

# MENTORING & SUPPORT MICROSOFT 365 COPILOT

EXPLORING TRAINING AND MENTORING STRATEGIES

A large, abstract graphic on the left side of the slide features several concentric circles and arcs in light blue and white. Some arcs have small arrows pointing clockwise or counter-clockwise. Numerical values such as 140, 150, 160, 170, 180, 190, 200, 210, 220, 230, 240, 250, and 260 are placed along the outer edges of these circles. Dotted lines connect some of the arcs.

# INTRODUCTION & OBJECTIVES

# AGENDA OVERVIEW

## **Understanding the Mentor's Role**

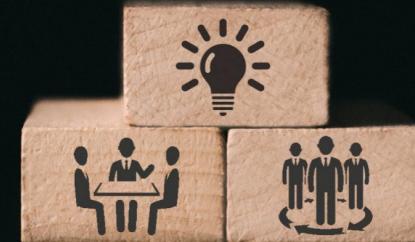
The first block focuses on the vital role mentors play in guiding and supporting individuals in their development.

## **Building Trust and Leadership**

The second block emphasizes the importance of trust and leadership skills in the context of the AI era to foster collaboration.

## **Training and Support Strategies**

The final block explores effective training and support strategies for utilizing Microsoft 365 Copilot for better productivity.



# TRAINING OBJECTIVE: ENABLEMENT, TRUST, PRACTICE

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## Key takeaways

# KEY TAKEAWAYS

- Leverage AI to transform your organization and enhance employee experience.
- View AI as a tool to boost creativity, productivity, and skill development among employees.
- Offer personalized information to improve satisfaction and efficiency.
- Utilize AI to enhance both on-site and remote work experiences.
- Enhance infrastructure management and compliance with AI.
- Establish responsible guidelines for AI use.
- Motivate employees to share ideas on AI improvements and assess their value.
- Cultivate a culture of continuous learning and collaboration around AI and data.

# Copilot for Microsoft 365

## Readiness checklist and key resources

USER  
ENABLEMENT

MICROSOFT  
RESOURCES

### Get ready

- ✓ Secure exec sponsorship, create AI Council, and define RAI principles
- ✓ Identify success owners, Champions, and early adopter cohorts
- ✓ Detail high value scenarios and personas
- ✓ Be intentional with assignment and concentrate seats
- ✓ Define success criteria, KPIs, and success measurement plan

### Onboard & engage

- ✓ Complete User Enablement Strategy training
- ✓ Design and deploy training and engagement community (Center of Excellence/Champion Platform)
- ✓ Launch employee communications and Champion program
- ✓ Onboard executives and user cohorts
- ✓ Deliver user Champions and support staff training

### Deliver impact

- ✓ Review success measures and user survey results
- ✓ Conduct feedback and reporting analysis
- ✓ Deliver extended training and adoption support
- ✓ Identify additional optimization scenarios
- ✓ Iterate user experience strategy
- ✓ Gather and amplify success stories

### Extend & optimize

- ✓ Extend to new high value scenarios
- ✓ Deliver business process transformation with Copilot Studio, plugins and connectors
- ✓ Drive group and cross-organizational productivity and innovation
- ✓ Understand custom line of business opportunities

### Support continuous learning and optimization



#### [Microsoft Unified](#)

Unified unlocks the greatest value from your investment.

#### [Microsoft FastTrack](#)

FastTrack is a Microsoft delivered benefit designed to help you deploy Microsoft 365.



#### [Microsoft Learn](#)

Build your skills across Microsoft products and services with industry leading online training and certification programs.



#### [Microsoft Adoption](#)

Resources to ensure you are delivering employee satisfaction and business value. Accelerate human change management with on-line resources, training and communities to make the most of your investment, all included with your subscription.

# ROLE OF THE MENTOR



# THE ROLE OF THE MENTOR IN AI TRANSFORMATION

## Guidance Through Complexity

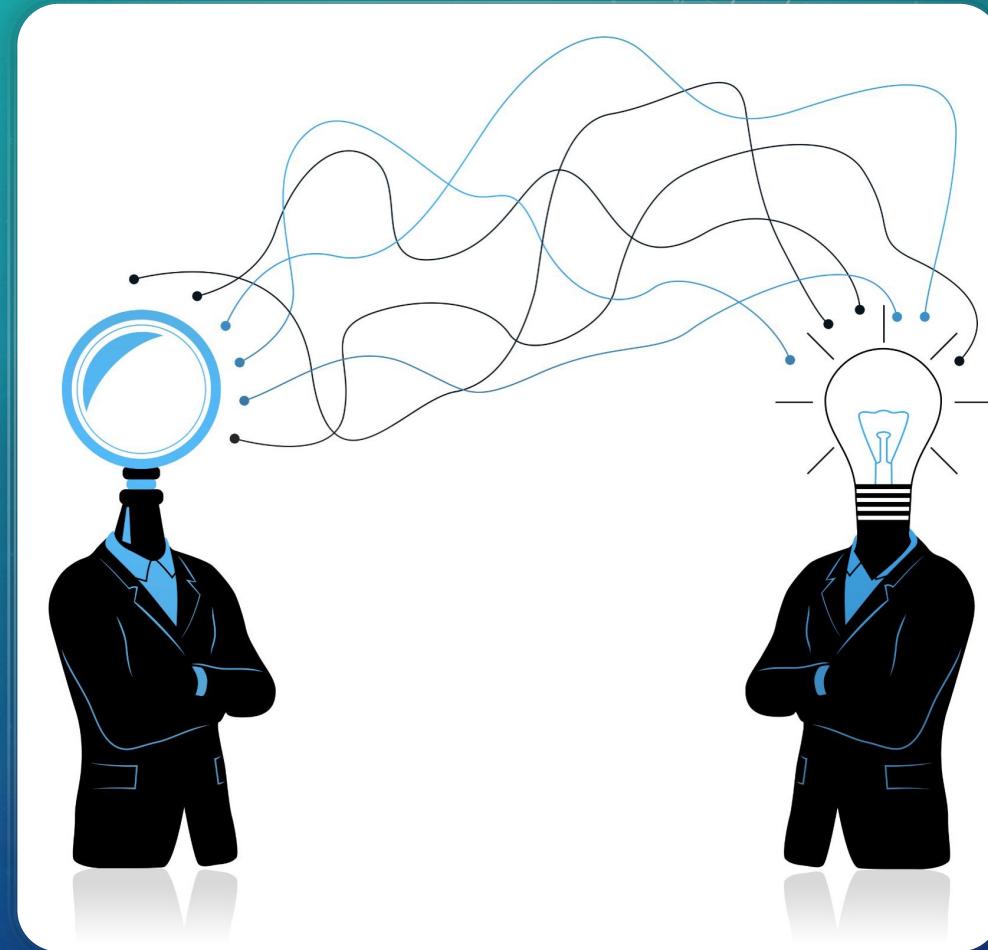
Mentors provide essential guidance in navigating the complexities involved in adopting AI technologies effectively.

## Facilitating Understanding

They facilitate understanding of AI concepts, making it easier for individuals to grasp and implement new technologies.

## Encouraging Innovation

Mentors foster a culture of innovation within organizations, inspiring individuals to explore creative solutions through AI.



# RESPONSIBILITIES: KNOWLEDGE TRANSFER, MOTIVATION, SUPPORT

## Knowledge Transfer

Mentors are responsible for sharing their expertise and knowledge about tools like Microsoft 365 Copilot to facilitate learning.

## Motivation

A mentor's role includes motivating team members to embrace technology and encouraging them to explore new possibilities.

## Ongoing Support

Providing continuous support throughout the learning journey is essential for mentors to help their mentees succeed.





# THE 'PEOPLE FIRST' STRATEGY

## Prioritizing Employee Needs

A 'people first' strategy focuses on understanding and addressing the needs of employees during technological transitions.

## Fostering Inclusivity

This approach promotes an inclusive environment where all voices are heard and valued during the change process.

## Acceptance of Change

By prioritizing employees, organizations can foster acceptance and reduce resistance to AI technologies.



# TRUST AND LEADERSHIP IN THE AI ERA



# HOW TO BUILD TRUST IN NEW TECHNOLOGIES

## Transparency in Technology

Being transparent about the capabilities and limitations of new technologies fosters trust among team members and stakeholders.

## Engaging Team Members

Actively engaging with team members helps to build rapport and encourages a collaborative environment for technology adoption.

## Encouraging Feedback

Encouraging open feedback allows for continuous improvement and enhances trust in new technologies among users.

# ROLE MODEL AND COMMUNICATION



## Embracing New Technologies

Leaders should demonstrate a positive attitude towards adopting new technologies, serving as role models for their teams.

## Effective Communication

Communicating the benefits of tools like Microsoft 365 Copilot can reduce anxiety and build excitement among team members.

## Fostering Enthusiasm

Encouraging enthusiasm for new technologies can improve team morale and increase productivity in the workplace.



# TRAINING & SUPPORT STRATEGIES

# MICROSOFT 365 COPILOT IN PRACTICE

## Enhancing Daily Workflows

Microsoft 365 Copilot can streamline daily tasks, making workflows more efficient and reducing time spent on repetitive activities.

## Boosting Collaboration

By facilitating real-time collaboration, Microsoft 365 Copilot helps teams work together seamlessly across different applications and devices.

## Integrating Applications

Microsoft 365 Copilot integrates various applications, allowing users to transition smoothly between tasks and tools for increased productivity.

# USE CASES (OUTLOOK, WORD, TEAMS, EXCEL)

## Streamlining Tasks

Microsoft 365 Copilot can automate repetitive tasks in applications, reducing time spent on manual inputs.

## Improving Efficiency

By integrating Copilot, users can enhance their productivity with intelligent suggestions and quick access to information.

## Collaboration in Teams

Copilot facilitates better collaboration in Teams by summarizing discussions and tracking action items effectively.

## Data Insights in Excel

With Copilot, Excel users can generate data insights and visualizations, aiding in better decision-making.



# DEMO: EXPERIENCE COPILOT LIVE

## Hands-On Experience

Participants will engage in a live demo, allowing them to experience Microsoft 365 Copilot in real-time.

## Interactive Session

Sessions are designed to be interactive, encouraging questions and exploration of Copilot's features.

## Tool Features and Capabilities

Demo will showcase key features and capabilities of Microsoft 365 Copilot, enhancing productivity, tailored to your organization.



# CREATING EFFECTIVE PROMPTS

# PROMPT FORMULA: ROLE, GOAL, CONTEXT

## Defining the Role

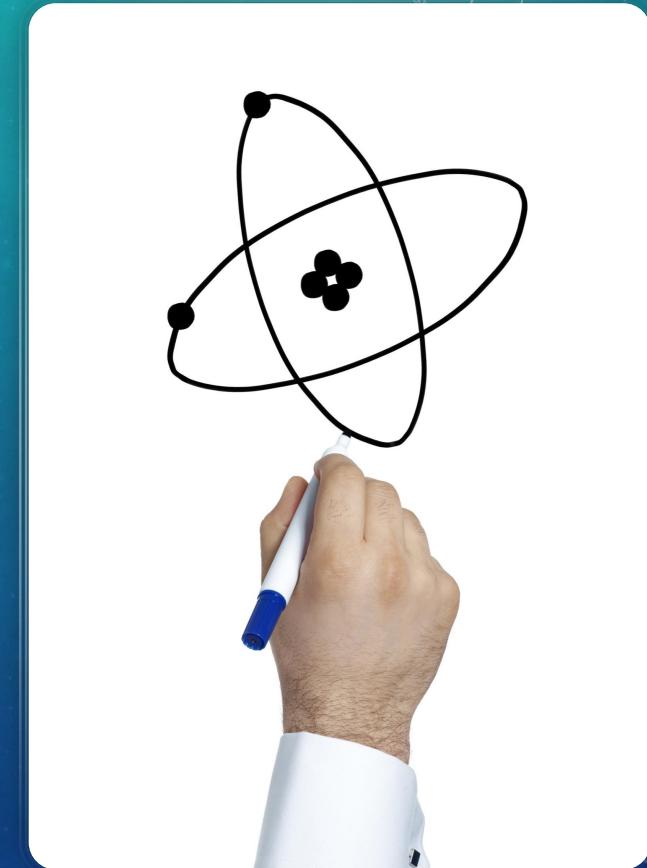
Clearly defining the role is essential for guiding the responses you receive from Copilot. It sets the framework for the interaction.

## Clarifying the Goal

Clarifying the goal helps to focus the responses you get, ensuring they align with your intended outcomes for the interaction.

## Providing Context

Providing context is crucial for achieving meaningful responses, as it gives background information necessary for understanding your request.



# EXAMPLES & PROMPT HANDOUT

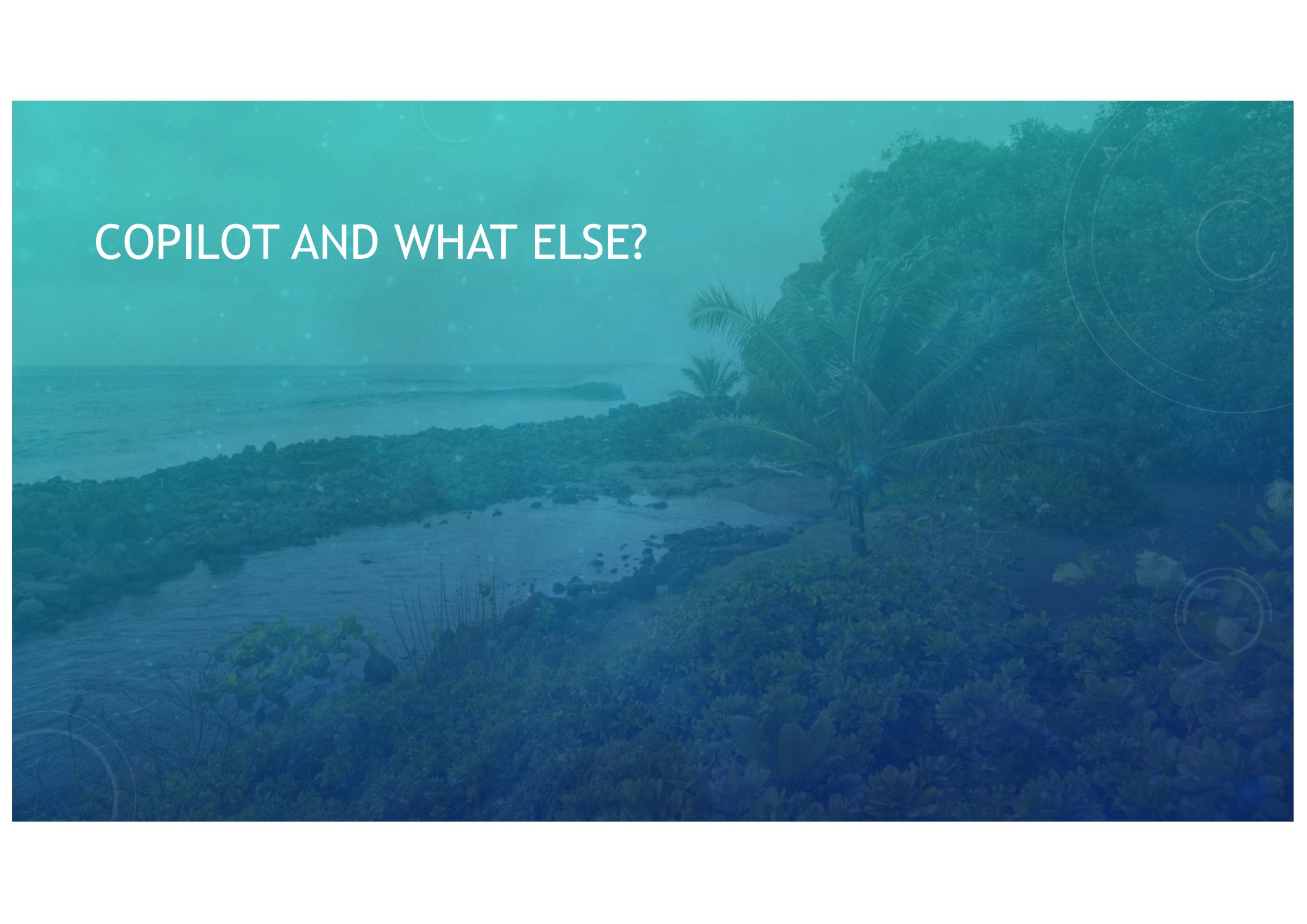
## Effective Prompt Examples

Participants will be provided with examples of effective prompts that demonstrate best practices for Microsoft 365 Copilot.

## Prompt Handout

A handout can be distributed that serves as a reference guide for creating prompts efficiently.



A scenic coastal landscape featuring a rocky beach, lush green vegetation, and palm trees. In the background, the ocean stretches to a distant horizon under a clear sky.

COPilot AND WHAT ELSE?

# COPilot Agents

## Key Features

- **Conversational AI** tailored to business needs
- **Integration** with internal systems and data sources
- **Low-code customization** with a user-friendly interface
- **Security and compliance** aligned with Microsoft standards

## Use Cases

- Automating HR FAQs
- Guiding employees through IT support
- Helping marketing teams retrieve campaign data
- Streamlining onboarding or internal processes

## Benefits

- Increases productivity
- Reduces repetitive tasks
- Enhances self-service and user satisfaction

# COPILOT STUDIO

## Interface Introduction

The Copilot Studio interface is designed for ease of use, enabling users to navigate effortlessly through its features.

## Functionality Highlights

Key functionalities of Copilot Studio allow users to create prompts efficiently and enhance the overall user experience.

## Enhanced User Interaction

The studio's design focuses on maximizing user interaction, making it easier to engage with the platform and its tools.

# DEMO: COPILOT AGENTS & STUDIO

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# TIPS FOR INTRODUCING COPILOT IN THE ORGANIZATION



# RESOURCES FOR ENABLEMENT

## Training Modules

Training modules provide structured learning opportunities that help participants acquire essential skills for the rollout process.

## User Guides

User guides offer detailed instructions and information that assist participants in effectively utilizing the resources provided.

## Support Channels

Support channels are available to provide assistance and address any questions or issues that arise during the rollout process.



# USER ENABLEMENT GUIDE, TEMPLATES, TRAINING MODULES

## Comprehensive User Guide

The user enablement guide serves as a vital resource for both individuals and teams, enhancing their learning experiences.

- [Learning for Mentors](#)
- [User Enablement in Viva](#)

## Templates for Learning

Templates included in the guide are designed to streamline processes and foster effective learning within teams.

- [Copilot Chat Tools and Templates](#)
- [Top 10 to try](#)
- [Prompt ingredients](#)

## Training Modules

Training modules provide structured content that supports ongoing education and skills development for users.

- [Copilot Virtual Skilling Event Framework](#)
- [Copilot Daily Scenarios](#)
- [Scenario Library](#)

# DEMO: USING PROVIDED TOOLS

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# SHARING & DEVELOPING KNOWLEDGE

# PROMPT SHARING & OPTIMIZATION

## Importance of Sharing Prompts

Sharing prompts among team members enhances collaboration and leads to better outputs from Copilot.

## Optimizing Prompts

Optimizing prompts is crucial for improving the quality and relevance of interactions with Copilot.

## Enhanced Team Interaction

Effective prompt sharing and optimization foster enhanced interactions, leading to increased productivity.

You can use this template in **SharePoint**, **OneNote**, or **Microsoft Lists** to standardize prompt documentation and

markdown

### ### 📝 Prompt Title:

> e.g., "Weekly Campaign Summary for Marketing Reports"

### ### 🌟 Objective:

> What should this prompt achieve?

> e.g., Summarize campaign performance data for weekly reports

### ### 📄 Sample Prompt:

> "Summarize this week's marketing campaign performance across email, social media, and p

### ### 📈 Data or Context Provided:

> Link or reference to input source, e.g., campaign dashboard, Excel data

### ### 🔄 Optimized Version (if available):

> A version of the prompt that worked better after iteration.

### ### ✅ Use Case Examples:

> When and where to use this prompt? (e.g., weekly team syncs, executive reporting)

### ### 👩 Contributor:

> Name and department of the prompt creator

### ### 💬 Notes or Feedback:

> Comments from others who used or refined the prompt

# WHITEBOARD ACTIVITY: COLLECTING BEST PROMPTS

## **Collaborative Engagement**

Participants will work together to contribute ideas, enhancing creativity and collaboration in prompt collection.

## **Refining Best Prompts**

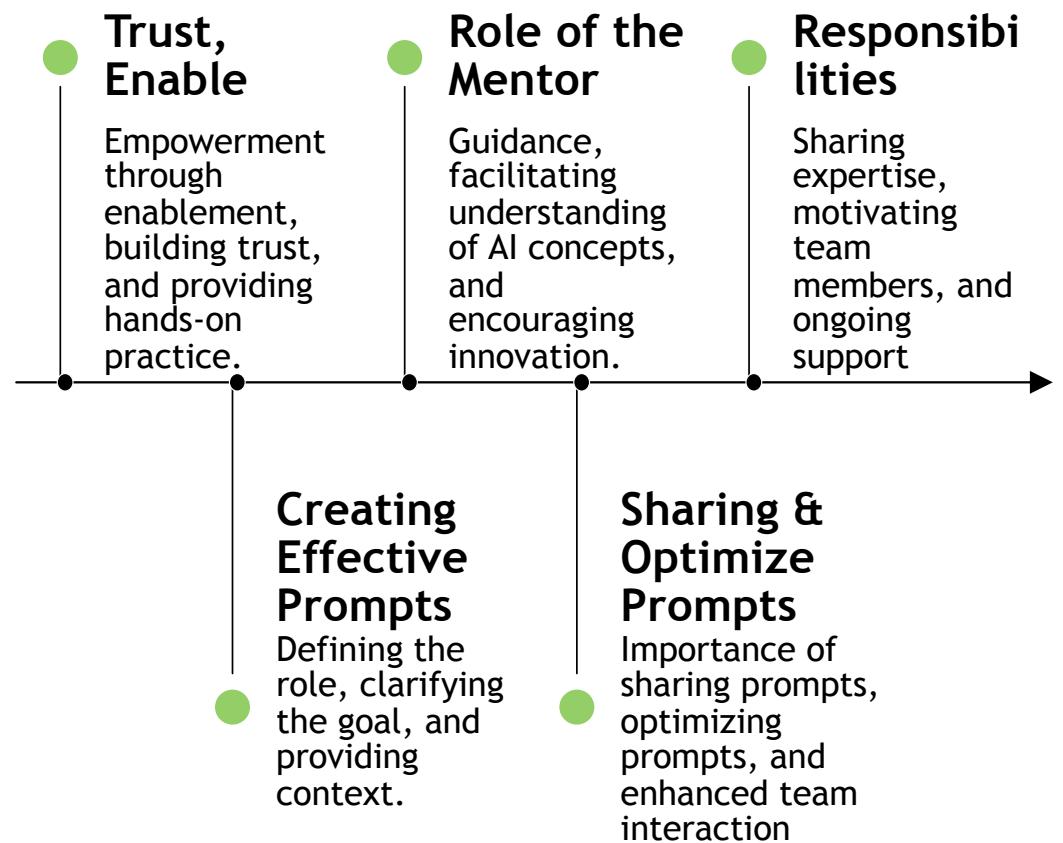
The activity encourages participants to refine and improve the prompts, ensuring they are effective and useful.

## **Continuous Improvement Culture**

This collaborative effort fosters a culture of continuous improvement, essential for effective teamwork and innovation.



# WHAT HAVE YOU SEEN?



# FAQ

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# APPENDIX



# HANDOUT OVERVIEW

## How Microsoft implements Copilot

- Deploying Microsoft 365 Copilot with the help of—you guessed it—Copilot
- Deploying Microsoft 365 Copilot internally at Microsoft
- GitHub - Direct Link

Ensuring all participants have easy access to necessary materials is crucial for effective learning and engagement.

## Variety of Handouts

The presentation includes a variety of handouts tailored to different topics, allowing participants to explore further.