



Power Platform COMMUNITY CONFERENCE

SEPTEMBER 18–20, 2024 • Workshops: Sept 16, 17 & 21

MGM GRAND • Las Vegas, NV



Power Platform
COMMUNITY CONFERENCE

PRACTICAL AI SKILLS FOR BUSINESS APPLICATIONS

Lisa Crosbie

Whova

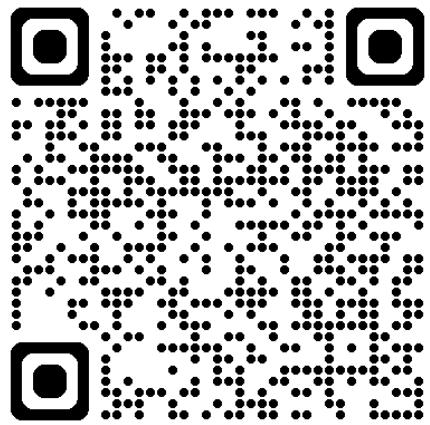


The official event app for the **Power Platform Community Conference**

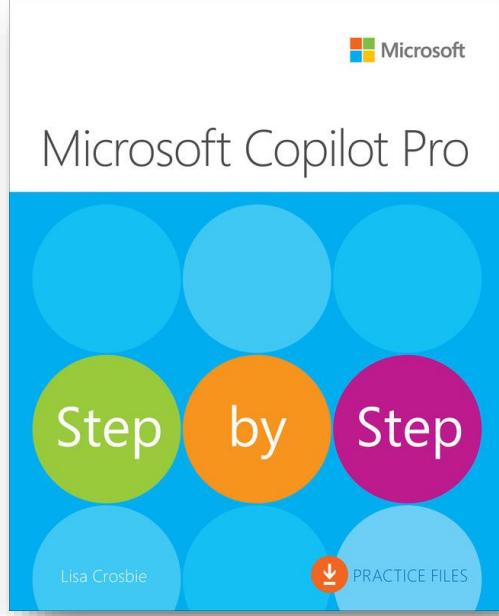
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- ➔ Event announcements
- ➔ Personalized agenda, session details
- ➔ Speaker & attendee profiles
- ➔ Networking, meet-ups, messages
- ➔ Event documents

Event Invitation
Code: **PPCCConf2024**



30% off preorders
COPILOTSBS



LISA CROSBIE

TUTORIALS & FEATURE UPDATES

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POWER PLATFORM • DYNAMICS 365

Lisa Crosbie

@LisaCrosbie • 61.3K subscribers • 190 videos

Learn how to get started and get the most out of your business applications with practice...more

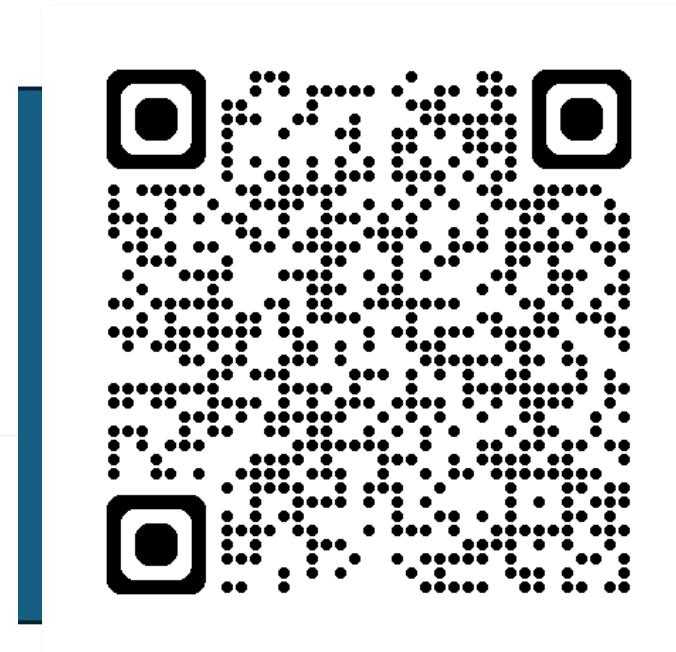
lisacrosbie.com and 3 more links

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- HOW TO BUILD MODEL-DRIVEN POWER APPS (COMPLETE COURSE) 3:23:34
- DYNAMICS 365 EXPLAINED IN 10 MINUTES 9:54
- What is Dynamics 365? 285K views • 1 year ago
- How to Turn Your Excel Spreadsheets into Power... 32:45
- How to present PowerPoint in Microsoft Teams: See notes... 4:48
- Microsoft Dynamics 365 Sales (CRM): Tutorial for... 47:19
- What is Microsoft Copilot? (Microsoft Copilot vs Copilo... 12:40



Lisa Crosbie

Business Applications & Microsoft 365 Copilot

Logistics

Wifi

MGMResorts-WiFi
(No Password)

Workshop format:

Presentation style, live demos, Q&A (Slido)

Optional follow along exercises

- copilot.microsoft.com
- Sign in with your (work or) personal account

Download workshop guide:

github.com/lisacrosbie/PracticalAI

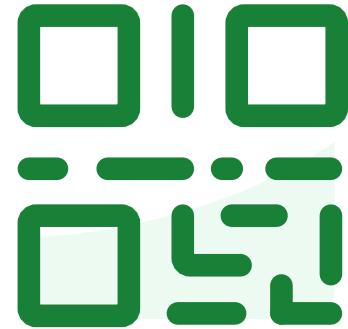


Agenda

TIME	TOPIC
9:00	Skill #1: Think differently
9:30	Skill #2: Understand what's available
10:15	Break
10:30	Skill #3: Write effective prompts
11:15	Skill #4: Use Copilot for low-code development
12:00	Lunch
1:00	Skill #5: Knowledge is power
1:30	Skill #6: Know when to build or extend
2:00	Skill #7: Build your own Copilot
2:30	Break
3:30	Skill #8: Keep an open mind
3:45	Open Q&A

The Slido logo consists of the word "slido" in a lowercase, bold, sans-serif font, with a small green square icon preceding the letter "s".

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**Join at slido.com
#1650843**

ⓘ Start presenting to display the joining instructions on this slide.

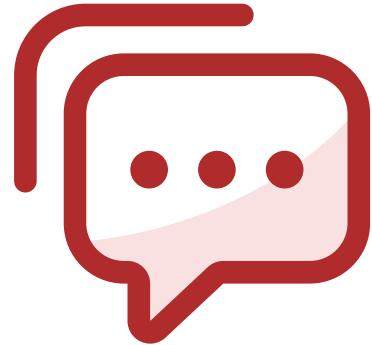
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What is your top learning objective for today?

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Audience Q&A

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Do you have a licence for:

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Surely you can't be serious!

- Something new was announced this morning
- Something that has worked before will not work
- Something will work unexpectedly well
- Something we cover today will be out of date by the end of the week

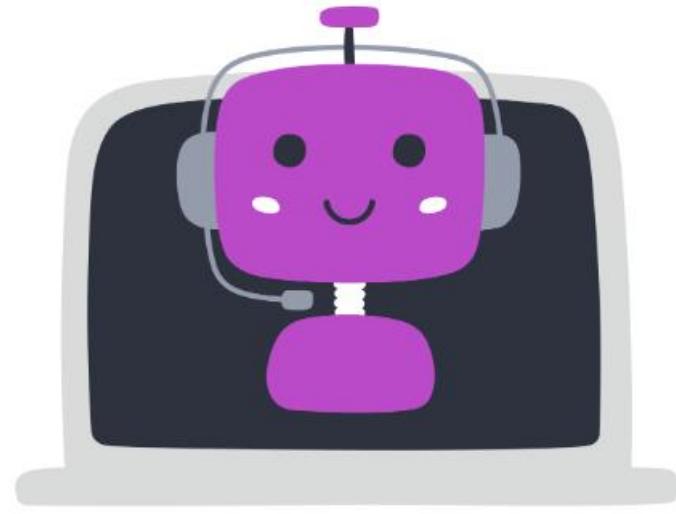




Skill #1

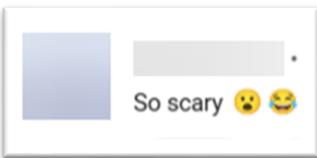
Think Differently



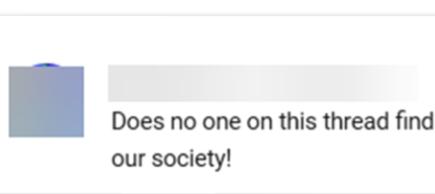


Not just another new technology

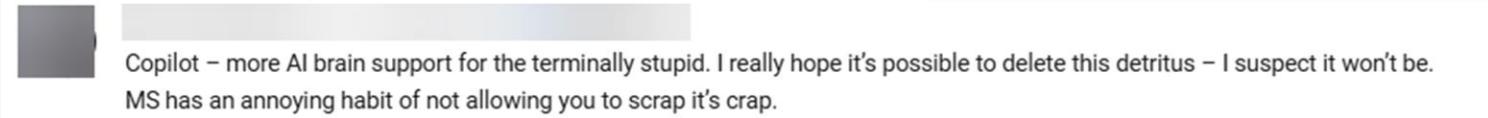
The Concerns



So scary 😱 😱



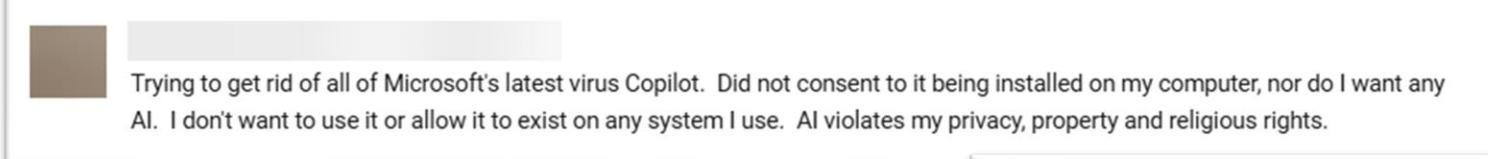
Does no one on this thread find this absolutely frightening? Do you not sense what's coming around the corner in every facet of our society!



Copilot – more AI brain support for the terminally stupid. I really hope it's possible to delete this detritus – I suspect it won't be. MS has an annoying habit of not allowing you to scrap its crap.



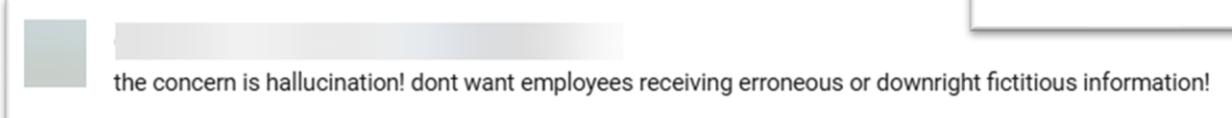
The real reason they want you to sign in is so that they can more closely connect the user with the data so it's easier for them to use it against you down the road.



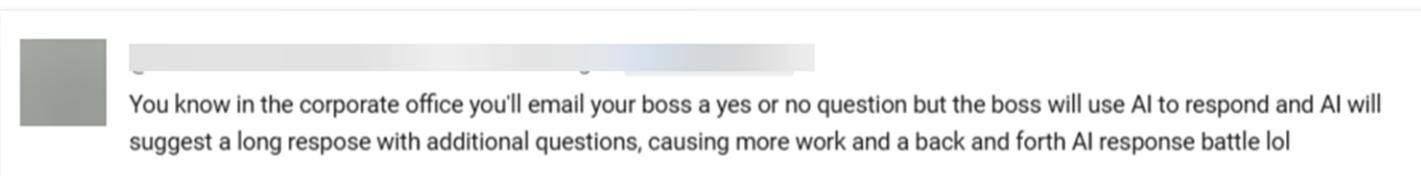
Trying to get rid of all of Microsoft's latest virus Copilot. Did not consent to it being installed on my computer, nor do I want any AI. I don't want to use it or allow it to exist on any system I use. AI violates my privacy, property and religious rights.



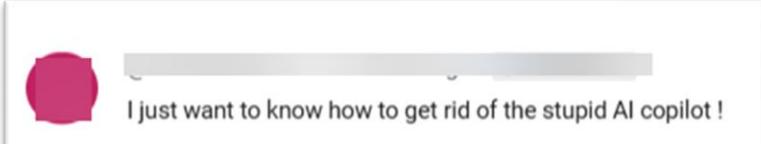
An uninvited A.I Software program that tracks everything you do on your PC and knows all your data AND you inside and out. If this is not dangerous and outright creepy, I don't know what is!!!



the concern is hallucination! dont want employees receiving erroneous or downright fictitious information!



You know in the corporate office you'll email your boss a yes or no question but the boss will use AI to respond and AI will suggest a long response with additional questions, causing more work and a back and forth AI response battle lol



I just want to know how to get rid of the stupid AI copilot !

The Excitement



Thank you so much for explaining so much in such a short time.

Feels like this thing is still so new and raw to me.

What an incredible time to be living in.



It looks like a Clippy, but that really works. Great stuff!



Very nice overview. Co-Pilot, Chat-GPT and Gemini already are re-shaping the tech world as we used to know it. The "rise of AI" is inevitable. How we use it and implement it will define us for eons to come.



So many amazing announcements from day 1, I'm super keen on the Copilot runtime- it's going to enable us to build so much on the device (vision, voice, TTS, OCR, analysis) and then kick it to copilot web via connectors. What a time to be a developer! 🎉



This is actually incredible! It makes every professional be more Directorial, as you fact check and get the most useful details out of every meeting/email/chat etc. Mind Blown!!



Copilot for all our Policies and Procedure documents would be super-handy for employees to ask questions and find the exact reference.



If you know how to use the AI, it can bring reduce regular and tedious jobs considerably, help you use your time more creatively and do more thorough output.



Thanks Lisa, excellent recap. Mind boggling 😅 this is so efficient. We could soon have so much more time in a day. Amazing!



happy



nervous



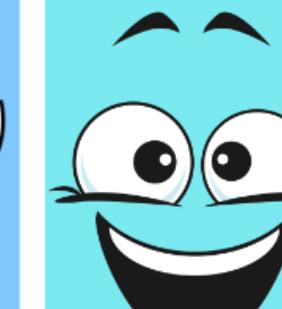
unimpressed



cranky



mad



glad



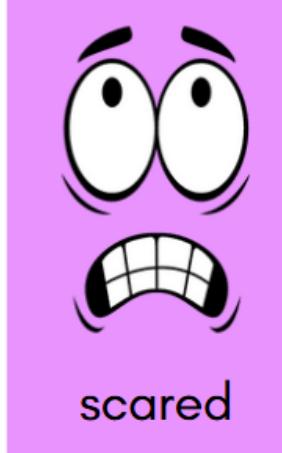
devious



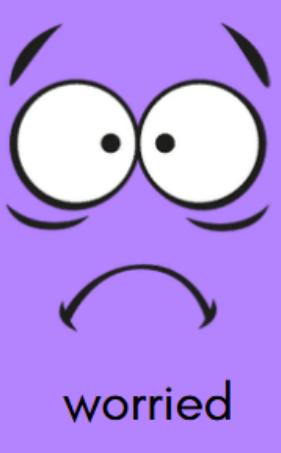
confused



forlorn



scared



worried



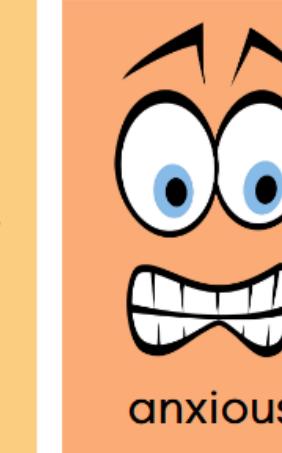
angry



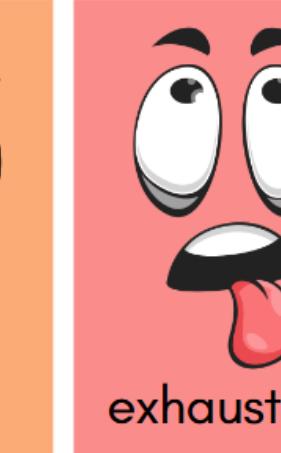
glum



elated



anxious



exhausted

How do you feel?

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What concerns you about generative AI?

- ① Start presenting to display the poll results on this slide.



Not just another technology



Conversation

Think of it like chatting with a human assistant, but it's not human

Knowledge

It has access to your knowledge, but it doesn't know or understand anything

Creativity

It generates answers, rather than retrieving them



**Tell me about the MGM
Grand in Las Vegas**



The **MGM Grand** in Las Vegas is one of the most iconic and largest hotels on the Las Vegas Strip. Here are some highlights:

1. **Accommodation:** The MGM Grand offers a variety of rooms and suites, ranging from contemporary to classic styles. Options include standard rooms, luxurious suites, and even SKYLOFTS for a more exclusive experience [1](#).
2. **Entertainment:** The MGM Grand Garden Arena hosts a wide range of events, including concerts, championship fights, and other major performances [2](#). The hotel is also home to several shows, including Cirque du Soleil's "KÀ" [1](#).
3. **Dining:** The resort features numerous dining options, including award-winning restaurants by celebrity chefs. You can enjoy everything from classic steakhouse dishes at Tom Colicchio's Craftsteak to Italian cuisine at Luchini [1](#).
4. **Casino:** The MGM Grand's casino is one of the largest in Las Vegas, offering a vast gaming floor with a variety of table games, slot machines, and a poker room [1](#).
5. **Pools and Cabanas:** The resort boasts multiple pools, including a lazy river and private cabanas, providing a tropical oasis in the middle of the desert [3](#).
6. **Nightlife:** The MGM Grand is known for its vibrant nightlife, with several bars, lounges, and nightclubs, including the famous Hakkasan Nightclub [1](#).

It's a place where you can experience the full spectrum of what Las Vegas has to offer, all in one location. Are you planning to stay there or just visit?

The **MGM Grand** in Las Vegas is one of the most iconic resorts on the Las Vegas Strip. Here's a quick overview of what makes it special:

Accommodation

- **Rooms and Suites:** The MGM Grand offers a variety of rooms and suites, from the stylishly chic Grand King rooms to luxurious suites like the Tower Spa Suite [1](#).
- **Amenities:** Rooms are equipped with modern amenities, including flat-screen TVs, work desks, and en suite bathrooms with free toiletries [2](#).

Entertainment

- **MGM Grand Garden Arena:** This venue hosts star-studded events, including concerts, championship fights, and other major events [1](#).
- **Shows:** The resort features spectacular shows and performances, often starring world-renowned artists [3](#).

Dining

- **Celebrity Chef Restaurants:** The MGM Grand boasts a range of dining options, including award-winning restaurants by celebrity chefs like Tom Colicchio's Craftsteak [2](#).
- **Variety:** From Italian cuisine at Luchini Italian Restaurant to classic steakhouse dishes, there's something for every palate [1](#).

Recreation

- **Pools and Cabanas:** The resort features tropical-inspired pools, private cabanas, and a lazy river, providing a perfect escape from the hustle and bustle of the Strip [2](#).
- **Casino:** The large casino floor offers a wide range of gaming options for those looking to try their luck [2](#).



You

Mary had a little



Copilot

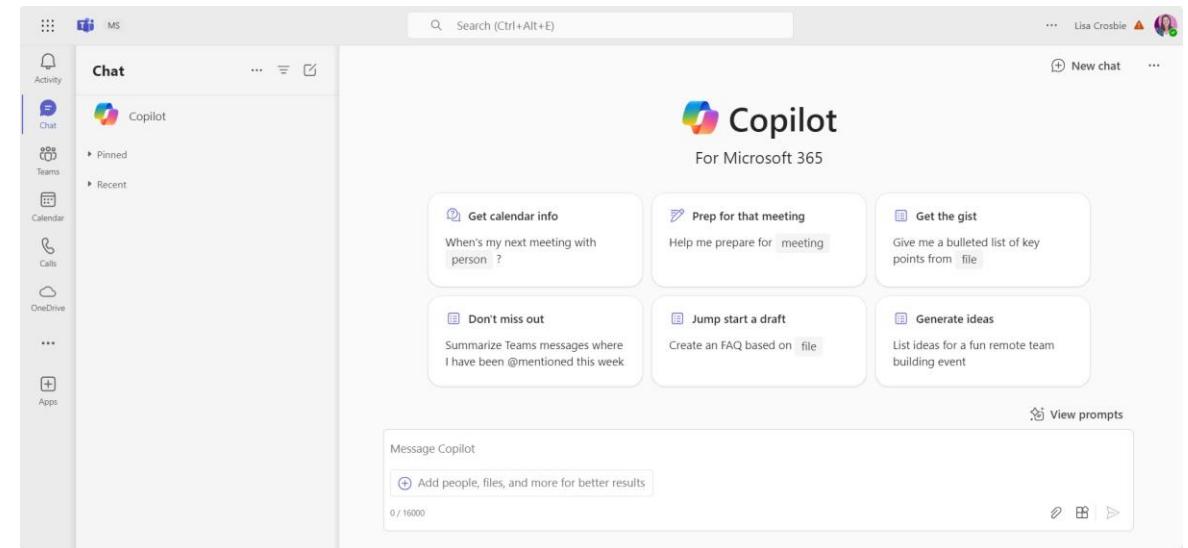
It sounds like you're starting the classic nursery rhyme! "Mary had a little lamb, its fleece was white as snow..." 🎶

Is there something specific you'd like to do with this rhyme? Maybe create a fun design or illustration?



• 1 of 30

Training and adoption



MS

Search (Ctrl+Alt+E)

Lisa Crosbie

New chat

Chat

Copilot

Pinned

Recent

Activity

Chat

Teams

Calendar

Calls

OneDrive

...

Apps

Copilot

For Microsoft 365

Get calendar info
When's my next meeting with person ?

Prep for that meeting
Help me prepare for meeting

Get the gist
Give me a bulleted list of key points from file

Don't miss out
Summarize Teams messages where I have been @mentioned this week

Jump start a draft
Create an FAQ based on file

Generate ideas
List ideas for a fun remote team building event

View prompts

Message Copilot

Add people, files, and more for better results

0 / 16000

How to approach training



How can I use this to
solve a problem?

How can I use this to
exploit an opportunity I
didn't have before?

Key processes by function

Sales	Marketing	Finance	Customer service	Legal	HR
Customer self-service	Customer insights & strategy	Quote to cash	Self-help	Regulatory & compliance management	Employee engagement
Lead generation	Demand generation	Record to report	Support assignment	Contracting	Recruiting
Customer engagement	Content creation	Tax & treasury	Issue diagnosis	Risk management	HR admin & payroll
Negotiations & closing	Campaign execution	Planning & analysis	Problem resolution	Litigation	Compensation & benefits
Post-sale follow-up & upsell	Predictive analysis	Risk management & compliance	Continuous improvement	Consultation	Learning & development
Sales analysis & forecasting	Personalization	Procure to pay		Intellectual property	Talent management
	Sales enablement & recommendation			Advisory services	HR strategy & planning

KPIs by function

Sales	Marketing	Finance	Customer service	Legal	HR
Opportunities pursued	Leads generated	Finance outsourcing spend	First Call Resolution (FCR) rate	Outside counsel spend	Employee onboarding time
Deal Size	Agency spend	Cost per analysis request	Calls answered by agents	Cost per internal review	Calls answered by agents
Win rate / Close rate	Customer retention	Deal review time	Issue resolution time	Compliance rate	Issue resolution time
Customer retention	Employee retention	Time to close	Customer retention	Contract error rate	Employee retention
Average discount size	Cost per lead	Compliance rate	Case volume	Number of disputes	Hiring costs per employee
Upsell / Cross sell rate	Brand value	Forecast accuracy	Time to first response	Dispute win rate	Admin cost per employee
Cost per lead	Lead conversion rate	Employee retention	Average call time		First call resolution rate
Sales cycles length	Revenue per lead generated	Day sales outstanding	Customer experience (CSAT)		Workforce demographics
Response rate					

Adoption

Habit Tracker



Exercise

m	t	w	t	f
✓				



Meditate

	✓	✓		
--	---	---	--	--



Hydrate

✓				
---	--	--	--	--



Copilot

✓			✓	
---	--	--	---	--

AI is not (just) a search engine



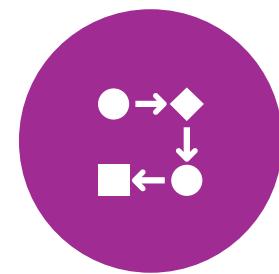
Generate text,
code, images



Play a game

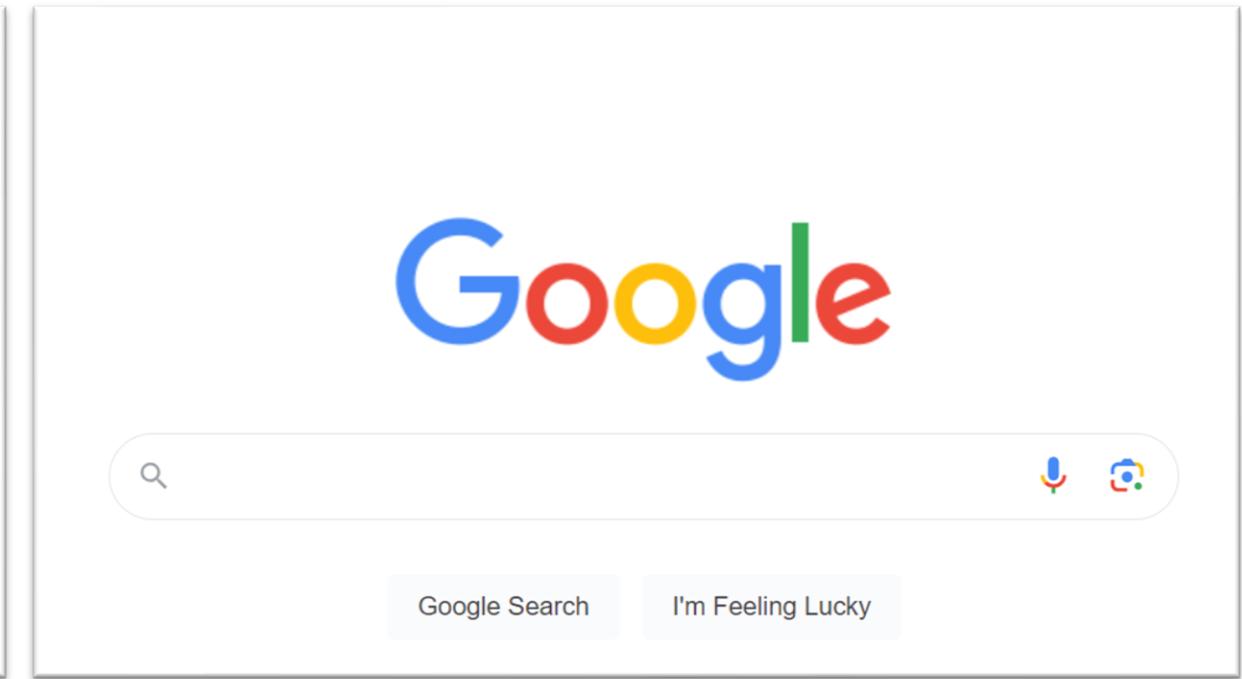
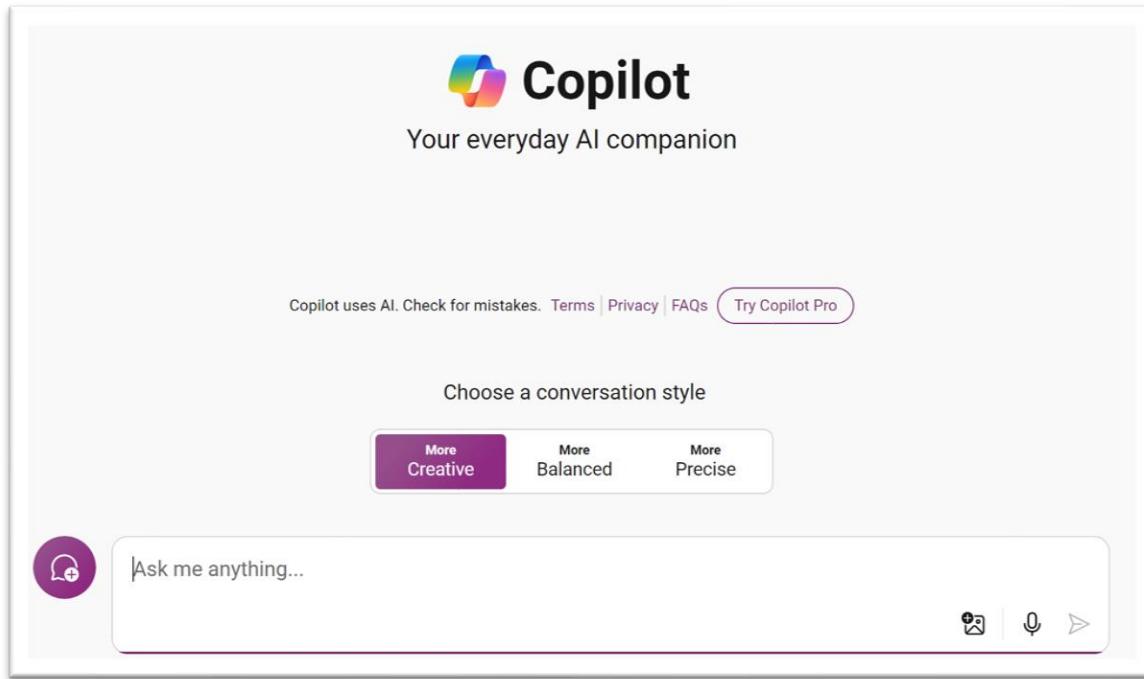


Take on a persona
or perspective



Iterate and refine

The Copilot vs Google Challenge





fears about ai



All News Images Videos Shopping Books Maps : More

Tools

In the world Technology Overblown Geoffrey Hinton Biggest

Fears about AI

From sources across the web

Biases due to AI	▼	Privacy erosion	▼	Fear: ai will make bad decisions	▼
Job fears	▼	Loss of control	▼	Algorithmic bias caused by bad data	▼
Fear of misuse	▼	Loss of jobs to automation	▼	Weapons automatization	▼

Feedback



Engineering Institute of Technology

<https://www.eit.edu.au> › artificial-intelligence-decoding... ::

Artificial Intelligence and Automation: Decoding Human ...

13 Feb 2024 — The rapid development of AI generates uncertainty, **fostering fear and anxiety**.

As AI evolves, its potential impact on society, ethics, and daily ...

People also ask :

What are the fears of AI?



What is scary about AI?





You

Act as a change management specialist working with a group of executives to design a training program to adopt Microsoft Copilot. What concerns or fears do you anticipate from the group?



Copilot

When working with executives to design a training program for adopting Microsoft Copilot, it's important to anticipate and address several common concerns and fears:

1. **Resistance to Change:** Executives might worry about the disruption to established workflows and the potential resistance from employees who are comfortable with existing systems ^①.
 2. **Fear of Job Security:** There could be concerns about job displacement or redundancy, especially if Copilot is perceived as a tool that could replace certain roles ^②.
 3. **Lack of Understanding:** Some executives might feel they lack the technical knowledge to fully grasp how Copilot works and how it can be integrated into their operations ^③.
 4. **Cost and ROI:** Concerns about the financial investment required for training and implementation, and whether the return on investment will justify these costs ^②.
 5. **Integration with Existing Systems:** Worries about how well Copilot will integrate with current systems and whether it will cause any compatibility issues ^②.
 6. **Data Security and Privacy:** Executives might be concerned about the security of their data and how Copilot handles sensitive information ^②.

7. Training Effectiveness: Doubts about whether the training program will be effective enough to ensure that all employees can use Copilot efficiently ⁽³⁾.

8. User Experience: Concerns about the learning curve and whether the user interface will be intuitive enough for all employees to adopt without significant frustration [\[2\]](#).

Addressing these concerns proactively in your training program can help ease the transition and foster a more positive attitude towards adopting Microsoft Copilot. Would you like to discuss strategies to mitigate these concerns?

Learn more [1 hbr.org](https://www.hbr.org) [2 arrowcore.com](https://www.arrowcore.com) [3 forbes.com](https://www.forbes.com) [4 vumc.org](https://www.vumc.org) [5 spiceworks.com](https://www.spiceworks.com)



1 of 30

Yes, please share strategies to address these concerns.

No need, I'm good. Thanks!

How can we ensure a smooth transition?



Ask me anything...

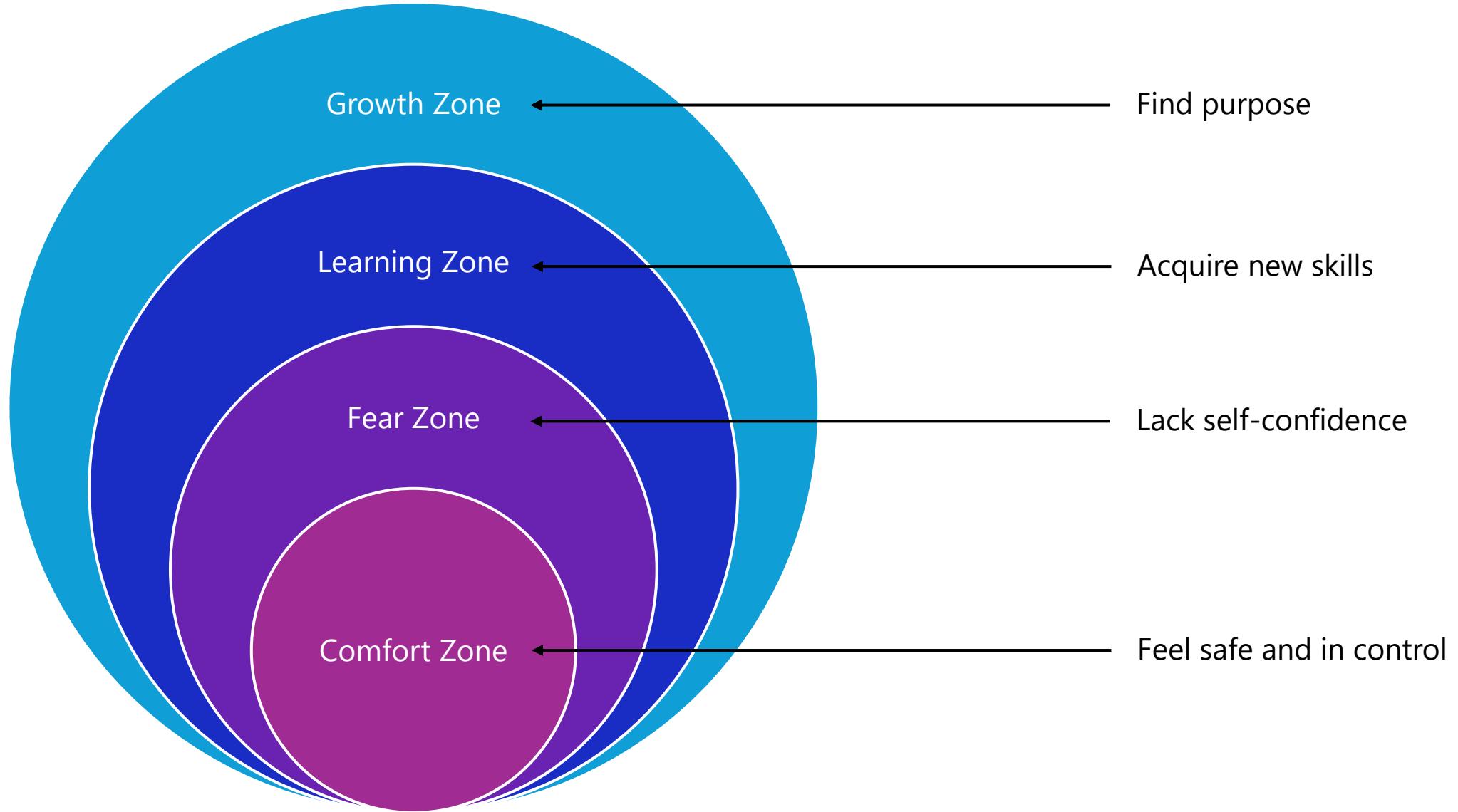


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What did you learn from the Copilot vs Google Challenge?

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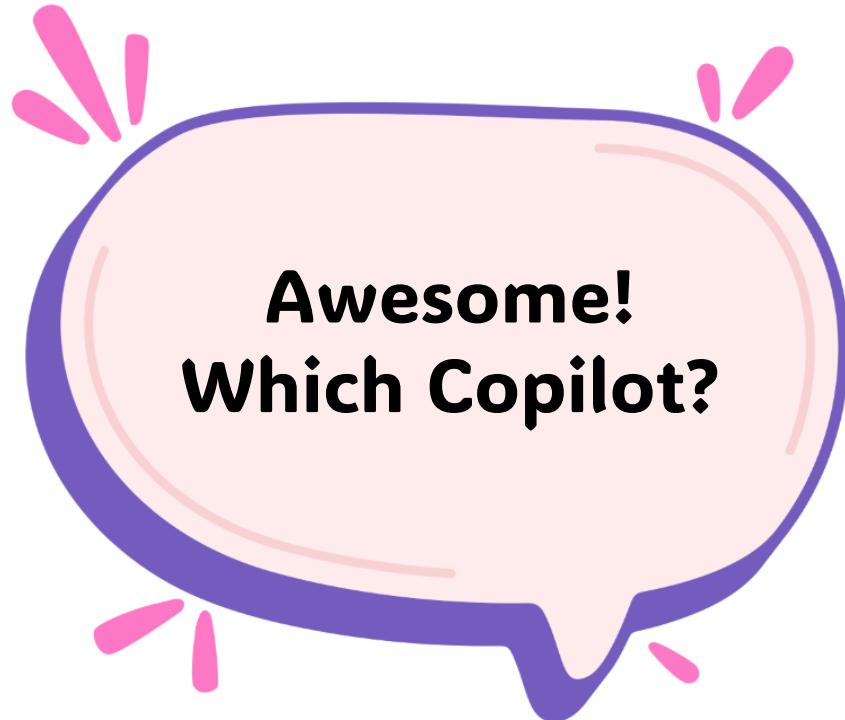
Skill #2

Understand
what's
available

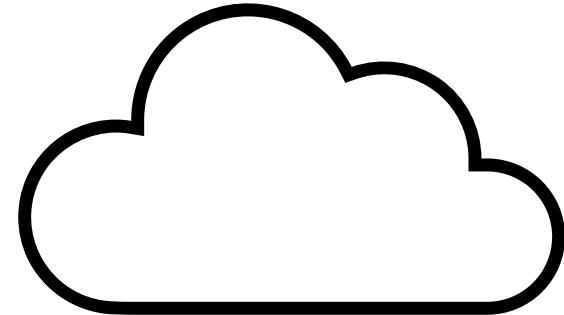
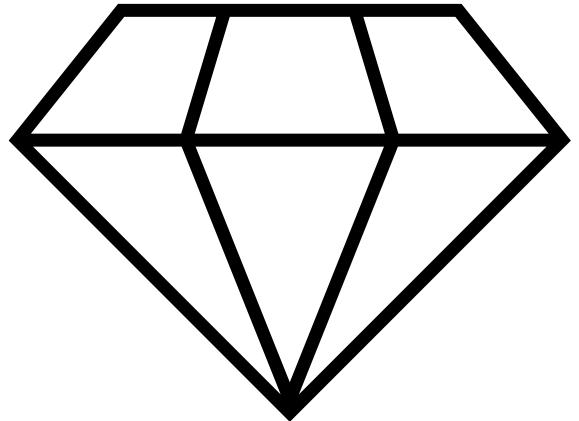




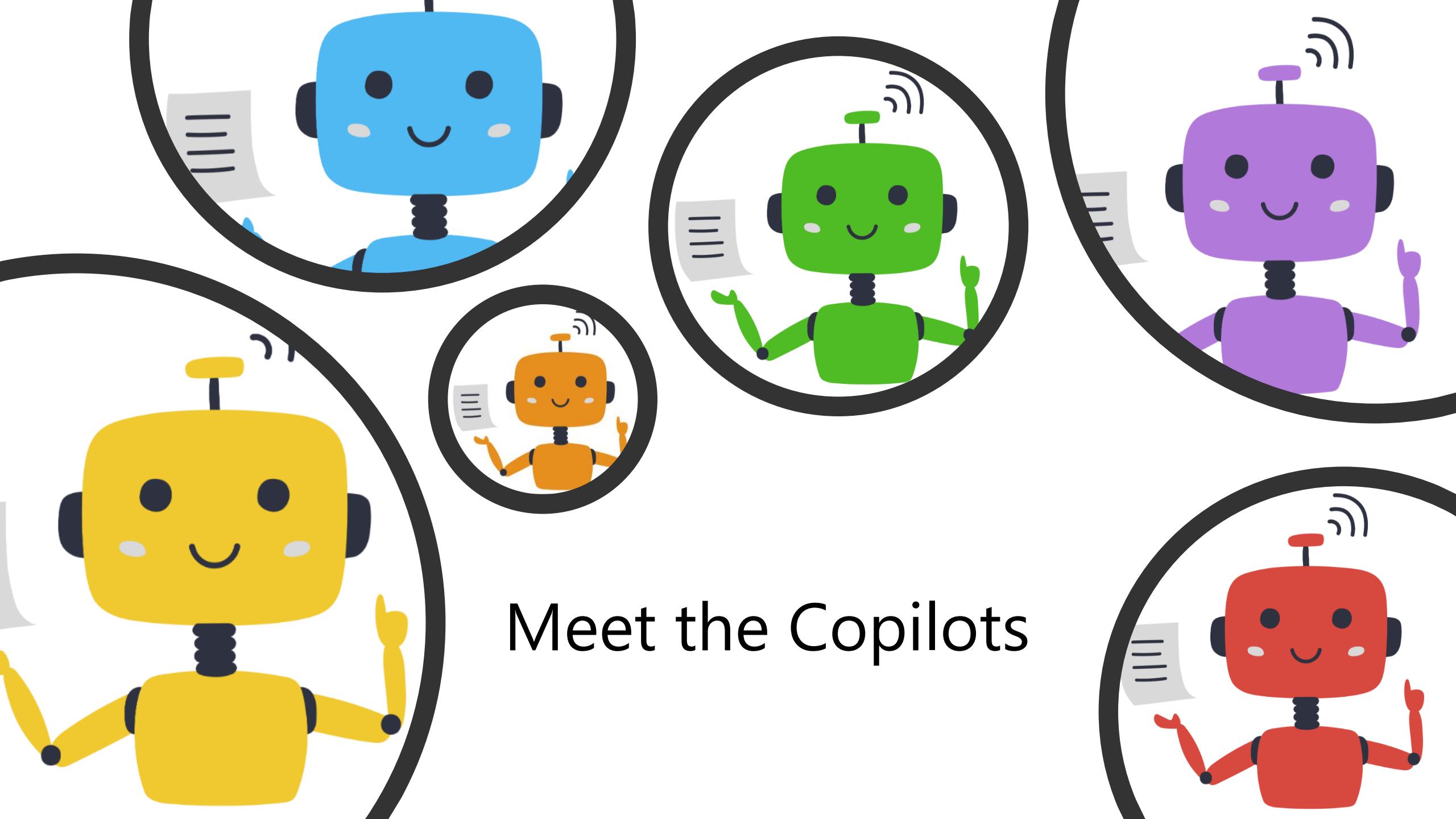
**We want to get
started with Copilot!**



**Awesome!
Which Copilot?**



Where you need to be



Meet the Copilots

Microsoft Copilot (free)

The Research Assistant





COPILOT

NOTEBOOK

Try the app

Lisa



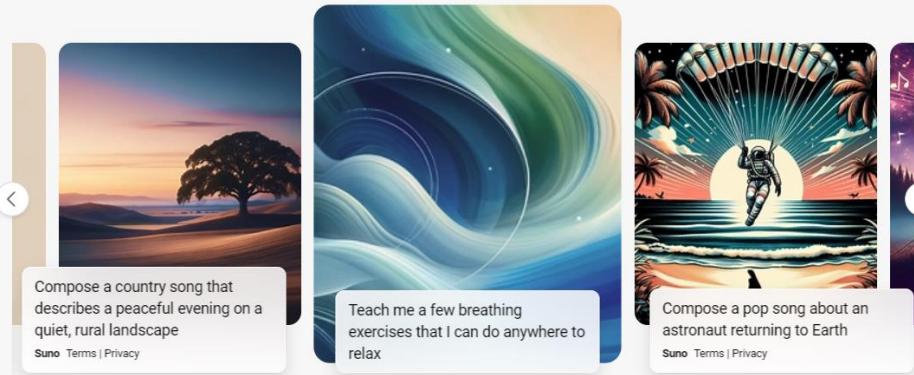
Chats Plugins

Recents

- Nursery Rhyme 4:18 pm
- MGM Grand in Las Vegas 4:14 pm
- Top Things to Do in Las Vegas 4:13 pm
- Las Vegas Recommendations 4:11 pm
- Addressing Concerns in Microsoft Copilot 3:56 pm
- Creating an Image 30 Aug 2024
- Creating a Colorful Lightbulb Image 8 July 2024
- create a colourful graphical icon to rep 26 Mar 2024
- Work Anniversary Celebration Image 8 Mar 2024



Your everyday AI companion

Copilot uses AI. Check for mistakes. [Terms](#) | [Privacy](#) | [FAQs](#) [Try Copilot Pro](#)

Choose a conversation style

More Creative

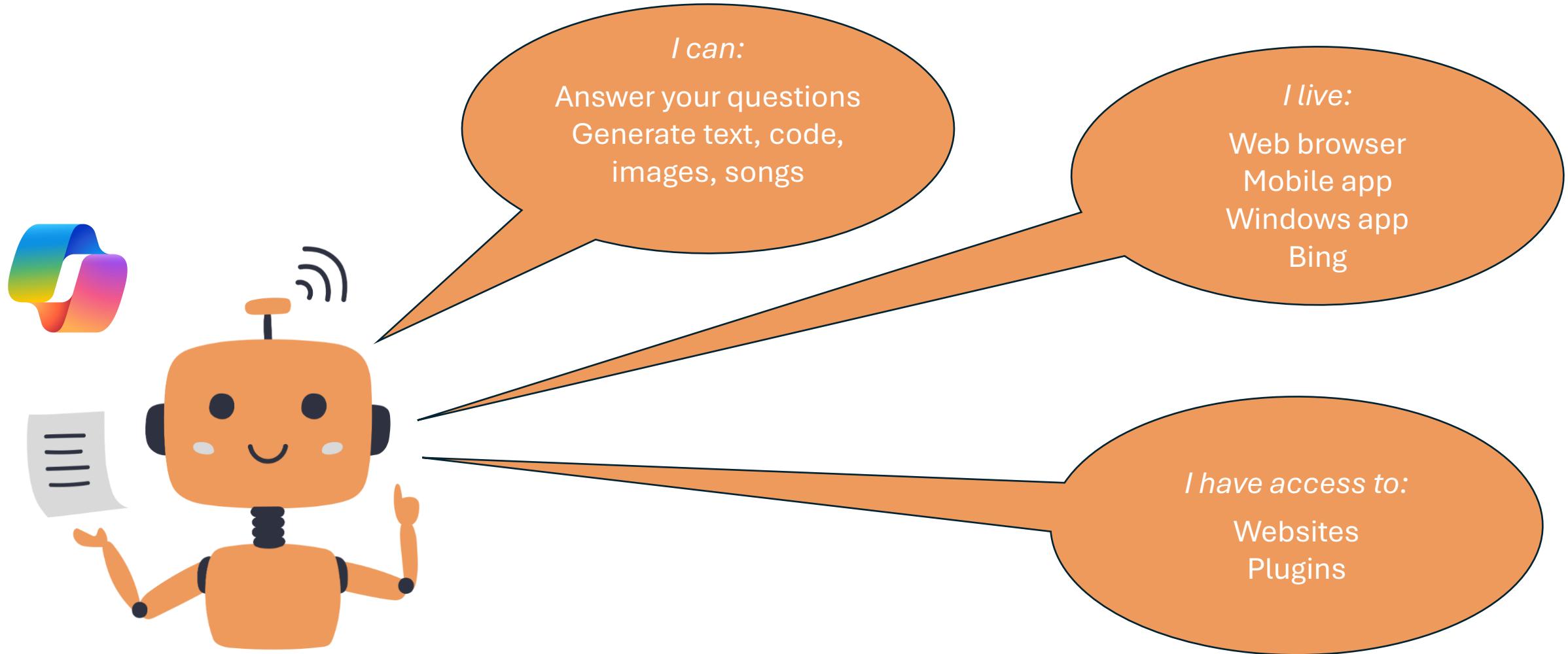
More Balanced

More Precise



Ask me anything...

Microsoft Copilot (Free): The Research Assistant



Microsoft Copilot Pro

The Creator Assistant





COPILOT

NOTEBOOK

Try the app

Lisa



Chats Plugins

Recents

- Italian Restaurants in Melbourne 3 Sept 2024
- Italian Restaurants in Melbourne 3 Sept 2024
- Pineapple Bun Fillings 2 Sept 2024
- Mary's Little Lamb 25 Aug 2024
- Battista's Recommended Dishes 12 Aug 2024
- Creating a Puppy Sticker 11 Aug 2024
- Puppy Sticker 11 Aug 2024
- Italian Restaurants in Melbourne 11 Aug 2024
- Digital Display with Social Media Metri 11 Aug 2024
- Yeah, tell me about the moon landing 11 Aug 2024
- Moon Landing Overview 11 Aug 2024
- Dreaming Big and Reaching for the Sta 11 Aug 2024
- Social Media Post Ideas with Star Emo 11 Aug 2024
- Glittery Star Emoji 11 Aug 2024
- Glittery Star Sticker 11 Aug 2024
- Congratulations on the Million-Dollar 11 Aug 2024
- Happy Clapping Sticker 11 Aug 2024

[See all recent chats](#)

Copilot PRO

Your everyday AI companion



Coach me through an upcoming job interview with some mock questions

Compose a folk song inspired by earth, water, fire, and air
[Suno](#) [Terms](#) | [Privacy](#)

Compose a pop song about adventures in the summer rain
[Suno](#) [Terms](#) | [Privacy](#)

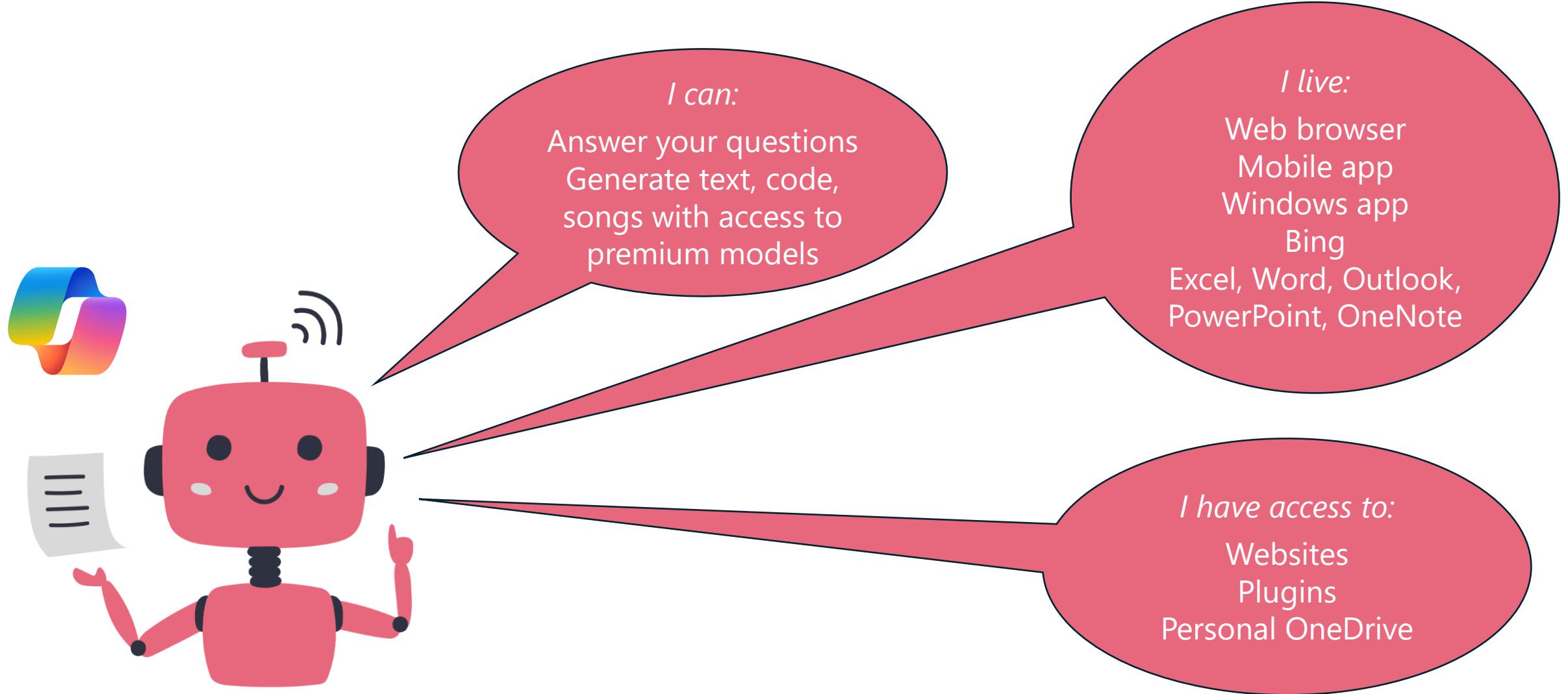
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Choose a conversation style

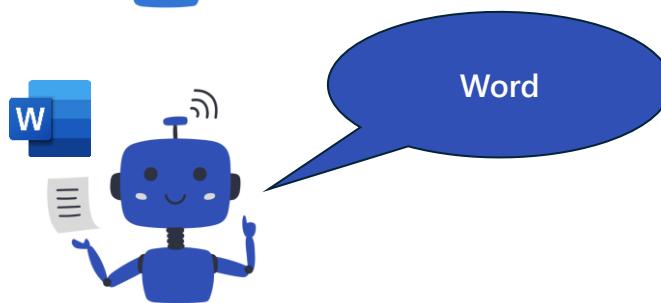
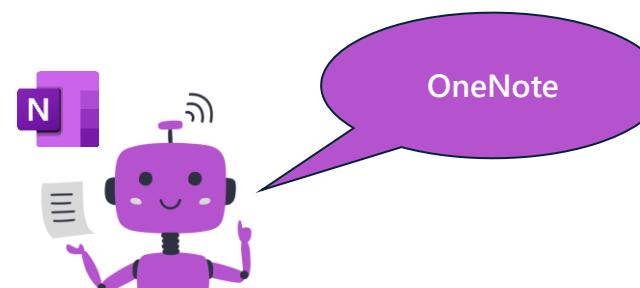
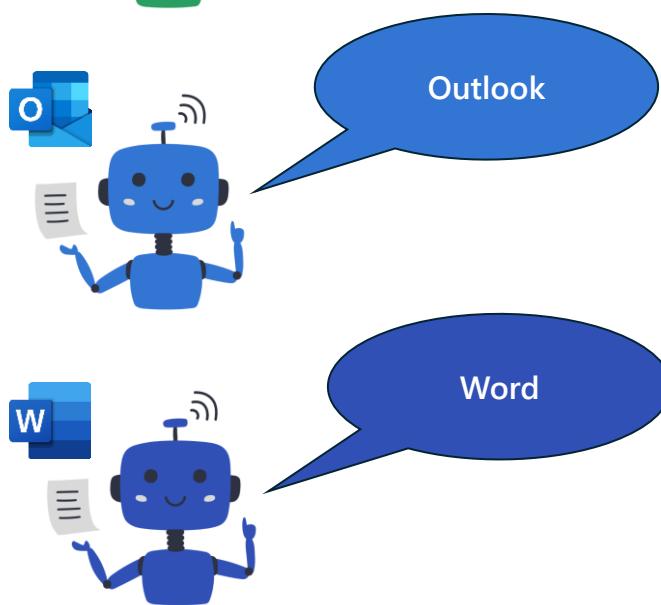
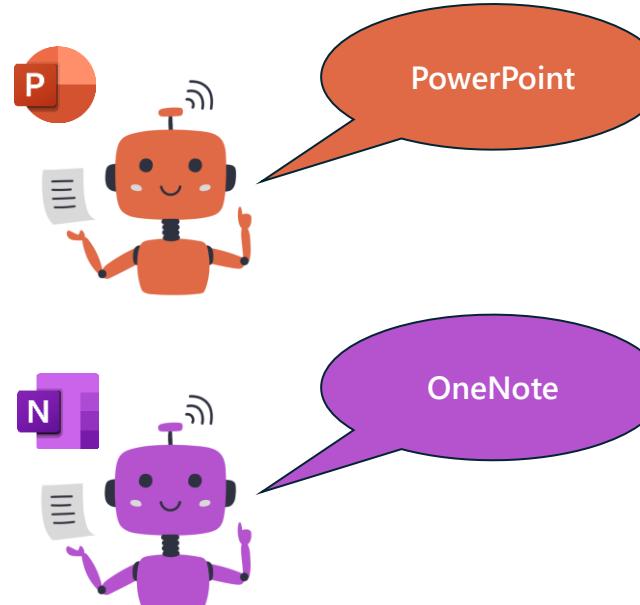
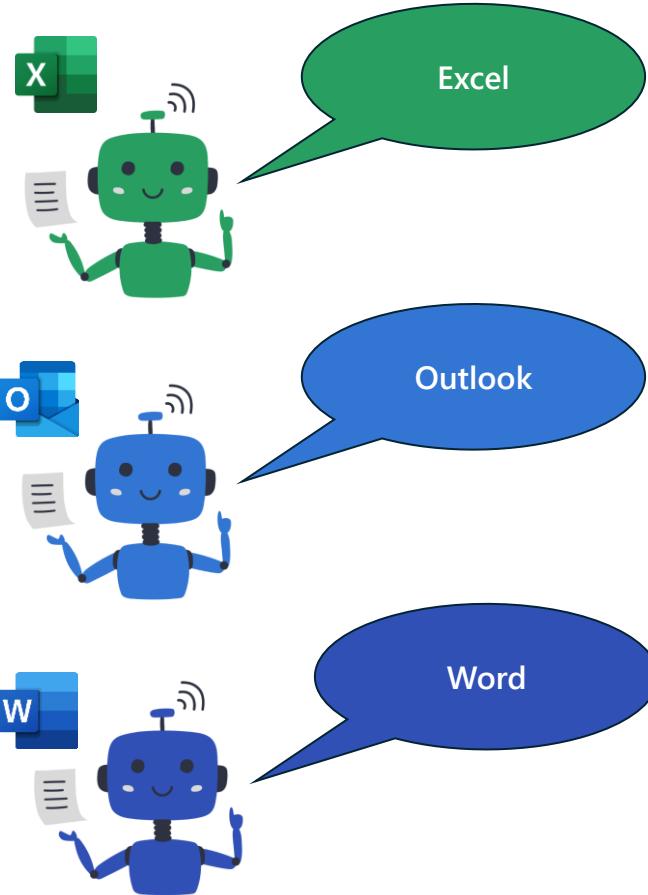
[More Creative](#)[More Balanced](#)[More Precise](#)

Ask me anything...

Microsoft Copilot Pro (Consumer): The Creator Assistant



Microsoft Copilot Pro with M365 Applications



Copilot for Microsoft 365

The Productivity Assistant



MS

Search (Ctrl+Alt+E)

Lisa Crosbie

New chat

Chat

Copilot

Pinned

Recent

Activity

Chat

Teams

Calendar

Calls

OneDrive

...

Apps

Copilot

For Microsoft 365

Get calendar info
When's my next meeting with person ?

Prep for that meeting
Help me prepare for meeting

Get the gist
Give me a bulleted list of key points from file

Don't miss out
Summarize Teams messages where I have been @mentioned this week

Jump start a draft
Create an FAQ based on file

Generate ideas
List ideas for a fun remote team building event

View prompts

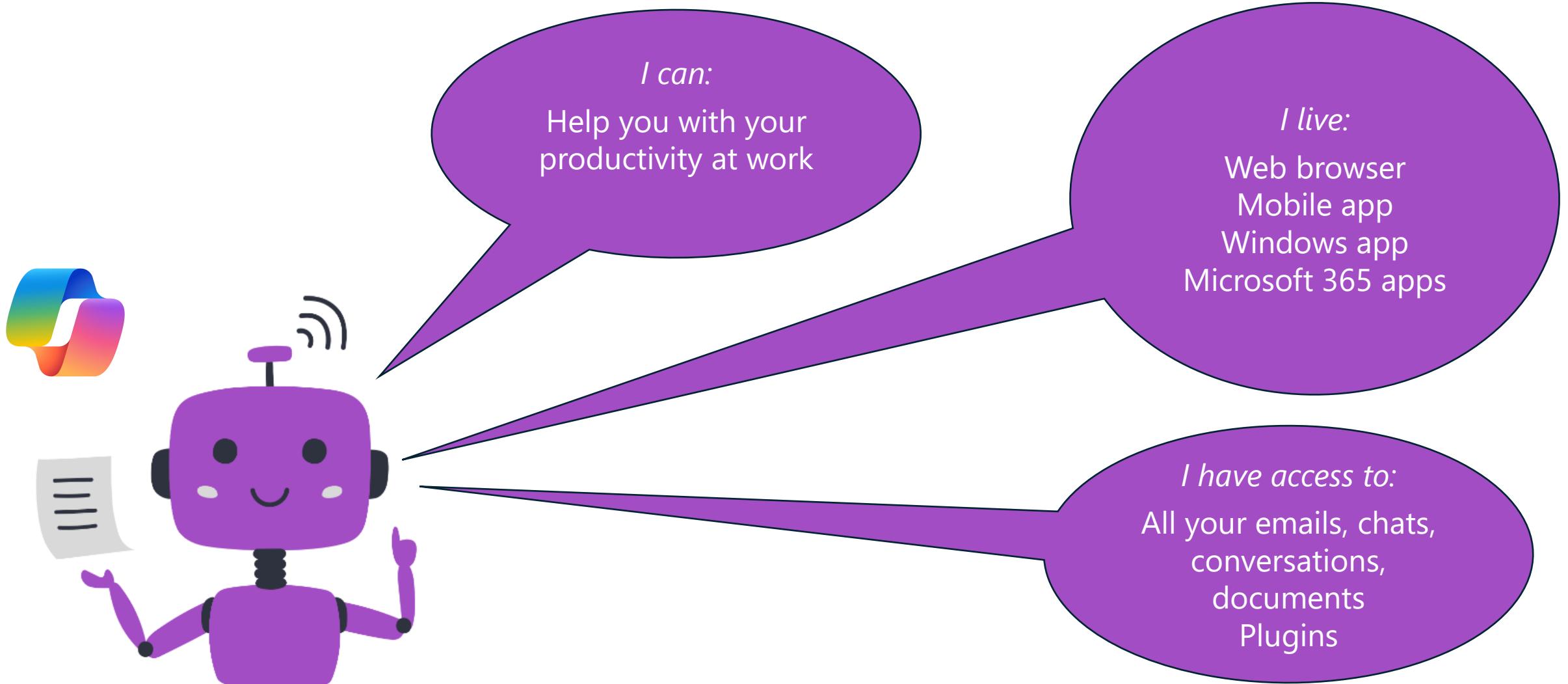
Message Copilot

Add people, files, and more for better results

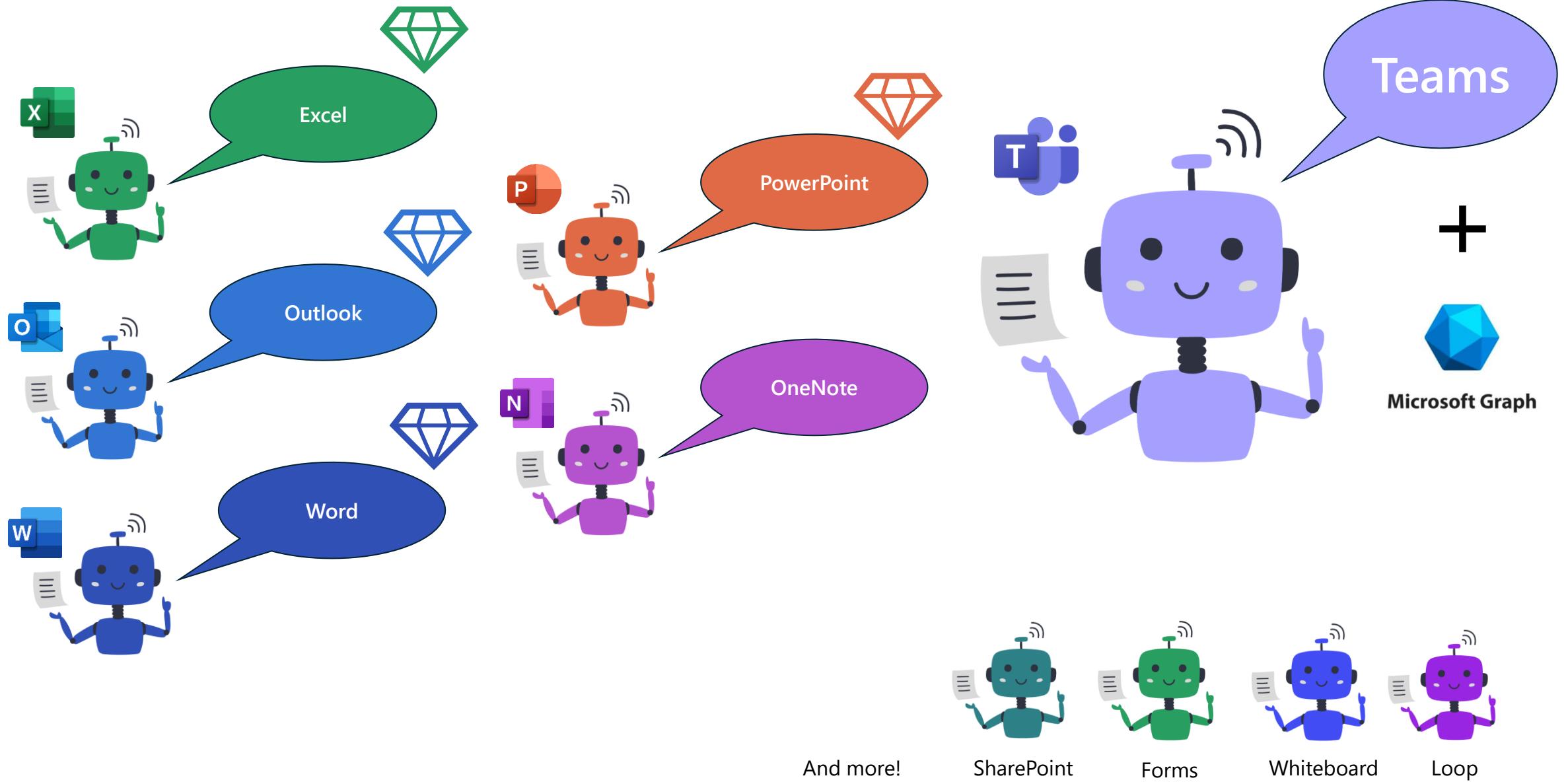
0 / 16000

∅ | ⌂ | ➤

Copilot for Microsoft 365: The Productivity Assistant



Copilot for Microsoft 365

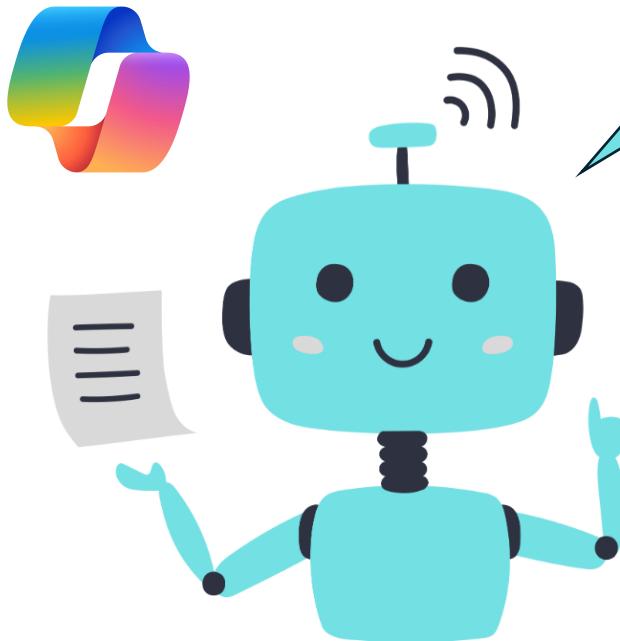


Copilot Studio

The Creator



Copilot Studio: The Creator



I can:
Create a custom
Copilot and publish to
multiple channels

I can also:
Extend the first party
Microsoft Copilots

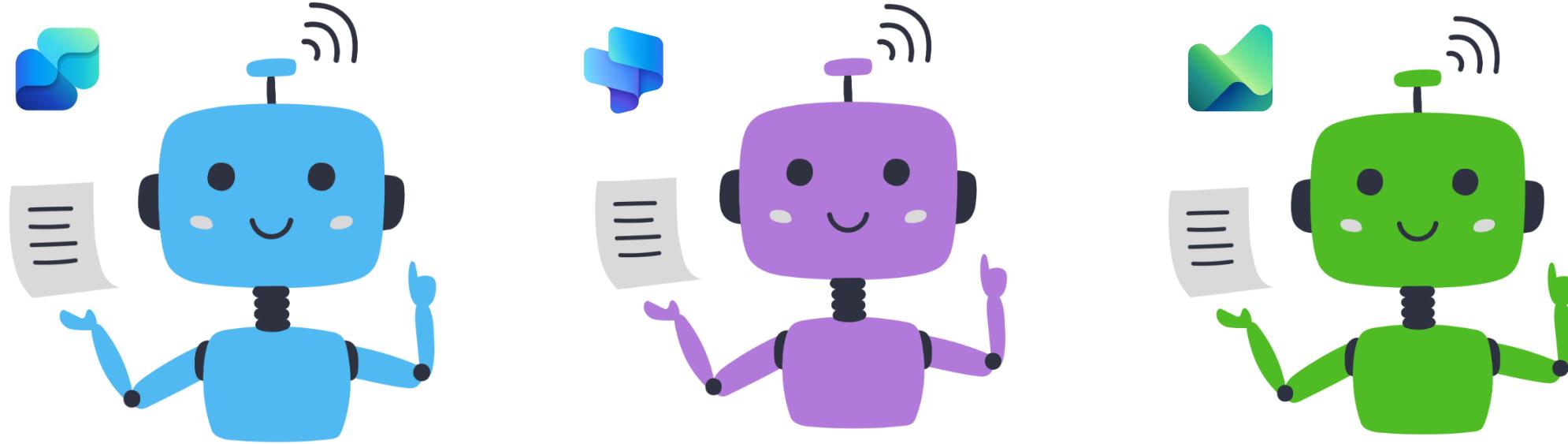
I can work with:
Your data sources
Conversational paths
Plugins and actions
Azure Open AI

Please download and install the
Slido app on all computers you use



Which Copilot uses this icon?

- ① Start presenting to display the poll results on this slide.



Copilot for Business Functions

Role-based extensions: Sales, Service, and Finance Assistants

Role-Based Copilot Extensions



Copilot for Microsoft 365

Productivity for Sales, Service, Finance



Copilot for Sales

The Sales Assistant

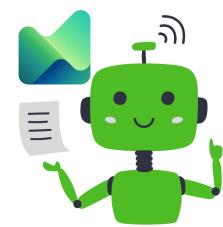
Close more deals



Copilot for Service

The Junior Agent

Modernize your contact center



Copilot for Finance

The Finance Assistant

Streamline financial processes



Copilot Studio

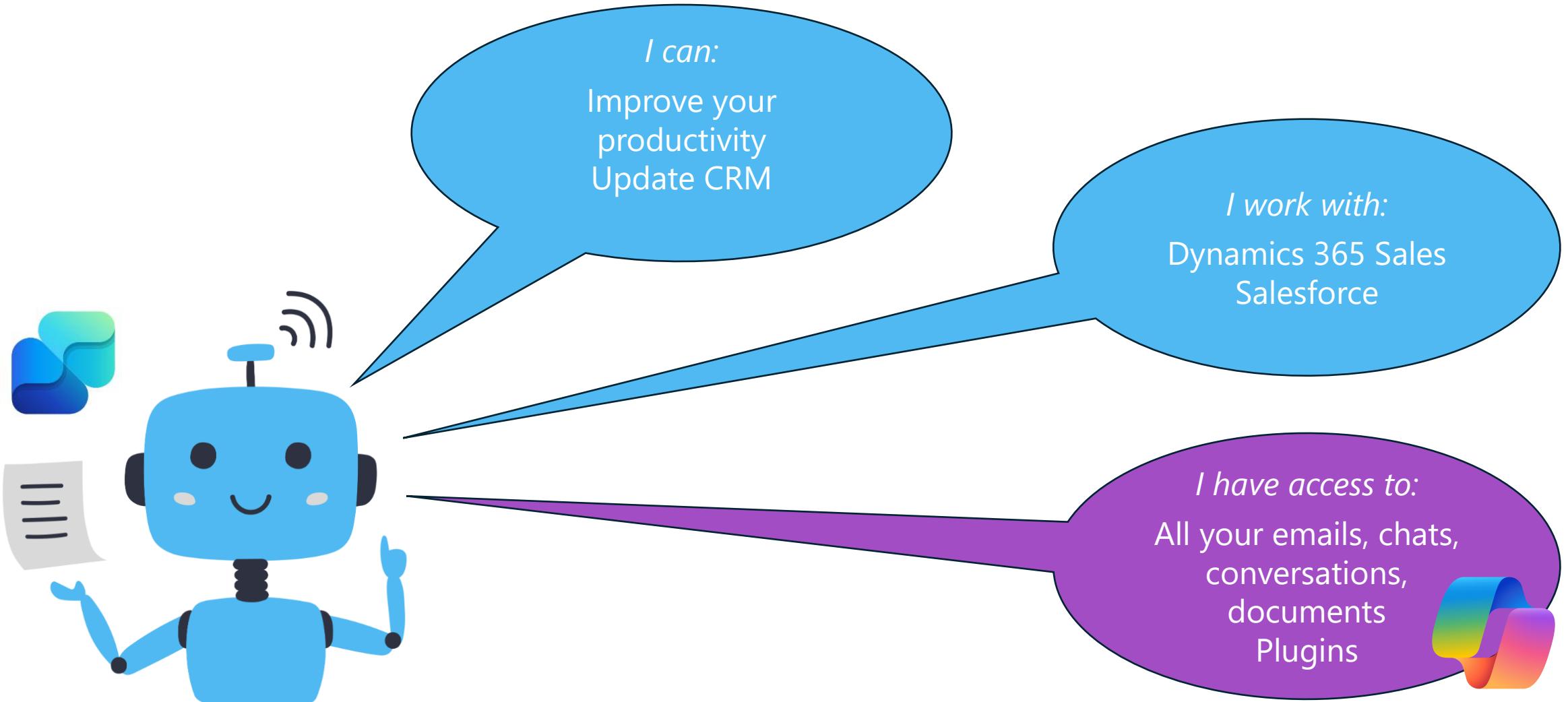
Customize and extend to other systems

Copilot for Sales

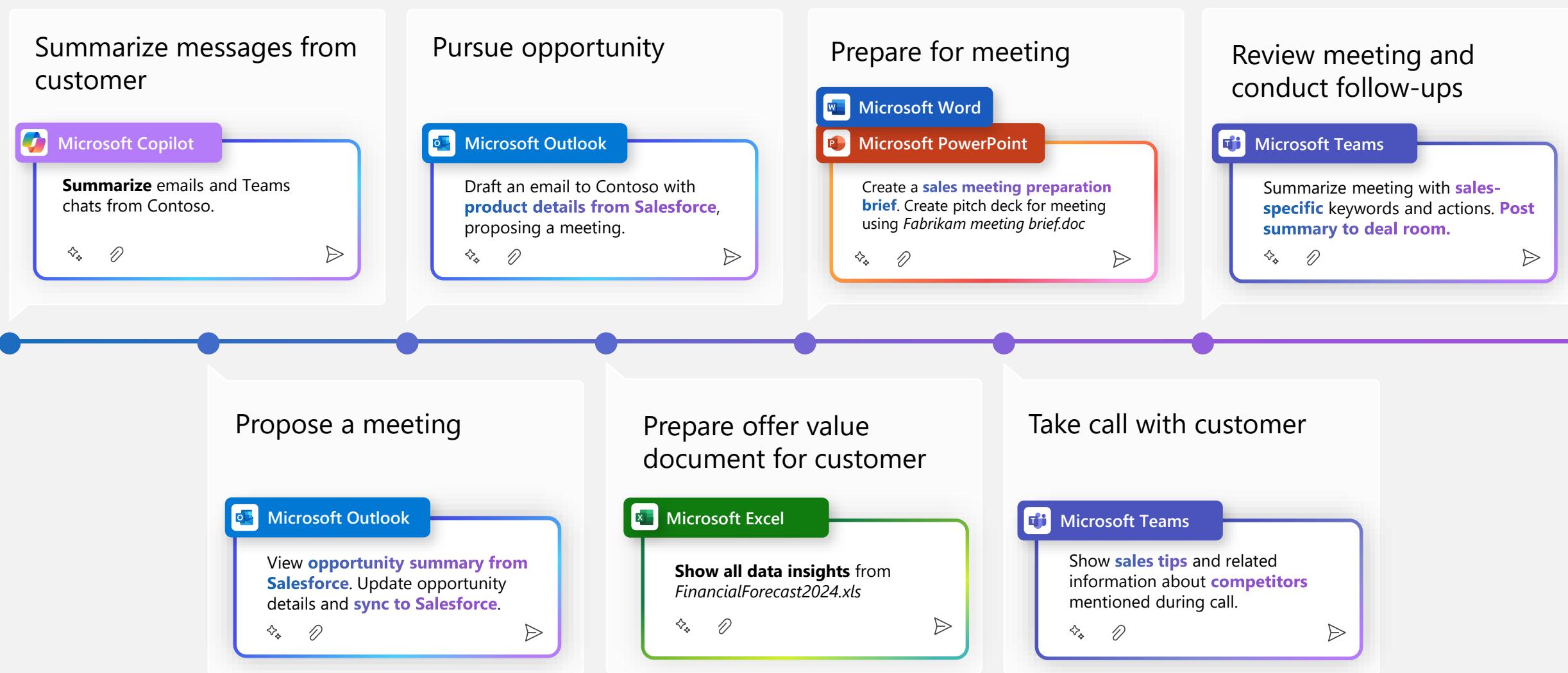
The Sales Administrator



Copilot for Sales: The Sales Administrator



A seller's day-in-the-life with Copilot for Sales

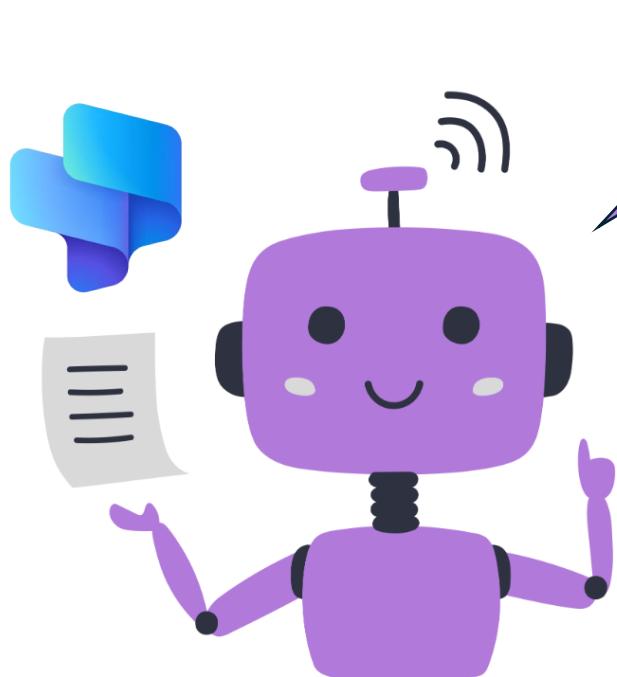


Copilot for Service

The Junior Agent



Copilot for Service: The Junior Agent



I can:

Improve your productivity
Surface knowledge
Summarize interactions

I work with:

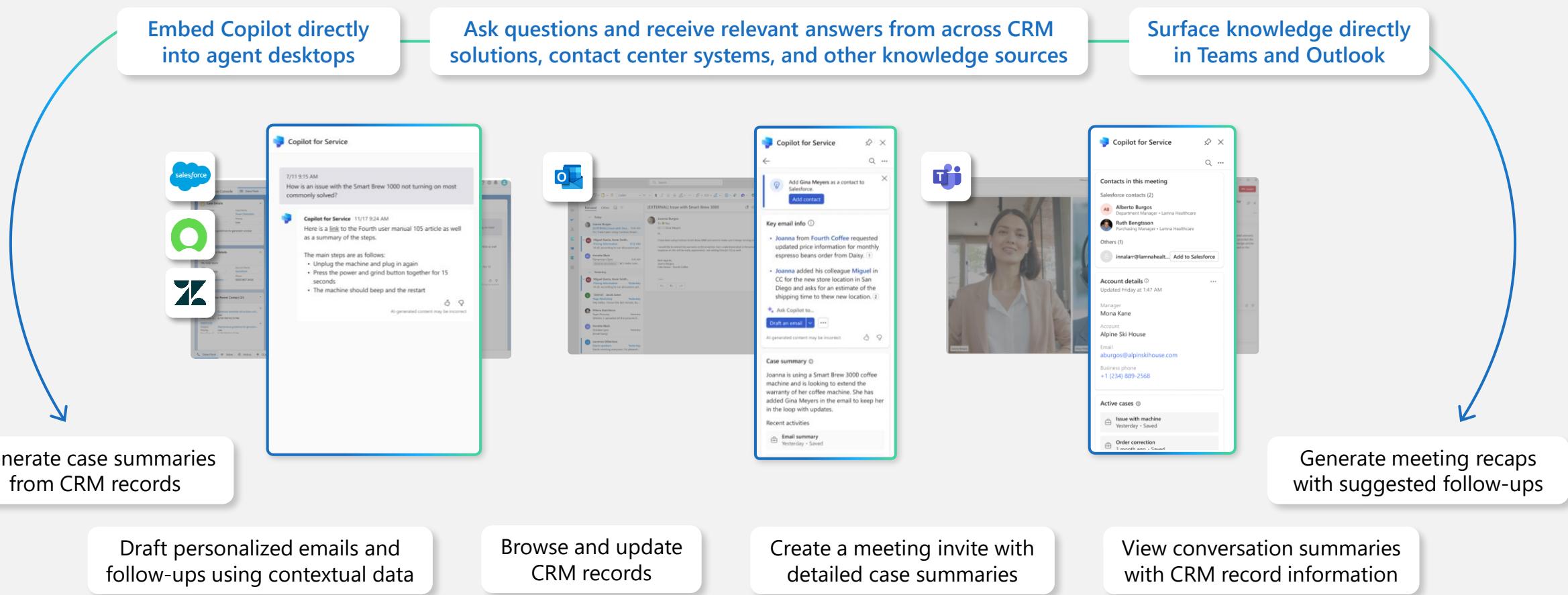
Service Now
Zendesk
Salesforce

I have access to:

All your emails, chats,
conversations,
documents
Plugins

Microsoft Copilot for Service

Maximize agent productivity in the flow of work

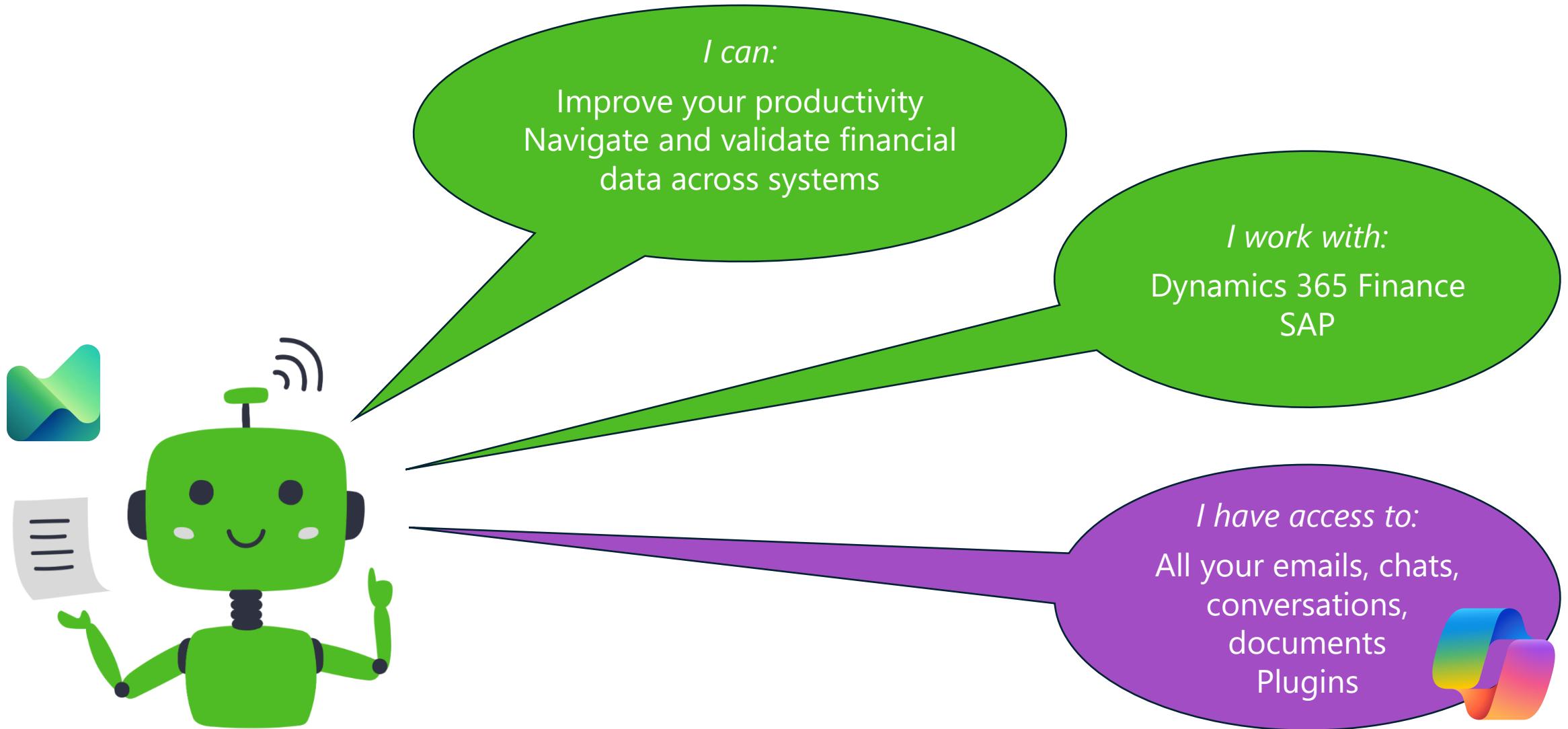


Copilot for Finance

The Finance Assistant



Copilot for Finance: The Finance Assistant



Microsoft Copilot for Finance

Accelerate business impact and reduce cost with a copilot in the flow of work.

Copilot for Finance is experienced in Microsoft 365 and connects to your financial systems

Northwind Traders
Cash flow forecast

Sum of Amount	Column Labels	11/1/2023	1/1/2024	2/1/2024	3/1/2024	4/1/2024	5/1/2024
Row Labels		Actual	Actual	Actual	Forecast	Forecast	Forecast
1 Inflow	\$ 30,940,442	\$ 30,608,026	\$ 35,214,405	\$ 28,547,057	\$ 24,934,504	\$ 17,285,400	\$ 17,285,400
2 Cash sales	\$ 1,468,095	\$ 6,228,400	\$ 2,520,000	\$ 6,297,440	\$ 6,039,947	\$ 2,280,342	\$ 2,280,342
3 Incoming customer payments	\$ 4,000,095	\$ 1,601,797	\$ 6,048,379	\$ 5,959,379	\$ 6,039,947	\$ 1,795,729	\$ 1,795,729
4 Interest, other income	\$ 8,102,367	\$ 2,387,059	\$ 7,811,033	\$ 5,043,858	\$ 4,280,242	\$ 4,280,242	\$ 4,280,242
5 Loan proceeds	\$ 4,742,563	\$ 7,513,102	\$ 2,698,274	\$ 2,044,802	\$ 1,795,341	\$ 1,795,341	\$ 1,795,341
6 Other receipts	\$ 8,157,609	\$ 5,812,370	\$ 7,834,462	\$ 2,044,802	\$ 7,246,682	\$ 7,246,682	\$ 7,246,682
7 Returns and allowances	\$ 4,443,188	\$ 5,604,188	\$ 7,726,359	\$ 2,511,073	\$ 2,511,073	\$ 2,511,073	\$ 2,511,073
8 Outflow	\$ 21,353,294	\$ 26,399,174	\$ 22,499,150	\$ 25,164,531	\$ 20,753,235	\$ 25,164,531	\$ 25,164,531
9 Advertising	\$ 1,571,927	\$ 729,393	\$ 1,767,547	\$ 998,806	\$ 1,301,347	\$ 1,301,347	\$ 1,301,347
10 Leases and rentals	\$ 1,841,157	\$ 1,631,757	\$ 5,625,000	\$ 1,026,000	\$ 953,500	\$ 953,500	\$ 953,500
11 Commitment	\$ 1,624,159	\$ 274,757	\$ 588,882	\$ 907,969	\$ 1,026,000	\$ 1,026,000	\$ 1,026,000
12 Employee benefit programs	\$ 552,463	\$ 937,842	\$ 1,403,186	\$ 511,754	\$ 492,071	\$ 325,931	\$ 1,151,418
13 Insurance (other than health)	\$ 381,560	\$ 622,243	\$ 801,886	\$ 1,458,221	\$ 1,402,136	\$ 43,536	\$ 172,190
14 Interest expense	\$ 1,854,117	\$ 664,338	\$ 980,614	\$ 1,210,100	\$ 1,163,563	\$ 1,499,784	\$ 1,629,730
15 Materials and supplies (in COGS)	\$ 488,578	\$ 1,331,378	\$ 1,437,766	\$ 1,629,287	\$ 1,710,751	\$ 1,203,142	\$ 1,436,881
16 Meals and entertainment	\$ 1,398,781	\$ 1,685,580	\$ 272,550	\$ 143,226	\$ 137,719	\$ 65,387	\$ 89,194
17 Miscellaneous	\$ 1,026,940	\$ 157,262	\$ 1,829,845	\$ 1,382,503	\$ 1,329,330	\$ 115,481	\$ 616,712
18 Mortgage interest	\$ 194,710	\$ 1,189,551	\$ 1,141,450	\$ 1,026,919	\$ 1,080,365	\$ 406,070	\$ 190,987
19 Rent expense	\$ 1,707,982	\$ 1,942,299	\$ 1,431,354	\$ 1,019,329	\$ 1,070,295	\$ 1,549,957	\$ 189,200

Accelerate impact

Deliver new insight and reduce the time it takes to compile and analyze data

Analyze variances

Selected criteria and variances

Criteria

February forecast varies from actuals more than 10%

Variances

2 pairs of variances have been identified that match this criteria.

E9

The variance of \$755,705, representing an approximately 12% decrease. 1 2 Washington state sales was \$505,685 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.

E12 F12

In February 2024, the actual loan proceeds reached \$2,044,802, marking a variance of nearly 25% from the initially forecasted amount of \$1,635,842 for the same period. 1 2 The difference is due to the changes in "Lease and rent breakdown.xlsx".

Add criteria

Outlook

Focused Other

Kristin Watson (Kristin Watson) 8:51 AM Direct Deposit Required

Brocklyn Simmons (Brocklyn Simmons) 8:25 AM Team Pictures (@Koko, I uploaded all the pictures ...)

Laurence Giberton (Laurence Giberton) 8:52 PM Good morning everyone, I'm pleased...

Acme Services (Acme Services) 10:55 PM Invoice for our services We hope this email finds you well. Please...

Eleanor Pena (Eleanor Pena) 9:14 PM Pricing Information Hi all, according to our discussion yes...

Robert Fox (Robert Fox) 9:25 PM Invoices Thank you for choosing our services...

Annette Black (Annette Black) 6:12 PM October sync Hi all, just a gentle reminder of ...

Jessie Jones (Jessie Jones) 8:30 PM Report I trust this email finds you in good he...

Diane Russell (Diane Russell) 5:20 PM Monthly Financial Report I hope this email finds you well. Attach...

Maria McKinney (Maria McKinney)

Reduce cost

Drive efficiency by applying AI to optimize manual, labor-intensive processes

Email from: Kristin Watson 2/23/2024, 9:55 AM

Save email

Finance insights

- Jane Cooper is the primary contact for the customer Fabrikam (US).
- Fabrikam specializes in crafting immersive and premium tea experiences, highlighting ethically sourced leaves and a diverse range of delicate flavors.

Copy

AI-generated content may be incorrect

Customer

358 overdue invoices. See details

Fabrikam (US) Supply chain

Contact

Saved in SAP (1)

JC Jane Cooper Fabrikam (US) · Account manager

Note

New note



Dynamics 365



Copilots in Dynamics 365



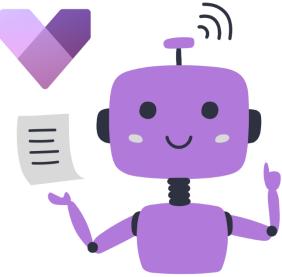
Sales



Field Service



Business Central



Customer Service



Project Operations



Finance



Customer Insights
Journeys & Data



Commerce



Supply Chain



Power Platform



Copilot for Power Apps

The Assistant App Maker
The App User Assistant



Power Apps

Search

This is a developer environment and not meant for production use. [Learn more](#)

Environment Lisa USA Demo

Try the new data experience

Home

Create

Learn

Apps

Tables

Flows

Solutions

More

Power Platform

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 is in preview and uses generative AI [See terms](#)

Other ways to create an app

Start with data

Create new tables, select existing tables, or connect to external data sources.

Start with a page design

Select from a list of different designs and layouts to get your app going.

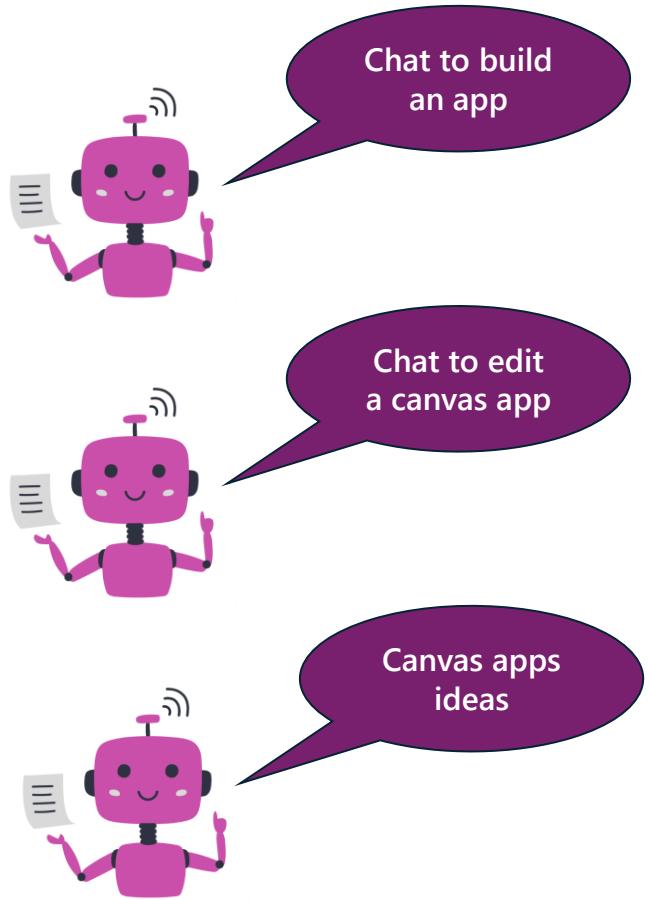
Start with an app template

Select from a list of fully-functional business app templates. Use as-is or customize to suit your needs.

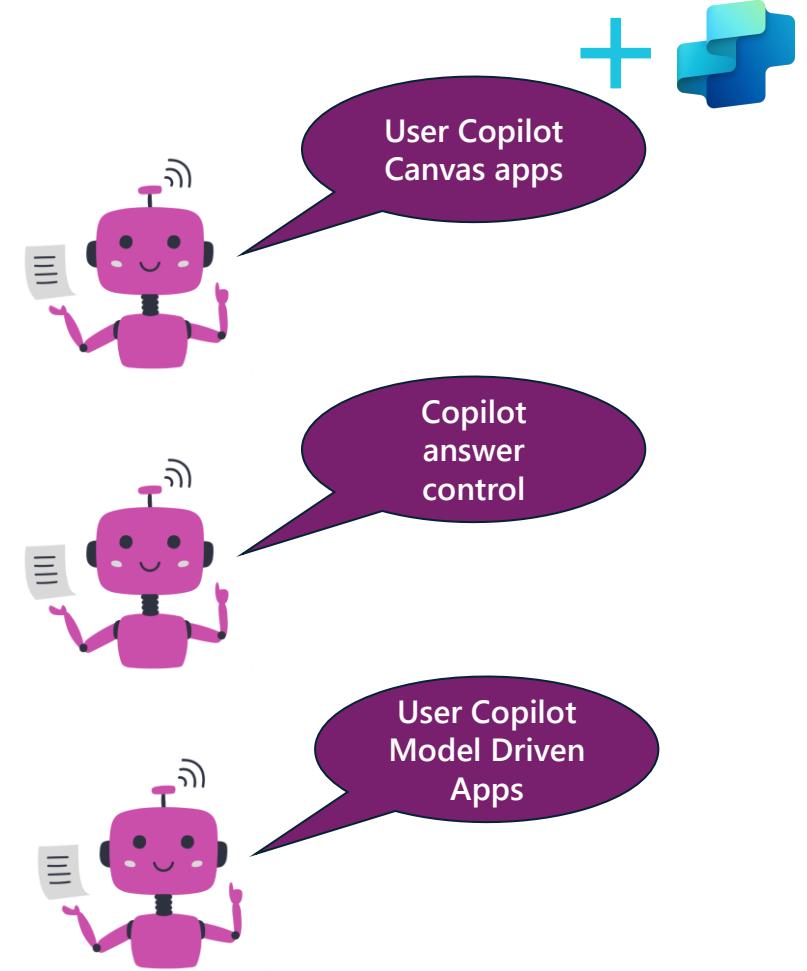
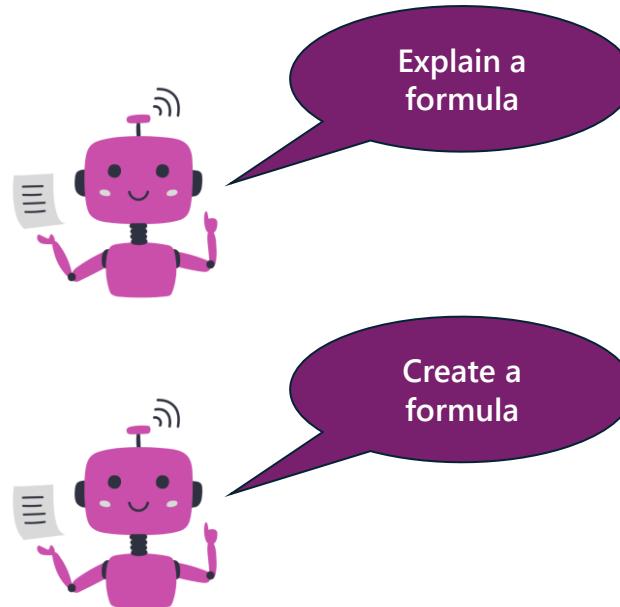
Your apps

Name	Modified	Owner	Type
Event demo app	3 days ago	Lisa Crosbie	Canvas
Venue Management Canvas App	3 days ago	Lisa Crosbie	Canvas
Event Management MDA	3 days ago	Lisa Crosbie	Model-driven
Basic CRM	3 months ago	Lisa Crosbie	Model-driven

Copilot(s) for Power Apps



Copilots for App Makers



Copilots for App Users

Copilot for Power Automate

The Automation Assistant



Power Automate

Search

Environments (na) (default)

?

LC

Home

Create

Templates

Learn

My flows

Approvals

Solutions

Process mining

AI hub

Automation center (preview...)

Desktop flow activity

More

Power Platform

Let's automate something. What should it do?

Get started by selecting an example or describing your own automation idea.

Every month, copy all files from OneDrive folder to another OneDrive folder

Copy all rows from an Excel file to another excel file with a click of a button

When a new item is created in SharePoint, send me an email

Describe in detail how you want your automation to work

Generate

Learning for every level [See all](#)

< >

Analyze process mining reports in Power Automate Beginner 45 min	Analyze your business process with Microsoft... Beginner 43 min	Register for free 1-day automation workshop Beginner 8 hr	Automate processes with Robotic Process... Intermediate 2 hr 5 min	Improve business performance with AI... Beginner 6 hr 56 min	Automate a business process using Power... Beginner 4 hr 5
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Discover Robotic Process Automation (RPA) with zero infrastructure

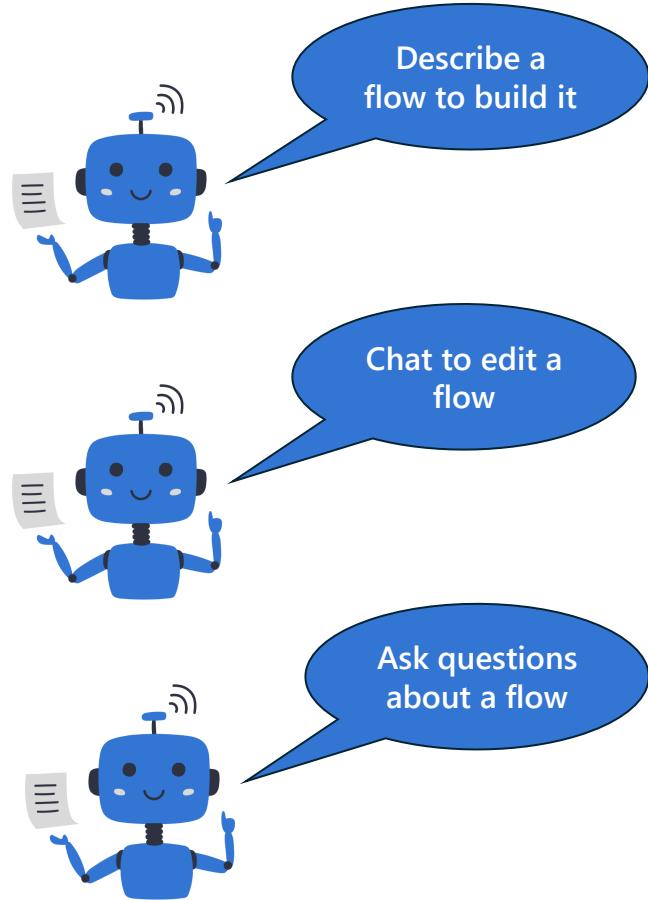
With hosted RPA, you can now build, test, and run automation at scale! Set up your own Microsoft-hosted machines in a few steps.

New hosted machine

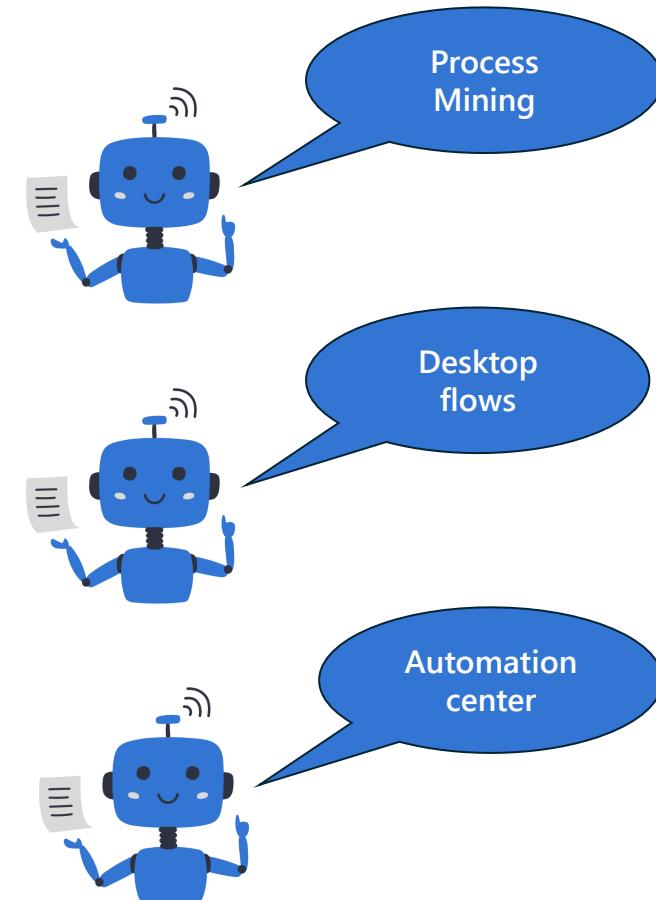
More to explore in Power Automate

< >

Copilot(s) for Power Automate



Copilots for Cloud Flows



Meet our friends

Copilot for Power Pages

The Web Design Assistant



[Home](#)[Templates](#)[Learn](#)[Solutions](#)[Power Platform](#)

Start building your website with Copilot

[Develop a site for project management](#)[Design a website for internal communication](#)

Describe the site you want and let AI create the first draft



Make sure AI-generated content is accurate and appropriate before using it. [See terms](#)

Other ways to create a site



Start with a template

Select from a gallery of premade site templates to get your site going.



Start from blank

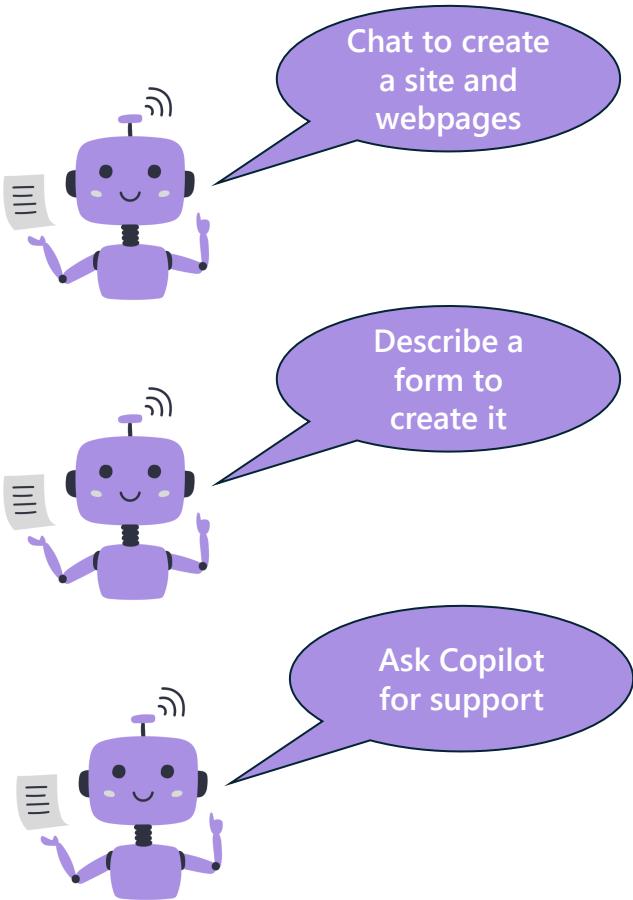
Start from a blank site that you can customize to suit your needs.

[Active sites](#)[Inactive sites](#)

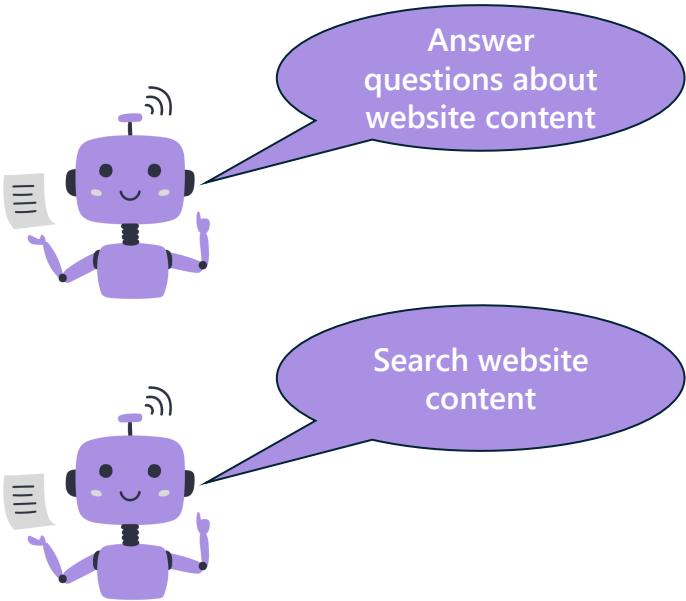
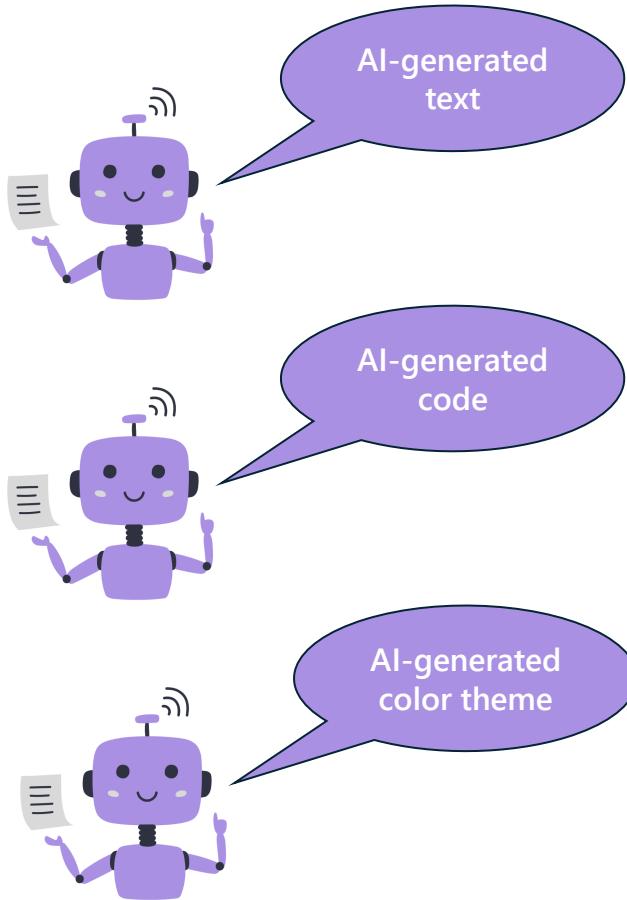
There are no sites in this environment

To start designing one now, choose [Create a site](#).

Copilot(s) for Power Pages



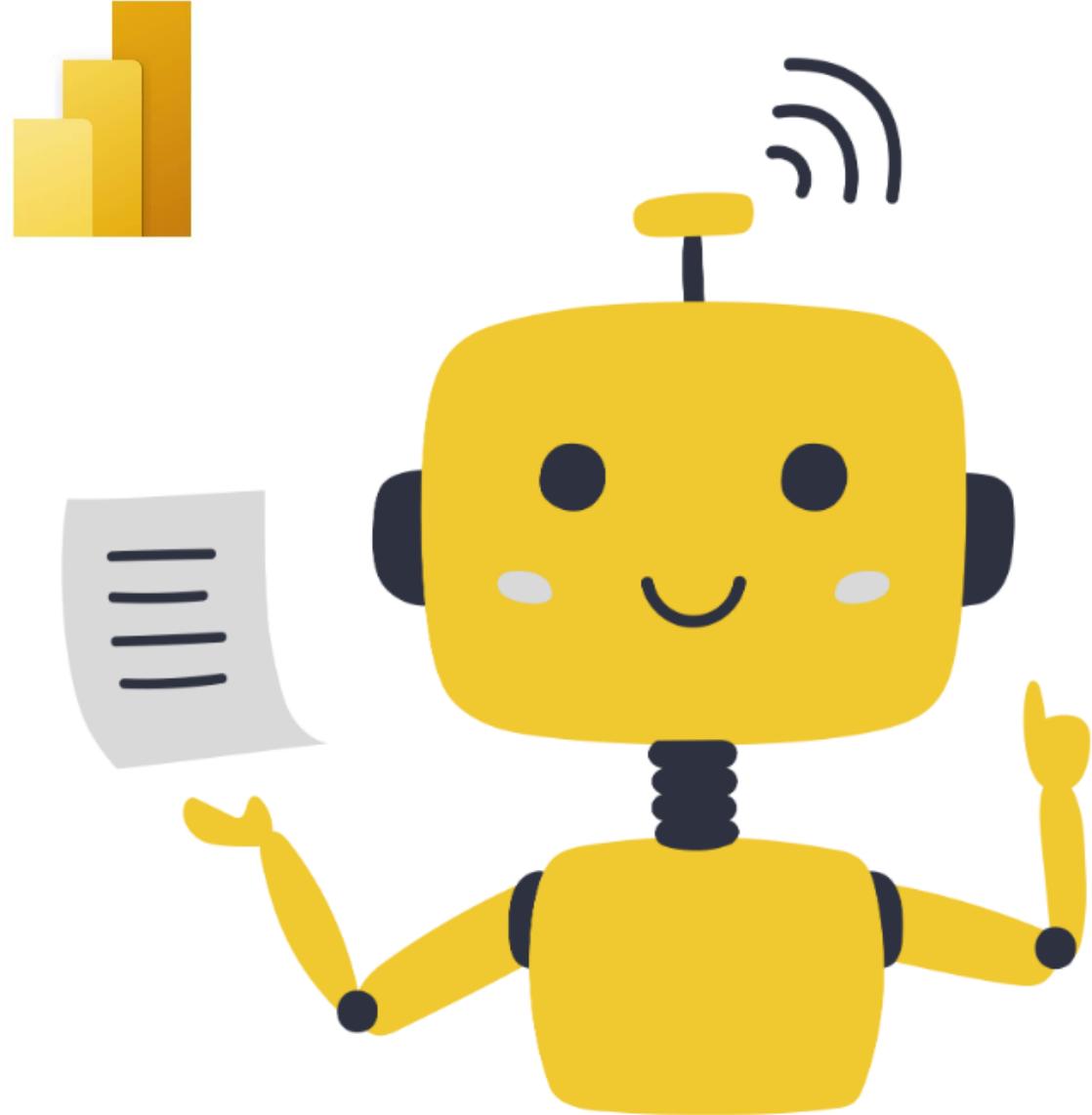
Copilots for Makers



Copilots for Users

Copilot for Power BI

The Assistant Data Analyst



Copilot Pane Summary Skill Feedback Form
forms.office.com

Monitoring Transactions, Cases, and Resources

Role: All | Location: All

Count of Location
3

Count of CaseId by Date and Role

Date	Invoice Processor
Jul 04	18
Jul 05	22
Jul 06	15
Jul 07	18
Jul 08	17
Jul 09	20
Jul 10	15
Jul 11	18
Jul 12	15
Jul 13	18
Jul 14	17
Jul 15	20
Jul 16	15
Jul 17	18
Jul 18	17
Jul 19	20
Jul 20	15
Jul 21	18
Jul 22	17
Jul 23	20
Jul 24	15
Jul 25	18
Jul 26	17
Jul 27	20
Jul 28	30
Jul 29	15
Jul 30	18
Jul 31	17
Aug 01	20

Count of CaseId
499

Count of Location by Role, Transaction Type and Location

Location	Role	Transaction Type	Count
San Diego, USA	Invoice Approver	Invoice Entry	18
San Diego, USA	Invoice Processor	Invoice Entry	17
San Francisco, USA	Invoice Approver	Invoice Entry	33
Seattle, USA	Invoice Processor	Invoice Entry	33
San Diego, USA	Invoice Approver	Re-issuing the invoice	18
San Diego, USA	Invoice Processor	Re-issuing the invoice	17
San Francisco, USA	Invoice Approver	Re-issuing the invoice	33
Seattle, USA	Invoice Processor	Re-issuing the invoice	33
San Diego, USA	Invoice Approver	Complete the Customer Memo	15
San Diego, USA	Invoice Processor	Complete the Customer Memo	19
San Francisco, USA	Invoice Approver	Complete the Customer Memo	19
Seattle, USA	Invoice Processor	Complete the Customer Memo	19
San Diego, USA	Invoice Approver	Refund With Standard Refund	8
San Diego, USA	Invoice Processor	Refund With Standard Refund	19
San Francisco, USA	Invoice Approver	Refund With Standard Refund	19
Seattle, USA	Invoice Processor	Refund With Standard Refund	19
San Diego, USA	Invoice Approver	Approve Invoice	10
San Diego, USA	Invoice Processor	Approve Invoice	12
San Francisco, USA	Invoice Approver	Approve Invoice	13
Seattle, USA	Invoice Processor	Approve Invoice	13

Count of Location by Role, Resource and Location

Resource	Location	Count
Invoice Processor	San Diego, USA	184
Invoice Processor	San Francisco, USA	104
Invoice Processor	Seattle, USA	53
Invoice Approver	San Diego, USA	38
Invoice Approver	San Francisco, USA	38
Invoice Approver	Seattle, USA	22
Credit Manager	San Diego, USA	30
Credit Manager	San Francisco, USA	30
Credit Manager	Seattle, USA	7
Customer Support	San Diego, USA	10
Customer Support	San Francisco, USA	10
Customer Support	Seattle, USA	10

Count of Location by Date, Transaction Type and Location

Date	Location	Transaction Type	Count
Tuesday, June 29, 2021	San Diego, USA	Invoice Entry	18
Tuesday, June 29, 2021	San Francisco, USA	Invoice Entry	17
Tuesday, June 29, 2021	Seattle, USA	Invoice Entry	33
Tuesday, June 29, 2021	San Diego, USA	Re-issuing the invoice	18
Tuesday, June 29, 2021	San Francisco, USA	Re-issuing the invoice	17
Tuesday, June 29, 2021	Seattle, USA	Re-issuing the invoice	33
Tuesday, June 29, 2021	San Diego, USA	Complete the Customer Memo	15
Tuesday, June 29, 2021	San Francisco, USA	Complete the Customer Memo	19
Tuesday, June 29, 2021	Seattle, USA	Complete the Customer Memo	19
Tuesday, June 29, 2021	San Diego, USA	Refund With Standard Refund	8
Tuesday, June 29, 2021	San Francisco, USA	Refund With Standard Refund	19
Tuesday, June 29, 2021	Seattle, USA	Refund With Standard Refund	19
Tuesday, June 29, 2021	San Diego, USA	Approve Invoice	10
Tuesday, June 29, 2021	San Francisco, USA	Approve Invoice	12
Tuesday, June 29, 2021	Seattle, USA	Approve Invoice	13
Wednesday, June 30, 2021	San Diego, USA	Invoice Entry	15
Wednesday, June 30, 2021	San Francisco, USA	Invoice Entry	19
Wednesday, June 30, 2021	Seattle, USA	Invoice Entry	19
Wednesday, June 30, 2021	San Diego, USA	Re-issuing the invoice	15
Wednesday, June 30, 2021	San Francisco, USA	Re-issuing the invoice	19
Wednesday, June 30, 2021	Seattle, USA	Re-issuing the invoice	19
Wednesday, June 30, 2021	San Diego, USA	Complete the Customer Memo	15
Wednesday, June 30, 2021	San Francisco, USA	Complete the Customer Memo	19
Wednesday, June 30, 2021	Seattle, USA	Complete the Customer Memo	19
Wednesday, June 30, 2021	San Diego, USA	Refund With Standard Refund	8
Wednesday, June 30, 2021	San Francisco, USA	Refund With Standard Refund	19
Wednesday, June 30, 2021	Seattle, USA	Refund With Standard Refund	19
Wednesday, June 30, 2021	San Diego, USA	Approve Invoice	10
Wednesday, June 30, 2021	San Francisco, USA	Approve Invoice	12
Wednesday, June 30, 2021	Seattle, USA	Approve Invoice	13
Thursday, July 01, 2021	San Diego, USA	Invoice Entry	15
Thursday, July 01, 2021	San Francisco, USA	Invoice Entry	19
Thursday, July 01, 2021	Seattle, USA	Invoice Entry	19
Thursday, July 01, 2021	San Diego, USA	Re-issuing the invoice	15
Thursday, July 01, 2021	San Francisco, USA	Re-issuing the invoice	19
Thursday, July 01, 2021	Seattle, USA	Re-issuing the invoice	19
Thursday, July 01, 2021	San Diego, USA	Complete the Customer Memo	15
Thursday, July 01, 2021	San Francisco, USA	Complete the Customer Memo	19
Thursday, July 01, 2021	Seattle, USA	Complete the Customer Memo	19
Thursday, July 01, 2021	San Diego, USA	Refund With Standard Refund	8
Thursday, July 01, 2021	San Francisco, USA	Refund With Standard Refund	19
Thursday, July 01, 2021	Seattle, USA	Refund With Standard Refund	19
Thursday, July 01, 2021	San Diego, USA	Approve Invoice	10
Thursday, July 01, 2021	San Francisco, USA	Approve Invoice	12
Thursday, July 01, 2021	Seattle, USA	Approve Invoice	13

Filters

Copilot Preview

I can chat, answer data questions, and summarize report content. Here are some things you can try:

- = Create a bulleted list of insights
- = Summarize visuals on this page

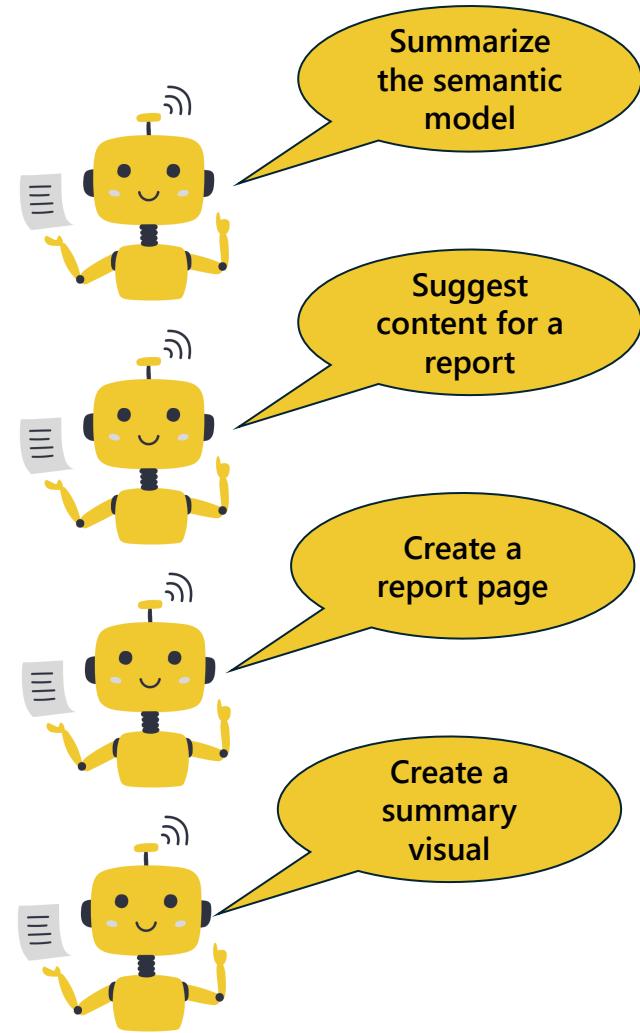
Summarize visuals on this page

From the visual "Count of Caseld by Date and Role", it is clear that the number of cases handled by the Invoice Processor significantly exceeded that of the Invoice Approver from June 29 to August 4, 2021. The highest number of cases handled by the Invoice Processor in a single day was 30 on July 28, while for the Invoice Approver it was 9 on July 7.

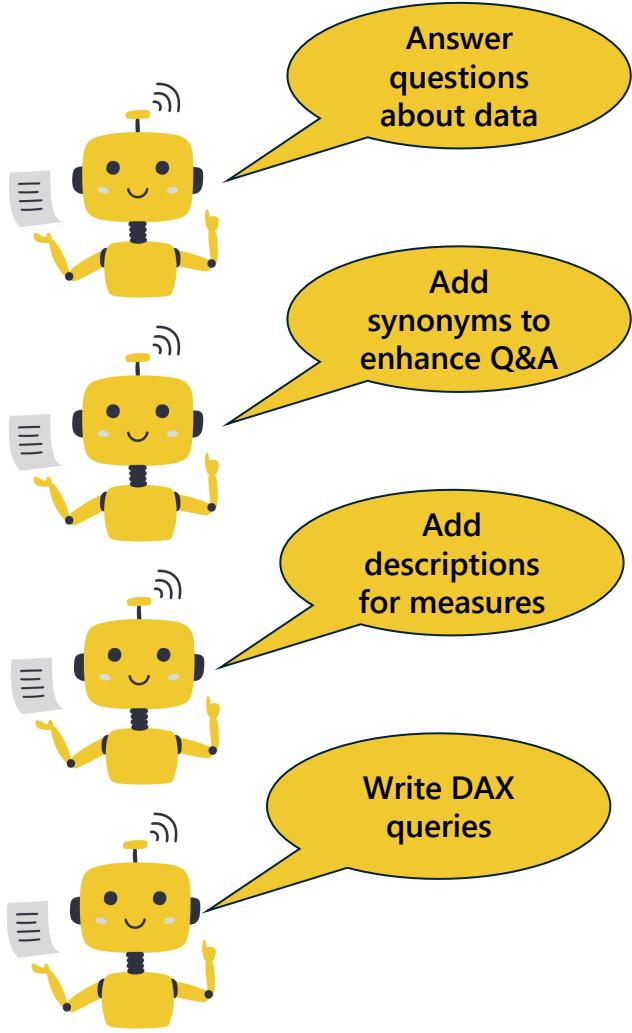
The visual "Count of Location by Date, Transaction Type and Location" gives us insights into the volume of different transaction types handled across three locations: San Diego, San Francisco and Seattle. Transaction types include "Complete the Customer Memo", "Confirm Payment Received", "Invoice Entry",

Content created by AI may not be accurate or appropriate, so review it carefully. [Read terms](#)

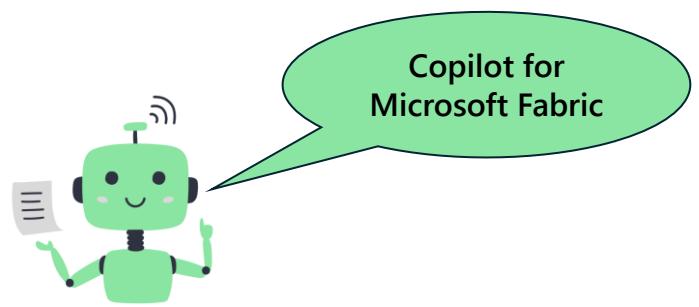
Copilot(s) for Power BI



Copilots for Report Authors



Copilots for Business Users



Meet my friend



Skill #3

Write effective prompts



Core concepts

- **Large Language Model**
 - Trained on huge datasets to understand how language patterns work
- **Prompt**
 - The question or input you give to Copilot
 - Iterate to continue the conversation
- **Response**
 - Copilot generates a response by predicting what comes next in the language pattern
- **Temperature**
 - Determines the scale of how predictable (deterministic) or creative the response will be

Prompting for different Copilot experiences



Copilot on the web, mobile (or in Teams):

- Free form conversation
- Idea generation, problem solving, brainstorming
- Finding or drawing on multiple resources



Copilot in productivity and business applications

- Specialist assistants scoped for specific skills

Elements of effective prompting

- **Goal:** the instruction that tells Copilot what you want
- **Context:** the “why” behind your instruction
- **Source:** content, examples, or additional information
- **Expectations:** the length, tone, or format of the desired output

Example: Goal

Write a blog post about the benefits of remote work

Example: Context

Write a blog post about the benefits of remote work. This post is intended for small business owners who are considering allowing their employees to work remotely. The goal is to highlight the advantages and persuade them to adopt remote work policies.

Example: Source

Write a blog post about the benefits of remote work. This post is intended for small business owners who are considering allowing their employees to work remotely. The goal is to highlight the advantages and persuade them to adopt remote work policies. Include examples such as a tech startup that saw a 20% increase in productivity after transitioning to remote work, or a marketing agency that reduced overhead costs significantly by closing its physical office and moving to a fully remote setup

Example: Expectations

Write a 1,000-word blog post about the benefits of remote work. This post is intended for small business owners who are considering allowing their employees to work remotely. The goal is to highlight the advantages and persuade them to adopt remote work policies. Include examples such as a tech startup that saw a 20% increase in productivity after transitioning to remote work, or a marketing agency that reduced overhead costs significantly by closing its physical office and moving to a fully remote setup. The post should have at least three subheadings (e.g., Increased Productivity, Cost Savings, and Employee Satisfaction) and a concluding paragraph that summarizes the key points. Maintain a professional yet friendly tone throughout

Example: A different expectation

Write a 150-word elevator pitch about the benefits of remote work. This is intended to help me explain to small business owners that they should consider allowing their employees to work remotely. Use a conversational, friendly, but persuasive tone.

Exercise: Effective prompting

- Go to copilot.microsoft.com
- Type in a basic prompt
- Try adding context, examples, expectations to improve the results

Ideas to get started: Write a blog post about:

- change management
- project management
- the benefits of low code
- the benefits of a 4-day working week

Please download and install the
Slido app on all computers you use

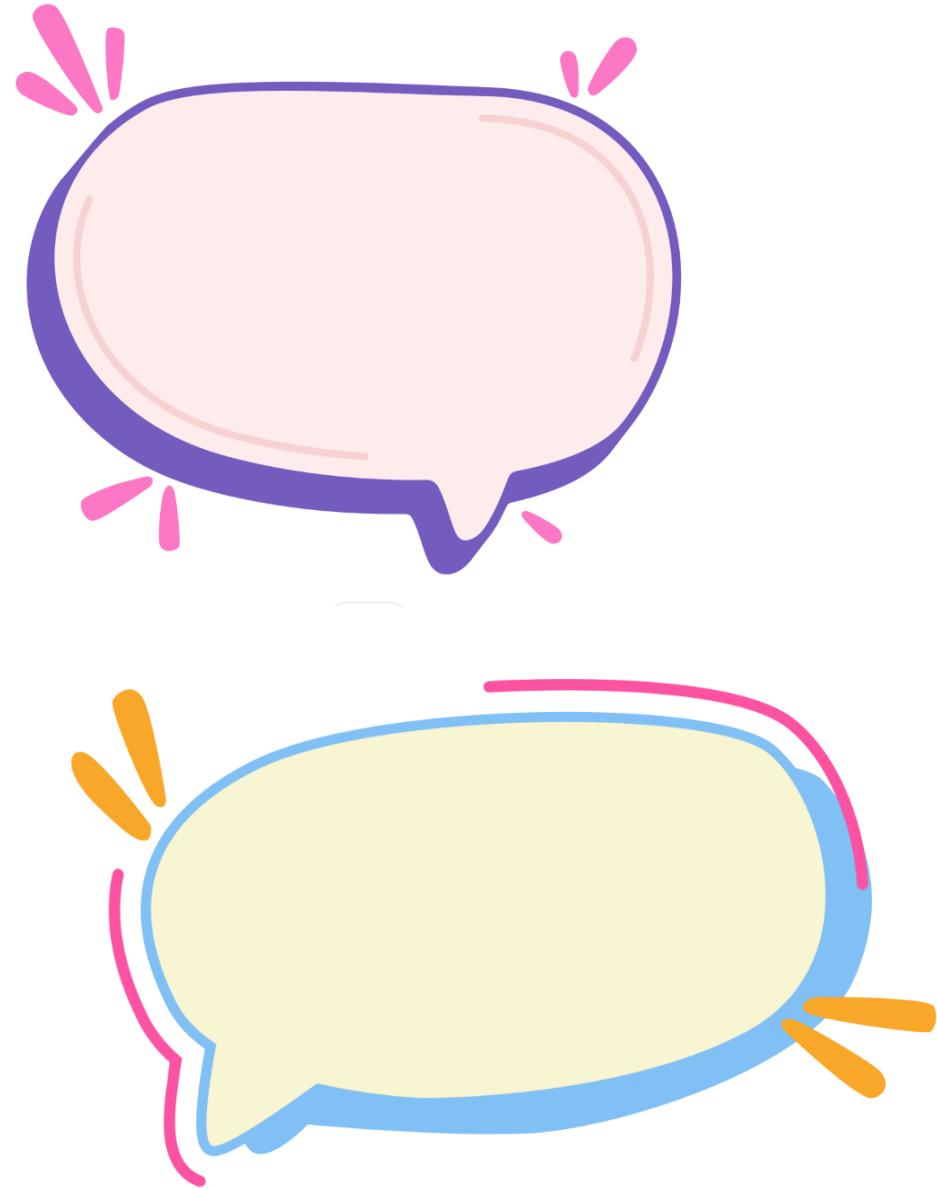


**What top tips can you share
about what improved your
results?**

- ① Start presenting to display the poll results on this slide.

It's a conversation

- Don't expect to get a perfect response in one shot
- Provide additional information, context, expectations
- Iterate and refine your prompts
- Give Copilot feedback on what you liked or didn't like
- Explain how you want to change the response



Exercise: Iterate and Refine

- Go to copilot.microsoft.com
- Type in a basic prompt
- Give Copilot feedback on the results and ask it to make changes
 - This part was great, but can you reword the second paragraph ...
- Provide additional context or expectations
 - Rewrite it so that it is suitable for a message from a CEO to employees



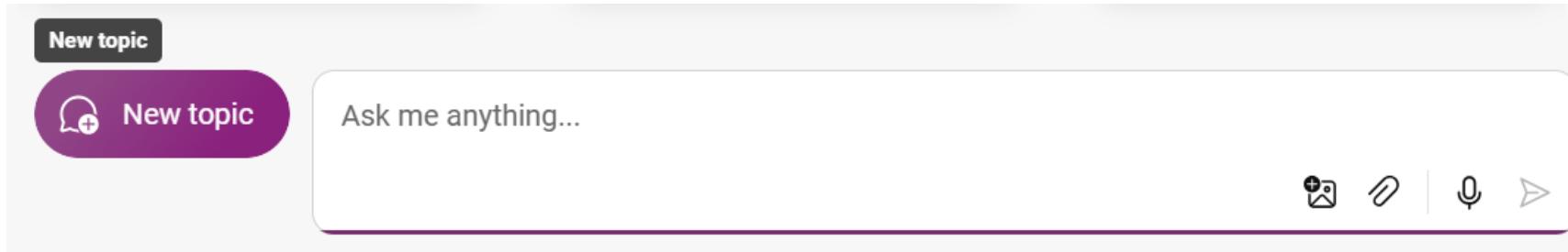
Additional Tips - #1

Be specific

- Tell me about low code
 - Describe different capabilities of what you can do with low code and the benefits and limitations of each
-

Additional Tips - #2

Tell Copilot when you are **starting a new conversation**



Additional Tips - #3

Use **quotation marks** for:

- Specific terminology
- Quotes
- Titles of books, songs, movies

 You

Describe "machine learning"

 Copilot

Certainly! **Machine learning (ML)** is a field within artificial intelligence (AI) that focuses on developing and studying statistical algorithms capable of learning from data. These algorithms generalize patterns from existing information to make predictions or perform tasks without explicit instructions [1](#). In essence, ML enables computers to learn and adapt based on data, gradually improving their accuracy over time. It finds applications in various domains, including natural language processing, computer vision, speech recognition, and predictive analytics for business problems [1](#) [2](#). If you'd like more details or have any specific questions, feel free to ask!



 You

Describe machine learning

 Copilot

Certainly! **Machine learning (ML)** is a fascinating field within artificial intelligence (AI) that focuses on creating algorithms capable of learning from data and making predictions or decisions without explicit instructions. Here are some key points:

1. **Learning from Data:** ML algorithms analyze data to identify patterns, relationships, and trends. They adapt and improve their performance over time as they encounter more examples.
2. **Generalization:** ML models generalize from the data they've seen to make predictions about unseen data. This ability to generalize is crucial for handling new situations effectively.
3. **Types of ML:**
 - **Supervised Learning:** In this approach, models learn from labeled examples (input-output pairs). For instance, predicting house prices based on features like square footage and location.

Additional Tips - #4

Use [tags](#) or [labels](#)

Draft with Copilot X

Write about the benefits of remote work for small business owners.

Title: How working at home will benefit your employees

Introduction: Introduce the growing trend and desire for remote work

Body: Discuss the benefits of remote work including productivity and employee satisfaction

Conclusion: Summarize the key points and encourage readers to consider this for their business

377/2000

[Generate](#)



Advanced Prompting Skills





The persona pattern

- Act as a persona

You are an experienced recruiter interviewing a candidate for a role as a marketing manager. You are looking for someone who can develop a comprehensive marketing plan aligned with your business goals. You want someone who will be a creative thinker, with strong leadership skills. Prepare a list of questions to ask at the interview that will help identify whether this person is the right candidate for the job

- Write for a persona

Rewrite this as a message to the employees announcing that we will be introducing a new remote work policy



Ask for multiple options

- Give me 10 suggested titles under 50 characters for this blog post
- Give me 5 ideas for ways to reward high performing staff

Then pick an idea to explore further and continue the conversation

- Let's work with the idea about X

In context learning (provide examples)



You are a recruitment specialist. Here is an example of a job description for a software developer:

Example:

'Job Title: Software Developer

Responsibilities: Develop and maintain software applications, collaborate with cross-functional teams, and participate in code reviews. Requirements: Bachelor's degree in Computer Science, 3+ years of experience in software development, proficiency in Java and Python. Preferred: Experience with cloud technologies and Agile methodologies.'

Now, write a job description for a marketing manager.



Flipped interaction pattern

The screenshot shows the Microsoft Copilot interface. At the top, there are icons for Microsoft 365, Copilot, Work (selected), Web, and Notebook. Below this, a message from 'You' reads: "I want help preparing for a pitch to a new customer to adopt Power Platform. Act as the CEO of a large enterprise organisation who is sceptical about low code. Ask me a series of questions and wait for me to respond each time, until you are convinced it is a good idea." A response from 'Copilot' follows: "Sure, let's get started. As the CEO of a large enterprise organization, I have some concerns and questions about adopting a low-code platform like Power Platform." Below this, a question is listed: "1. How does Power Platform ensure the security and compliance of the applications developed on it, especially given the sensitive nature of our data?" At the bottom, a message says: "I'll wait for your response before moving on to the next question."

Work Web Notebook

You

I want help preparing for a pitch to a new customer to adopt Power Platform. Act as the CEO of a large enterprise organisation who is sceptical about low code. Ask me a series of questions and wait for me to respond each time, until you are convinced it is a good idea.

Copilot

Sure, let's get started. As the CEO of a large enterprise organization, I have some concerns and questions about adopting a low-code platform like Power Platform.

1. How does Power Platform ensure the security and compliance of the applications developed on it, especially given the sensitive nature of our data?

I'll wait for your response before moving on to the next question.

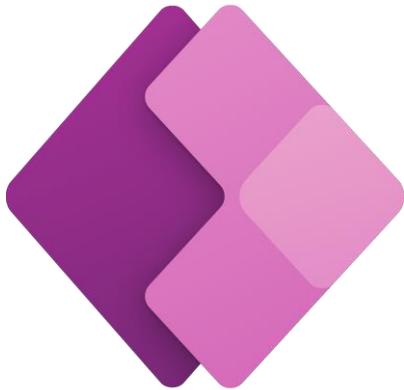
Exercise: Flipped interaction pattern

- Go to copilot.microsoft.com
- Give Copilot a prompt which sets up the expectation that you want it to *ask you questions one at a time until you get to the desired result*
- Examples to try:

Let's improve our customer onboarding process. Keep asking me questions one by one until we've mapped out a full new process that addresses pain points and increases retention.

Guide me through prioritizing our next product features. Ask one question at a time until we've chosen the top three features for the next release.

Up next: specialist prompting skills



Prompt to query a database (Dataverse)

Prompting for low code application development



Skill #4

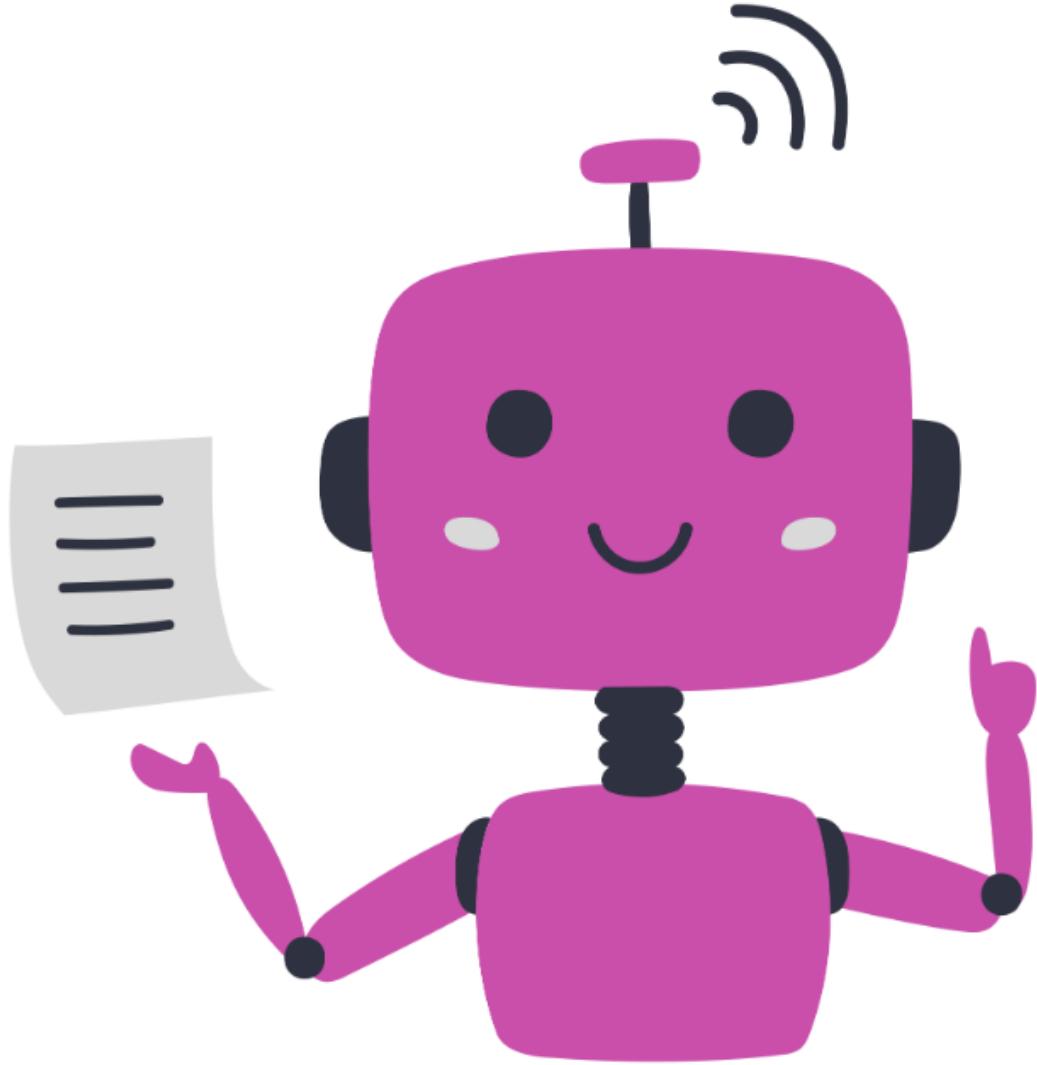
Use Copilot
for low-code
development



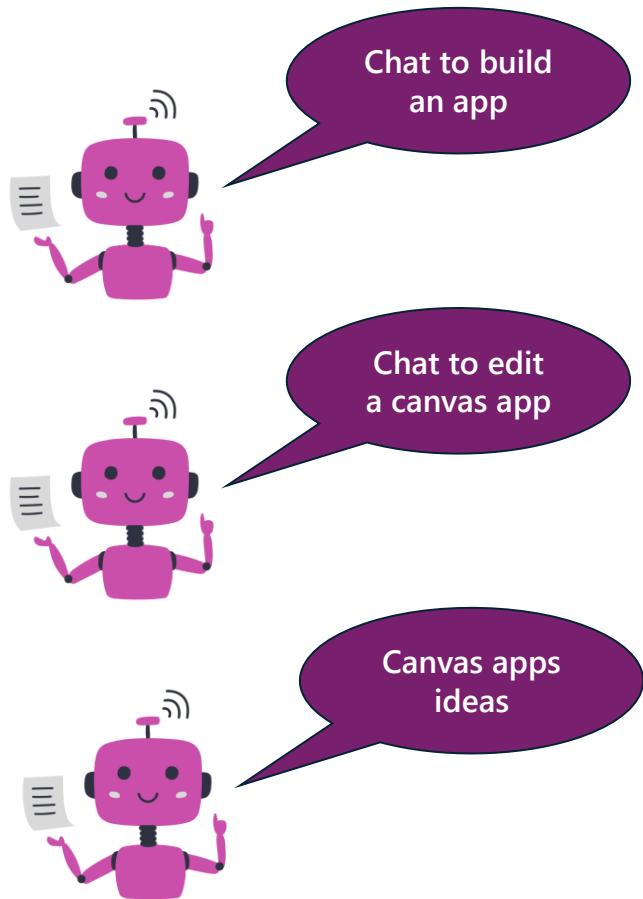


Copilot for Power Apps

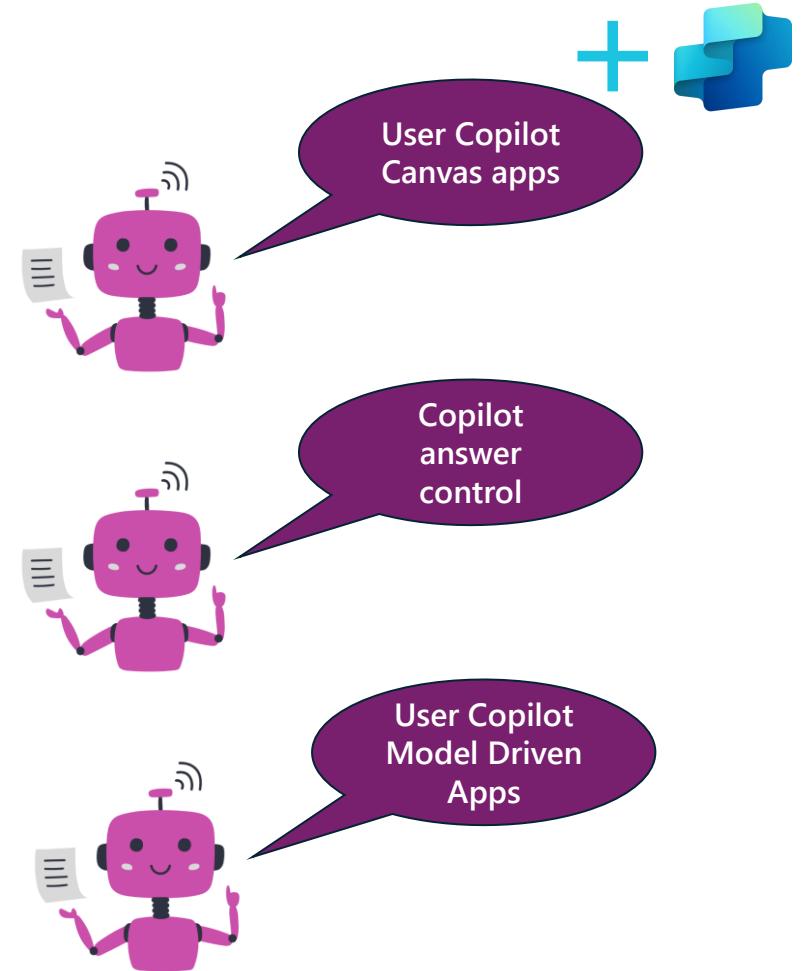
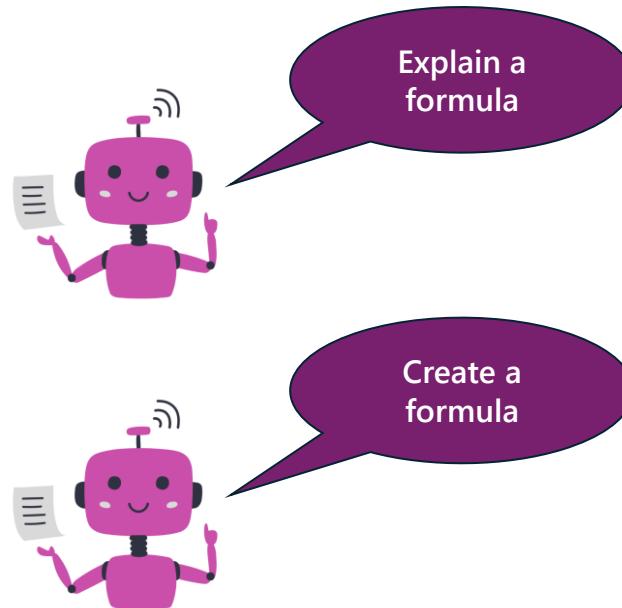
The Assistant App Maker
The App User Assistant



Copilot(s) for Power Apps



Copilots for App Makers



Copilots for App Users

Power Apps

Search

This is a developer environment and not meant for production use. [Learn more](#)

Environment Lisa USA Demo

Try the new data experience

Home

Create

Learn

Apps

Tables

Flows

Solutions

More

Power Platform

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 is in preview and uses generative AI [See terms](#)

Other ways to create an app

Start with data

Create new tables, select existing tables, or connect to external data sources.

Start with a page design

Select from a list of different designs and layouts to get your app going.

Start with an app template

Select from a list of fully-functional business app templates. Use as-is or customize to suit your needs.

Your apps

Name	Modified	Owner	Type
Event demo app	3 days ago	Lisa Crosbie	Canvas
Venue Management Canvas App	3 days ago	Lisa Crosbie	Canvas
Event Management MDA	3 days ago	Lisa Crosbie	Model-driven
Basic CRM	3 months ago	Lisa Crosbie	Model-driven

Please download and install the Slido app on all computers you use



Suggest a prompt to build an app

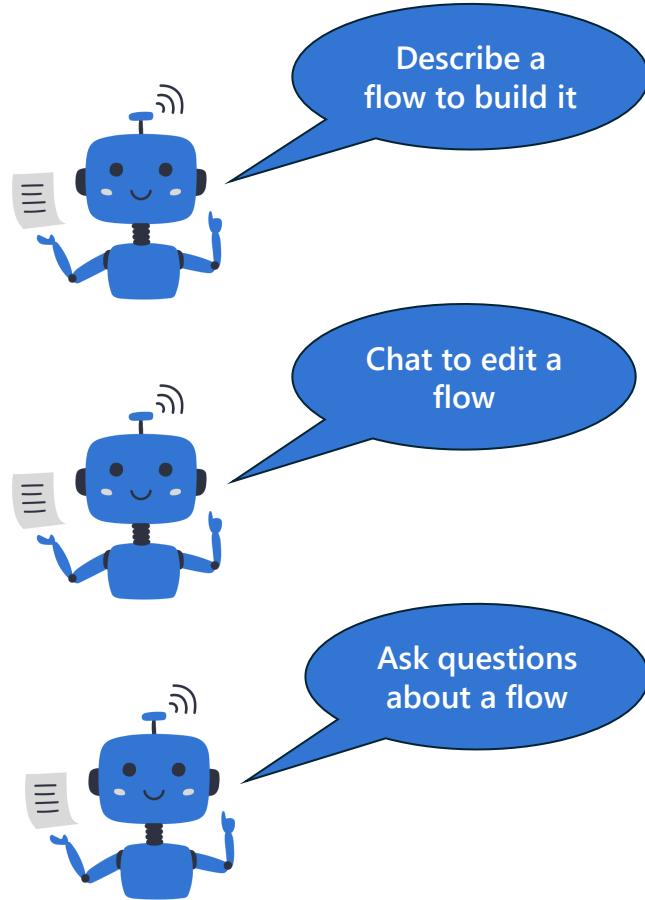
- ① Start presenting to display the poll results on this slide.

Copilot for Power Automate

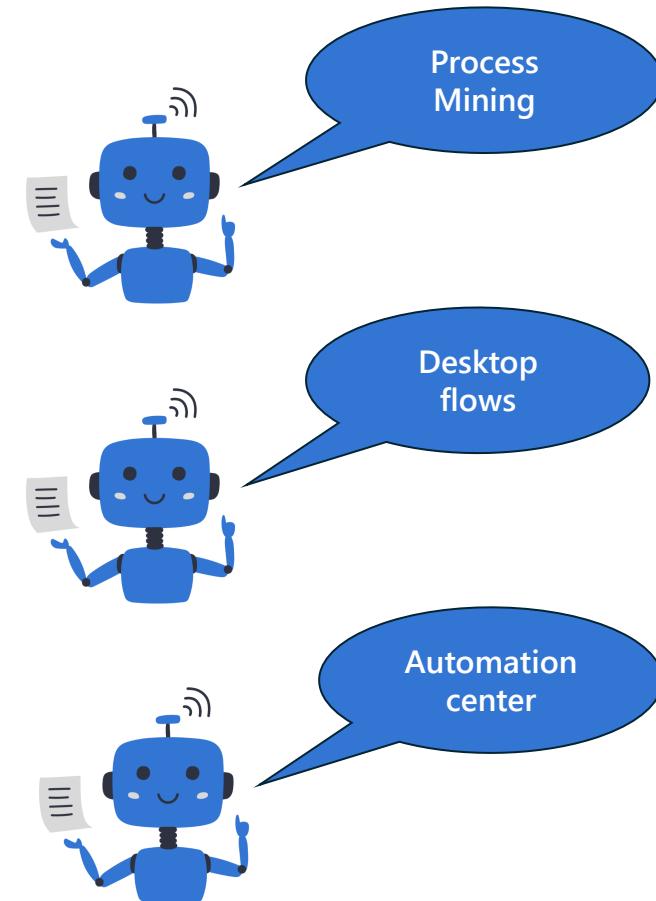
The Automation Assistant



Copilot(s) for Power Automate



Copilots for Cloud Flows



Meet our friends

Effective Prompts for Cloud Flows

- When X happens, do Y
- Be as specific as possible
- Mention the connector





- ☰
- Home
- + Create
- Templates
- Learn
- My flows
- Approvals
- Solutions
- Process mining
- AI hub
- Automation center (previe...)
- Desktop flow activity
- ...
- More

Power Platform

Create your automation with Copilot

Get started by selecting an example or describing your own automation idea.

Every month, copy all files from OneDrive folder to another OneDrive folder

Copy all rows from an Excel file to another excel file with a click of a button

When a new item is created in SharePoint, send me an email

Describe in detail how you want your automation to work

Generate

Learning for every level [See all](#)

Analyze process mining reports in Power Automate

Beginner



Analyze your business process with Microsoft...

Beginner

43 min



Register for free 1-day automation workshop

Beginner

8 hr



Automate processes with Robotic Process...

Intermediate

2 hr 5 min



Improve business performance with AI...

Beginner

6 hr 56 min



Automate processes with Robotic Process...

Beginner



Discover Robotic Process Automation (RPA) with zero infrastructure

With hosted RPA, you can now build, test, and run automation at scale! Set up your own Microsoft-hosted machines in a few steps.

New hosted machine | ▾



Ask a chatbot

Describe it to design it

Step 1 of 2

What will your flow do?

Describe what you want to automate and AI will help you make it happen.
[How it works](#)

When a new item is created in the SharePoint list IT Help Desk, use the office 365 connector to get the manager, and start an approval process. Send the approval to that manager. Update the approval status in the sharepoint list and send an email to the person who created the item



Suggested flow

After you review this AI generated flow suggestion, select **Next** to configure it

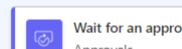
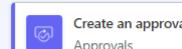
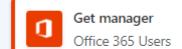
Trigger

The flow starts when this happens

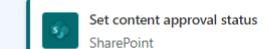


Actions

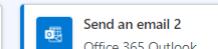
This is what the flow will do



✓ True



✗ False



This isn't what I'm looking for

Next

Cancel



AI Builder Prompts



AI prompts

Donor Profile - Request for a Meeting



Prompt

You are a relationship manager working for a large nonprofit organization Contoso NonProfit, managing relationships with current and potential philanthropists and major donors. You are empathetic, able to connect with donors on a personal level, understand their motivations for giving, and address their concerns effectively. You have excellent written communication skills and you have high integrity. You think strategically about donor engagement, aligning interests with organisational goals. Contoso Nonprofit's core goal is to ensure that children from all backgrounds, especially those in underserved communities, have access to quality education. Your organisation works to remove barriers such as poverty, discrimination, and geographical isolation that hinder children's ability to attend school and receive a quality education.

You are reviewing a donor profile Donor Profile which provides information about her interests, motivations, and propensity to give. Write an email to send to this person to secure a meeting.

+ Add dynamic value

Test your prompt ^

Use sample values to see how well your prompt works.

Donor Profile

Enter a sample value

Test prompt

AI-generated content may be incorrect. Make sure it's accurate and appropriate before using it. [Read terms](#)

Save custom prompt

Cancel

Donor Profile - Request for a Meeting

Test your prompt ^

Use sample values to see how well your prompt works.

Donor Profile

Profile: Gabriella Morales

Personal Overview:

Gabriella Morales is a successful entrepreneur and philanthropist based in Melbourne, Australia. Born and raised in Australia to immigrant parents, Morales has built a diverse portfolio in the tech industry, primarily focusing on ed-tech and green-tech startups. She has founded several successful companies, with her most notable venture being the innovative ed-tech platform, 'Learnify', which has revolutionized digital education in Australia and beyond.

Professional Accomplishments:

Morales began her career in the tech sector shortly after graduating with a degree in Computer Science from the University of Melbourne. She quickly rose through the ranks, demonstrating a keen understanding of business strategy and a passion for innovative technologies. In 2015, Morales took the leap into entrepreneurship and has since been instrumental in the growth and success of several tech companies.

Philanthropic Activities:

Morales is well-known for her philanthropic pursuits and has been active in various charitable causes for the past decade. Her passion for education and environmental sustainability is reflected in her philanthropic efforts. She serves on the board of the 'Education for All' Foundation and has donated significantly towards green-tech initiatives focused on renewable energy and sustainable living. She also launched the 'Morales Scholarship Fund' in 2018, providing scholarships for underprivileged students wishing to pursue careers in the STEM fields. Her commitment to giving back to the community has been recognized with several awards and commendations.

Personal Interests:

Morales has a passion for travel, art, and outdoor activities. She is an avid supporter of the local arts scene and is often seen at gallery openings and theater performances. Her love for the outdoors aligns with her commitment to environmental sustainability, often participating in community clean-ups and tree planting activities.

LIA Commentary

Linkage: Gabriella has demonstrated a strong commitment to philanthropic causes, especially in education and environmental sustainability. Her ongoing support for various initiatives, including founding the 'Morales Scholarship Fund', indicates a high level of loyalty to the causes she cares about. While her direct engagement with our organization is not yet established, her track record suggests a potential for strong loyalty once engaged.

Interest: As a successful entrepreneur in the tech industry and a recognized philanthropist, Gabriella possesses significant influence. Her ventures, particularly 'Learnify', have garnered widespread recognition, further amplifying her influence. Her ability to impact decisions within her professional network and among fellow philanthropists could be invaluable in raising awareness and support for our organization's mission.

Ability: Gabriella's success as an entrepreneur, with several successful startups under her belt, signifies a high level of affluence. Her generous donations to various causes and the establishment of a scholarship fund underscore her financial capability to support significant philanthropic endeavors. Gabriella's affluence, combined with her philanthropic inclinations, positions her as a potentially major donor who can make substantial contributions to our campaigns.

Strategy Recommendations:

1. ****Personalized Outreach:**** Prepare a customized proposal that aligns with Gabriella's interests in education and environmental sustainability, highlighting projects where her impact could be most profound.
2. ****Engagement Opportunities:**** Invite Gabriella to exclusive events that showcase our work's impact, offering her a firsthand look at how her contributions could make a difference.
3. ****Board Involvement:**** Considering Gabriella's strategic insight and experience, explore the possibility of board membership or advisory role, particularly in initiatives related to her expertise in ed-tech and green-tech.
4. ****Recognition and Partnership:**** Develop a recognition plan that aligns with Gabriella's philanthropic and professional values, including potential co-branded initiatives that leverage her influence and amplify our mission.

By tailoring our approach to match Gabriella Morales' philanthropic profile and professional achievements, we can foster a partnership that not only benefits our organization's goals but also aligns with

AI-generated content may be incorrect. Make sure it's accurate and appropriate before using it. [Read terms](#)

Donor Profile - Request for a Meeting

Subject: Invitation to Discuss Partnership Opportunities for Education and Environmental Sustainability

Dear Ms. Morales,

I hope this email finds you well. My name is [Your Name], and I am a Relationship Manager at Contoso NonProfit. I recently came across your impressive philanthropic profile and was inspired by your dedication to education and environmental sustainability. I believe that your expertise and passion align perfectly with our organization's mission to provide quality education to underserved communities and remove barriers hindering children's access to education.

Your entrepreneurial journey and the success of your ed-tech platform, 'Learnify', have not gone unnoticed. Your innovative approach to digital education has revolutionized the industry, and we admire your commitment to making a positive impact. We would be honored to discuss potential partnership opportunities with you.

At Contoso NonProfit, we strive to create a personalized approach to donor engagement, and we believe that your involvement could be transformative. Based on your philanthropic interests and professional accomplishments, we have developed a strategy that we believe will resonate with you:

1. Personalized Outreach: We would like to prepare a customized proposal that highlights projects where your expertise and contributions could have a profound impact. By aligning our initiatives with your interests in education and environmental sustainability, we can create a partnership that is both meaningful and effective.

2. Engagement Opportunities: We invite you to exclusive events that showcase the impact of our work. These events will provide you with a firsthand look at how your contributions can make a difference in the lives of children from underserved communities. We believe that experiencing our programs and initiatives firsthand will deepen your understanding of our mission and inspire further support.

3. Board Involvement: Given your strategic insight and experience in the ed-tech and green-tech sectors, we would like to explore the possibility of your board membership or an advisory role. Your expertise would be invaluable in shaping initiatives related to education and environmental sustainability, and your guidance would greatly contribute to our organization's success.

4. Recognition and Partnership: We are committed to recognizing your philanthropic and professional values. We would like to develop a recognition plan that aligns with your vision, including potential co-branded initiatives that leverage your influence and amplify our mission. Together, we can create a lasting impact and inspire others to join our cause.

Ms. Morales, your profile presents a highly promising opportunity for engagement in our philanthropic efforts. Your alignment with our core causes, influential status, and financial capacity make you an ideal candidate for deeper involvement with our organization. We believe that by building a personalized relationship with you, acknowledging your achievements, and aligning our proposals with your values, we can foster a significant and mutually beneficial partnership.

I would be honored to meet with you at your convenience to discuss these opportunities further. Please let me know a date and time that works best for you, and I will ensure that all necessary arrangements are made. Thank you for considering this invitation, and I look forward to the possibility of working together to make a meaningful impact on the lives of children in underserved communities.

Warm regards,

[Your Name]

AI-generated content may be incorrect. Make sure it's accurate and appropriate before using it. [Read terms](#)

Save custom prompt

Cancel

Skill #5

Knowledge
is Power

53

Copilot and Knowledge



General
knowledge

Your
knowledge

Vast amounts of data
and knowledge used to
train the large
language model

Domain specific or
business specific
documentation and
information

RAG

(Retrieval Augmented Generation)

Retrieval:

- When you ask a question, Copilot goes through all the connected data

Generation:

- Copilot uses the LLM to generate a response in a clear and conversational way.



Why is grounding Copilot in your knowledge important?



- Improve accuracy and relevance
- Tailor the generative AI to your specific context
 - *without a custom LLM
- Risk mitigation (fewer hallucinations)

Knowledge Sources

Public websites
Add public websites for real-time answers

Files
Upload documents from your local computer

SharePoint and OneDrive
Securely integrate and manage internal data

Dataverse (preview)
Customize and deploy structured data tables

Connect to your enterprise data (preview)

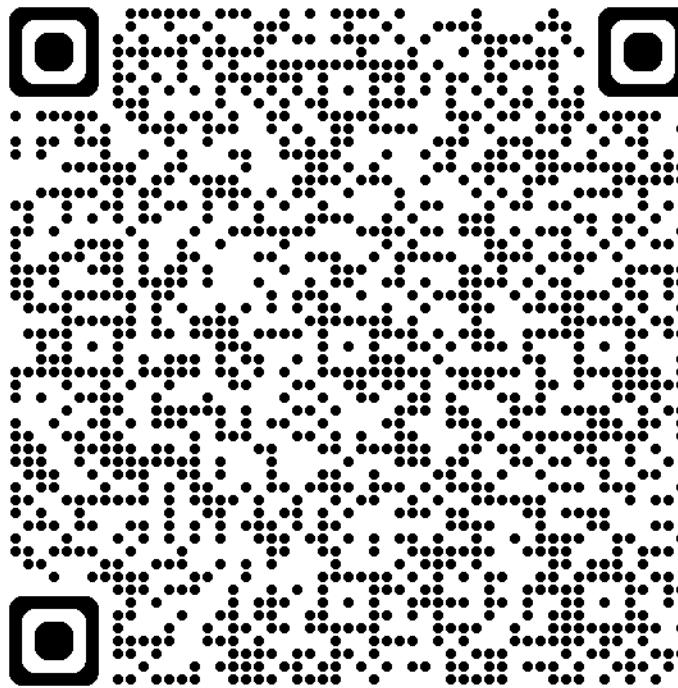
Enterprise websites	Azure SQL	ADLS Gen2	MediaWiki
Salesforce	ServiceNow Knowledge	File share	SharePoint Server
SAP	Ado Git	CSV	Jira
Azure DevOps Wiki	Oracle SQL database	Microsoft SQL server(New)	ServiceNow Catalog
Confluence	ServiceNow Tickets	Custom Connector	Power Platform connector actions

Knowledge
Add data, files, and other resources to inform and improve AI-generated responses.

Allow the AI to use its own general knowledge (preview). [Learn more](#)

Disabled

Exercise: General Knowledge vs Your Knowledge



<https://bit.ly/Computers1962>

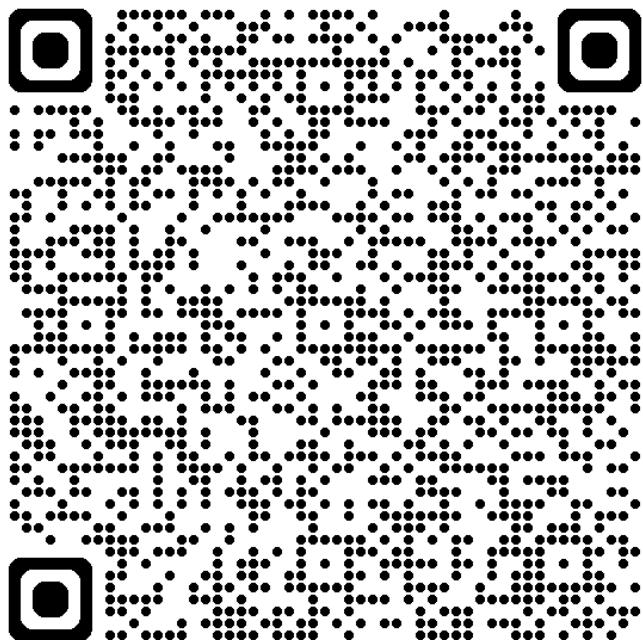
“Computers—the Machines We Think With” (1962)

by D. S. Halacy explores the history, development, and impact of computers on various aspects of society, highlighting their capabilities and future potential.

Exercise: General Knowledge vs Your Knowledge

Try these questions:

- 1) Using this custom copilot
- 2) Using copilot.microsoft.com



What are the practical uses of computers today?



How advanced are computers compared to the human brain?



How is automation using computers changing industries?



What are the challenges computers face, and how are people reacting?



What were the most exciting recent developments in computing technology in the early 1960s?



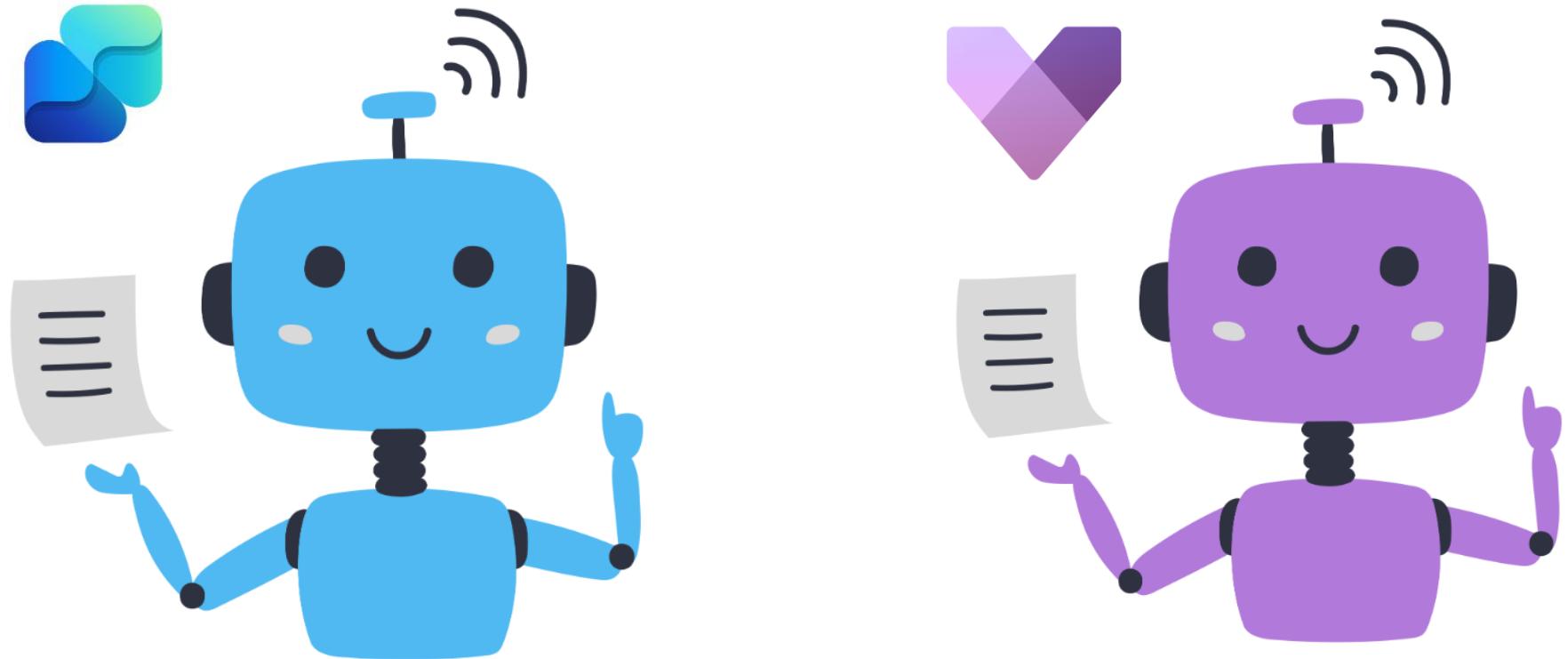
What are computers capable of that were once thought impossible?

Please download and install the
Slido app on all computers you use



**What did you learn or find
interesting from this exercise?**

- ① Start presenting to display the poll results on this slide.



Sample knowledge scenarios: Sales and Customer Service



Knowledge in Sales

- Summarize opportunities and customer information in Outlook
 - Suggest updates to CRM
-

Sweep Move Rules Quick steps Read / Categorise Unread Tags Policy Print Discover groups Find Undo

Follow up and next steps Tracked To Dyn... X

Summary by Copilot

Sandra Kellett <sandrakellettdemo@gmail.com>
To: Lisa Crosbie

Hi Lisa,

In discussion with the board yesterday, we need to get this finalised by the end of June, there is some urgency to get started. I have budget approval for the first \$100k

Let's catch up on Monday

Thanks
Sandra

...

Sandra Kellett
Dear Lisa, Thank you for your email and for summarizing our discussion so well. I...
Fri 17/05/2024 2:01 PM

You
Dear Sandra, Thank you very much for the engaging and productive conversation ...
Fri 17/05/2024 2:00 PM

Copilot Sales

Email from: Sandra Kellett
Received 18/05/24, 9:56 AM
Saved email

Key sales info ⓘ

- You are the owner of the **opportunity** with **Zappa Construction**, estimating a revenue of \$150,000.00 USD from **Intellectual Property Services**, with an estimated close date of November 27, 2024. [1](#) [2](#)
- Sandra Kellett**, the General Manager at **Zappa Construction**, mentioned in an email that there is urgency to finalize a deal by the end of June and has budget approval for the first \$100k. [3](#)
- The email was sent by **Sandra Kellett** on May 17, 2024, requesting to catch up on Monday regarding finalizing details with urgency.

AI-generated content may be incorrect

3 references

Copilot Sales

Email from: Sandra Kellett
Received 18/05/24, 9:56 AM
Saved email

Suggested Dynamics 365 Updates ⓘ

- Est. revenue seems to have changed to **\$100,000**.
[Update opportunity](#)
- Est. close date seems to have changed to **6/30/2024**.
[Update opportunity](#)

AI-generated content may be incorrect



Knowledge in Customer Service

- Answer customer questions using knowledge
 - Draft customer emails using knowledge
 - Enable agents to create new knowledge from resolved cases
-

Dynamics 365 | Customer Service Hub

New look Light Dark

Save Save & Close Save & Route Refresh New Resolve Case Cancel Case Assign Add to Queue Share

A Mineral Build Up in Water Supply - Saved
Case

Normal Priority 8/26/2024 11:03 PM Created On In Progress Status Lisa Crosbie Owner

Phone to Case Process Active for 13 days Identify (13 D) Research Resolve

Summary Details Case Relationships SLA Related

Contact Claudia Mazzanti
Company Fourth Coffee
Email claudiamazzanti@crm...
Mobile

Case Title * A Mineral Build Up in Water S...
Case Number CAS-47732-V4V6K6
Subject Water supply
Customer * Claudia Mazzanti
Origin Email
Product Smart Brew 300

Summary Timeline Highlights RECENT CASES ENTITLEMENTS

Timeline: Search timeline, Enter a note...
Highlights: Recent, Live chat from: Claudia Mazzanti Closed, A Mineral Build Up in Water Supply, View more, Transcript
Recent Cases: A Mineral Build Up in Water Supply, Active
Entitlements: No data available

Copilot Get AI-powered help with solving customer issues.
Ask a question Write an email

Hi Lisa, what do you need?
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Try using Copilot to translate, rephrase your responses, summarize, and change tone.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. [Read terms](#)

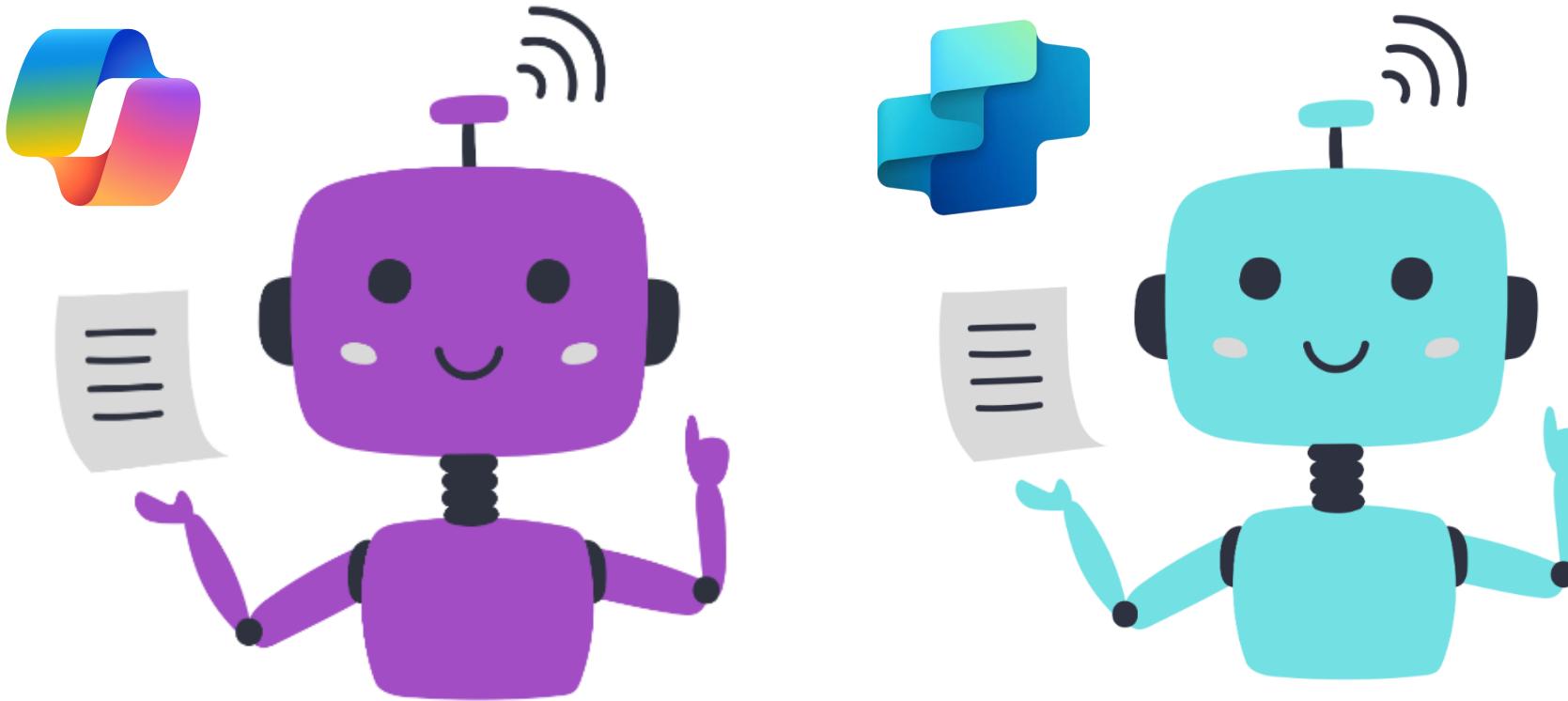
How to fix inconsistent water flow issue in Sm...
Describe what you need



Skill #6

Build or Extend?





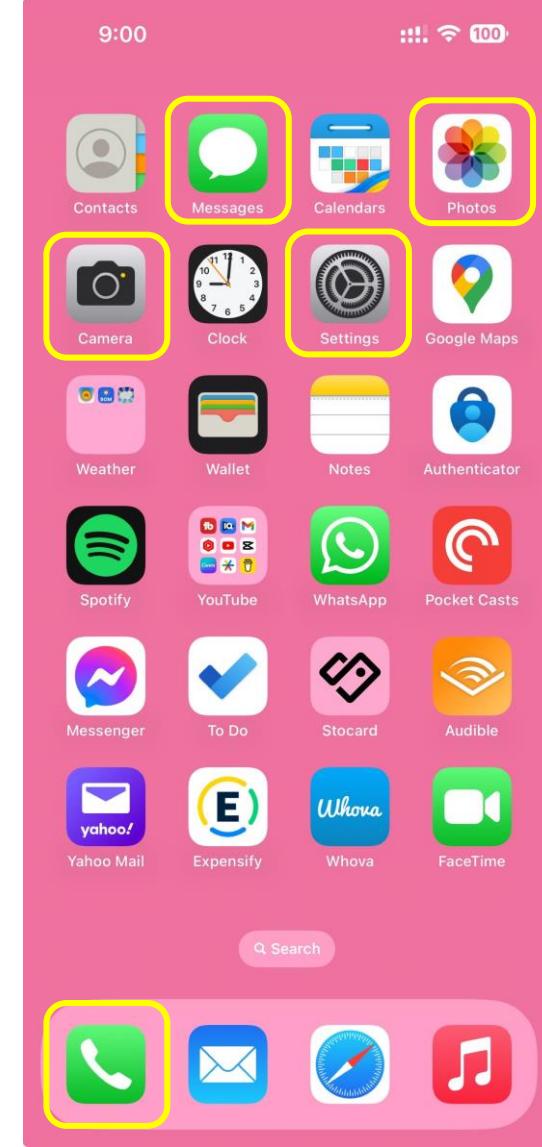
Should I extend Copilot for Microsoft 365 or build my own Copilot?

It's not always a simple choice

- What are you trying to achieve?
- Where do you want the Copilot to “live”?
- What data should it have access to?
- What skills will it have?
- Who will be using it?



Understand the starting point





Understand the starting point

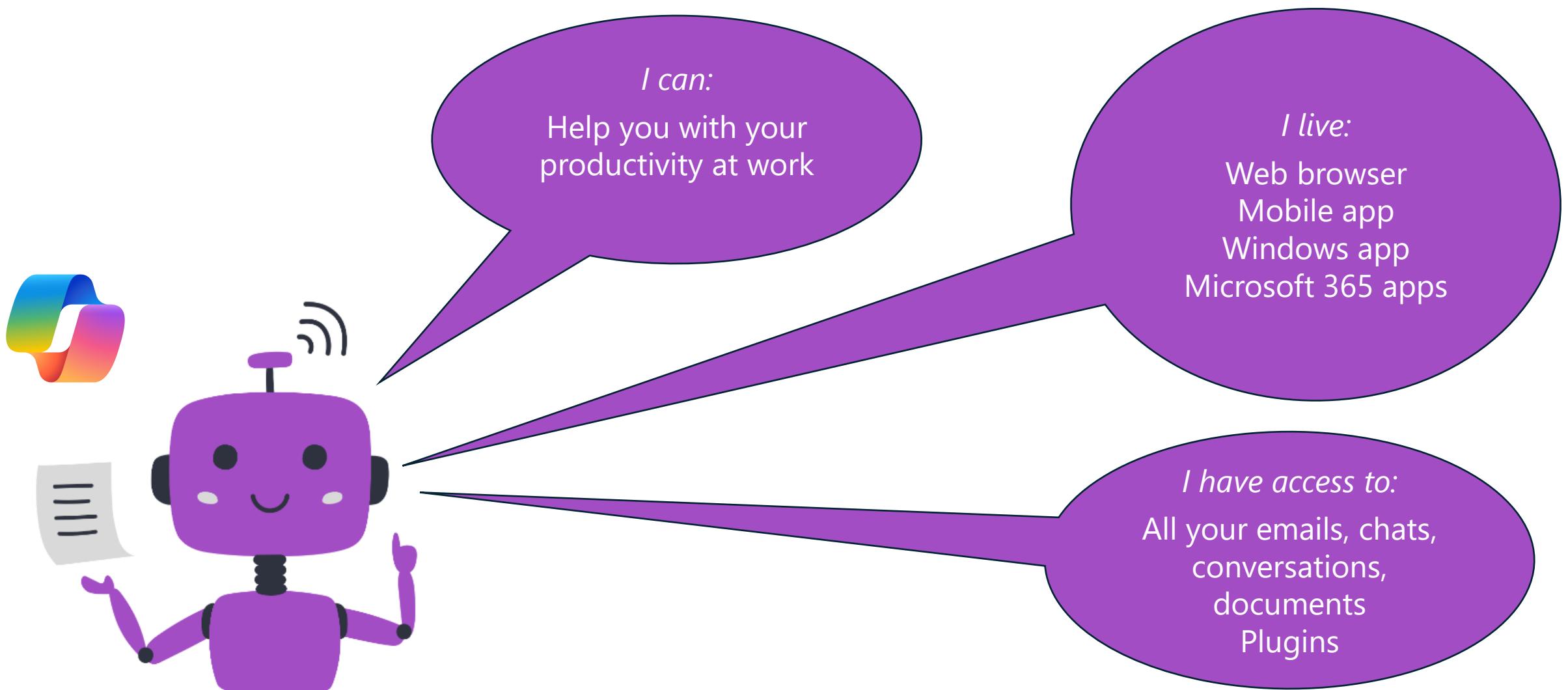




Understand the starting point

First-party Copilots

Copilot for Microsoft 365: The Productivity Assistant



Copilot for Microsoft 365: Skills



I can draft documents and emails

I can create presentations based on your description or documents

I can summarize meetings and suggest follow up actions

*I have access to:
All your emails, chats, conversations, documents*

Please download and install the
Slido app on all computers you use



What productivity skills would you like your Copilot to have?

- ① Start presenting to display the poll results on this slide.



Productivity skills

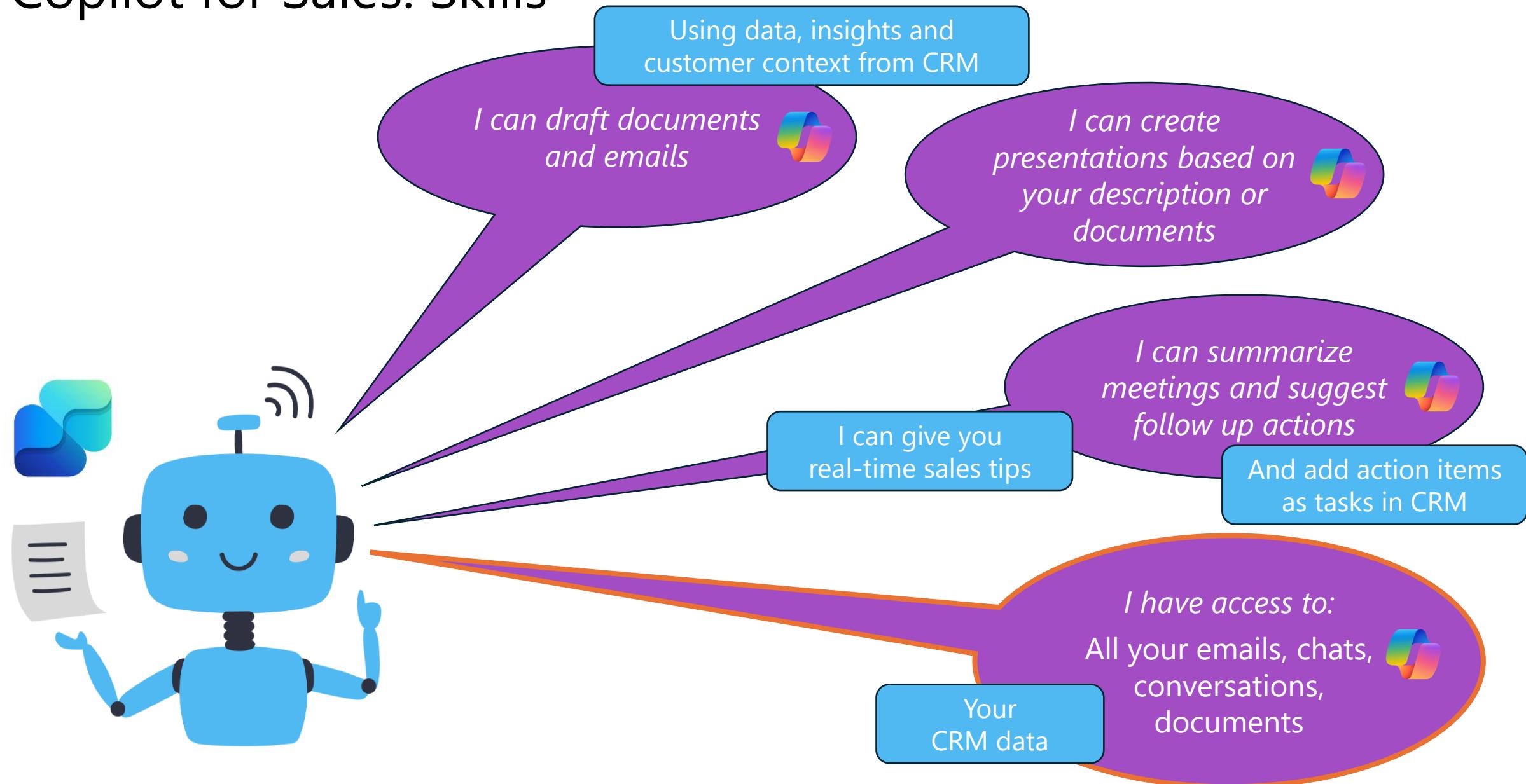
Connected to the Microsoft Graph

Works with Microsoft 365 applications

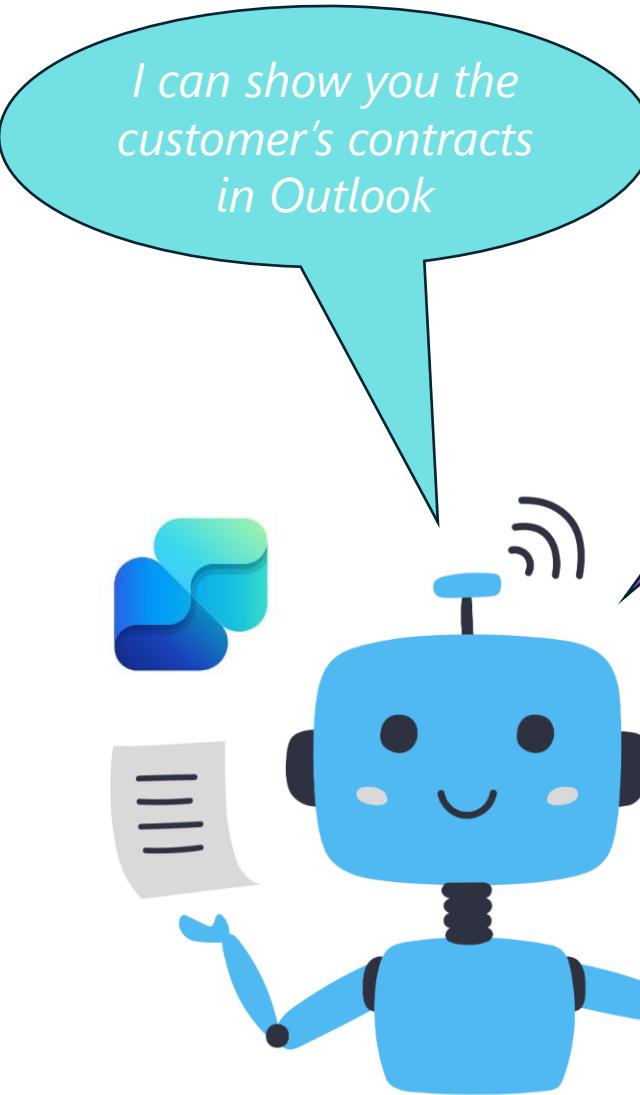
Internal use

When to extend Copilot for Microsoft 365

Copilot for Sales: Skills

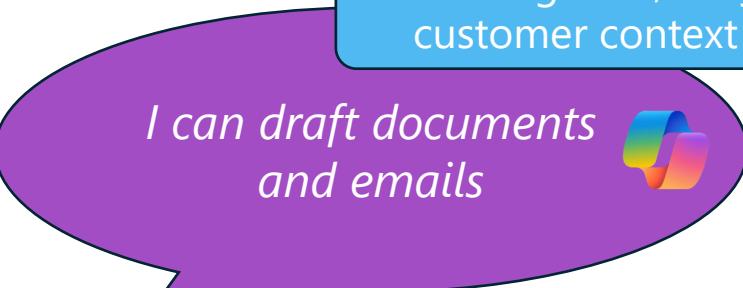


Copilot for Sales: Extend



I can show you the customer's contracts in Outlook

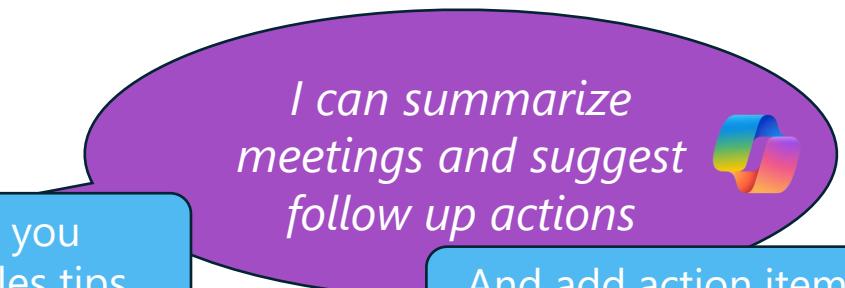
Using data, insights and customer context from CRM



I can draft documents and emails



I can create presentations based on your description or documents



I can summarize meetings and suggest follow up actions



I can give you real-time sales tips

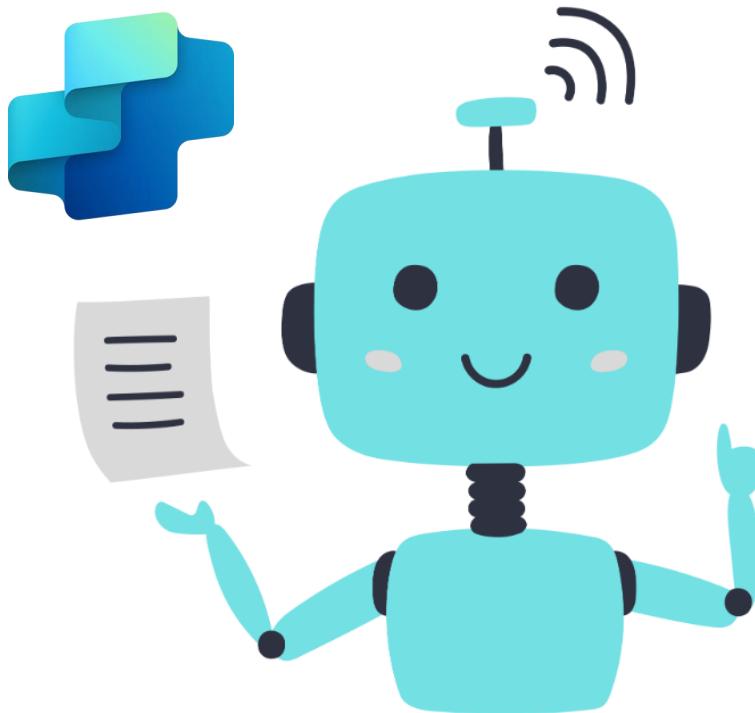
And add action items as tasks in CRM



*I have access to:
All your emails, chats, conversations, documents*



Your CRM data



No pre-defined skills or data connections

Control over the scope / scripted responses

Publish across multiple channels

Internal or external use

When to build your own Copilot

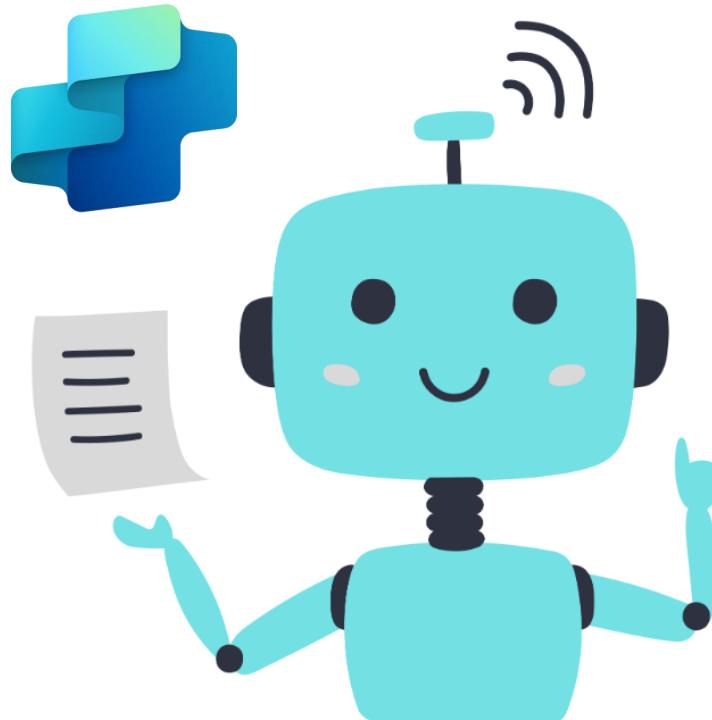
Scripted Responses: Exercise

Pick a major brand and imagine you are creating a Copilot for your website

Go to copilot.microsoft.com

Ask the following question based on the product the brand sells

What is the best X?

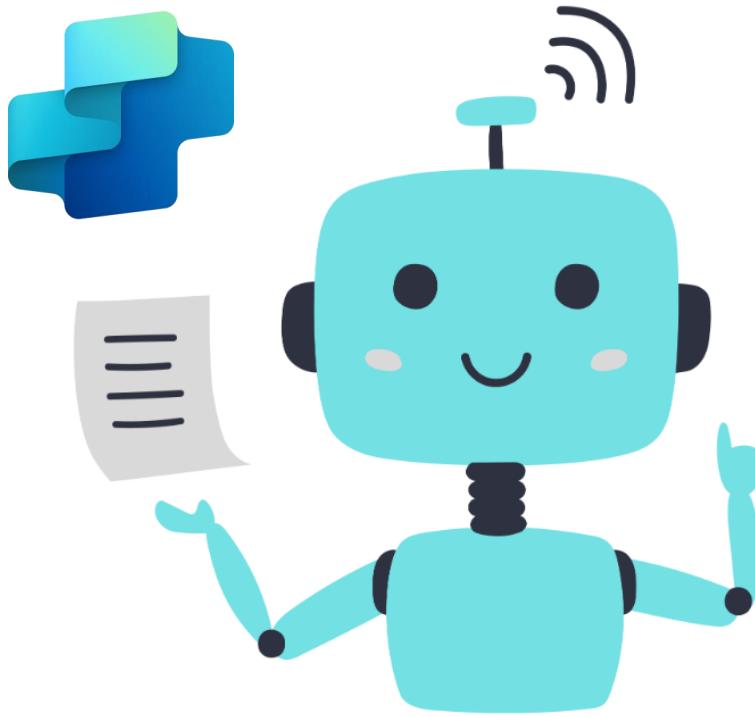


Please download and install the
Slido app on all computers you use



What responses did you get from your brand exercise?

- ① Start presenting to display the poll results on this slide.



Employee Assistant (HR/IT)

Concierge

Book appointments

Find service locations

Upsell / cross sell

Customer FAQ

Scenarios for Custom Copilots

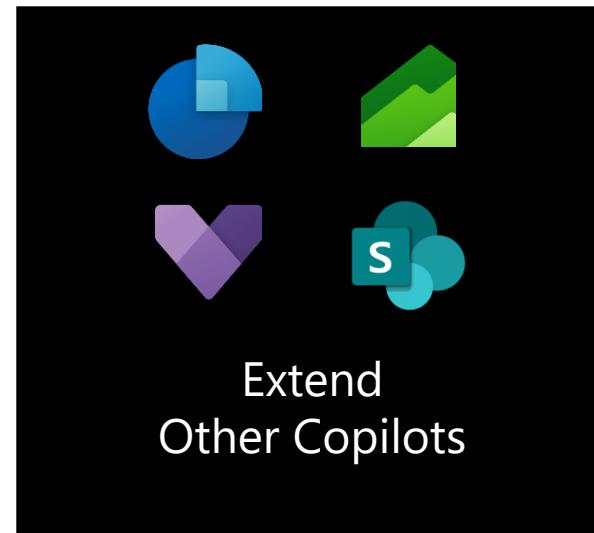


Skill #7

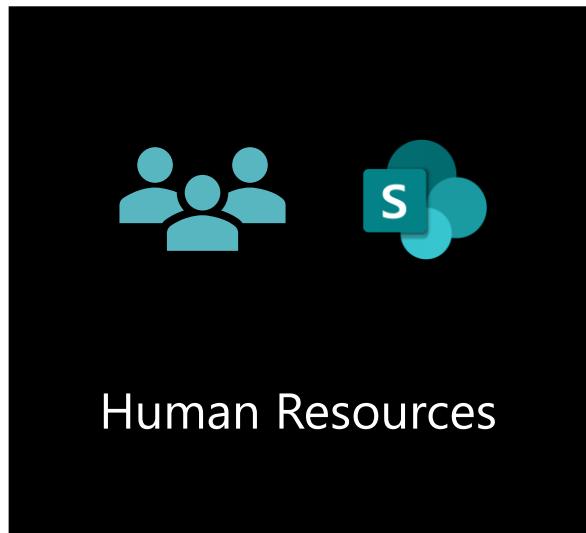
Build your own Copilot

7)

What can you create with Copilot Studio?



Typical starting point



Human Resources

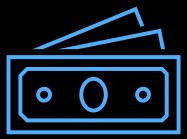


IT Help Desk

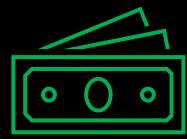


Extend Copilots

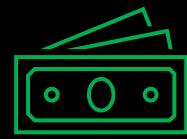
Managing value and risk



Internal copilots
using internal data



Internal copilots
using external data



External copilots
using external data

The real value



Convert leads to
customers



Schedule an
appointment



Process claims or
applications



Reimagine your
call center



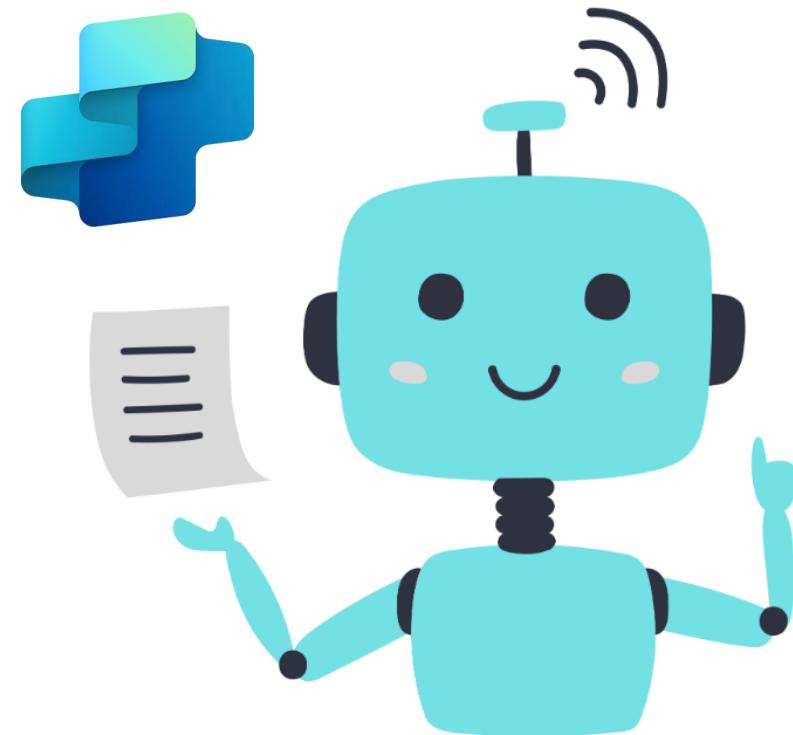
Find the right
service location



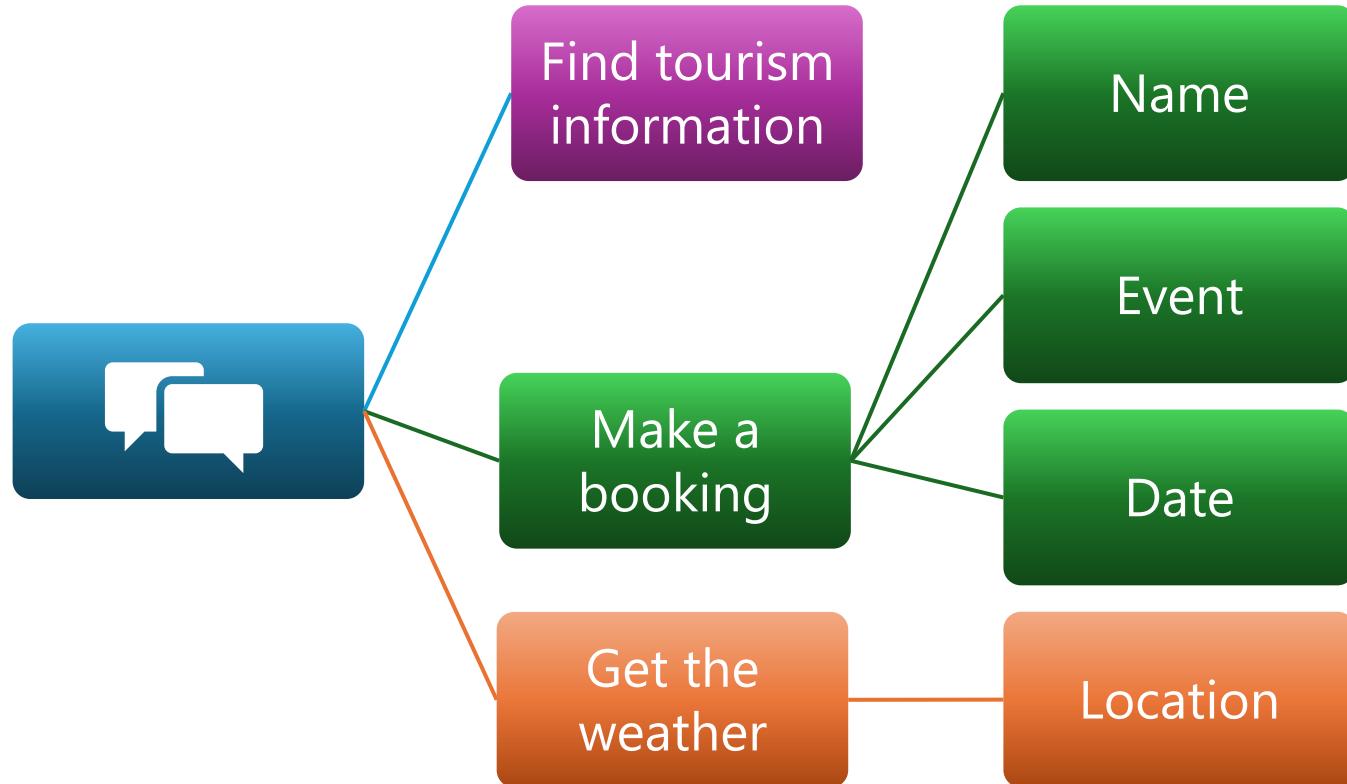
Upsell or suggest
new products

Copilot Studio Capabilities

- Chat over knowledge with generative AI
- Create specific topics
- Actions and plugins
- Publish to multiple channels
- Monitor and improve
- Integrate with conversational services



Conversational Orchestration



Copilot Studio

Environment
Lisa Crosbie's Environm...

Copilots

Euro Travel Bot Overview Knowledge Topics Actions Analytics Channels

Custom copilots

Microsoft

Copilot for Microsoft 365

Coming soon

Your copilot is ready! Here's what's next:

- Add actions so your copilot can do things for you
- Build topics to focus and guide how your copilot answers
- Publish your copilot so others can use it

Details

Name: Euro Travel Bot

Description: None provided

Instructions: None provided

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

+ Add knowledge

Disabled

Slovenia Info.pdf

See all

Topics

Add conversation topics to focus and guide the way your copilot answers.

+ Add topic

Test your copilot

Hello, I'm Euro Travel Bot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. I can help you with all sorts of amazing things to do in Europe. What would you like to explore?

2 minutes ago

Ask a question or describe what you need

0/2000

Test



Skill #8

Keep an
open mind





Business Transformation with Copilot



Transformation with AI



Change the way you work

Rethink how things can be done

Redefine roles

Transformation journey



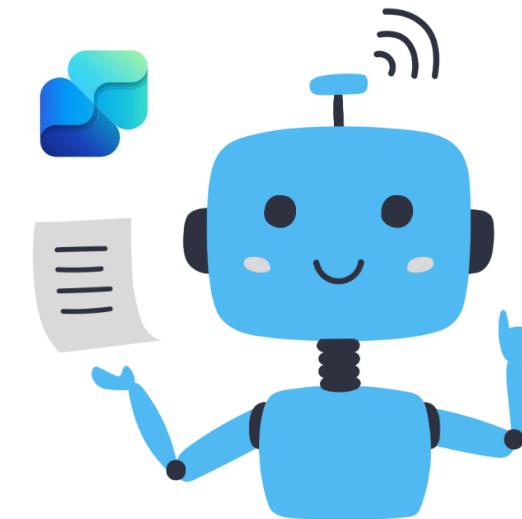
Transform the employee experience

Transform the customer experience

Transform processes and automation

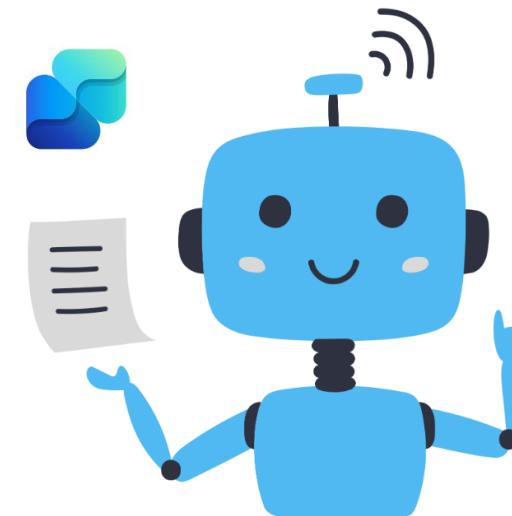
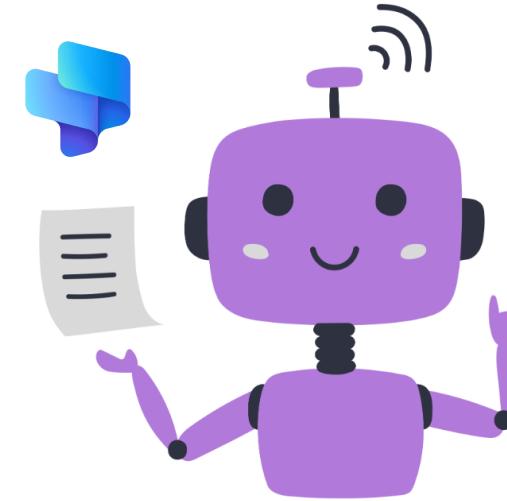
Internal: Productivity

- Start by leveraging the out of the box Microsoft Copilot tools to help with everyday work. Improve productivity, prevent burnout, reduce data entry and app switching.
- Spend time on higher value activities
 - Reduce data entry
 - Stay in context
 - First drafts
 - Rewrite and repurpose



Internal: Customer Facing

- Transform the contact center experience with tools that transcribe, summarize, analyze sentiment, provide just in time knowledge, and reduce post call work.
 - Conversation summary
 - Chat summary
 - Sentiment analysis
 - Built-in knowledge
 - Agent scripts
 - Automation



External: Customer Facing

- Create once and provide knowledge and self-service across multiple channels
- Knowledge is at the heart of successful AI transformation
 - Orchestrate the conversation
 - Publish to multiple channels
 - Escalate to live agents

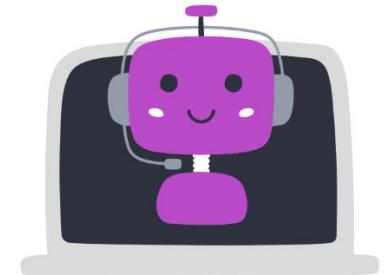




Agents



Agents: Beyond Chat & Response



Assistant

Copilot is your personal assistant

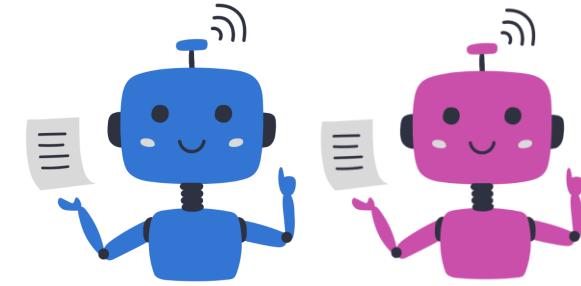
Agent

Copilot acts independently with human guidance

Autonomous Agent

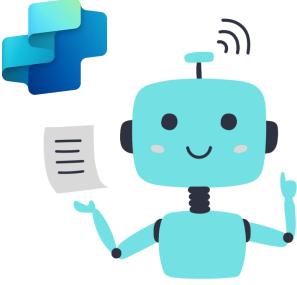
Copilot acts independently

“Agentification” of Copilots

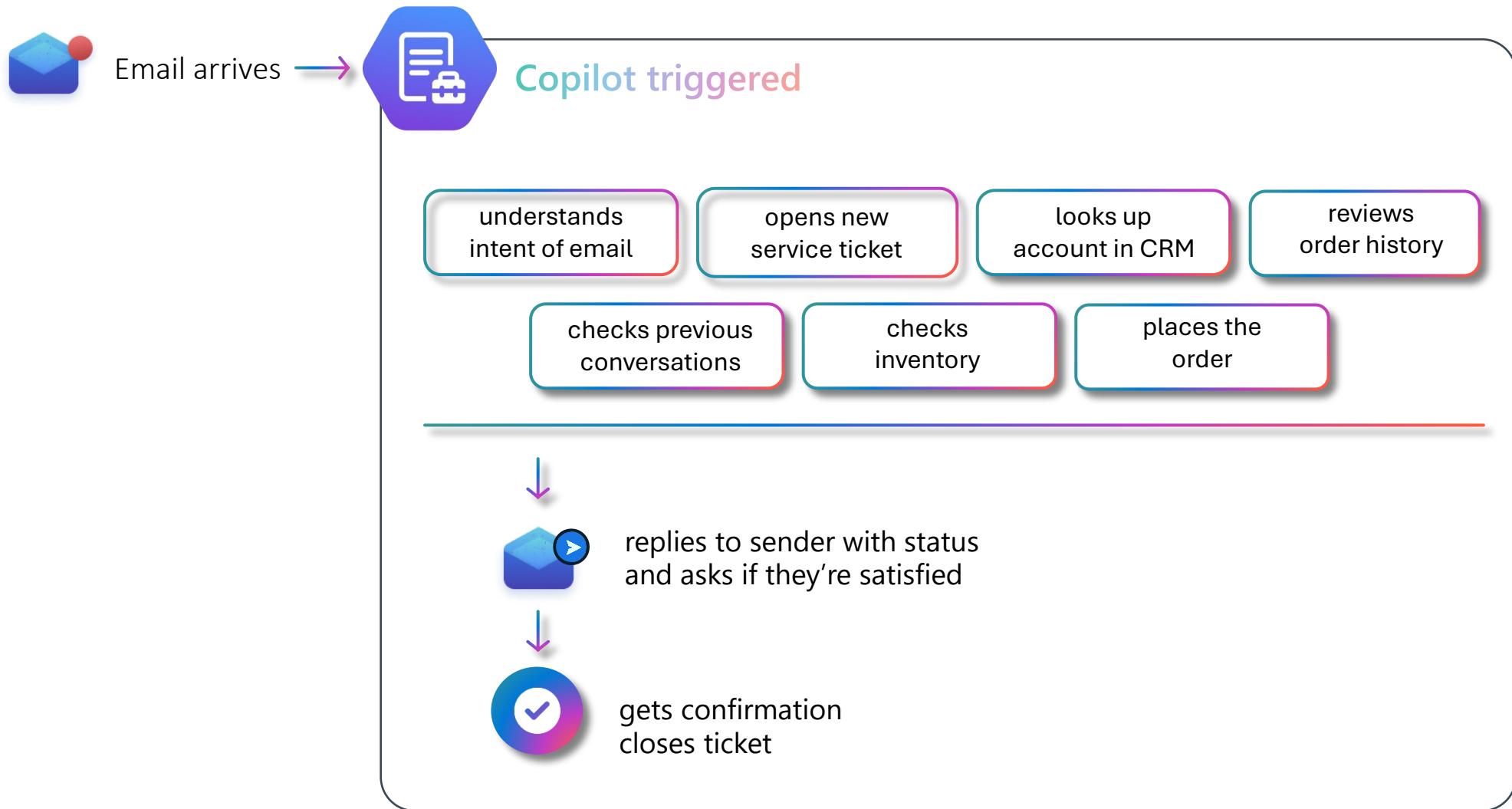


An agent can autonomously perform tasks, make decisions, and interact with users or other systems:

- Can be triggered by events, actions, schedules, and more
- Uses memory to orchestrates long running processes
- Automates asynchronous processes
- Takes actions
- Uses knowledge to find information and make decisions
- Follows human guardrails and asks for help or approval
- Monitors, learns and improves with each interaction



Copilots with agent Capabilities



IT Helpdesk Overview Knowledge Actions History Topics Analytics Channels Published 05/21/2024 Publish Settings ... Teach Test

Interactions > Increase in hardware exception requests for new hires

New hire detected
Flow Triggered
Send email with preference request
Exceptions approval
Send email with preference request
Update hiring manager
Flow Complete

Copilot Context

Overview

Summary

Initiated, approved and created a purchase order for new hire Apple M3 Pro 32BG.

Thought process

Instructions

- SAP Success factors: triggered flow
- IT Helpdesk: Ticket created
- Email sent: to new hire
- New hire response: Hardware selection and preferences
- Approval process: Initiated
- Approval: Confirmed
- PO created: Device ordered
- Confirmation sent : To new hire and hiring manager

Reasoning

- New hire hardware approved and delivered in 4 weeks.
- User provided negative feedback based on delivery time.

Memories

AI Flows

- Describe the outcome you want
- Provide the AI with context and guardrails
- Assemble a workflow with a set of inputs
- Unlock scenarios you couldn't automate before



Work Groups - Mit Booking char Microsoft Po Microsoft Po Microsoft Po Microsoft Po Microsoft Po (2) Approval

https://make.preview.powerautomate.com/environments/a86ee4a9-f785-e9f6-a819-967da5f9c01a/copilotflows/58c6efd8-1b12-ef1...

Power Automate Search Environments Build 2024 AI Flows MJ

Customer Request Processing Save draft Publish

Input values

- Group Screening Agreement
- Customer Request

Flow values

Output values

- Customer Email Response
- Request Decision

AI flow instructions

Examine the Customer Request and figure out what the customer's options are according to the Group Screening Agreement. Use the Booking Change Policy as a guide.

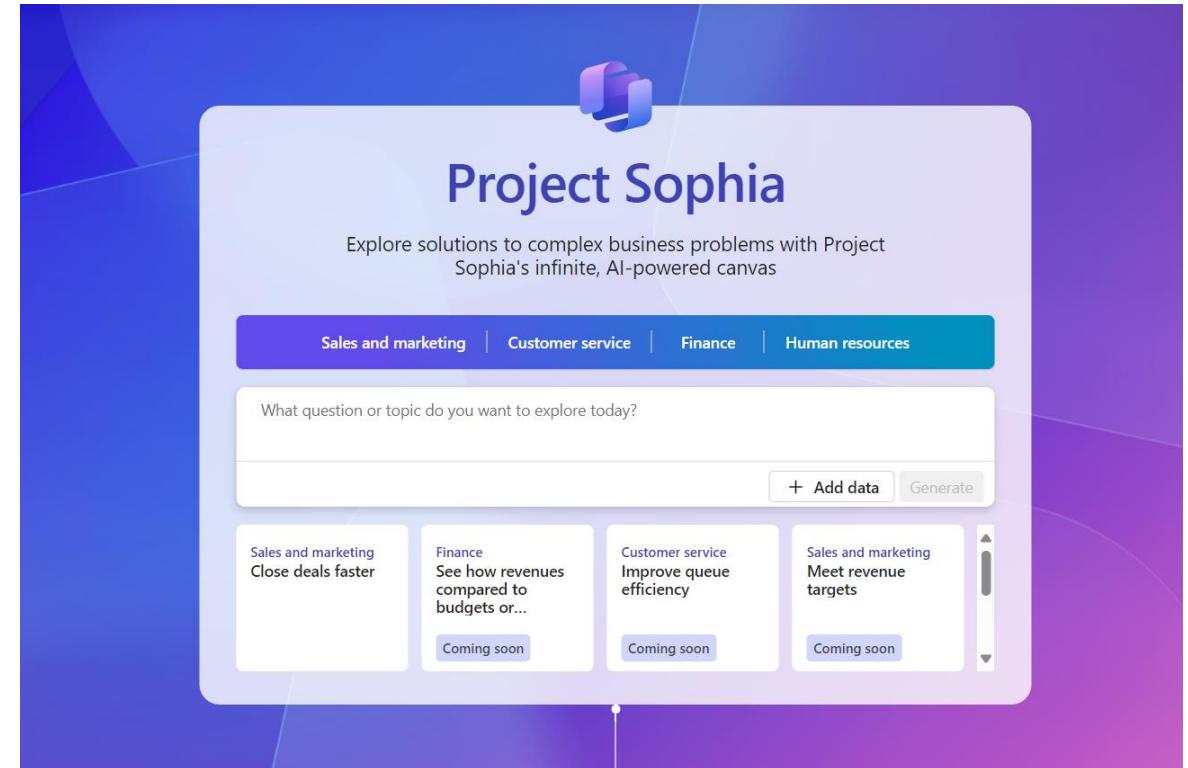
If the customer's request would violate the terms of the group screening agreement, the Request Decision is "Denied." Write a warm, friendly email explaining the reason

You can use the key button '/' to add Inputs, Outputs and References to instructions.

Update AI-generated content may be incorrect

Project Sophia

The Future of Reporting





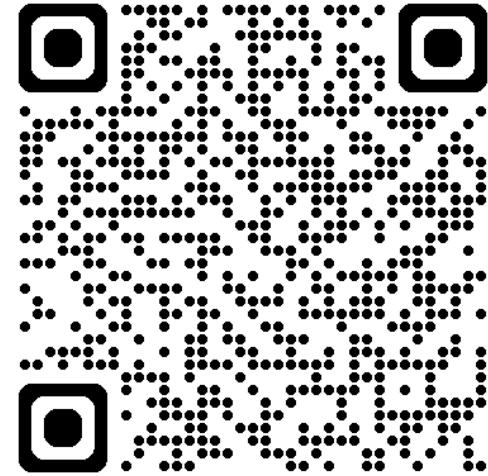
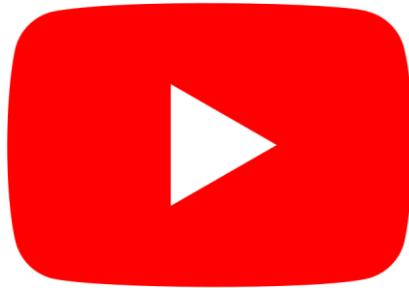
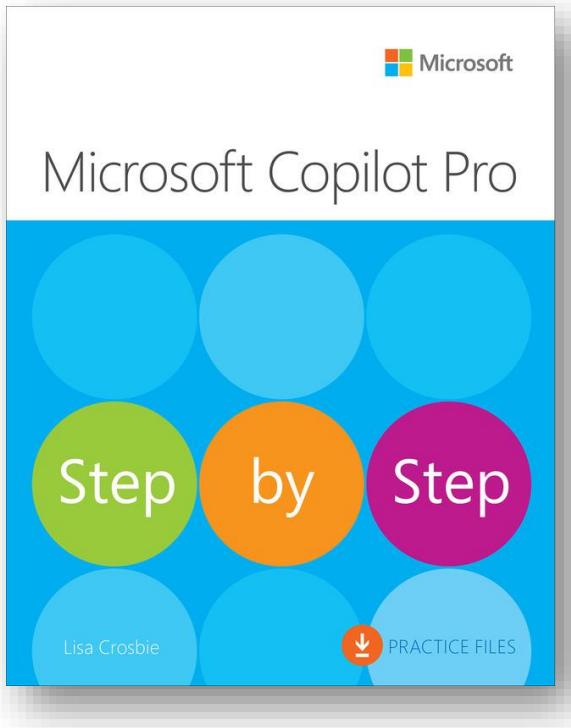
Wrap up

Q&A



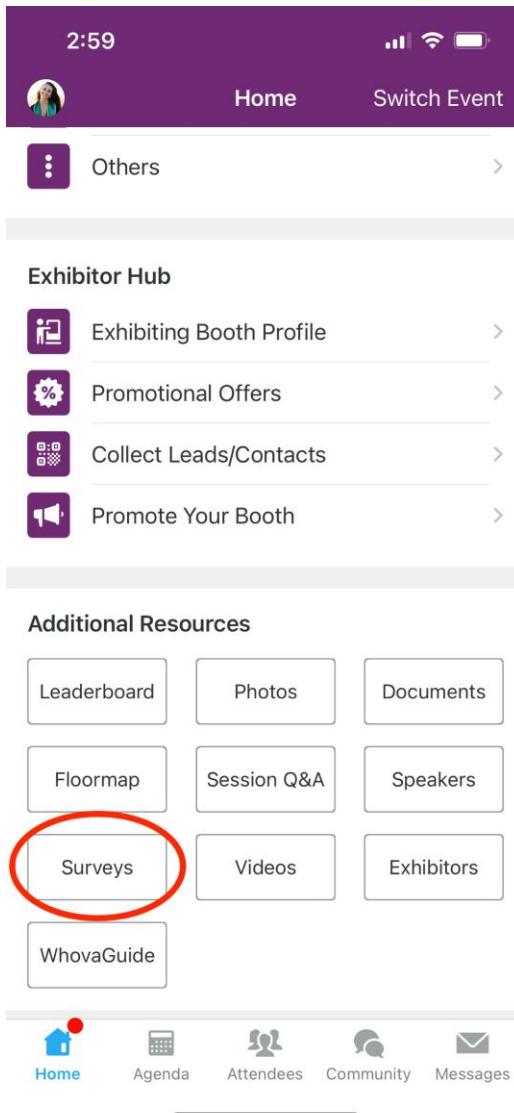


30% off Preorders
COPILOTSBS



Free tutorials, courses and feature updates
youtube.com/lisacrosbie

thank you



Session Feedback Surveys

We really want to hear from YOU!

In the pursuit of making next year's Power Platform Community Conference even better, we want to hear your feedback about this session.

Here's How -

- *Simply go to the Whova App on your smartphone*
- *Scroll down on the Power Platform Community Conference Homepage to 'Additional Resources' to click "Surveys".*
- *Click Session Feedback.*
- *Scroll down to find this session title.*
- *Complete the session feedback survey.*
- *Finally, click 'Submit'*

It's just that easy!

thank you

Gracias	ευχαριστώ	Danke	Grazie	благодаря
Hvala	Obrigado	Kiitos	شُكْرًا	Tak
Ahsante	Teşekkürler	مُتَشَكِّرٌ م	Salamat Po	감사합니다
Cám ơn	شُكْرِيَّه	Terima Kasih	Dank u Wel	Děkuji
நன்றி	Köszönöm	ありがとう ございます	ឃុំបញ្ជូនទេរីប	Dziękuje
谢谢	Tack	Mulțumesc	спасибо	Merci
תודה	多謝晒	дякую	Ďakujem	Ευχαριστώ

Licensing – Copilot for Service



Microsoft Copilot

Copilot

Free

Copilot for Microsoft 365

\$30

Copilot for Sales

\$50

Copilot for Service

\$50

Foundational capabilities



Web grounding



Commercial data protection



Enterprise-grade data protection



Microsoft Graph grounding



Microsoft 365 Apps



Copilot Studio



Role-specific capabilities



Licensing details for Dynamics 365 Customer Service and Copilot for Service

D365 Customer Service Enterprise ¹	Microsoft Copilot for Service	Capabilities	GA	Where experiences surface
\$95	\$50	Core CRM/CEC capabilities <ul style="list-style-type: none"> Case management, knowledge management, intelligent routing of records, reporting and analytics 	• Available now	Dynamics 365 Customer Service
		Copilot experiences in Dynamics 365 Customer Service <ul style="list-style-type: none"> Case summary, multi-turn Q&A, draft an email, out-of-the-box knowledge integration 	• Available now	
		Copilot experiences in Dynamics 365 Customer Service <ul style="list-style-type: none"> Multiturn chat auto prompting 	• July 2024	
1		Copilot experiences in Dynamics 365 Customer Service with Omnichannel <ul style="list-style-type: none"> Conversation summary, sentiment analysis 	• Available now	
		Copilot experiences in third-party agent desktops <ul style="list-style-type: none"> Copilot embedded in Salesforce and/or other agent desktops <u>Context aware</u> Copilot embedded in Salesforce and/or other agent desktops 	• February 2024 • July 2024	
		Pre-built integrations with knowledge sources <ul style="list-style-type: none"> Out-of-the-box integrations with CRM systems (e.g., Salesforce, ServiceNow, Zendesk), websites, SharePoint, and offline files 	• February 2024	
2,3		Copilot for Microsoft 365 <ul style="list-style-type: none"> Microsoft 365 App Copilots, Copilot Studio, Microsoft Graph, etc. 	• Available now	Copilot for Microsoft 365 (\$30)
3		Outlook integrated experiences <ul style="list-style-type: none"> Email summary and drafting enriched with CRM data, view/edit CRM records (contacts, cases), case summary Schedule a meeting based on email context, meeting prep, create new case 	• April 2024 • July 2024	Outlook
3		Teams integrated experiences <ul style="list-style-type: none"> View/edit CRM records (contacts, cases, accounts), case summary Meeting recap (including suggested notes and creating CRM tasks) Meeting prep 	• April 2024 • March 2024 • July 2024	Teams
3		Microsoft 365 Chat integration experiences <ul style="list-style-type: none"> Plugins to ask questions, summarize CRM entities such as case, reason over knowledge 	• April 2024	Microsoft 365 Chat

¹Included with Omnichannel add-in; ²Copilot for Microsoft 365 can be licensed separately; ³Only available after purchase of Copilot for Service

Licensing details with Copilot for Service

App	Scenario	Capability	Copilot for Microsoft 365	Copilot for Service
Outlook	Email read	Highlight key emails	Y	Y
		Summarize email threads	Y	Y
		Save emails and appointments to CRM		Service value
		Summarize email threads with CRM data		Service value
		Add/update contacts to CRM		Service value
	Email compose	Read/write/summarize access to CRM entities		Service value
		Draft new email	Y	Y
		Draft reply email	Y	Y
		Use excel data in email reply	Y	Y
		Draft reply with CRM data		Service value
Teams	Calendar	Draft reply with Teams meeting summary and tasks		Service value*
		Read/write/summarize access to related CRM entities		Service value
		Meeting prep with CRM case summary		Service value
		Read/write/summarize access to related CRM entities		Service value
	During meeting	Meeting prep with CRM case summary		Service value
		Catch me up, Q&A, discussion so far, wrap up	Y	Y
		Real time service prompts and tips		Service value*
	Post meeting	Read/write/summarize* access to related CRM entities		Service value
		Summary, notes, tasks	Y	Y
		Follow up items with CRM task creation		Service value*
Chat/ Microsoft 365 Chat	Chat/ Microsoft 365 Chat	Q&A and summarize* over content	Y	Y
		Q&A over connectors (Salesforce, ServiceNow, Zendesk)	Y	Y
		Summarize and Q&A over CRM data		Service value*

*On the roadmap

Licensing – Copilot for Sales



Microsoft Copilot

Copilot

Free

Copilot for Microsoft 365

\$30

Copilot for Sales

\$50

Copilot for Service

\$50

Foundational capabilities



Web grounding



Commercial data protection



Enterprise-grade data protection



Microsoft Graph grounding



Microsoft 365 Apps



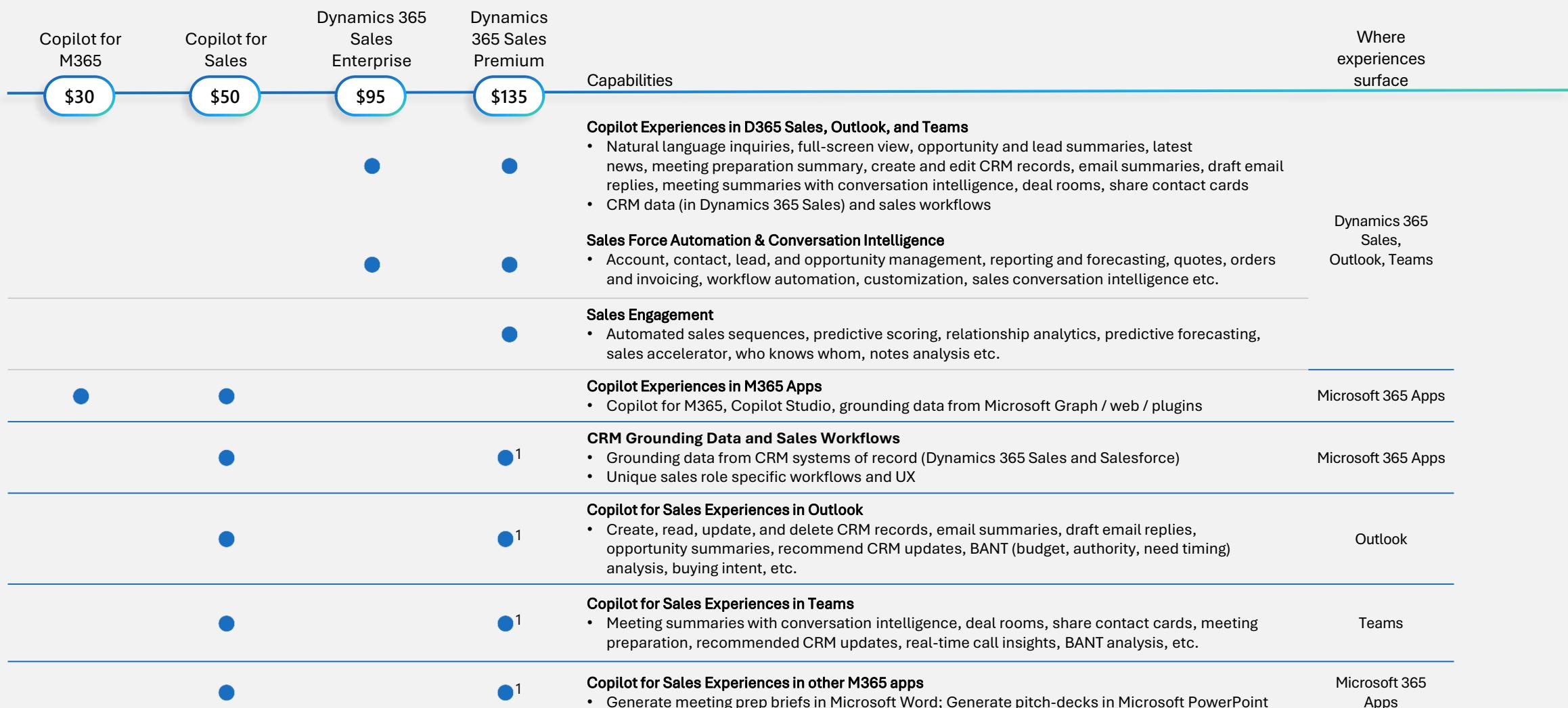
Copilot Studio



Role-specific capabilities



Licensing details



Licensing details with Copilot for Microsoft 365

Copilot for Sales includes everything in Copilot for Microsoft 365 *plus* sales insights from CRM platform

	App/scenario	Capability	Copilot for Microsoft 365	Copilot for Sales
 Outlook	Email read	Highlight Key Emails	Y	Y
		Summarize Email Threads	Y	+ Sales value
		Save Emails and Appointments to CRM		+ Sales value
		Auto Update Contact Info To CRM		+ Sales value
	Email composure	Read / Write / Summarize access to related CRM entities		+ Sales value
		Draft New Email	Y	+ Sales value
		Draft Reply Email	Y	+ Sales value
		Use Excel Data In Email Reply	Y	Y
	Calendar	Set Up Teams Channels From Outlook (Collab Spaces / Deal Rooms)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
		Meeting Prep w/ CRM Opportunity Summary		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
 Teams	During meeting	Catch Me Up, Q&A On Discussion So Far, Wrap Up	Y	Y
		Real-time sales tips (Competitor/Brand mentions)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	Post meeting	Summary, Notes & Tasks	Y	Y
		Follow Up Q&A	Y	Y
		Sentiments, Talking Speed, Talk To Listen Ratio for seller self-improvement		+ Sales value
		Create CRM Tasks from Follow-ups		+ Sales value
	Team/Channel	Collaborate using Collab Spaces - Account and Deal Room sales templates		+ Sales value
	Chat	Summarize and Q&A On Content	Y	Y
	Meeting extension	Search and share CRM entities as adaptive cards across Outlook and Teams		+ Sales value
 Word	Prepare for meeting	Generate meeting preparation brief	Y	+ Sales value
 Copilot chat	Get sales insights	Q&A with sales insights on conversion rate, sales pipeline, sales cycle, and win rate		+ Sales value