

Welcome!

Good prompting & other learnings – Microsoft 365 Copilot

Webinar



Maarten Druwé
Copilot Technical Specialist at
Microsoft

Microsoft 365 Copilot



Your AI assistant at work



Microsoft 365 Copilot

Natural Language



+



+



+



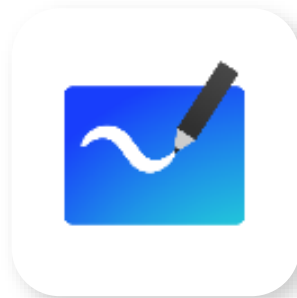
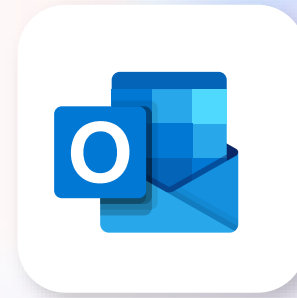
Large Language
Models

Microsoft Graph
- Your Data -

Microsoft 365
Apps

The
Web

Microsoft 365 Copilot Applications



and more!



Microsoft 365 Copilot

Built on Microsoft's **comprehensive** approach



Security



Compliance



Privacy



Responsible AI

Customer Copyright Commitment

[Microsoft announces new Copilot Copyright Commitment for customers - Microsoft On the Issues](#)

Use Copilot services with confidence

We stand behind
our Copilot
customers

We are sensitive
to the concerns
of authors

Copyright
guardrails are built
into the product



Microsoft 365 Copilot



Unleash creativity

Harness Copilot's power so you never start from scratch



Unlock productivity

Let Copilot summarize actions for you, and optimize your time



Uplevel skills

Be better at what you're good at and master what you've yet to learn

Top 10 tasks for new users



Summarize a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

1



Summarize an email thread

– there's no need to read through an entire email thread when you join in the middle.

2



Tell me my agenda for the day

– start the day off on the right track with a clear picture of your activities and action items.

3



Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

4



Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

5



Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

6



Create a to do list for me

– avoid downtime by generating a list of tasks at any point in the day.

7



Write an email about ...

– end procrastination on those difficult emails by getting a first draft in seconds.

8



Tell me how to plan for ...

– get an idea of a project plan for nearly any task and then adapt it to your needs.

9



Revise this content

– when you've got a rough draft of an idea turn it into usable text and then vary the length and tone.

10

A Day in the Life of Maarten

Copilot technical specialist, Microsoft



8:30 AM

I ask Copilot via the 'BizChat' experience to give me an overview of emails from customers I did not respond to yet.



Microsoft Copilot

List customer emails from the last 5 days that I did not yet respond to. Format the response in a simple table, containing sender, topic, date and the required follow-up

5:00 PM

I need to respond to a lot of customer emails. I'm using Copilot in Outlook to draft a reply. Especially helpful when I need to communicate in French



Copilot in Outlook

Reply to the customer saying that SharePoint agents are currently rolling out to all tenants. Write the email in French, be polite but not too formal.

8:40 AM

I go through some of our internal group chats, and ask Copilot what I missed



Copilot in Teams

Help me catch up with what's going on in this group chat.
Has anyone requested me to do something?

3:00 PM

A customer asked me some difficult questions. I'm first asking Copilot for answers. Most of the time, it finds the answer in our internal Teams chats/channels, Viva Engage communities or in documents on SharePoint.



Microsoft Copilot

Tell me when SharePoint agents will be available for my customer. Focus on internal information such as on Teams, Viva Engage, or SharePoint.

9:00 AM

I wasn't able to join a couple of meetings yesterday, including some trainings. I'm using Copilot to quickly read the summaries and ask extra questions if needed.



Copilot in Teams

Recap this meeting for me
Give me a table containing the agreed upon next steps, including defined deadline and who's responsible

1:30 PM

I need to record a webinar. I'm using Copilot in Word to finetune my presenter notes. I first dictate in my own words what I'd like to say. Then, I ask Copilot to improve this text, make it more fluent and eliminate mistakes.



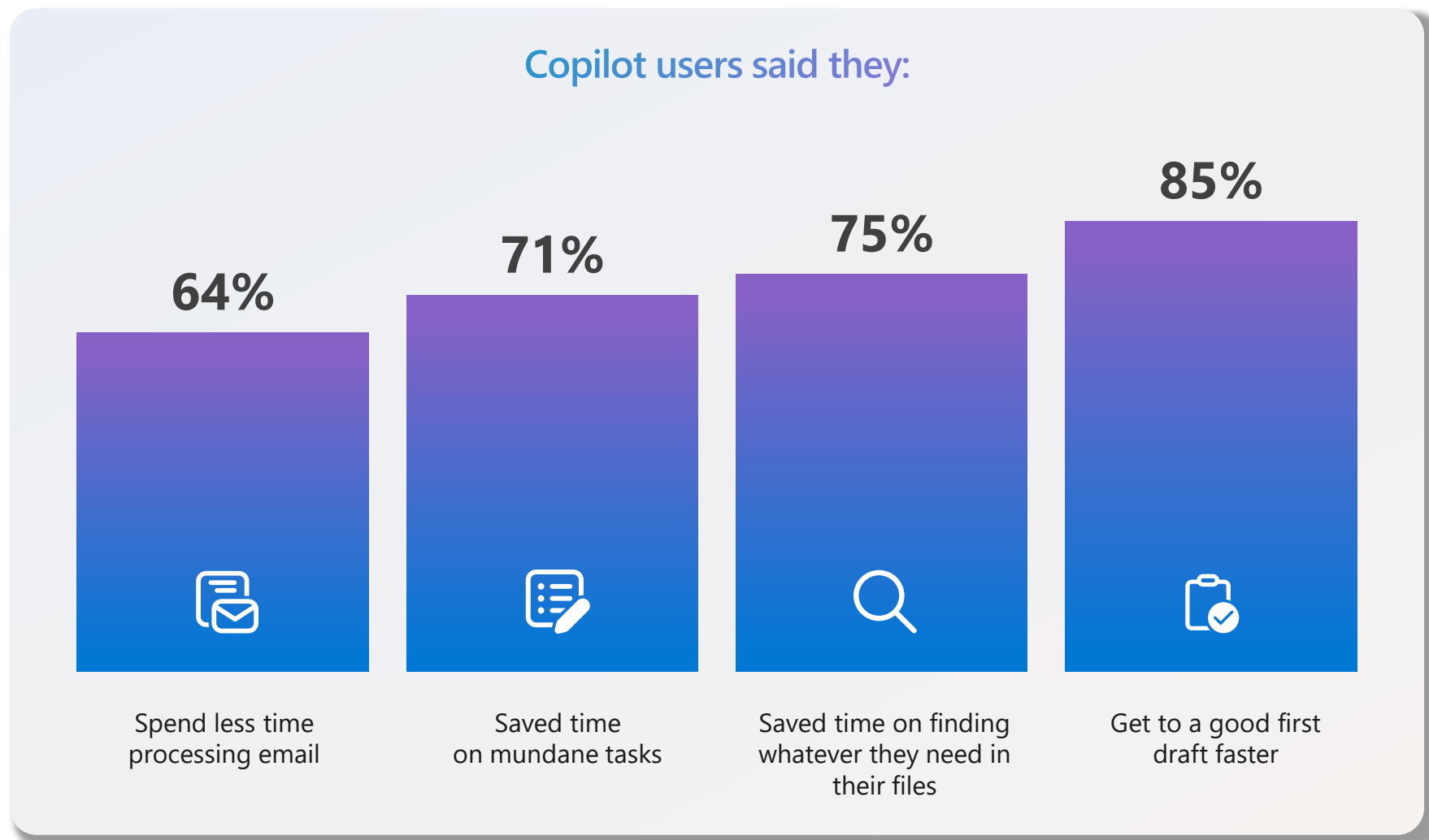
Copilot in Word

Rewrite this text so I can present this in a webinar. Make sure it's clear, easy to listen to for non-native speakers, and engaging.



Maarten Druwé
Copilot Technical Specialist

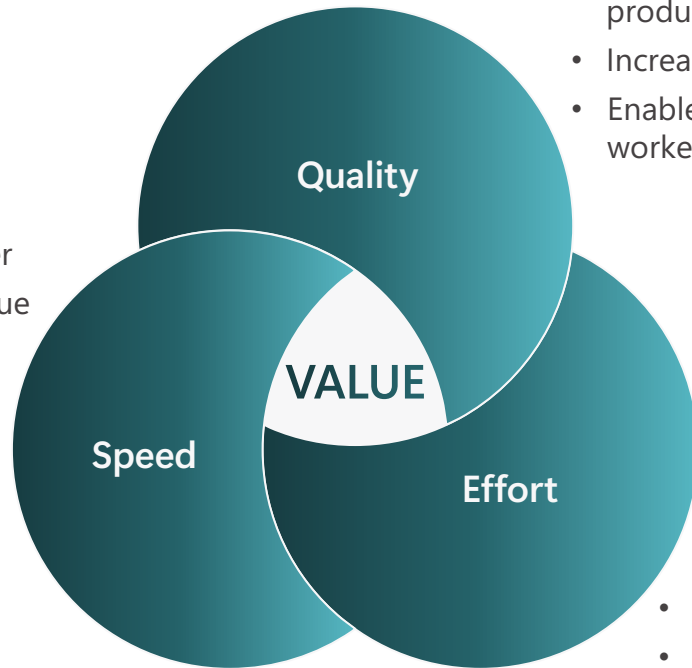
Copilot users are more productive



Microsoft 365 Copilot value



- Complete tasks faster
- Engage in higher value activities
- Increase output



- Improve quality of content produced
- Increase creativity
- Enable less experienced/skilled workers to achieve success



- Reduce mundane tasks
- Improve wellbeing and engagement
- Increase job satisfaction through improved results

Return on investment/ Return on experience



Increased revenue



Business process improvements



Cost avoidance



Wellbeing



Talent retention

3 essentials for Copilot success



Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Executive sponsorship
- ✓ Align AI to business strategy
- ✓ Providing clarity and prioritization
- ✓ **Best practice:** AI Council



Human change

Manage the human transformation with robust user enablement programs

- ✓ User enablement program
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Community of Practice and Copilot Dashboard



Technical readiness

Build and iterate technical skills to deliver on business results

- ✓ Secure your data infrastructure
- ✓ Policy review
- ✓ Extend to new high value line of business scenarios
- ✓ **Best practice:** Optimization Assessment

Responsible AI principles

Get ready

You can get quick wins by ...

- setting default sharing link type ('specific people' vs 'anyone with the link')
- setting sharing link expiration
- asking site owners to review SharePoint site permissions
- changing SharePoint sites from 'public' to 'private'
- using 'Restricted SharePoint Search' or 'Restricted Content Discovery' as a temporary solution if needed
- running 'Data Access Governance' reports* to get insights into oversharing
- applying 'restricted access control' on SharePoint sites and OneDrive accounts**

*Requires SharePoint Advanced Management or Microsoft 365 E5 licenses

**Requires SharePoint Advanced Management licenses



Microsoft Copilot for Microsoft 365 Optimization Assessment Results

Thank you for taking the time to complete the Copilot for Microsoft 365 Optimization Assessment. You've taken an important step to understand how far along your organization is in adopting AI. This report highlights the foundational elements you already have to help your organization prepare for its digital transformation journey and take full advantage of Copilot for Microsoft 365.

The answers you provided in the Copilot Optimization Assessment give us your Optimization Scores, which reflects your organization's potential ability to take advantage of Copilot for Microsoft 365 to help increase employee productivity and security posture.

Blockers Identified **0**

This score reflects any primary blockers to overcome to get ready for Copilot for Microsoft 365 and the new era of AI.

Microsoft 365 Copilot-ready users **67%** in your organization

5000 of 7500

Customer Baseline

Organizational Profile Readiness **90%**

19/16

Productivity Tool Readiness **80%**

16/20

Copilot for Microsoft 365 Deployment Path

Best in Class

Your organizational readiness score relates to your ability to drive adoption of Copilot for Microsoft 365 through effective organizational sponsorship and awareness of the capabilities of generative AI solutions.

Productivity and collaboration are the backbone of Copilot for Microsoft 365. A major benefit of AI is the opportunity to automate certain tasks and improve productivity to help employees focus on the work that matters most to your organization.

The Copilot deployment path is part of the overall technical readiness guidance developed to help customers get started with their Copilot deployments quickly and continue to optimize their data security along the way.

Copilot is NOT Autopilot...

It relies on a **good prompt** - A good prompt is like a recipe that tells Copilot what ingredients to use and how to combine them

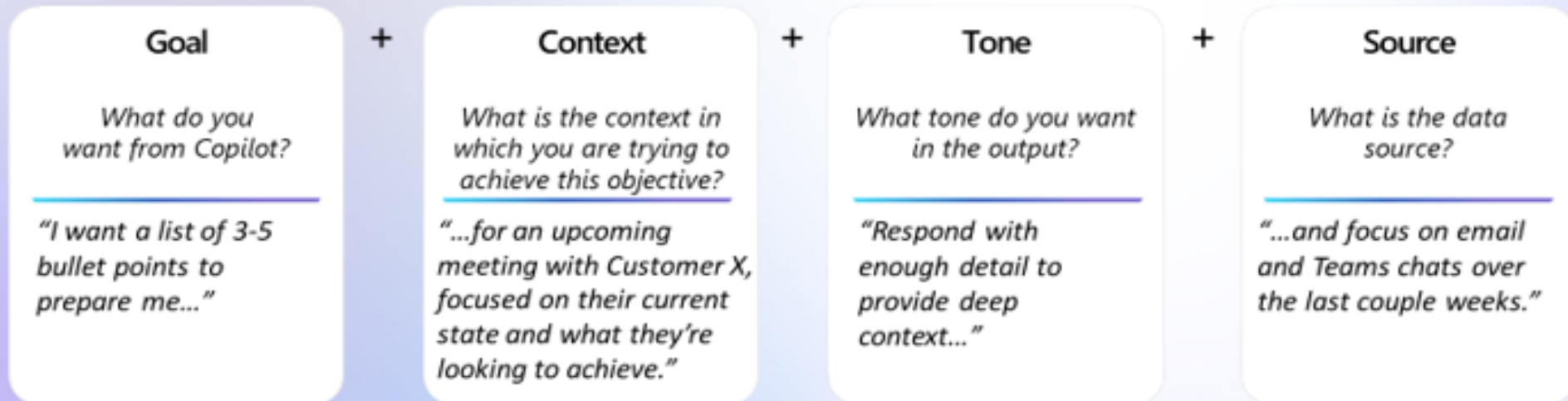
A good prompt is one that is clear, concise, and specific

What are my action items from yesterday from the weekly team meeting?

Bad prompt is one that is vague, ambiguous, or overly broad

What did I miss yesterday?

Get the most out of Microsoft 365 Copilot by writing precise prompts using this formula



The art and science of prompting



Prompts are how you ask Copilot to do something for you — like creating, summarizing, editing, or transforming.

Think about prompting like **having a conversation**, using plain but clear language and providing context like you would **with an assistant**.

1. Tell Copilot what you need

Learn about projects and concepts:

"What is [Project X] and who are the key stakeholders working on it?"

Edit text:

"Check this product launch rationale for inconsistencies."

Transform documents:

"Transform this FAQ doc into a 10-slide onboarding guide."

Summarize information:

"Write a session abstract of this [presentation]."

Create engaging content:

"Create a value proposition for [Product X]."

Catch-up on missed items:

"Provide a summary of the updates and action items on [Project X]."

The art and science of prompting



2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.

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

The art and science of prompting



Keep iterating to improve your prompts

You are an HR Manager who needs to prep for an upcoming Candidate hiring interview for a new position within the IT department for an AI Engineer. Create a prompt that will help you prepare for the interview.

Good

Help me prepare for an upcoming candidate interview for a new AI Engineer role in our IT department by creating a list of questions

Better

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please prepare a list of appropriate questions for the candidate, so that I look prepared during the interview

Best

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please review the candidate's resume here: [/\[resume file\]](#) and the position detail here: [/\[position doc\]](#) and provide me a comprehensive list of questions that I can use to determine the candidate's fit against the position

Goal

Context

Source

Expectations

The art and science of prompting



3. Ask yourself these questions when prompting

Consider how to make your prompts more **impactful** by thinking about how Copilot can help in your **entire** workflow.



Why am I using this prompt?

What is the context for this task.



What will I do with the output of this prompt?

Am I going to send it on to someone else?
Transform it into a different format?



Can I extend Copilot's remit to save more time

Can I ask Copilot to do a bigger task to automate more work?

The art and science of prompting



Following up on your prompts helps you collaborate with Copilot, to gain more useful, tailored responses.

4. Keep the conversation going



Generating content ideas

Lead with broader requests, then give specific details about the content.



Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Don't be afraid to try again! Adjust your prompt and ask follow up questions to refine and improve if you're not happy with the first response.

It can help to break down more complicated tasks into simpler components

Hallucination Example

Which ones is heavier, a kilogram of feathers or a kilogram of steel?

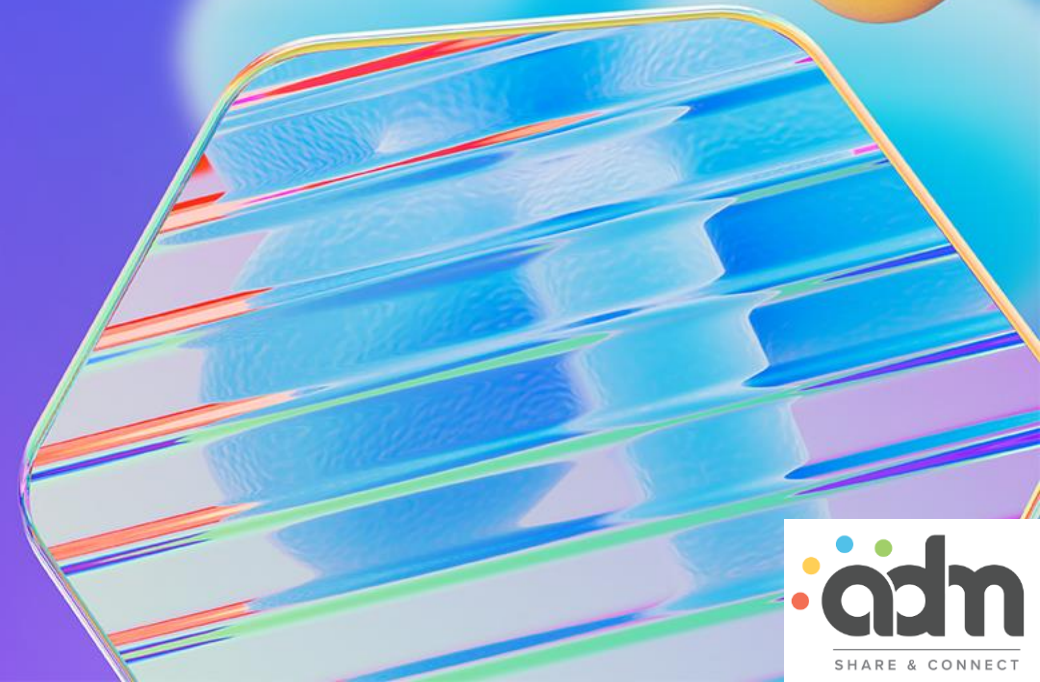
A kilogram of steel is heaviest

Are you sure about that?

Yes, steel is heavier than feathers so a kilogram of steel weighs more than a kilogram of feathers.

Over the past year we have ...

- heard feedback from 1000+ customers
- implemented 700+ product updates
- added 150+ new features
- improved performance with new AI models such as GPT-4o



The next wave of innovation in Copilot

Announcing



Copilot Pages

Generally available

Announcing



Copilot in PowerPoint

Narrative builder

Generally available

Announcing



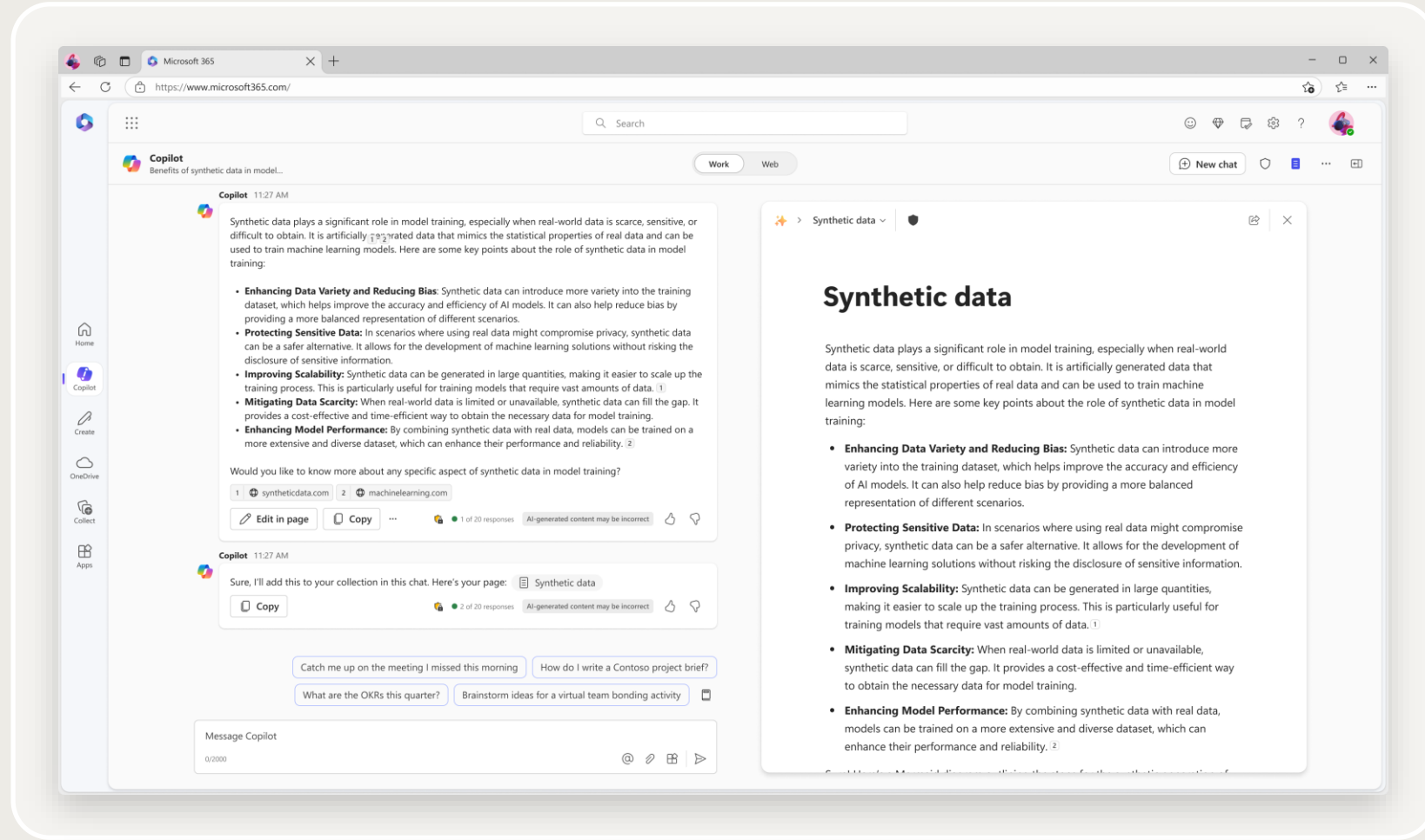
Copilot in Teams

Meeting copilot

Generally available

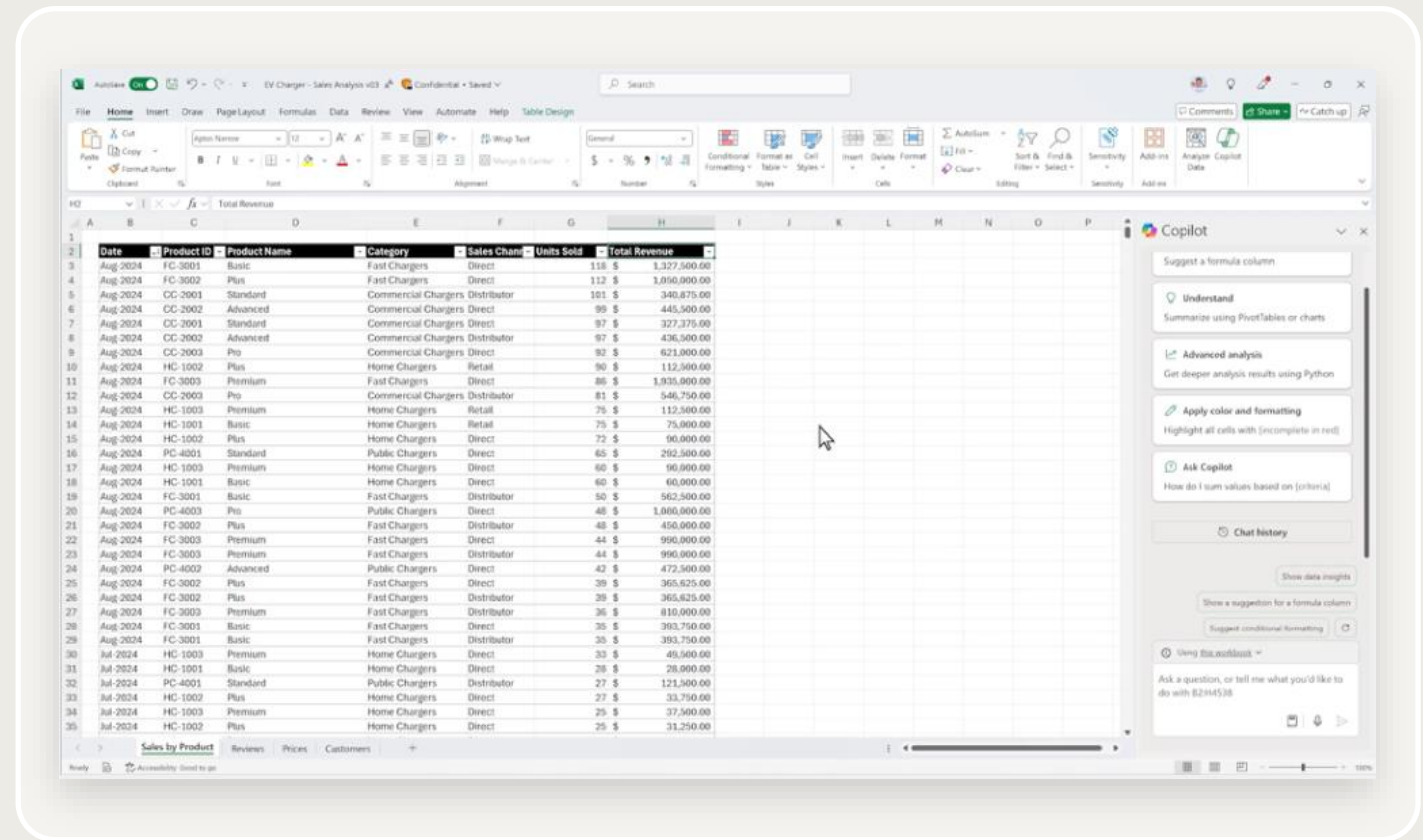
Copilot Pages

Quickly pull a BizChat response into a sharable canvas built for real-time multiplayer collaboration with AI; use Copilot to improve and expand upon subject matter, build visualizations, and bring in additional content.



Copilot in Excel with Python

Leverage the power of Python to unlock new scenarios that use machine learning, predictive modeling, text analytics, and other capabilities for **advanced analysis** – no coding required.



Available now in the US on platforms that support Python in Excel (Current Channel), coming to other countries in Q1 2025

AutoSave On | Ad Campaigns - historical data | Public | Last Modified: Just now | Search

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Table Design

Clipboard: Paste, Cut, Copy, Format Painter | Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color | Alignment: Wrap Text, Merge & Center | Number: General, Percent, Decimals | Styles: Normal, Good, Bad, Neutral | Cells: Insert, Delete, Format | Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select | Sensitivity, Add-ins, Analyze Copilot Data

	Campaign Owner	Campaign	Beer brand	Ad channel	Launch Date	Campaign Type	Budget	Revenue	Total Use	Engaged Users	ROI
70	Connors, Morgan	Toast to Trop Stella		TikTok	28-May	Digital marketing	\$ 18.474	\$ 14.292	22.395	4.807	-2
71	White, Michael	Oktoberfest C Leffe		Google	12-Jul	Customer Experien	\$ 19.325	\$ 25.465	12.513	6.746	3
72	Kovaleva, Anna	Stella fb Stella		Bing	01-Jan	Customer Experien	\$ 10.215	\$ 14.546	35.222	7.302	4
73	Halima, Yakubu	Tropics Tanta Corona		Bing	17-Apr	Digital marketing	\$ 9.006	\$ 8.975	20.780	9.694	
74	Davis, Mark	Brews & BBQ Corona		Bing	29-Jan	Customer Experien	\$ 18.066	\$ 17.542	44.791	323	
75	Glazkov, Ilya	Fall Froth Flir Hoegaarden		Instagram	12-Jul	Digital marketing	\$ 9.287	\$ 6.089	45.780	10.000	-3
76	Lawson, Andre	Sun-Kissed S Leffe		TikTok	07-Jun	Customer Experien	\$ 10.510	\$ 6.767	35.663	4.348	-3
77	Halima, Yakubu	Spring Fling F Hoegaarden		Youtube	17-Apr	Digital marketing	\$ 16.882	\$ 10.667	6.516	4.200	-3
78	Thompson, Lisa	Fall Flavor Fr Corona		Instagram	15-Jun	Customer Experien	\$ 19.637	\$ 17.832	5.905	452	
79	Halima, Yakubu	Beerfree Corona		TikTok	28-Feb	Digital marketing	\$ 18.785	\$ 11.781	2.901	1.804	-3
80	Lawson, Andre	Spring Sips S Budweiser		TikTok	28-May	Digital marketing	\$ 3.721	\$ 4.578	31.013	1.441	2
81	Johnson, David	Harvest Hops Stella		TikTok	17-Feb	Brand marketing	\$ 18.377	\$ 22.498	35.279	4.230	2
82	Macedo, Beatriz	Chill & Chug Leffe		Instagram	17-Apr	Customer Experien	\$ 10.128	\$ 9.873	46.535	3.294	
83	Johnson, David	Brews & Bites Stella		Bing	28-May	Customer Experien	\$ 18.236	\$ 18.752	46.212	1.498	
84	Lawson, Andre	Spring Spritz Corona		Bing	15-Jun	Digital marketing	\$ 18.758	\$ 34.254	30.749	15.752	8
85	Halima, Yakubu	Cheers to Ch Corona		Youtube	31-Mar	Digital marketing	\$ 13.703	\$ 9.754	25.011	20.154	-2
86	Johnson, David	Summer Sips Skol		Google	17-Feb	Customer Experien	\$ 6.772	\$ 5.498	44.623	32.457	-1
87	White, Michael	TV Corona		Google	28-May	Digital marketing	\$ 12.150	\$ 9.875	29.145	6.355	-1
88	Lawson, Andre	Winter Warm Skol		Google	17-Feb	Digital marketing	\$ 16.592	\$ 15.765	36.392	6.541	
89	Halima, Yakubu	Tropical Brew Corona		Instagram	28-May	Customer Experien	\$ 11.257	\$ 13.458	1.867	780	1
90	Halima, Yakubu	Brews & View Hoegaarden		Bing	17-Apr	Digital marketing	\$ 4.919	\$ 4.325	39.280	10.354	-1
91	White, Michael	Brews & Blue Budweiser		Youtube	29-Jan	Brand marketing	\$ 18.726	\$ 9.182	35.102	6.745	-5
92	Kovaleva, Anna	Tropical Brew Skol		Youtube	09-May	Digital marketing	\$ 7.533	\$ 3.596	14.512	2.775	-5
93	Brown, Sarah	Brews & View Leffe		Google	07-Jun	Customer Experien	\$ 2.613	\$ 1.145	39.274	5.073	-5
94	Johnson, David	Spring Fling F Leffe		Google	31-Mar	Customer Experien	\$ 18.674	\$ 8.151	10.476	1.479	-5
95	Cartier, Christian	Autumn Ale E Corona		Youtube	19-Jan	Customer Experien	\$ 7.643	\$ 8.456	14.233	8.077	1
96	Johnson, David	Spring Sips S Hoegaarden		Google	04-Apr	Customer Experien	\$ 19.552	\$ 20.154	15.450	4.372	
97	Smith, John	Sparkling Sip Stella		Youtube	17-Jan	Brand marketing	\$ 5.752	\$ 15.765	43.686	9.864	17

Copilot

- Understand**
Summarize using PivotTables or charts
- Advanced analysis**
Get deeper analysis results using Python
- Apply color and formatting**
Highlight all cells with [incomplete in red]
- Ask Copilot**
How do I sum values based on [criteria]

Chat history

Show data insights

Show a suggestion for a formula column

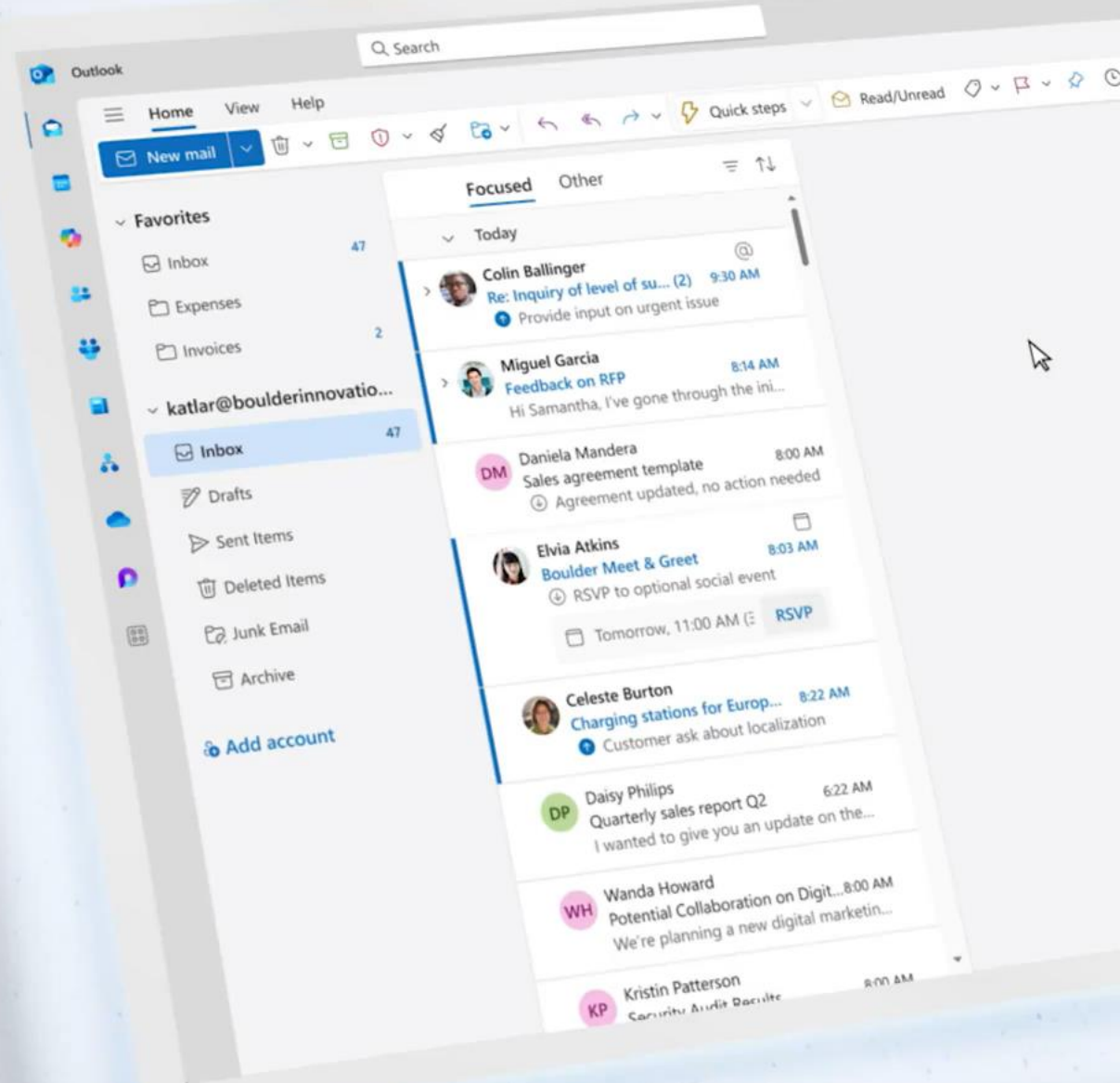
Suggest conditional formatting

Ask a question, or tell me what you'd like to do with A1:K116

Microsoft 365 Copilot

Copilot in Outlook

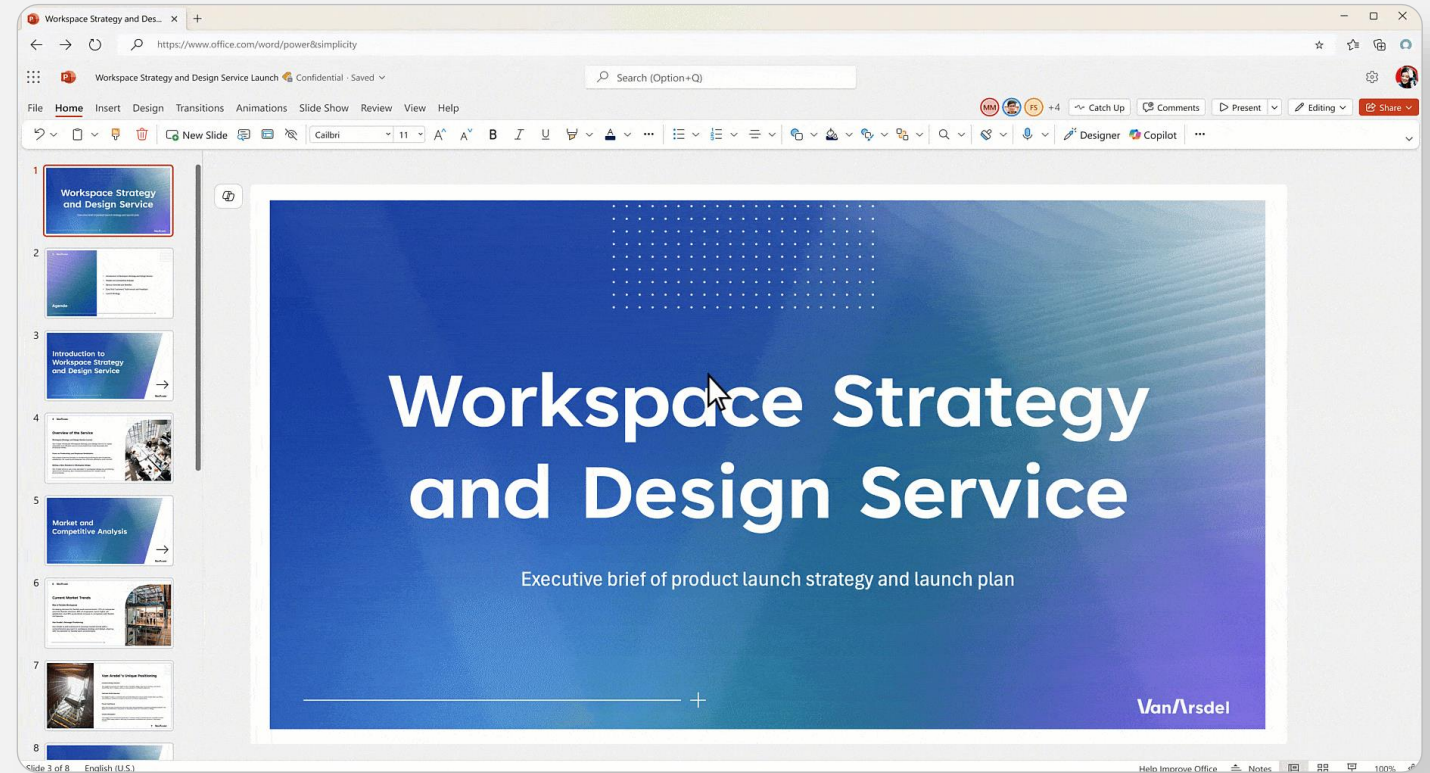
Prioritize my inbox



Supercharge Productivity

Presentation translation

Translation can be time-consuming and costly, even for a quick version for internal training or team meetings. With Copilot's Presentation Translation, you can translate an entire PowerPoint into one of 40 languages, maintaining the design integrity of each slide. It saves time and money, and promotes inclusivity.



**Available on the web starting
Dec 2024, desktop and Mac
starting in Jan 2025**

Announcing



Copilot agents

What are Copilot agents?

Copilot agents are AI assistants that can help optimize business processes and enhance productivity

Copilot agents vary in level of complexity and capabilities depending on your need

Simple



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available



Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available



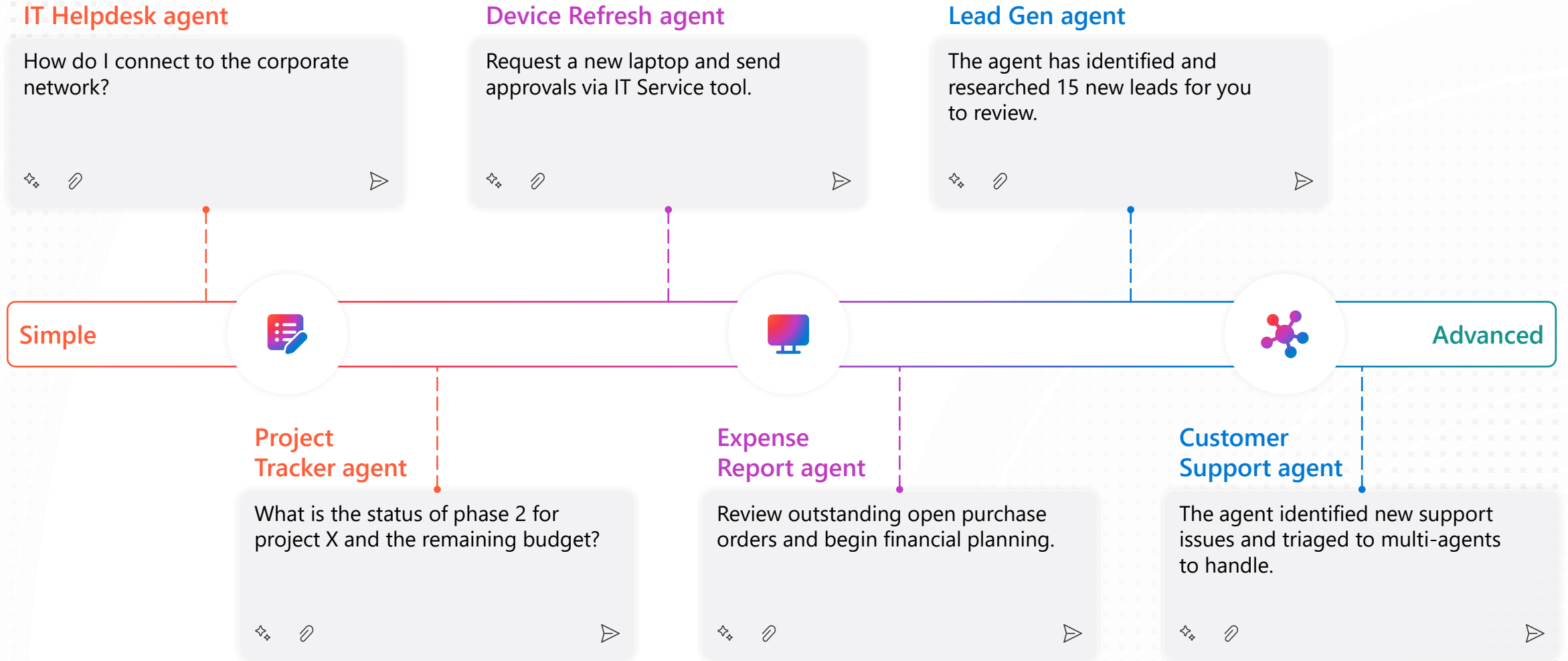
Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Coming soon

Advanced

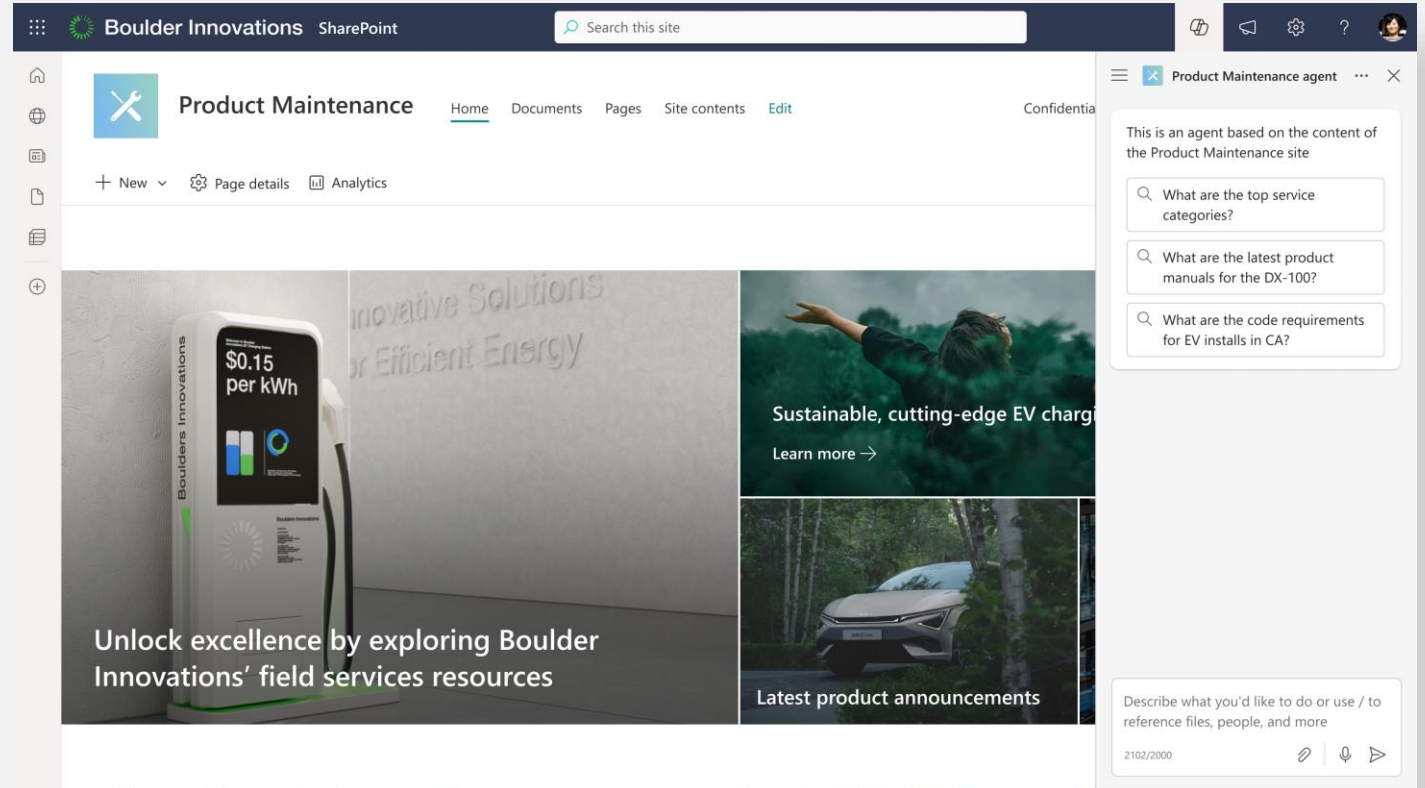
Spectrum of Copilot agents



Copilot Studio and Agents

Agents in SharePoint

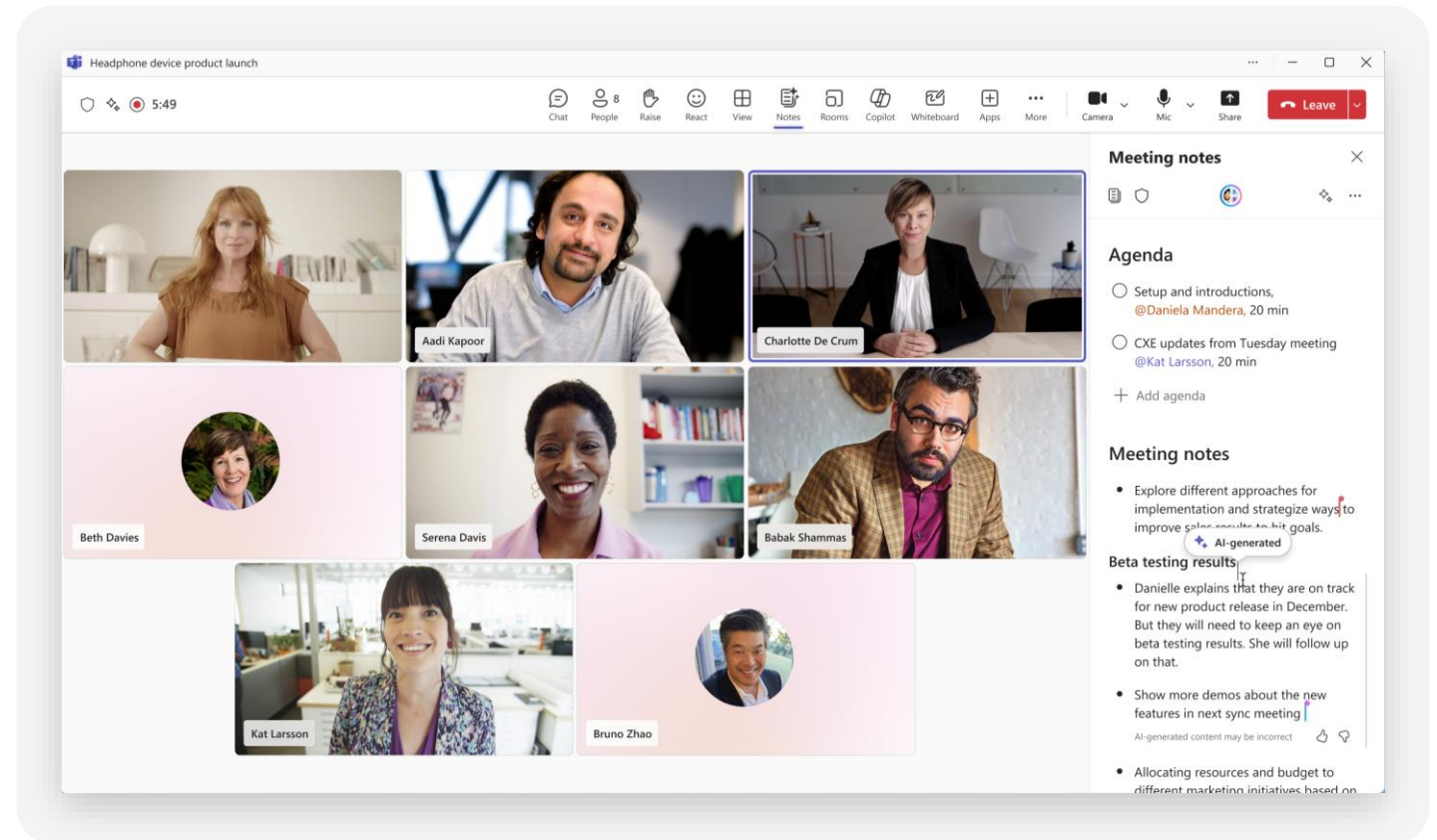
Agents in SharePoint empower employees to gain insights faster and make informed decisions with agents grounded on specific SharePoint content. Every SharePoint site is now equipped with its own agent, or employees can create their own agents tailored to specific files, folders, or sites. SharePoint agents can be shared via email or Teams. Agents follow existing SharePoint user permissions and sensitivity labels to help prevent the oversharing of sensitive information.



Available now

Facilitator

Starts taking real-time notes during Teams meetings, allowing everyone to co-author and collaborate seamlessly.



Available in public preview

Microsoft 365 Copilot will make you more productive and can improve quality, but it takes time to incorporate it into your daily life.

- Think: how could I use Copilot to make this task easier/quicker?
- Learn how to use Copilot in the different applications
- If something doesn't work from the first time, try again (different app, different prompt, ...)
- It's all about building the habit of using Copilot
- There are some network effects:
 - Colleagues sharing tips
 - Colleagues recording/transcribing meetings because they realize this means you can get Copilot summaries
 - Colleagues creating agents and sharing them with you

Your feedback



See you next
time!

