



**Bridge the gap: Unveiling Microsoft 365
Copilot for tangible business outcomes**



Meet Kelly and Ivan





Copilot for Microsoft 365

Natural Language



Large Language
Models

+



Microsoft Graph
- Your Data -

+



Microsoft 365
Apps

+



Web



Familiar use cases Copilot for M365

PowerPoint

Writing

- Create first drafts
- Add more content
- Edit content and format

Reading

- Summarize deck content
- Extract next steps

Outlook

Writing

- Reply to thread
- Author new email

Reading

- Summarize long threads

Word

Writing

- Create first drafts
- Add more content

Reading

- Summarize long documents
- Ask questions about document content

Teams

In-meeting

- "Catch me up"
- Ask questions about discussion so far
- Wrap up

Post-meeting

- Create notes and actions
- Recap and querying

Chat

- Summarize and ask questions about content in a group, mtg, or 1-1 chat

Excel

Writing

- Create tables and graphs for data insights

Reading

- Analyze trends and explore your data
- Make data-driven recommendations



We are going to demo you 15 real-life “killer” use cases



Procurement



Sales



Marketing/Communications



Human Resources



IT



Executives

+ 10 min Q&A
+ prompting tips

What turns a good prompt into a great prompt?

Summarise my
emails

vs

From my emails over
the past week,
create a table of
actions, including
who's action it is,
the person that
assigned it, when it



Learn how to prompt Copilot

Prompting Copilot is the process of giving instructions or asking questions to Copilot in natural language. You can prompt Copilot by typing your request in the Copilot window. To prompt Copilot effectively, follow the below best practices:

Use the default prompts provided in the menu for better results:

These prompts have been designed to provide clear instruction for Copilot to follow. You can then add more details as required.

Use clear and specific language:

This helps Copilot understand your request and provide a more accurate response. For example, instead of asking "How do I write a good email?", you can ask "How do I write a formal email requesting a meeting with a client."

Provide as much context as possible:

The more information you provide, the better Copilot can tailor its response to your needs. For example, you can provide the purpose, audience, tone, and format of your document, as well as any relevant details or examples. You can also attach or link any existing documents or sources that you want Copilot to refer to.

Review the Prompt guidance and Prompt elements for more information on how to use prompts effectively:

You can access infographic capabilities by clicking on the Help icon in the Copilot window. This infographic explains the components and structure of a good prompt, as well as tips and examples.

If you are writing a prompt, it's important to focus on some of the key elements below to get the best response from Copilot.

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

Initial Prompt

Microsoft Work Web

⌚ What is Microsoft 365 Extra Fe

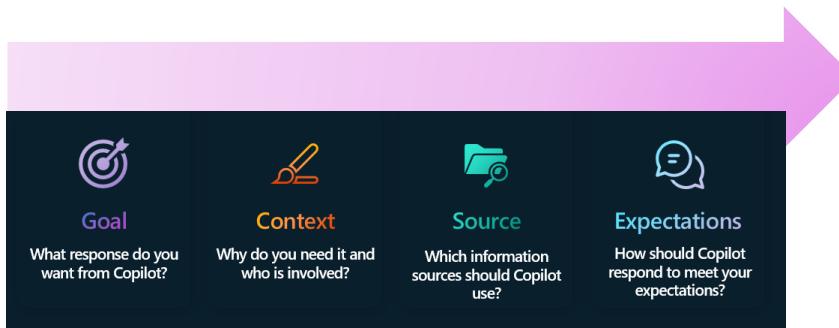
What is Microsoft 365 Extra Features?

⚠ Work content and chats cannot be seen outside your organisation

Microsoft 365 Extra Features is an additional license that is available to customers who have the original Microsoft 365 subscription. This license provides access to certain features and services that come with Microsoft 365 at no extra cost. Some of these features include Bing Chat Enterprise, which is an AI-powered copilot for the web with commercial data protection, Microsoft Clipchamp, a video editing tool, and Microsoft Loop, a co-creation app that lets teams collaborate across the apps and devices they already use ¹

AI-generated content may be incorrect

1 Reference • 1 of 30 responses •



Power Prompt

Microsoft Work Web

⌚ What is Microsoft 365 Extra Fe

Explain what Microsoft 365 Extra features are. Context is a customer of mine has asked a question about this so please provide response in succinct bullet points.

⚠ Work content and chats cannot be seen outside your organisation

Microsoft 365 Extra Features is an additional license available to customers who have the original Microsoft 365 subscription. This license provides access to certain features and services that come with Microsoft 365 at no extra cost. Here is a summary of the features included in Microsoft 365 Extra Features:

- **Bing Chat Enterprise:** An AI-powered copilot for the web with commercial data protection. It ensures user and business data are protected, won't leak outside the organization, and won't be used to train large language models ¹
- **Microsoft Clipchamp:** A video editing tool for anyone to create professional-looking videos, even with no prior experience ¹
- **Microsoft Loop:** A co-creation app that lets teams bring together all the parts of a project in one place and collaborate

Ask me anything or type / to add people, files, and more

0/4000 ➤



Procurement



Sales



Marketing/Communications



Human Resources



IT



Executives



Pressured Procurement Professional Patrick



Procurement | Build a Business Case

Potential benefits

Reduce Spend

Access data more efficiently across systems

1. Define opportunity for investment

Ask copilot to create a project brief from emails and other company documents.



Copilot

Support efficient review and understanding of the issues that need to be addressed with the investment.

2. Gather project information

Meet with the production team to learn about the various options available and gather financial information for the business case.



Copilot in Teams

Help ensure a productive meeting by using Copilot to suggest questions and clarify what people said. Use the recap for a summary and action items.

3. Gather financial data

3. Gather financial data

Pull data from the financial system using a plug in built with Copilot Studio to estimate past cost of sales and revenues by year.



Copilot in Excel
Copilot Studio in Copilot for Microsoft 365

Reduce the effort required to pull information from financial systems.

6. Stress test the business case

Use Copilot to test some options for the business case and identify the largest variances.



Copilot in Excel

Speed analysis by using Copilot to add formulas columns and create charts.

5. Produce summary report

Once the case flow analysis is complete use Copilot to turn the project brief into a set of slides for the executive presentation. Then add in the financial information.



Copilot in PowerPoint

Improve the quality of your presentations by using Copilot to revise content and organize the slides using Excel data.

4. Meet with chief economists

Get the latest economic forecast from the economist team to estimate future pricing and cost of materials. Organize the information in a table in Excel and use Copilot to produce charts showing trends in the data.



Copilot in Excel
Copilot in Teams

Collaborate effectively across teams / functions (e.g., legal, transportation) in a secure way. Use data for decision making in meetings and discussion.



Stressed Sales Specialist Shashan



Sales | Respond to an RFP

Potential benefits

Improve close rate

Number of opportunities

Increase revenue per sale

1. Summarize the RFP

Use Copilot to organize the information required for the RFP by generating a list of required items sorted by category.



Copilot in Word

Get started quickly by skipping over non-essential portions of the RFP.

2. Gather opportunity information

Use Copilot to summarize information from the company website and annual reports to understand financials, goals, and challenges.



Copilot

Rapidly pulling information such as IT spending changes and new product releases from lengthy documents can save time.

3. Use Copilot to research responses

Use custom RFP repository copilot built with Copilot Studio to ask for responses to the RFP questions.



Copilot Studio

Using defined content to answer customer questions ensures accuracy of the responses.

6. Create email with response

Have Copilot turn a list of bullet points into a professional email summarizing the RFP response.



Copilot in Outlook

Quickly create professional emails that are concise and more likely to be read and can lead to higher close rates.

5. Revise responses

Use Copilot to revise the document content to make it more readable. Go back to the RFP bot to get answers to additional items.



Copilot in Word

Quickly make responses more readable to improve the quality of the RFP response.

4. Meet with team to review

Discuss required changes and opportunities for cross-sell. After the meeting generate a list of suggestions for updates.



Copilot in Teams

Don't miss any updates by asking Copilot for all of the suggestions made during the meeting.



Muddled MarCom Maestro Marcus



Marketing | Coordinate Market Research

Potential benefits

First draft faster

Cost per lead

1. Define the objective

Prepare a brief for your upcoming research by using Copilot for your first draft and tagging other key documents.



Copilot
Copilot in Word

Summarize many types of documents, including PDFs and website content, making it easier to consume dense content online.

2. Determine your approach

Meet the research team with your objective in hand. Determine the best research approach over a Teams meeting. Rely on Copilot in Teams for action items.



Copilot in Teams

Keep the conversation flowing onto meaningful topics to help cover the agenda quicker and reduce meeting times.

3. Discover market trends

Select the Show data insights prompt in Copilot in Excel.



Copilot in Excel

Use Copilot to help you explore and **understand your data better**.

6. Communicate results

Starting in a new email, prompt Copilot in Outlook to create a dynamic message that includes key links.



Copilot in Outlook

Document and socialize the research findings to help better inform product strategy.

5. Present the findings

In a new PowerPoint file, select the default Create presentation from file.



Copilot in PowerPoint

Let Copilot help you build a presentation by **generating slides** or images with your organization's branding.

4. Create a compete snapshot

Prompt Copilot in Word to draft you an internal snapshot of the findings, citing the results.



Copilot in Word

Don't start with a blank page again. Draft with Copilot and get to a finished document in a fraction of the time.



Hassled HR Hero Hannah



HR | Managing internal job transitions

Potential benefits

Reduce time to hire

Increase employee retention

Reduce time to create documentation and training

1. Reduce time to screen candidates

Reduces hours of manual screening to minutes. Indicate keywords from multiple documents to surface qualified candidates. Access HR system data using plugins built in Copilot Studio.



Copilot in Word
Copilot Studio in Copilot for Microsoft 365

Rapidly get up to speed on what candidates are most qualified for certain roles.

2. Schedule interviews efficiently

Use Copilot to schedule follow up interviews between candidates and the hiring manager.



Copilot in Outlook

Streamline scheduling multiple candidates for interviews by asking Outlook to identify and schedule interviews.

3. Create onboarding materials quickly

Use Copilot to create role-specific onboarding materials.



Copilot in Word

Reduce time to prepare onboarding documents leading to increased employee satisfaction and speed to onboard; helping employees' reach productivity quickly.

6. Automate performance review prep

Automate data collection and report generation for performance reviews.



Copilot in Word
Copilot in Excel

Compile data quickly and generate individual review reports to support the process.

5. Collect feedback on onboarding and training

Analyze employee survey data and summarize key findings to refine delivery and relevance.



Copilot in Excel

Focus on overall employee satisfaction and onboarding experience by responding to feedback and refining onboarding and training.

4. Develop training material

Build training materials that are tailored to each role and employee.



Copilot in PowerPoint

Keep training relevant to the audience by using Copilot to mine historical documents to update with relevant training content. As internal systems change training can adapt to it more quickly.



Incensed IT Insider Isaac



Use Case | Document and Communicate Best Practices

Potential benefits

Skill Development

Increased Job Satisfaction

Faster Completion Times

Improved Documentation Quality and Accuracy

1. Document Solution

Craft document that outline steps for best practice. In addition, add specific results generated from solution.



Copilot in Word

Quickly make create draft and pull in data from data sources to support outcomes.

2. Get Customer Information

Using plugins built in Copilot Studio, easily access CRM information to pull customer information that supports best practice impact, such as opportunity pipeline and customer revenue.



Copilot Studio in Copilot for Microsoft 365

Rapidly gather critical information to support newly identified best practice.

3. Brainstorm Ideas

Create list of ideas to optimize best practice. Leverage Copilot to create an initial list. Then categorize all the items at the end of the session.



Copilot in Loop

Accelerate your project as you plan and collaborate easier with Copilot in Loop.

6 Revise support procedures

Based on the Leadership teams comments revise best practice documents for future use.



Copilot in Word

Quickly make summarize LT feedback to improve the quality of the best practice documentation.

5. Create an executive update

Create a presentation to brief the Leadership Team on this new best practice. Use Copilot to create slides based on the project plan.



Copilot in PowerPoint

Create a presentation from best practice documentation located in Word.

4. Summarize conversations

Prepare communication and incorporate summaries and action items from previous meeting.



Copilot in Outlook Copilot in Word

Summarize and the latest conversations and assign action items.



Exhausted Executive Elliot



**PREPARE FOR
YOUR DAY**



Q&A

Breaking Boundaries | prompting info

If you'd like to receive the presented
"killer" prompts (to try it out) &
tips to level up your prompting skills,
please scan the QR code and we'll send
it to you!*

*Your email address will be exclusively used for sending you the requested material and will not be shared or utilized for any other purposes.





Thank you!

