



# COPILOT ZERO TO HERO

*Bi-Weekly Bootcamp Series. Expert-Led Hands-on Sessions.*

## THREE STRATEGIES FOR AI

Jason Baxter



# AGENDA

- Introduction to the Copilot Zero to Hero Team.
- Understanding the series and upcoming sessions.
- The three strategies you need for AI.
- Special Guest Interview
- QnA & Homework

# ORGANISERS & PRESENTERS



**Tracy van der Schyff**  
Microsoft's #1 Fan, MVP



**Jacqui Muller (Soup Kitchen De Vil)**  
VP of Everything, UiPath MVP



**Carike Botha**  
Chief AI Scientist, MVP



**Jason Baxter**  
The Solution Guy, Microsoft



**Alistair Pugin (Hennie De Wet)**  
Shouting at ECM, MVP



**Warren du Toit**  
Azure Legend, Microsoft

# BI-WEEKLY SESSIONS



DATE	SPEAKER	TITLE	LINK
15th Jul 2025	Jason Baxter	Session 1: The Three Strategies you need for AI	<a href="#">Register</a>
29th Jul 2025	Tracy van der Schyff	Session 2: Assembling your AI Council: First steps	<a href="#">Register</a>
12th Aug 2025	Carike Botha	Session 3: Creating a Plan for Copilot Deployment	<a href="#">Register</a>
26th Aug 2025	Alistair Pugin	Session 4: Preparing the Tenant	<a href="#">Register</a>
9th Sept 2025	Jacqui Muller	Session 5: Preparing SharePoint Online	<a href="#">Register</a>
23rd Sept 2025	Warren du Toit	Session 6: Preparing Teams (Meetings) for Recording & Transcription	<a href="#">Register</a>
7th Oct 2025	Carike Botha	Session 7: Preparing Power Platform & Azure	<a href="#">Register</a>
21st Oct 2025	Tracy van der Schyff	Session 8: Creating a Communication Plan	<a href="#">Register</a>
4th Nov 2025	Alistair Pugin	Session 9: Rolling Out Copilot Chat	<a href="#">Register</a>
18th Nov 2025	Jacqui Muller	Session 10: Rolling Out "Tips and Tricks" Sessions	<a href="#">Register</a>

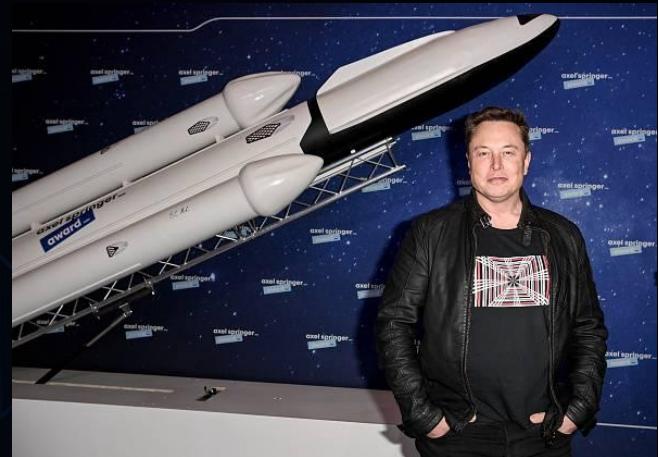


*Almost everything worthwhile carries with it some sort of risk, whether it's starting a new business, whether it's leaving home, whether it's getting married, or whether it's flying into space."*

— Chris Hadfield

*"By far, the greatest danger of artificial intelligence is that people conclude too early that they understand it."*

— Eliezer Yudkowsky



*"The pace of progress in artificial intelligence (I'm not referring to narrow AI) is incredibly fast. Unless you have direct exposure to groups like DeepMind, you have no idea how fast-it is growing at a pace close to exponential."*

— Elon Musk



# The five drivers of AI value



Organization  
& Culture



Business  
Strategy



Applied AI  
Experience



AI  
Governance



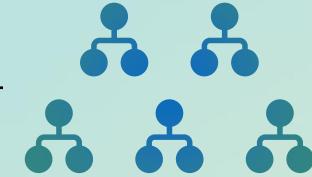
Technology  
Strategy

[aka.ms/AIStrategyRoadmap](http://aka.ms/AIStrategyRoadmap)



## Copilot

**Every employee  
has a Copilot**



## Agents

**Every business process  
transformed by agents**



# Transforming your organization with Copilot and agents

**AI powered productivity**  
Microsoft 365 Copilot + Copilot Chat

**Business process automation**  
Copilot Studio

**Commercial AI applications**  
Azure AI Foundry + Fabric

← Protect your organization with Microsoft Security →

**AI powered productivity**  
Microsoft 365 Copilot + Copilot Chat

**Business process automation**  
Copilot Studio

**AI powered productivity**  
Microsoft 365 Copilot + Copilot Chat



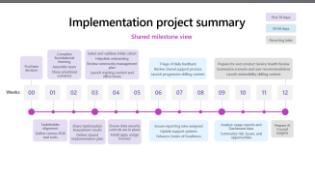
# Empowering Productivity and Understanding AI

*Invest in AI literacy so that employees across roles can effectively understand and use AI*

# We have the tools to support your AI journey

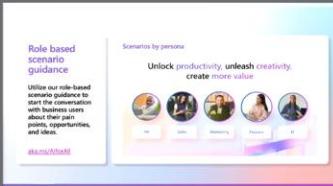


## Implementation summary guide



Business Leaders

## User Enablement Guide



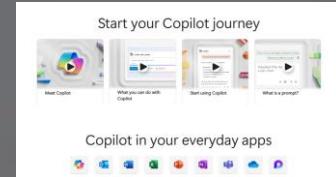
HR leaders, Change Management teams

## Copilot Scenario Library



User Experience and Adoption leaders

## Copilot Prompt Gallery



End users

## Copilot Analytics: Comms, Skilling, Measurement

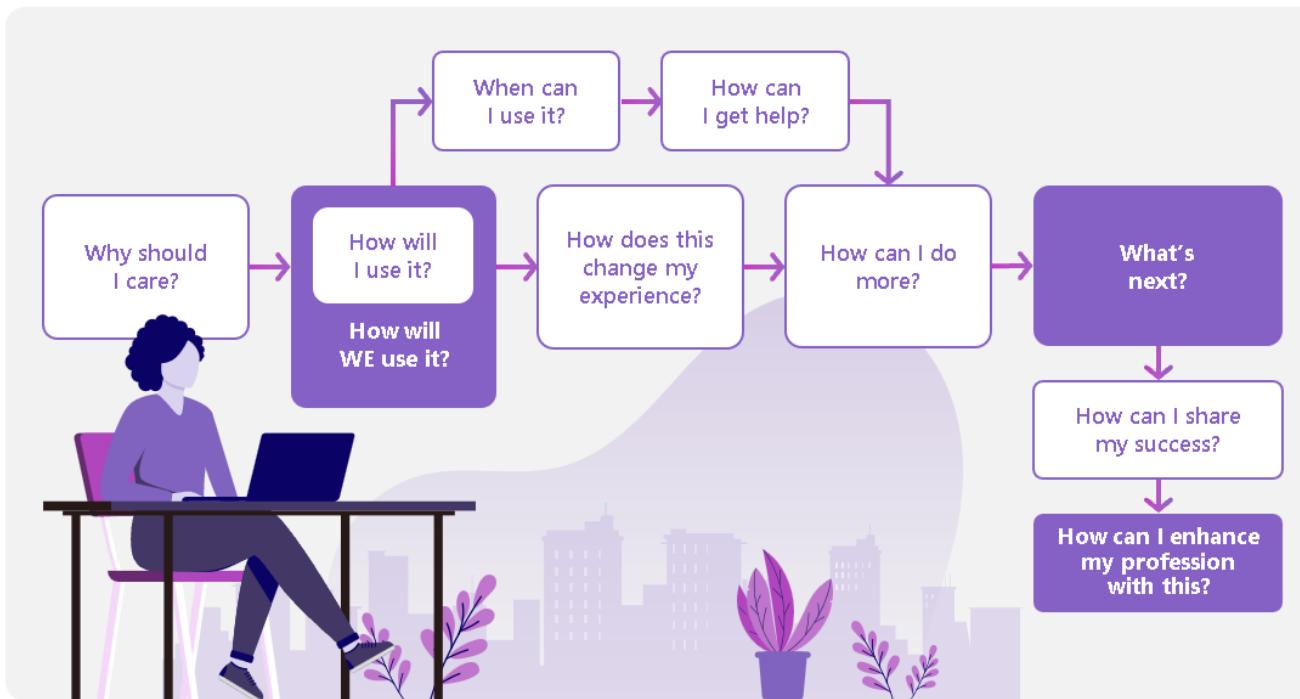


IT, L&D, Corp Comms, Analysts and End users

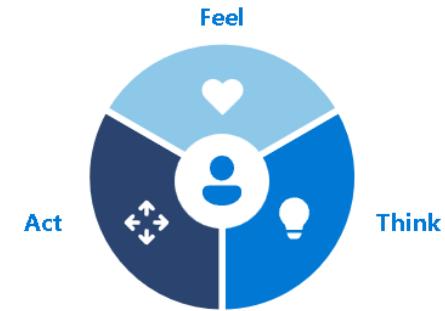
<https://aka.ms/CopilotAdoptionHub>

## Understanding the user journey

Getting to "Aha!"



An aha moment is defined as "*a moment of sudden insight or discovery*".



The Think-Act-Feel framework is grounded in decades of research showing a whole human understanding – including feelings – is critical to business outcomes.

Building on this framework we understand that **delivering accelerated change is based on trust**.



# Which Copilot experience are you looking for?

## Work

A secure and compliant Copilot integrated with your enterprise account.

[Go to copilot.cloud.microsoft](https://copilot.cloud.microsoft.com)



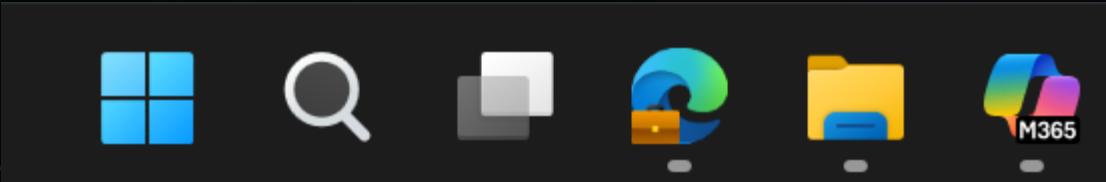
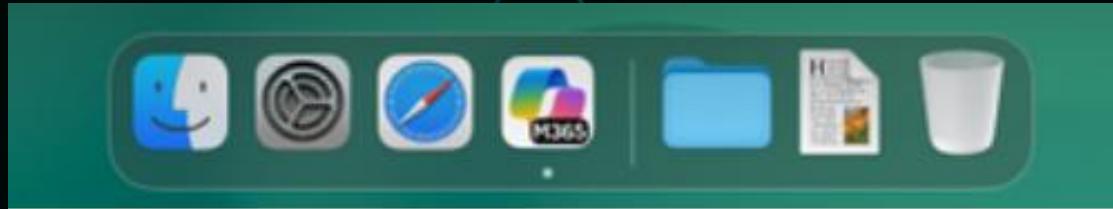
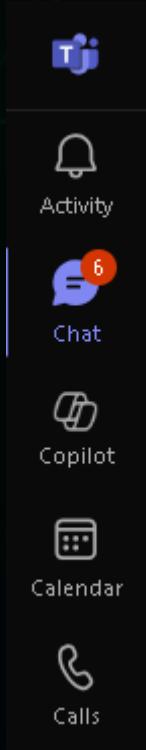
MariottiGhiringhi@micrsoft.com  
Manager, Customer Experience

## Personal

A helpful AI companion for your everyday life outside of work.

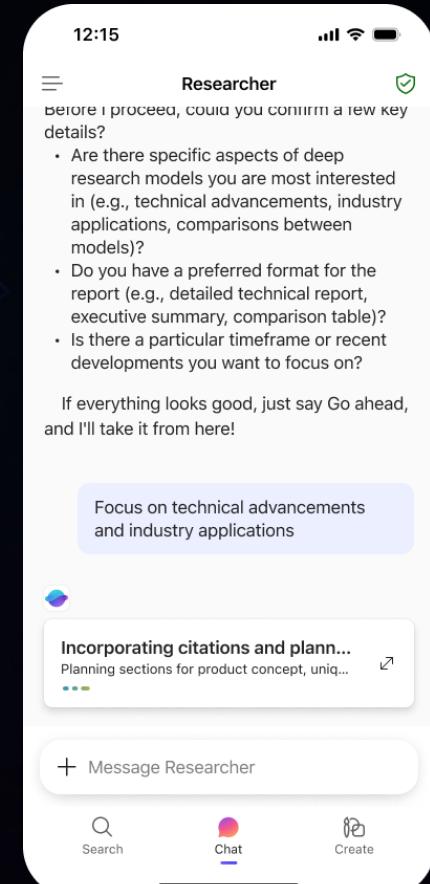
[Switch to a personal account](#)

# GIVE ACCESS (WORK)



[Download For Windows](#)

[Download for Mobile and Other Platforms](#)





Copilot Chat

Per User License

Message packs

Pay-as-you-go

Search

Chat

Work

Web

**Chat**

Skills Navigator

Analyst

Researcher

Sales

Agents

Chats

Pages

Notebooks

Create

Apps

...

Erika Fuller

**Hi, how can I help you?**

Message Copilot

**Identify the primary benefits in End of Quarter Numbers...**

You updated this

**What's new from Daisy Phillips?**

Your close connection

**List actions items for me from Feature review**

Upcoming today at 9:35 PM

See more ▾



Search

**Chat**

Chats

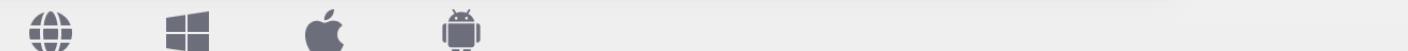


Pages

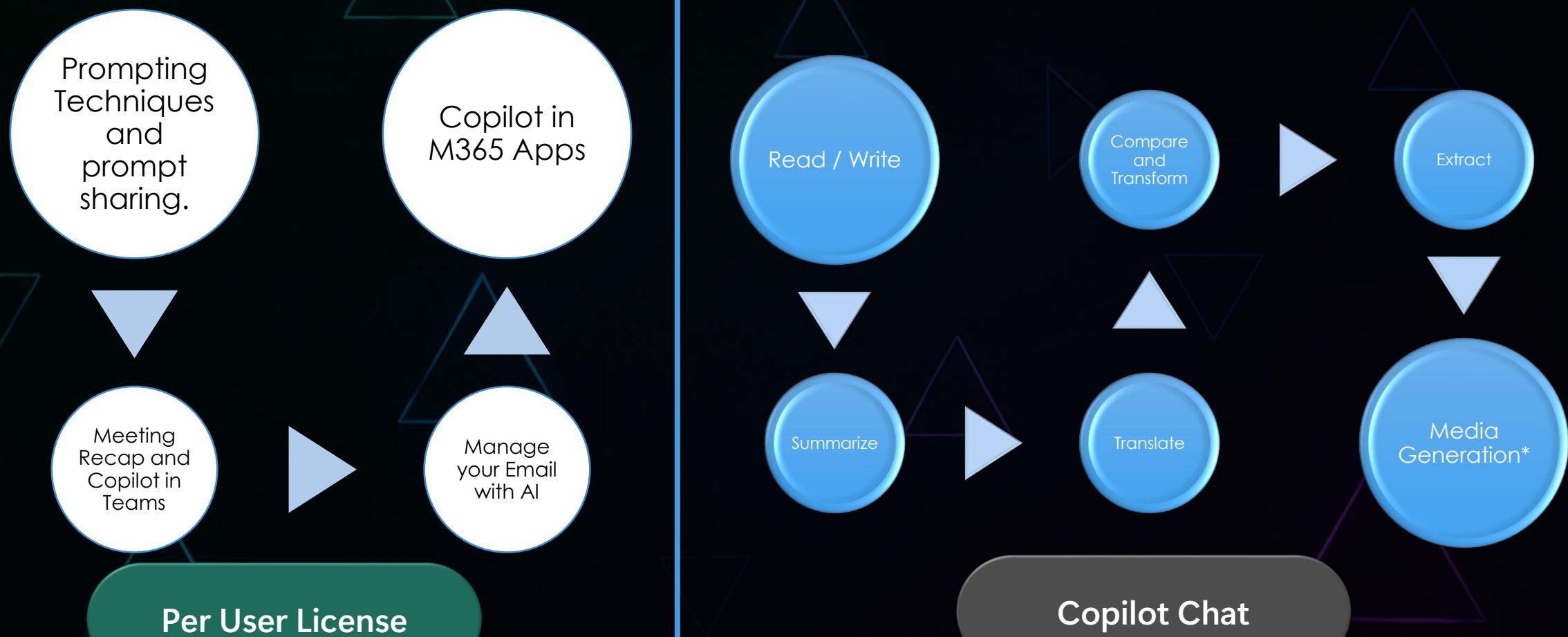


Create

Apps



# LAND CORE USE CASES



# RECAP



- A Copilot implementation project is a multi team effort , there are great supporting resources.
- Make sure you're using the right family of products for the right purpose.
- Give people convenient access to M365 Copilot (Work) or Copilot (Personal)
- Land Core Use cases once the Get ready phase and Technical Readiness is complete.
- Improve Security

# Reshape Business Processes





Microsoft 365  
Copilot is built  
on trust

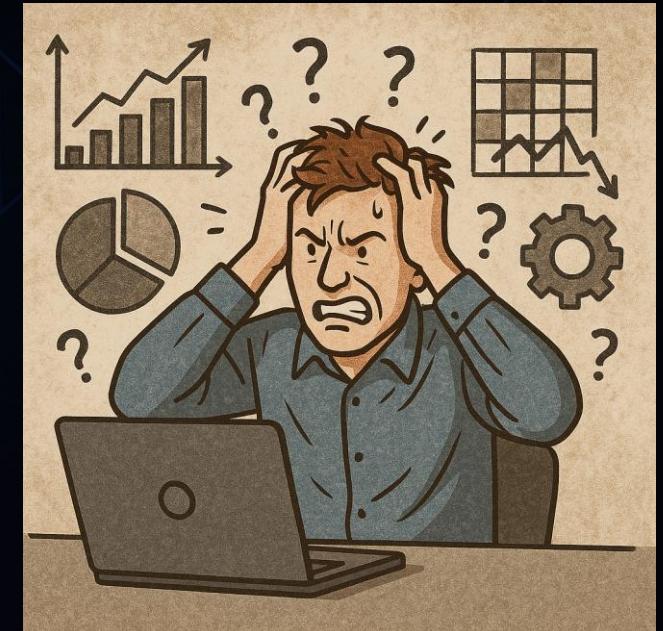
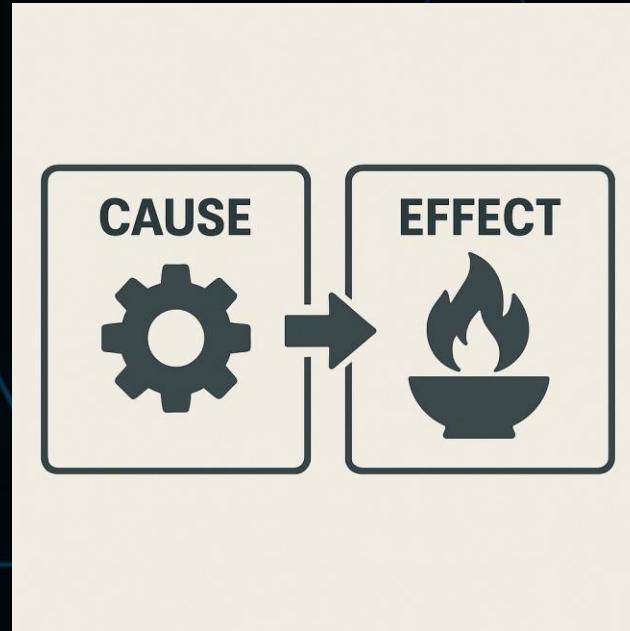
You control your data and your data's location

Copilot honors your existing M365 permissions and policies for data access

We secure your data at rest and in transit

Your data is not used to train our foundation models

You're protected against AI security and copyright risks



In the adage “garbage in, garbage out,” nowhere is it truer than in AI: the quality of outputs from generative AI is directly tied to the quality of data and inputs it's given.

# EXAMPLE 1: CUSTOMER SUPPORT EMAILS → AI CHATBOT TRAINING



Goal: Train a chatbot to answer customer questions.



Collect: Export customer emails from your support system or Inbox



Clean: Remove greetings, signatures, and unrelated text.



Tag: Label each email with a topic like “Refund Request” or “Shipping Delay.”



Organize: Put the data into a table with columns like Customer Message, Topic.



Use: Feed this into your AI tool to help it learn how to respond.

# RECAP

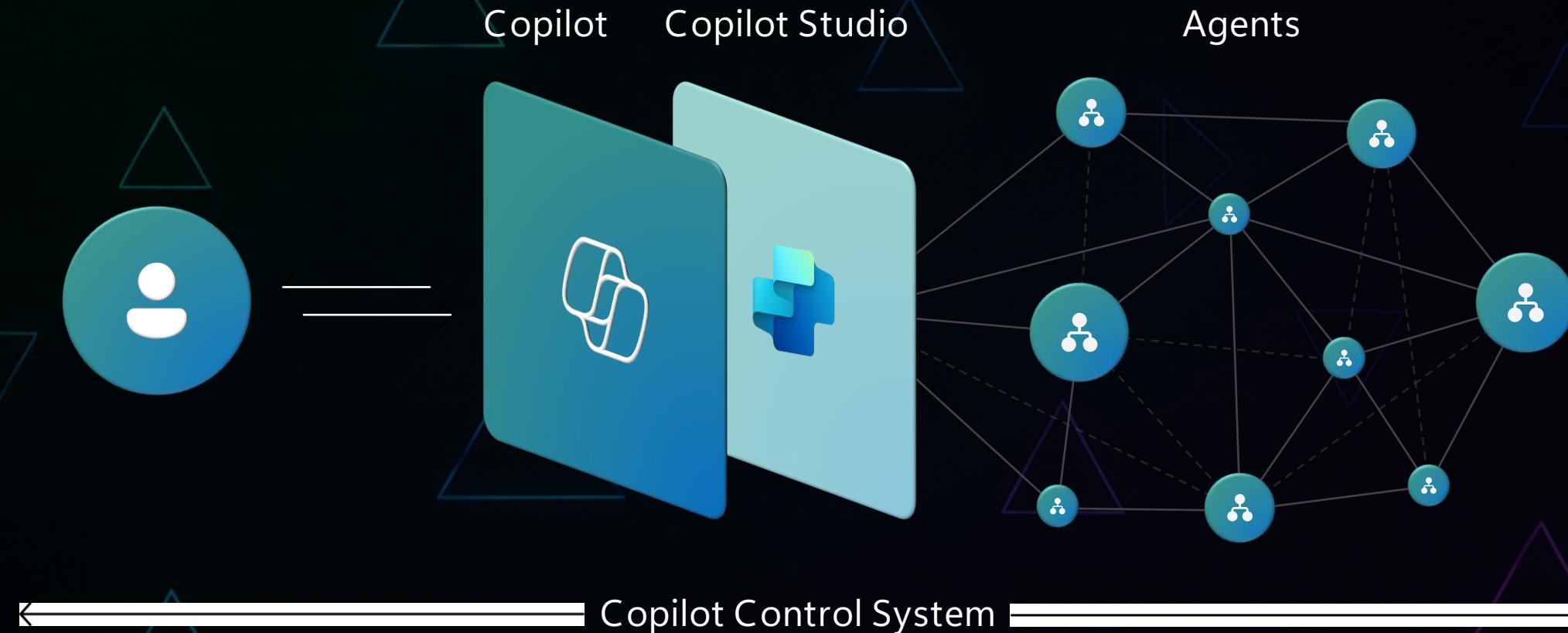


- AI needs data , but data needs to be secure and compliant.
- Focus on the use cases with the most value, best data , security already top of mind.
- Apply some lightweight data management and cleansing principles to get started.
- Map the requirements to the correct technologies.
- Small wins are better than learning all the possibilities.

# Bend the Curve on Innovation



# Copilot is the UI for AI



# KEY PROCESSES IN ENTERPRISE ORGANIZATIONS



## Customer Service

Self-help  
Support assignment  
Issue diagnosis  
Problem resolution  
Continuous improvement

## Sales

Customer self-service  
Lead generation  
Customer engagement  
Negotiations & closing  
Post-sale follow-up & upsell  
Sales analysis & forecasting

## Finance

Quote to cash  
Record to report  
Tax & treasury  
Planning & analysis  
Risk management and compliance  
Procure-to-pay

## Marketing

Customer insights & strategy  
Demand generation  
Content creation  
Campaign execution  
Predictive analysis  
Personalization  
Sales enablement & recommendation

## HR

Employee engagement  
Recruiting  
HR admin & payroll  
Compensation & benefits  
Learning & development  
Talent management  
HR strategy & planning

## Legal

Regulatory & compliance management  
Contracting  
Risk management  
Litigation  
Consultation  
Intellectual property  
Advisory services

## IT

Data management  
Software management & acquisition  
Device management  
IT operations  
Network operations  
Information security  
Change management & user adoption

# THE SORTING HAT OF USE CASES



Digital Transformation and Digital Literacy

Automation and Reporting

Traditional AI

GenAI

Integration involves transitioning from isolated applications to *reliable, scalable systems*. It works best when *AI seamlessly becomes part of the product*, rather than appearing as a separate, disconnected feature.



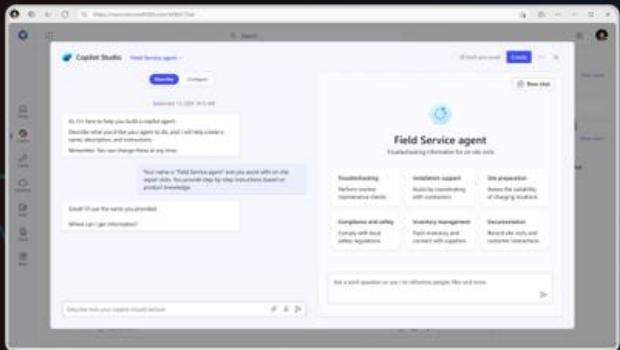
# A RANGE OF TOOLS FOR AGENT CREATION



No code

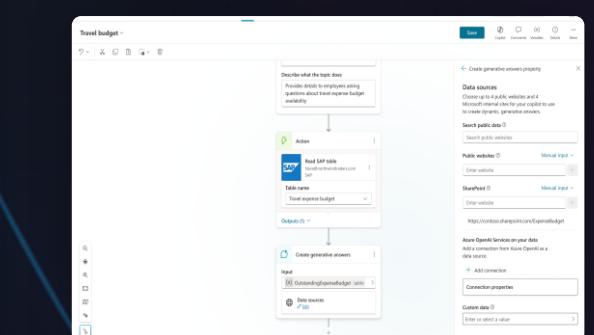


For End Users



Agent builder

For Makers

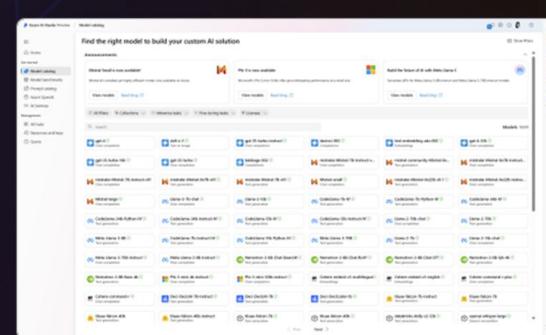


Copilot Studio



Pro code

For Developers



VS Code, Copilot Studio,  
Azure AI Foundry

OR Other Technologies

# RECAP



- Begin by outlining the business vision and data strategy.
- Collect requirements and align them with the appropriate technology, agent tools, licensing, and budget.
- Consider quality needs and complexity: you have the flexibility to choose a mix of tools or adjust the AI model.
- Monitor using Copilot Control System.

# SPECIAL GUEST INTERVIEW



Across the global customers you've worked with, what common challenges or misconceptions have you observed when it comes to adopting AI at scale?

Can you share a standout example of how a customer in a different region approached AI strategy in a way that surprised or inspired you?



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The Three Strategies you need for AI

## HOMEWORK – SESSION 1

# Activity #1

Preparing for AI in my Business



# CHECKLIST: PREPARING FOR AI IN BUSINESS



Task	Completed (✓)
1. Have I checked that I have the correct AI or Copilot subscription?	<input type="checkbox"/>
2. Have I confirmed that I am using the correct version of Copilot or AI tool for my needs?	<input type="checkbox"/>
3. Have I reviewed or started any essential security measures related to AI usage (e.g. data protection, user access)?	<input type="checkbox"/>
4. Have I identified and listed potential opportunities for AI in my business or area of study?	<input type="checkbox"/>
5. Have I researched at least three different strategies for implementing AI (such as automation, data analysis, or customer engagement)?	<input type="checkbox"/>
6. Have I considered the risks and challenges associated with each AI strategy?	<input type="checkbox"/>
7. Have I drafted a brief action plan for how I would apply one AI strategy in a real business scenario?	<input type="checkbox"/>
8. Have I gathered supporting evidence (such as case studies or articles) for each strategy?	<input type="checkbox"/>

# Activity #2

Practice Using Structured & Unstructured Data with Generative  
AI



# PART 1: UNSTRUCTURED DATA PRACTICE



## Scenario

You have a set of customer support emails. You want to turn them into a helpful FAQ using AI.

## Steps

- 1. Open Copilot Chat**
- 2. Paste this prompt:**

*"I have a list of customer emails asking about refunds, shipping delays, and product returns. Can you help me turn these into a simple FAQ with questions and answers?"*

*Attach a word document of 10 short paragraphs*

- 3. Review the AI's output.** Does it make sense? Are the questions clear?
- 4. Ask follow-up:** Try "Can you make the answers shorter?" or "Add a question about payment methods."
- 5. Save the result** as your FAQ draft.

Go to  
<https://copilot.microsoft.com/>  
and sign in  
with preferably  
your Work  
Account.

# PART 2: STRUCTURED DATA PRACTICE



## Scenario

You have a spreadsheet with product names, features, and prices. You want to generate product descriptions.

Go to <https://copilot.microsoft.com/> and sign in with preferably your Work Account.

## Steps

1. Open Copilot Chat
2. Paste this prompt:

*"I have a product table with columns: Product Name, Features, and Price. Can you generate a short, friendly product description for each item?"*

3. Imagine or describe 2–3 sample rows (e.g., "Smartwatch X, waterproof, heart rate monitor, \$199").
4. Review the AI's descriptions. Are they clear and engaging?
5. Ask follow-up: Try "Make it more professional" or "Add a call to action"

# Reflection

Questions

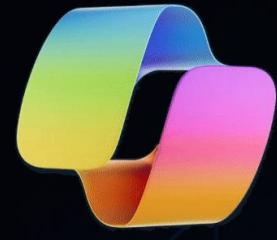




# REFLECTION QUESTIONS



1. **What was easier:** working with structured or unstructured data?
2. How did the ai handle vague vs. Clear inputs?
3. What would you do differently next time?



# COPILOT

## ZERO TO HERO

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# THANK YOU

# REFERENCES



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- <https://www.microsoft.com/en-us/worklab/work-trend-index/ai-at-work-is-here-now-comes-the-hard-part>
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