



# Boosting Productivity with Microsoft AI: A Guide for Project Managers



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[Connect](#)



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# In the age of AI, how do I?

*streamline business  
processes?*

*stay competitive?*

*make my employees  
more productive?*

# What employees want from AI

86%



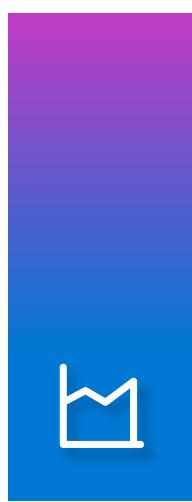
Finding info  
and answers

80%



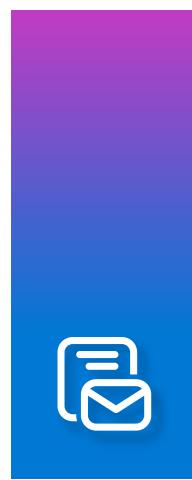
Summarizing  
meetings and  
action items

79%



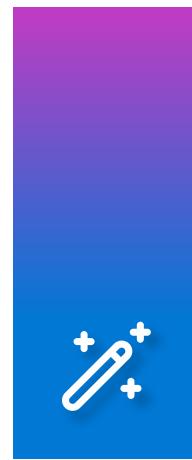
Analytical  
work

76%



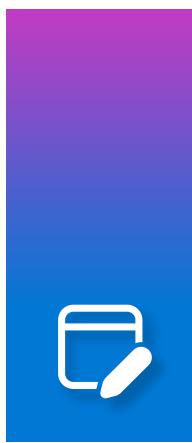
Admin  
tasks

73%

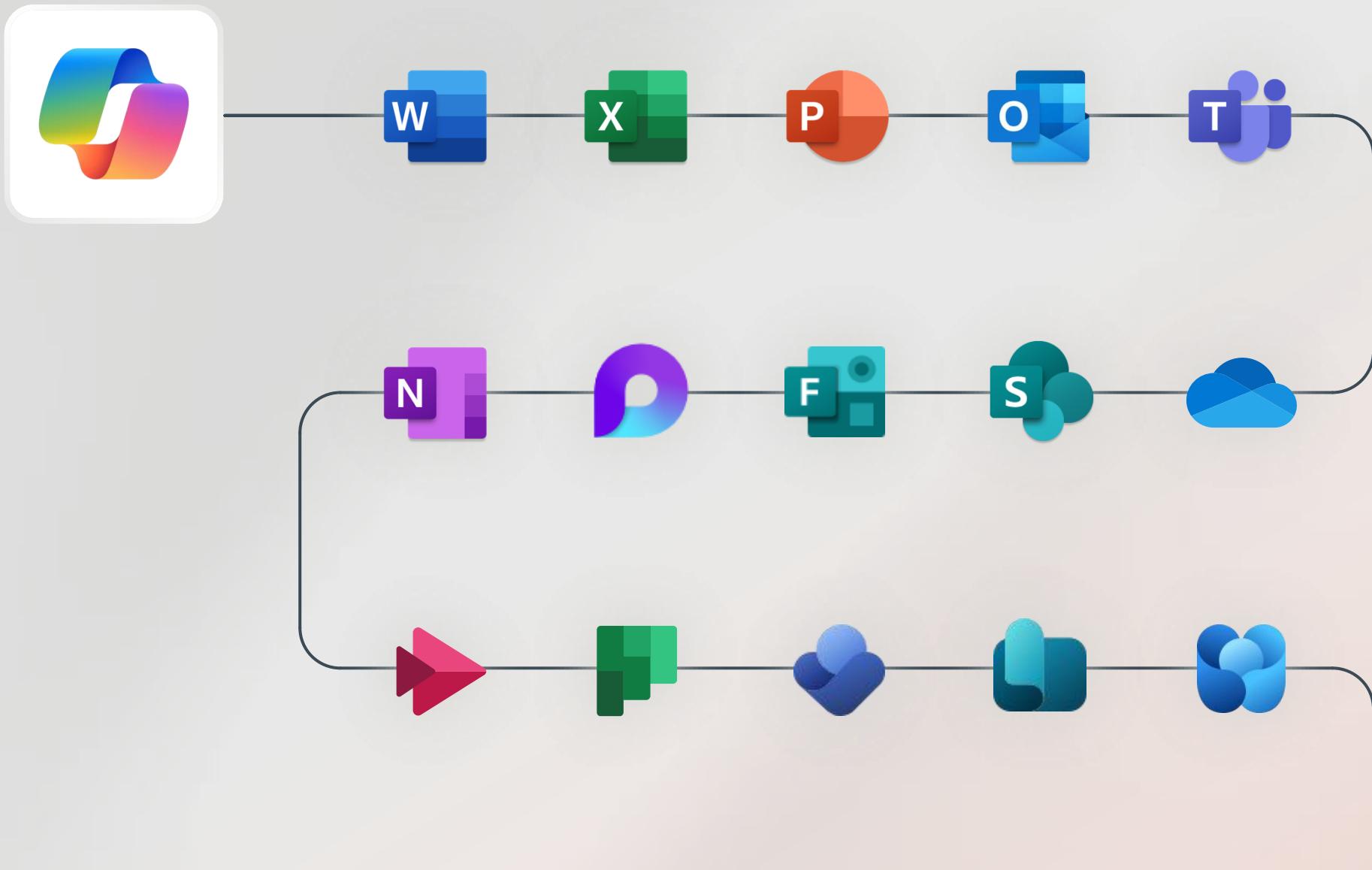


Creative  
work

70%



Planning  
their day





Search



Work

Web



## Copilot

To get started, try one of the suggested prompts, type your own, or just select the content you want to work with.



All

People

Files

Meetings

Emails

Prompts



Help me learn about  
topic

Draft email notes for  
meeting

Help me improve my  
writing based on file

View prompts

Are there any ORG changes happening next month?

+ Add content



Teams Premium includes built-in summaries with intelligent recap. Copilot will also include intelligent recap but expands on it with the ability to ask any question about the meeting

The diagram illustrates the comparison between Microsoft Teams Premium's built-in Intelligent recap feature and Microsoft Copilot, organized into two main sections: **Intelligent recap** (purple) and **Copilot** (blue).

**Intelligent recap (Purple Side):**

- Built-in and automated:** Represented by a purple circle.
- Standardized:** Represented by a purple circle.
- Video, speaker, and chapter markers:** Represented by a purple circle.
- Available after meeting only:** Represented by a purple circle.

**Copilot (Blue Side):**

- On-demand:** Represented by a blue circle.
- Based on unique prompts:** Represented by a blue circle.
- Conversational interaction, with citations:** Represented by a blue circle.
- Available real-time (during and after meeting):** Represented by a blue circle.

**Intelligent recap (Left Panel):**

- Product roadmap discussion:** Chat, Files, Details, Recap, +
- Date:** Jan 21, 2023 10:00 - 11:00
- Actions:** Open in Stream, Copilot
- Content:** Product Roadmap..., Marketing budget..., Marketing demo f...
- Notes:** Generated by AI. Be sure to check for accuracy.
- Meeting notes:**
  - Serena wants to look at the product roadmap before she and Danielle commit to more feature enhancements.
  - Danielle explains that they are on track for new product release in December. But they will need to keep an eye on beta testing results. She will follow up on that.
  - Danielle explains that they are managing the capacity well. There could be a problem if they get a surge of users. Babak will make sure that they have the necessary provisions to handle an influx of users if the need arises.
- Follow-up tasks:**
  - Danielle will follow up on feature enhancement prioritization
  - Jon Shamma will double check with Amanda regarding the ETA for the new...

**Copilot (Right Panel):**

- Task:** Create a table with pros and cons of option 1
- Generated by:** Copilot 11:43 AM
- Table:** Pros and cons of option 1: Drive campaign traffic to generic Sign up page:

Pros	Cons
Wider range of potential leads	Less persuasive
Simpler, faster sign-up process	Difficult to segment audience
Streamlines multiple campaigns	Less engaging
- Actions:** Copy, References, Elaborate on each pro and con, List more options, Ask a question about this meeting



...

Progress update

- □ ×

28:33

Chat People 5 Raise React View Notes Rooms Copilot Whiteboard Apps More Camera Mic Share Leave

Aadi Kapoor



Charlotte Crum



Ray Tanaka



Kat Larsson



Reta Taylor

## Go-to-Market Progress

Area	Owner	Status	Budget
Social Media Advertising	Aadi Kapoor	On Track	\$25,000
Content Marketing	Charlotte Crum	On Track	\$10,000
Email Marketing	Kat Larsson	At Risk	\$8,000
Search Engine Optimization (SEO)	Ray Tanaka	On Track	\$5,000
Market Research	Danielle Mandera	At Risk	\$10,000
Public Relations	Jessica Kline	On Track	\$ 10,000
Branding	Reta Taylor	On Track	\$ 15,000

Copilot

❖ **Let AI handle the busywork**  
Copilot can generate notes, list tasks, and much more—so you don't have to.

ⓘ **Check the facts**  
A response could be inaccurate or incomplete. Share feedback to help Copilot improve.

⌚ **It's just for you**  
Only you can see your conversation with Copilot.

View prompts

Which areas are at risk?



[Back](#)[Create action](#)

Home



Copilot



Create



OneDrive



Pages



Actions



Apps



Gather

**Message Lydia Bauer ✖ Liz Kane ✖ Launch team ✖ +  
to collect status updates on Project Shore and send a summary  
over email ⏺ by Friday, December 20th ⏺**

⌚ Repeats weekly ⏺ This action will run every Monday at 9:00 AM.

[Preview plan](#)[Create](#)

[Back](#)[Create action](#)

Home



Copilot



Create



OneDrive



Pages



Actions



Apps

Message Lydia Bauer, Liz Kane, and Launch Team to collect status updates on Project Shore and send a summary over email by Friday, December 20th

Draft message

Review and edit the message that will be sent to the people you've selected

Message

Hi there! I'm gathering status updates on Project Shore to share with our leadership team. Could you please send me your updates by Friday, December 20th?

Send messages to Lydia Bauer, Liz Kane, and Launch Team

Send reminder 1 day before

Send a summary over email

Copilot will send messages after you select Create

Create

Search

Kristin Patterson Chat Files

Kristin Patterson Wednesday 10/25 8:00 AM

Hi! Welcome back after your vacation. How was your trip? Let's catch up on our progress.

Kristin Patterson via Copilot Wednesday 11/20 1:00 PM

Hi there! I'm gathering status updates on Project Shore to share with our leadership team. Could you please send me your updates by Friday, December 20th?

- I've finalized initial rounds of material testing, which provided valuable insights into durability and sensory response, especially under varied environmental conditions.
- I'm in the process of building the first prototypes with the newly developed textures. These models are currently under review, and initi

Submit

Type a message

Ray Temeka

Beth Davies

Kayla Miles

Will, Kayla, Eric, +2

August Bergman

Emiliano Caballero

Marie Beauchemin

Oscar Knopf

Danica Fukuda

Karen Lumbard

Team Designer Template

Rebecca

Amanda Brady

Wednesday 1:29 PM

I had a great trip. Phoenix is so beautiful! Let's catch up soon.





# Copilot in Planner



Activity

Chat

Calendar

Calls

OneDrive

Copilot

Planner

...

Apps

My plans &gt;

Marketing plan



My Day

My Tasks

My Plans

Pinned

 Marketing plan  
Van Arsdel > General Monaco  
Product Team > General Simple plan  
Design Team > General

Manager 1:1 topics

Career plan

 Weekly design sync  
Meeting

+ New Plan

My plans &gt; Marketing plan

Share a status report with your team. Let Project Manager draft it for you in minutes.

Get started

Not now

## Goals and resources

This plan's purpose is to help track the marketing campaign for Van Arsdel's [Workspace Strategy and Design Initiative](#)

Add files or meetings for better results

## Recent activity from Copilot

Task title	Assigned to	Status
<input type="radio"/> Develop Campaign Creative and Testing		
<input type="radio"/> Perform A/B Testing on Landing Pages		
<input type="radio"/> Conduct Focus Groups for Creative Assets		
<input type="radio"/> Finalize Creative Assets		
<input type="radio"/> Testing Phase Complete		
<input type="radio"/> Develop Promotion Strategy		



My Day

My Tasks

My Plans

My Portfolios

Pinned

Marketing plan

Van Arsdel

Website Content Update

Van Arsdel

Internal Team Training

Professional Development W...

Product Pitch Deck

Van Arsdel

AI Productivity Tools

+ New plan



## My Tasks

Copilot



All

Private tasks

Assigned to me

Flagged emails



Filters (2) ▾

Title ▾

		Plan	Due date	Priority	
<input type="radio"/>	Create customer testimonial videos		Website Content Update	▪ Medium	(C)
<input type="radio"/>	Optimize website for SEO		Website Content Update	▪ Medium	(C)
<input type="radio"/>	Update website FAQs		Website Content Update	12/2/2024	▪ Medium
<input type="radio"/>	Write blog post about new service		Website Content Update	▪ Medium	(C)
<input type="radio"/>	Update website with new service details		Website Content Update	▪ Medium	(C)
<input type="radio"/>	Optimize social media ads		Social Media Campaign	▪ Medium	(C)
<input type="radio"/>	Track social media engagement metrics		Social Media Campaign	▪ Medium	(C)
<input type="radio"/>	Engage with followers on social media		Social Media Campaign	▪ Medium	(C)
<input type="radio"/>	Schedule social media posts		Social Media Campaign	11/30/2024	▪ Medium
<input type="radio"/>	Create social media posts		Social Media Campaign	▪ Medium	(C)
<input type="radio"/>	Plan social media content calendar		Social Media Campaign	▪ Medium	(C)
<input type="radio"/>	Prepare for public speaking engagements		Public Speaking Course	▪ Medium	(C)
<input type="radio"/>	Add new task				

# AI Use Cases in Project Management

## Project Planning & Management

- Business Case
- Project Management Plan
- Stakeholder Management Plan
- Resource Allocation Plan**
- Procurement and Contract Management
- Budget, Forecasting and Financial
- Communication Plan
- Change and Knowledge Management
- Quality Assurance
- Feasibility
- Training Plan
- Project Audit & Guidelines
- Status & Progress
- Risk Analysis
- Disaster Recovery/Contingency Plan
- Vendor Management

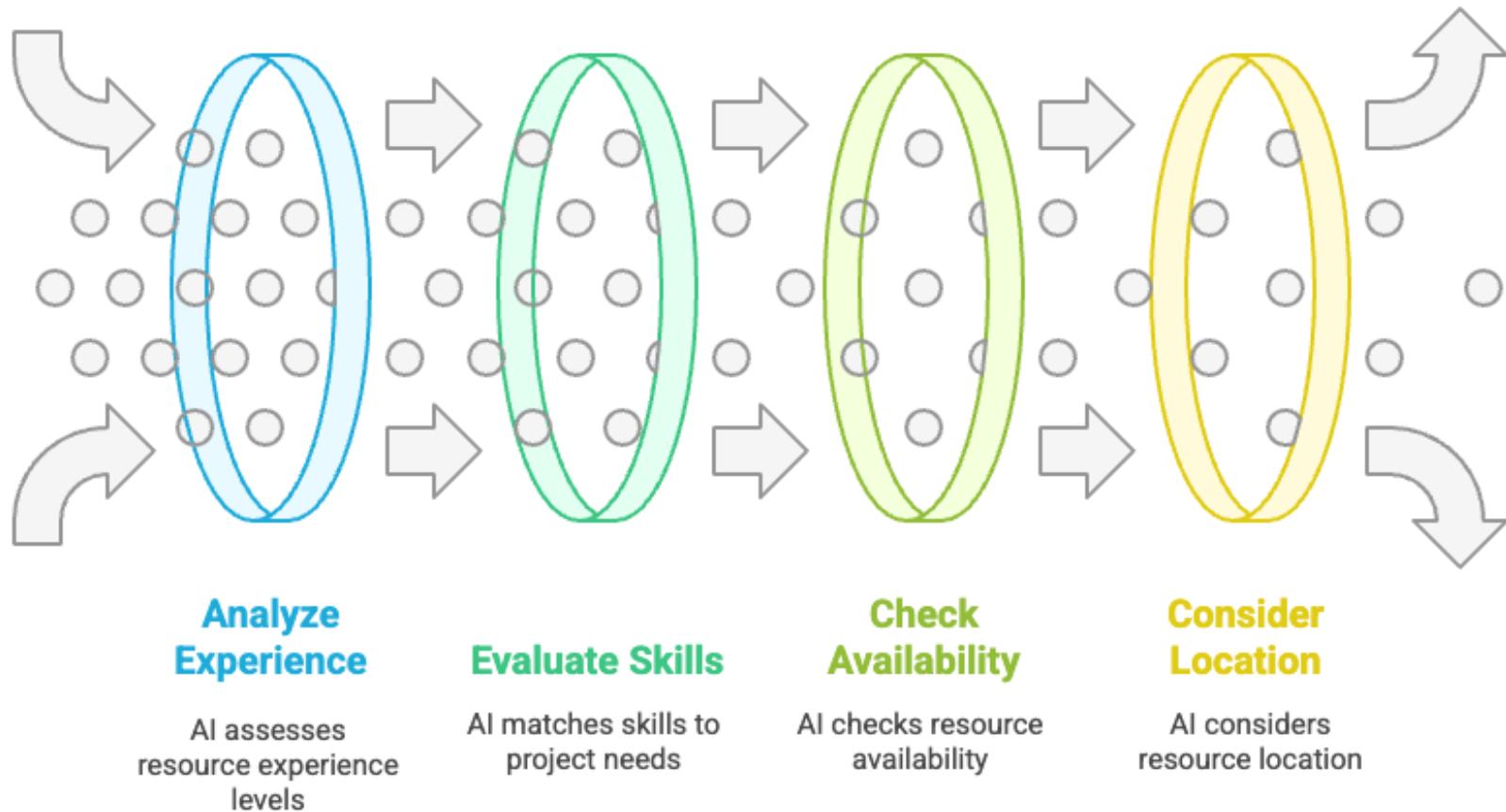
## Execution & Delivery

- Problem-solving techniques
- Innovation & Idea Generation
- Competitive Analysis
- Project Summarization
- Project Decision-making
- Earned Value Management
- Power/Interest Grid
- Critical Path
- Project Schedule
- Cause and Effect Diagram
- User Stories
- Agile Personas
- Task Prioritization
- Change Request
- Deployment

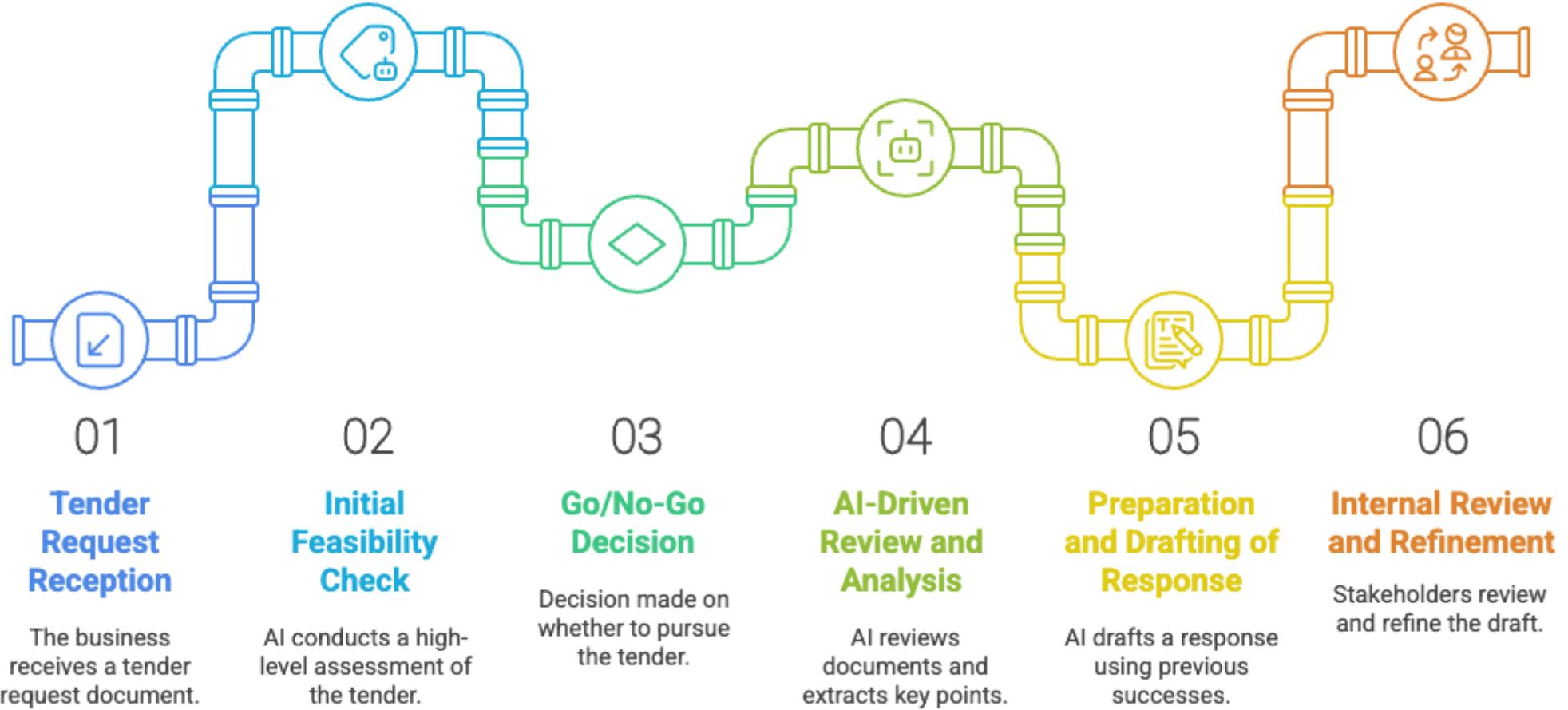
## Governance & Compliance

- Requirements Traceability Matrix
- Meeting Minutes & Action Items
- Acceptance Form
- Registers
- Post Implementation
- RFP, RFI, RFQ, Tender**
- SOW (Statement of Work)

# Resource Allocation Plan



# RFP, RFI, RFQ and Tender



# Tailoring Project Management Prompts

- When tailoring prompts for ChatGPT or other AI chatbots, make your instructions as clear and specific as possible.
- Use short, clear, concise sentences.
- Revise your questions based on the response you receive.

## Example 1 – Make a Decision

I'm leading a marketing team deciding between purchasing an all-in-one project management tool or developing a custom solution in-house.

- Purchasing the software costs \$10,000 up front, plus \$1,000 per month for 12 months.
- Developing in-house is estimated to cost \$25,000 in development expenses.

Show me the total cost for each option in a detailed cost-benefit analysis table and explain which approach you would suggest and why.

## Example 2 – Calculate Earned Value Management (EVM)

A website redesign project has a total budget of \$200,000 and is scheduled to complete in 8 months. At the 4-month mark, the Actual Cost (AC) is \$110,000, and the project is 40% complete.

- Am I over or under budget?
- Am I behind or ahead of schedule?
- What are the Earned Value (EV), Estimate to Complete (ETC), and Variance at Completion (VAC)?

Show this in a table format and highlight your explanation in bold.

# **Q&A**

# **Thank You!**