". Below the logo, a section titled "Try these prompts" is shown with four cards:

- Catch up on meetings**: "Catch me up on meetings I missed yesterday"
- Catch up on comms**: "Summarize unread message this morning"
- Get up to speed**: "List key points from file"
- Polish my writing**: "Suggest edits to file to make more concise"

# Copilot in OneDrive

Quickly find and compare content in up to five files, making it easier than ever to find the documents you need.



OneDrive

https://boulder-innovations.my.sharepoint.com

OneDrive

Search All files

Add new Share Copy link Download Automate

Kat Larsson

Home My files Shared Favorites Recycle bin

Browse by People Meetings Media New

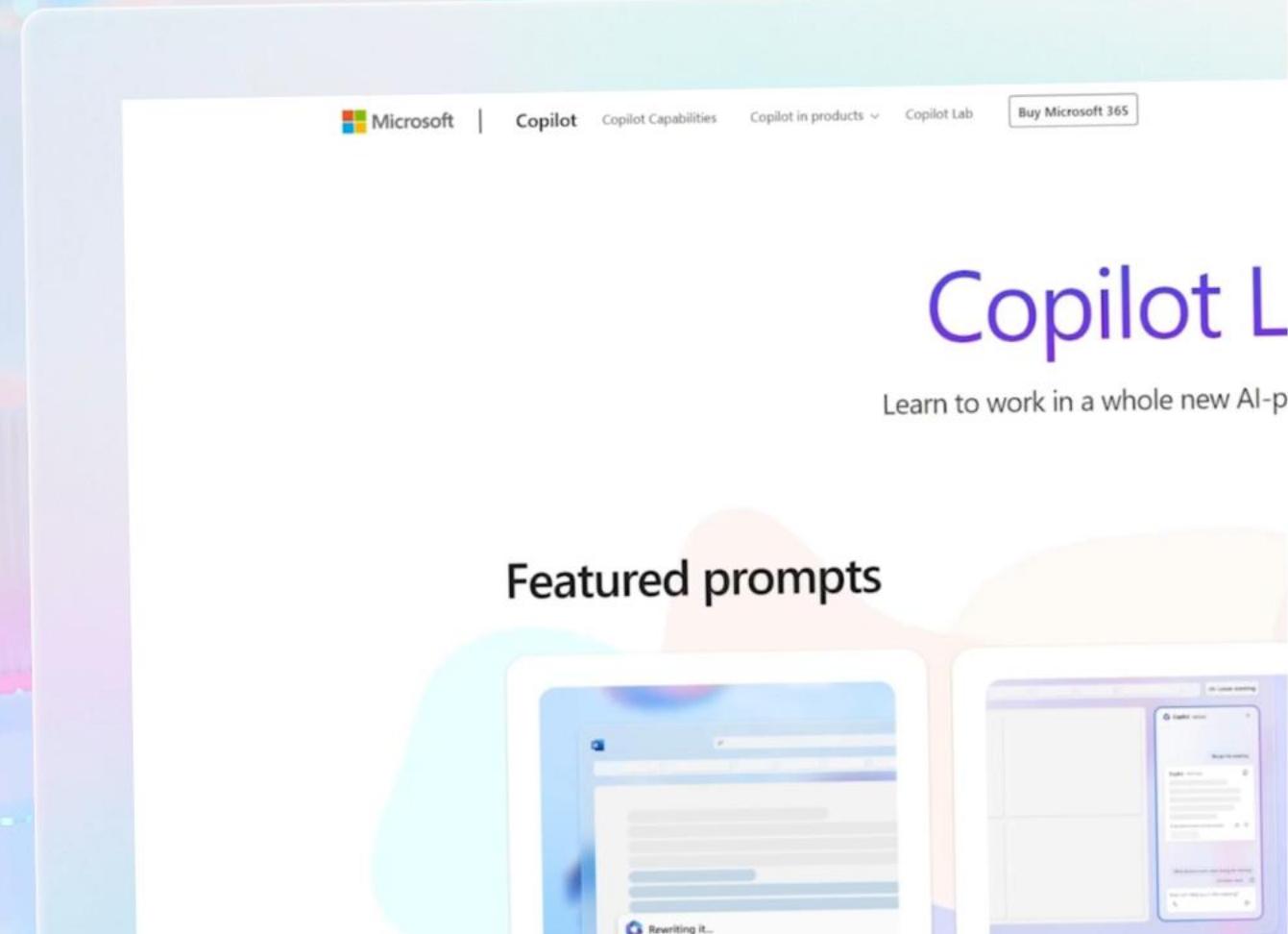
Quick Access Boulder Product Mountain Expansion Crew Kemper Table Team Design Prod More places...

My files > Charging station specs

Name	Modified	Modified by	File size	Sharing	Activity
2023 models	Last week	Guest Contributor	12 items		
CommercialChargerPro-Spec_v1_Approved.docx	Yesterday	Aaron Buxton	90.2 KB	Shared	You shared this file Aug 2nd
CommercialChargerPro-Spec_Updated_Aug 13.pdf	August 13	Katri Ahokas	105 KB	Shared	You shared this file Aug 2nd
CommercialChargerPro-sourcing.fluid	2 days ago	Kat Larsson	105 KB	Shared	
CommercialChargerPro-feature_breakdown.xlsx	4 days ago	Aaron Buxton	93 KB	Shared	
CommercialChargerPro-frame_model.dwg	Last week	Serena Ribeiro	423 KB	Shared	

MICROSOFT 365

# Microsoft 365 Copilot Lab



# Copilot Lab

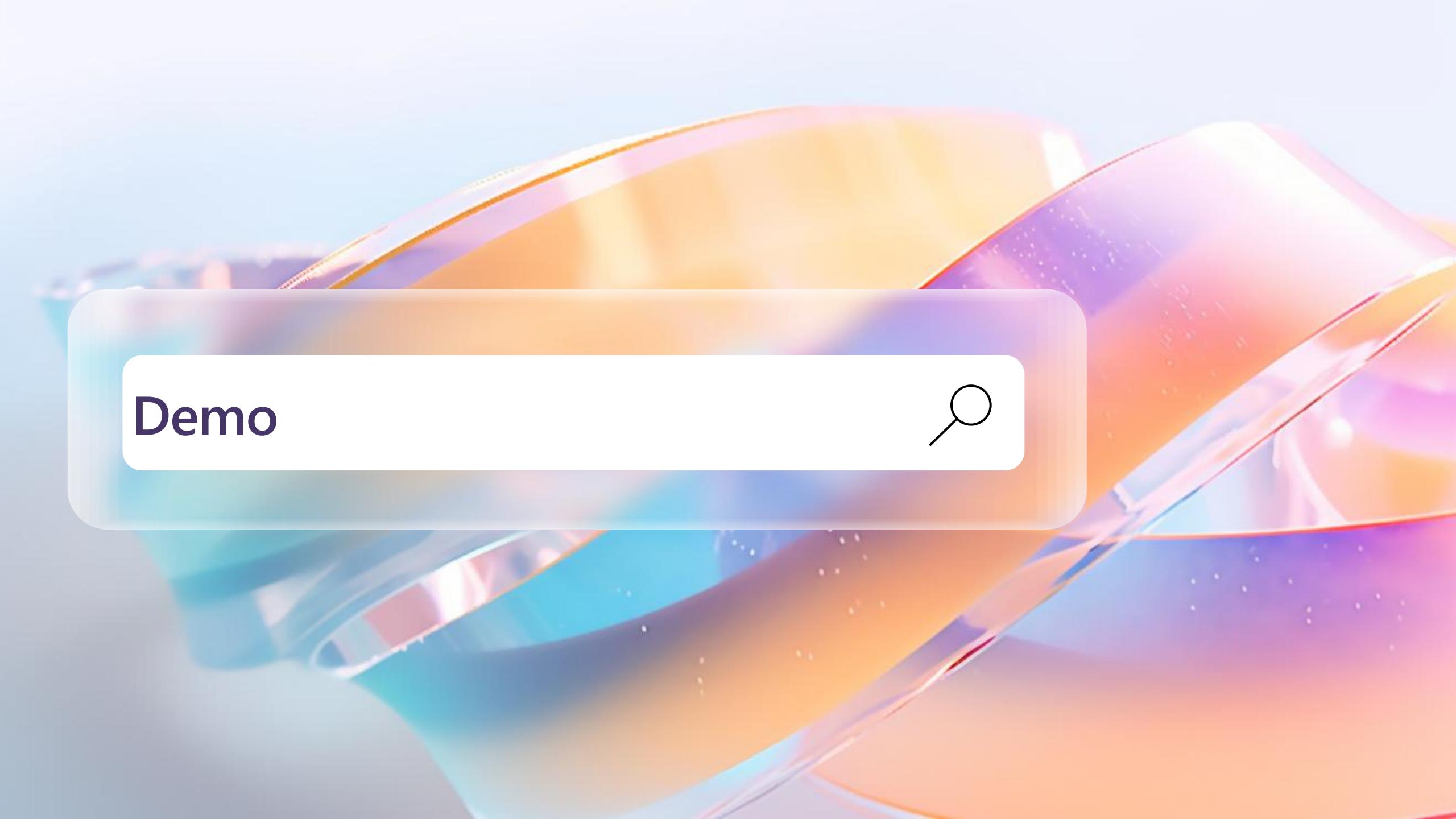
- A collection of prompts that can be used to explore and experiment with Copilot
- Learn the art and science of prompt Engineering in an easy way
- Provides latest information and resources
- Evolves and adapts as AI becomes more advanced

More prompts to try

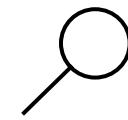
Work Personal

Apps Categories

Category	Prompt Title	Description
Work	Share meeting notes	Draft an email with notes and action items from [meeting]
	Write a status update	Write a status report to my manager based on [file]. Include any upcoming deliverables, due dates, and key decisions
	Catch up on messages	Summarize Teams messages from this week about...
	How to	How do I write a request for proposal?
Personal	Help me write	Write an email to my team about our top priorities for next quarter from [file]
	Discover a company topic	I need to explain [concept] to a [role/target audience]. I need to include an explainer of what it is, how it works, and a
	Draft an FAQ	Create an FAQ based on [file]
	Describe something concisely	Summarize this doc into a high-level overview of the benefits of [topic]
Work	Get calendar info	When's my next meeting with [person]?
	Create a quiz	Write a practice quiz about [Topic]. Include at least 20 questions, and group questions by category. Provide a detailed
	Create based on a topic	Create 5 hypothetical courses about [Topic]. Include a brief summary for each course and a catchy title.
	Prep for a meeting	I've got an upcoming meeting with [person]. Based on my recent communication and recent news items, create a...
Personal	Add images	Add a relevant image to this
	Get key info	List key points from [file]
	Brainstorm	Suggest 10 compelling taglines
	Draft an email template	Draft a personal email I can send



Demo

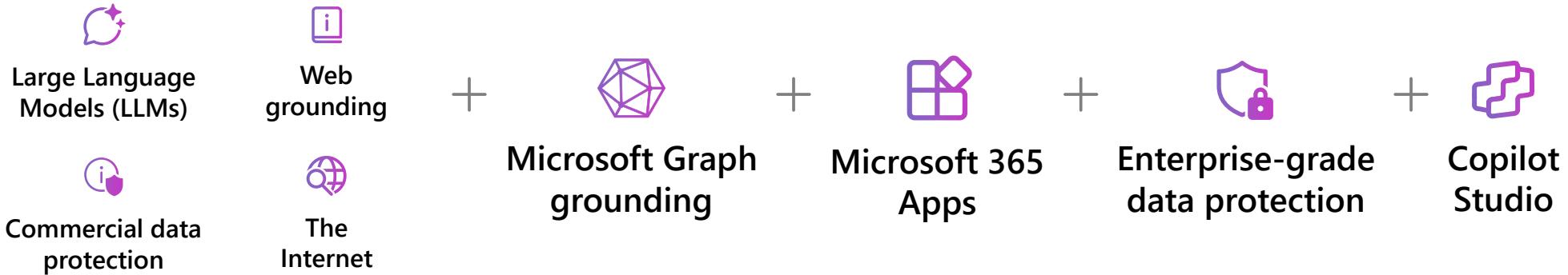




# Microsoft Copilot for Microsoft 365

Your everyday AI companion at work

## Natural Language



# The AI-powered organization

01



## Foundational productivity

### Get AI-ready checklist



#### Standardize onto Microsoft 365

Enrich your Copilot experience by getting your data into the Microsoft 365 Cloud.



#### Protect sensitive business data

Protect internal data from accidental leakage. Ensure users have the right access to the right internal content.



#### Empower employees with secure, AI-powered tools

Start using secure AI-powered web chat for the workplace with Bing Chat Enterprise.

# The AI-powered organization

01



## Foundational productivity

### Get AI Ready Checklist



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Enrich your Copilot experience by getting your data into the Microsoft 365 Cloud.



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Protect internal data from accidental leakage. Ensure users have the right access to the right internal content.

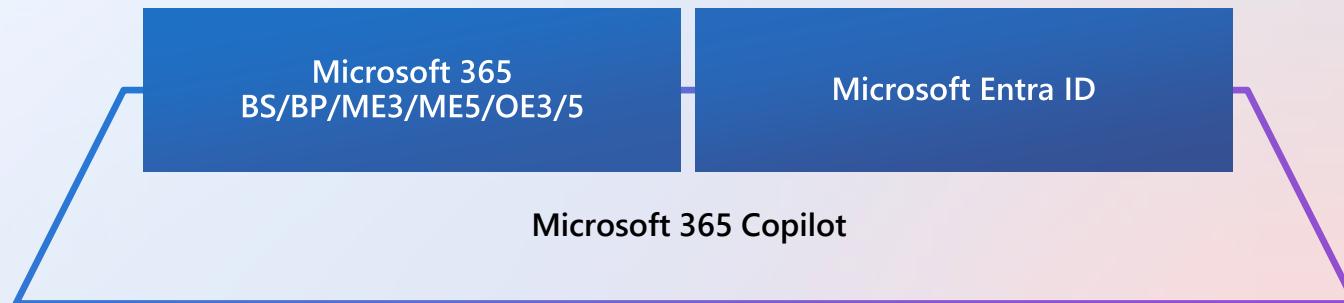


#### Empower employees with secure, AI-powered tools

Start using secure AI-powered web chat for the workplace with Microsoft Chat.

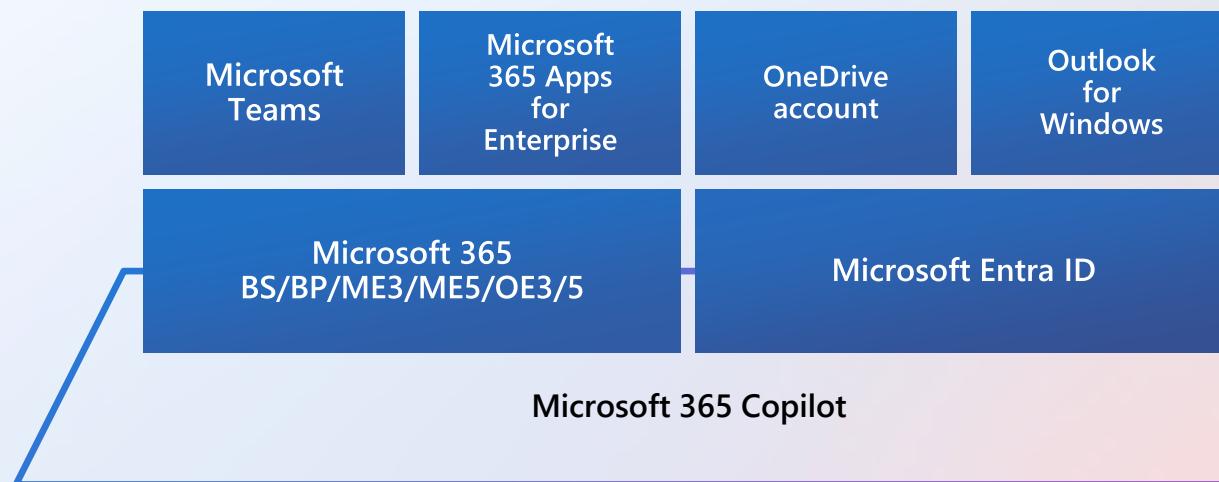


# The Copilot and Business Premium Get AI Ready building Blocks



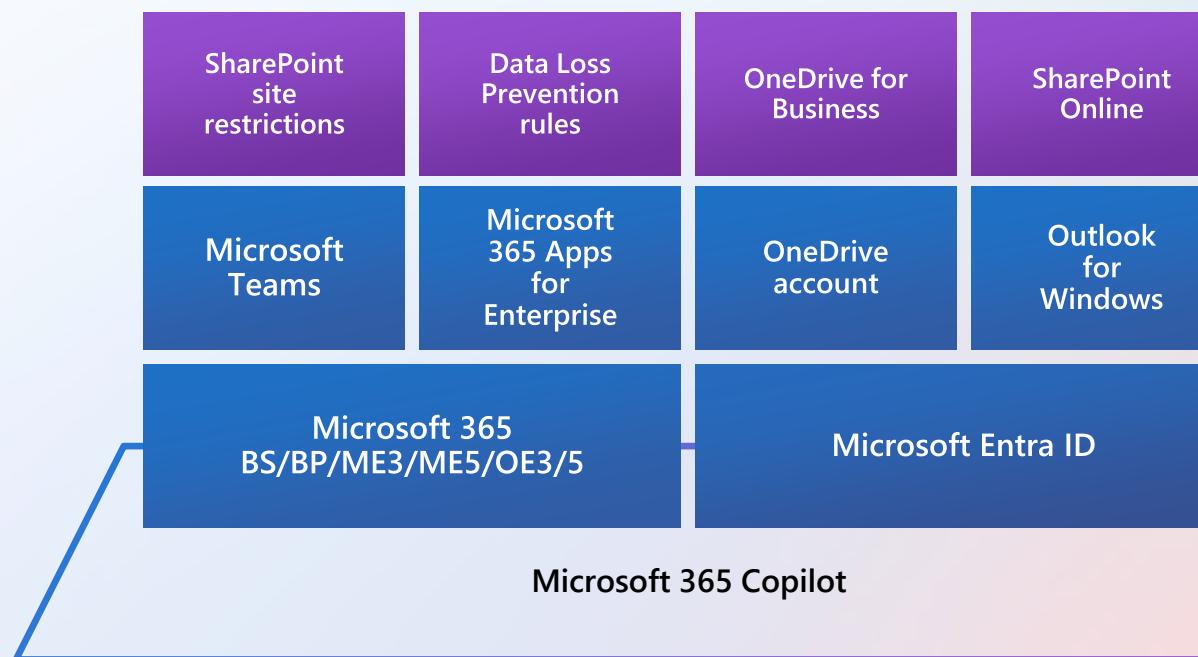


# The Copilot and Business Premium Get AI Ready building Blocks



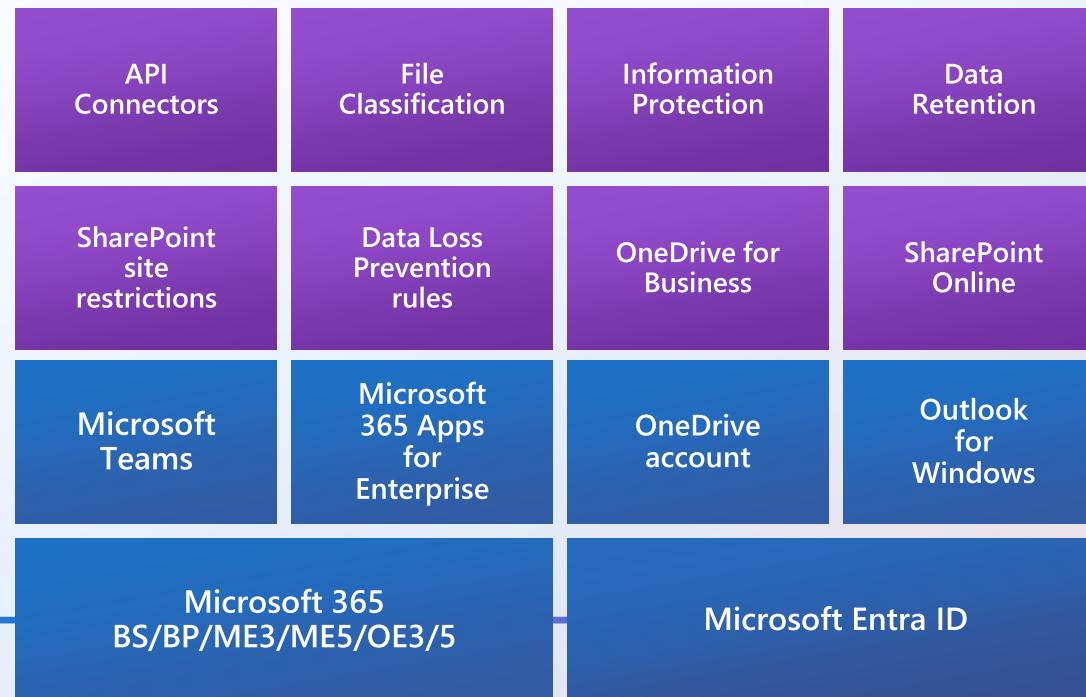


# The Copilot and Business Premium Get AI Ready building Blocks





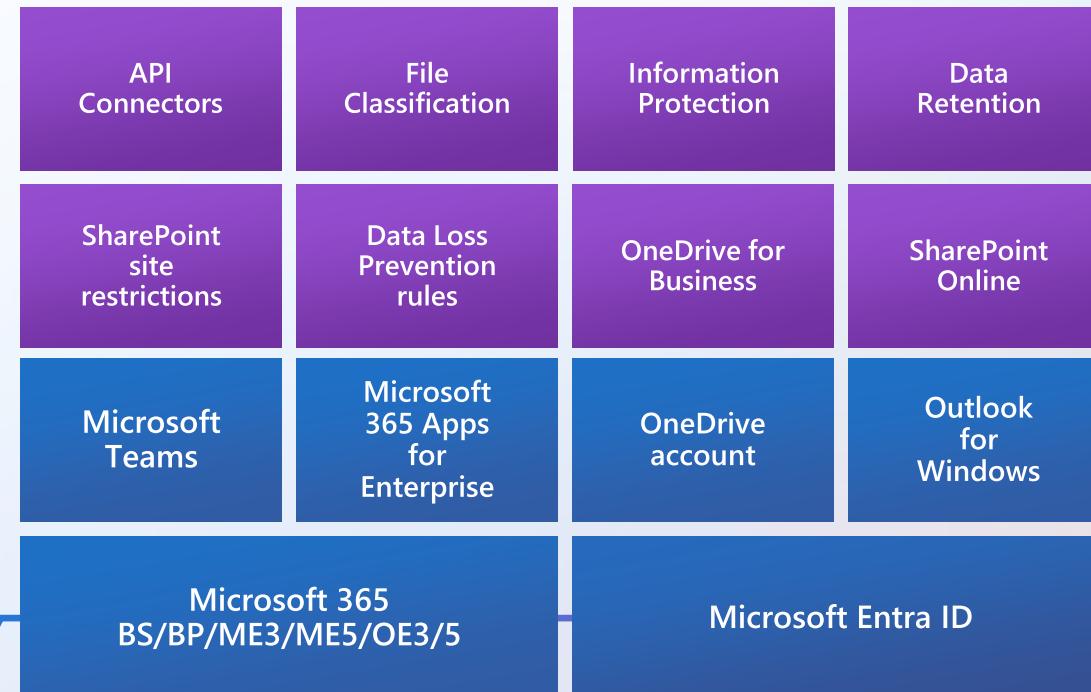
# The Copilot and Business Premium Get AI Ready building Blocks



Microsoft 365 Copilot



# The Copilot and Business Premium Get AI Ready building Blocks



Microsoft 365 Copilot

# AI-powered chat with commercial data protection

**Business data  
is protected**



User and business data is protected and will not leak outside the organization.

**Chat data is  
not saved**



Chat data is not saved, and no one at Microsoft can view customer data.

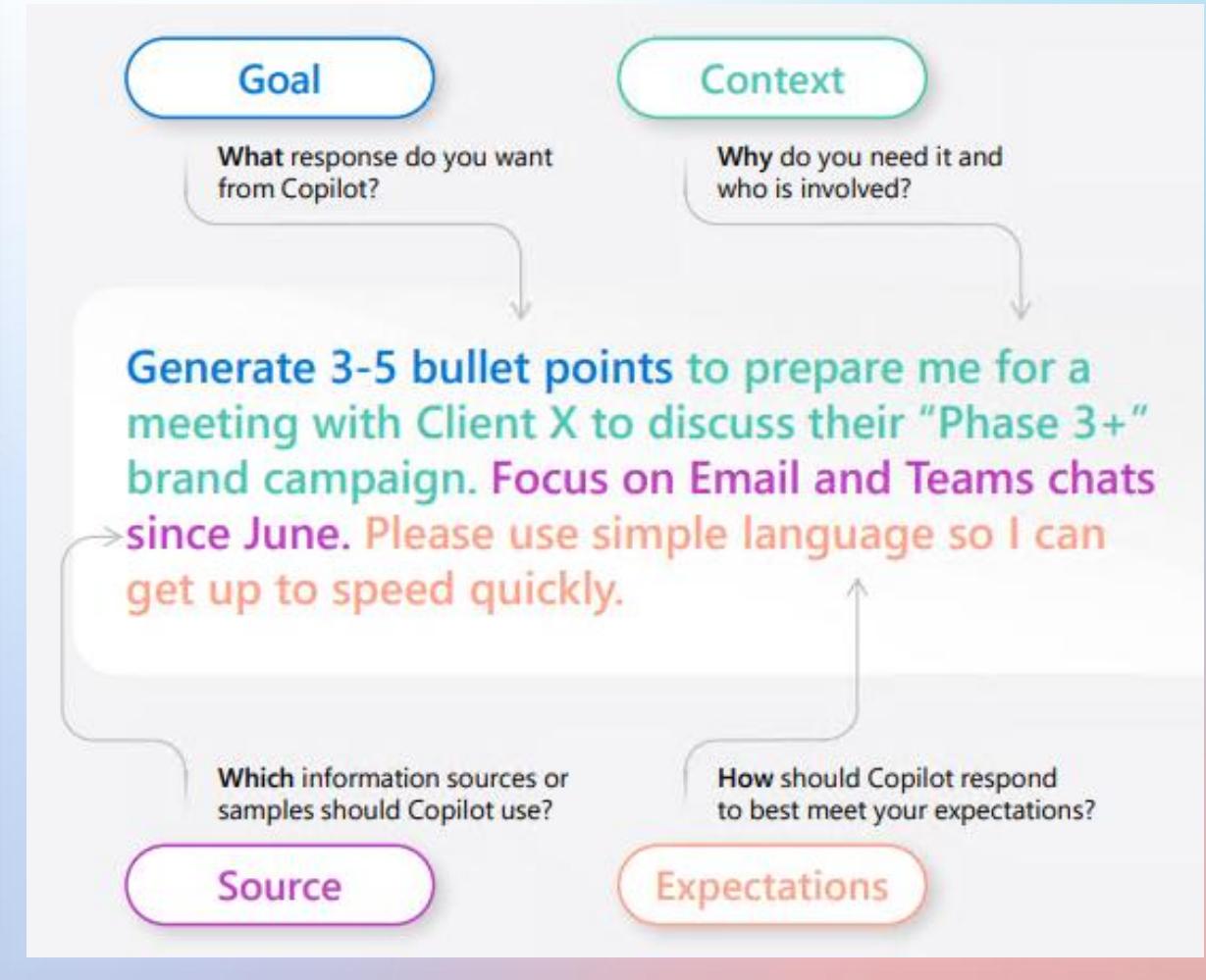
**Data is not used  
to train the model**



Chat data is not used to train the Large Language Models used by AI.

# Use prompts to get started with Copilot for Microsoft 365

Use prompts to create, summarize, edit or transform.  
It's like having a conversation with Copilot.



# Copilot Extensibility

# Plugin types

Use existing integrations or build new ones to extend your organization's AI-powered skills.

## Teams Message Extensions

Message extensions allow users to interact with a web service through buttons and forms in the Microsoft Teams, Outlook, and Microsoft 365 app clients.



## Power Platform Connectors

A proxy or a wrapper around an API that allows users to leverage a set of prebuilt actions and triggers to build their apps and workflows.



## Open AI Plugins

Open AI plugins connect ChatGPT to APIs, enabling it to perform actions like browsing and interacting with websites and games.

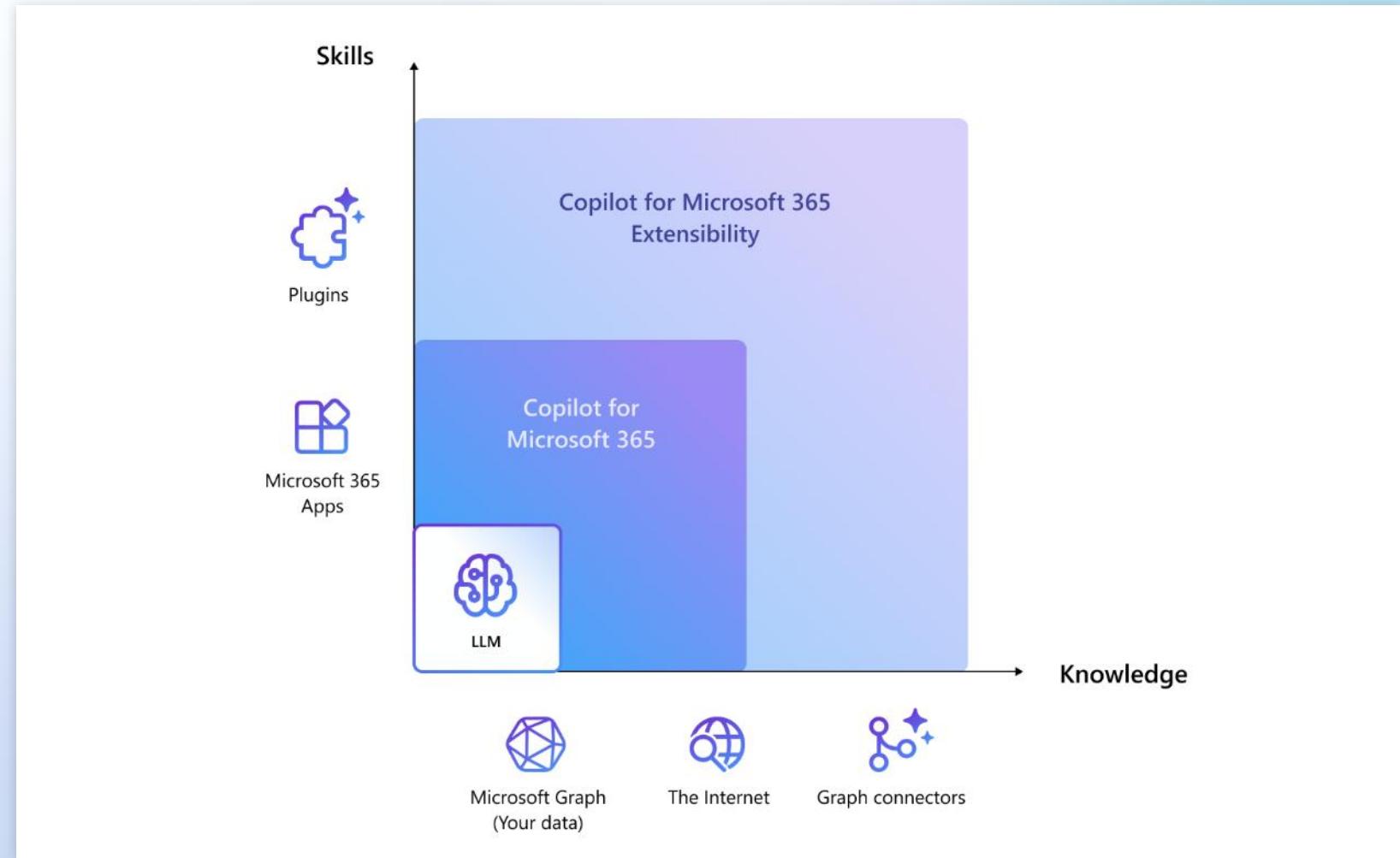


Existing Investments

New

# Extend Microsoft Copilot for Microsoft 365

- Enrich the data estate of your enterprise with industry-leading AI.
- Keep your users in the flow of their work, start to finish.
- Inherit world-class security, compliance, and privacy policies



# Copilot Customization



Introducing



## Copilot Studio

### Customize Copilot for Microsoft 365

Enable greater control and efficiency by authoring responses to predictable scenarios within Copilot for Microsoft 365.

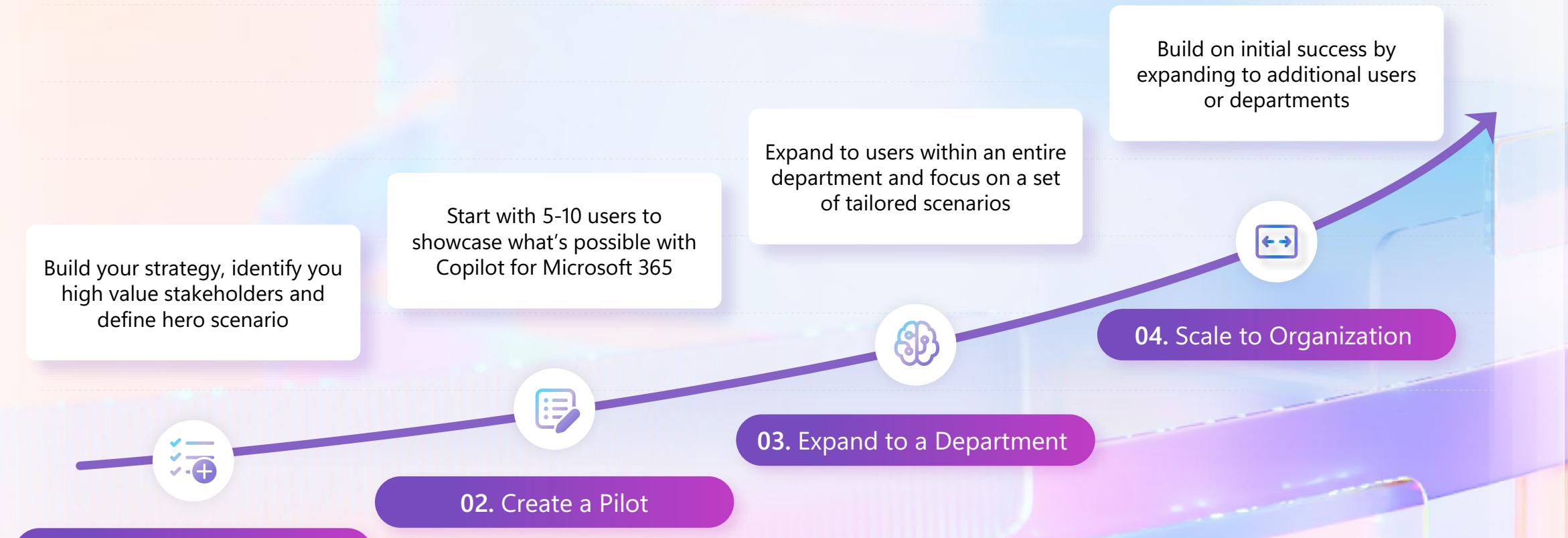
### Create custom copilots and GPTs

Incorporate your data and plugins for engaging interactions in the places that matter the most.

### Use one connected platform

Built on the foundations of leading AI technologies including Power Virtual Agents, and can connect to Azure AI Studio and more.

# Four steps to drive Copilot success with customers



# Copilot for Microsoft 365 Demos

- [Copilot for Microsoft 365 - Work On](#)
- [Copilot in Teams | Ask Better Questions](#)
- [Copilot in Teams | Discern Opinions Quickly](#)
- [Copilot in PowerPoint | Quickly generate ideas](#)
- [Copilot in PowerPoint | Create consistency](#)
- [Copilot in PowerPoint | Tell impactful stories](#)
- [Microsoft 365 Copilot | Get up to speed](#)
- [Microsoft 365 Copilot | Show up prepared – every time](#)
- [Microsoft 365 Copilot | Accomplish more in less time](#)
- [Copilot in Outlook | Translate an email](#)
- [Copilot in Outlook | Draft effective emails](#)
- [Copilot in Word | Request tailored edits](#)
- [Copilot in Word | Transform a document](#)
- [Microsoft 365 Copilot in Excel](#)
- [Copilot in Whiteboard | Brainstorming](#)
- [Microsoft 365 Copilot | Quickly align on next steps](#)
- [Semantic Index for Copilot: Explained by Microsoft](#)
- [The Copilot System: Explained by Microsoft](#)
- [Copilot Studios | Explained by Microsoft](#)
- [Microsoft Copilot Studio Demo – Microsoft Ignite 2023](#)

Check more demo videos at: [Copilot for Microsoft 365 Playlist](#)

# Links to learn more (1 of 2)

## What is Copilot?

- [Copilot for Microsoft 365](#)
- [The Copilot System](#)
- [ChatGPT vs. Copilot for Microsoft 365: What's the difference?](#)
- [Copilot for Microsoft 365 Early Access Program](#)
- [Copilot for Microsoft 365 Early Access Program FAQ](#)
- [Get Started with Copilot for Microsoft 365 \(Admin setup\)](#)

## How Copilot works

- [How Copilot for Microsoft 365 works: Microsoft Mechanics video](#)
- [Semantic Index for Copilot](#)
- [Microsoft Graph](#)
- [Microsoft Graph connectors](#)

## Additional copilot experiences across the Microsoft Cloud

- [Unleash your productivity with AI and Copilot for Microsoft 365](#)
- [Microsoft Dynamics 365 Copilot](#)
- [Copilot in Power Platform](#)
- [Microsoft Security Copilot](#)
- [GitHub Copilot](#)

## Privacy

- [Microsoft's privacy policy](#)
- [Microsoft Privacy Statement](#)
- [Trust Center data protection and privacy](#)
- [Data, privacy, and security for Azure OpenAI Service](#)
- [Role-based access control](#)
- [User permissions and permission levels in SharePoint Server](#)
- [Customer Lockbox requests](#)
- [Microsoft 365 isolation controls](#)
- [Data Protection Addendum](#)

# Links to learn more (2 of 2)

## Data residency and storage

- EU Data Boundary
  - [Website](#)
  - [Blog](#)
  - [Documentation](#)

## Compliance

- [Microsoft Compliance](#)
- [Service Trust Portal](#)
- [Compliance offering definitions](#)
- General Dat Protection Regulation (GDPR)
  - [Full summary](#)
  - [Short summary](#)

## Security

- [Configure usage rights for Azure Information Protection \(AIP\)](#)
- [Universal Licensing Terms for Online Services](#)
- [Data Protection Addendum](#)
- [Isolation and Access Control in Microsoft 365](#)

## How to prepare for Copilot for Microsoft 365

- [How to prepare for Copilot](#)
- [How to get ready for Copilot for Microsoft 365 \(Mechanics\)](#)
- [Learn about Microsoft feedback for your organization](#)
- [Manage Microsoft feedback for your organization](#)
- [How to manage Microsoft Search](#)
- [Microsoft 365 Product Terms](#)
- [AI and ML Connected Community](#)
- [Content management and security in SharePoint, OneDrive, and Teams](#)

## Responsible AI

- Responsible AI core principles
  - [Videos](#)
  - [Documentation](#)
- [Microsoft Responsible AI Standard](#)
- [Governing AI: A Blueprint for the Future](#)



<https://bit.ly/ciacspcopilot>