



Streamlining Work with Copilot for Microsoft 365

Presented by: James Spignardo & Greg Dodge

MEET OUR PRESENTERS



James Spignardo

Strategic Solutions Consultant
ProArch



Greg Dodge

Strategic Solutions Architect
ProArch

Agenda

- The Era of Copilot
- What is Copilot for Microsoft 365?
- How Copilot for Microsoft 365 can improve efficiency and productivity
- The Art & Science of Prompting
- Demo: A Day in the Life of TechSphere Solutions
- Q&A



The Era of Copilot

AI's Epic Road Trip to Microsoft Copilot

- **1940s-1950s:** Like building a rocket in your backyard, hoping it'll reach the moon. Surprise, it does!
- **1960s-1990s:** AI goes through awkward teenage years, trying on different outfits: problem-solving suits, machine learning sneakers, and neural network caps.
- **2000s-Present:** AI hits the gym, drinks protein shakes (deep learning), and suddenly, it's winning contests against humans in chess and Jeopardy.
- **Microsoft and AI:** Decides on a road trip across the AI landscape, picking up souvenirs like Azure AI, GitHub Copilot, and finally, the cool and savvy hitchhiker, Microsoft Copilot.
- **Microsoft Copilot:** Like having a GPS that doesn't just give directions but also drives the car, writes your emails, codes your apps, and occasionally makes coffee.



Anticipated impact of General AI on the global workforce in the coming years



- General AI will create millions of new jobs in five years.
- General AI is anticipated to increase productivity and efficiency, boosting the global economy.
- According to a report by PWC, General AI is projected to increase global GDP by 14% by 2030
- 64% of business owners expect a positive impact of AI on their productivity¹
- Companies adopting AI could potentially double their cash flow by 2030, with a forecasted additional annual net cash-flow growth of about 6% for over a decade²



Copilot for Microsoft 365 by the Numbers

60%

Percent of leaders say a lack of innovation is a concern

68%

Said Copilot improved the quality of work

64%

Of people struggle finding the time and energy to get their work done

70%

Said Copilot made them more productive

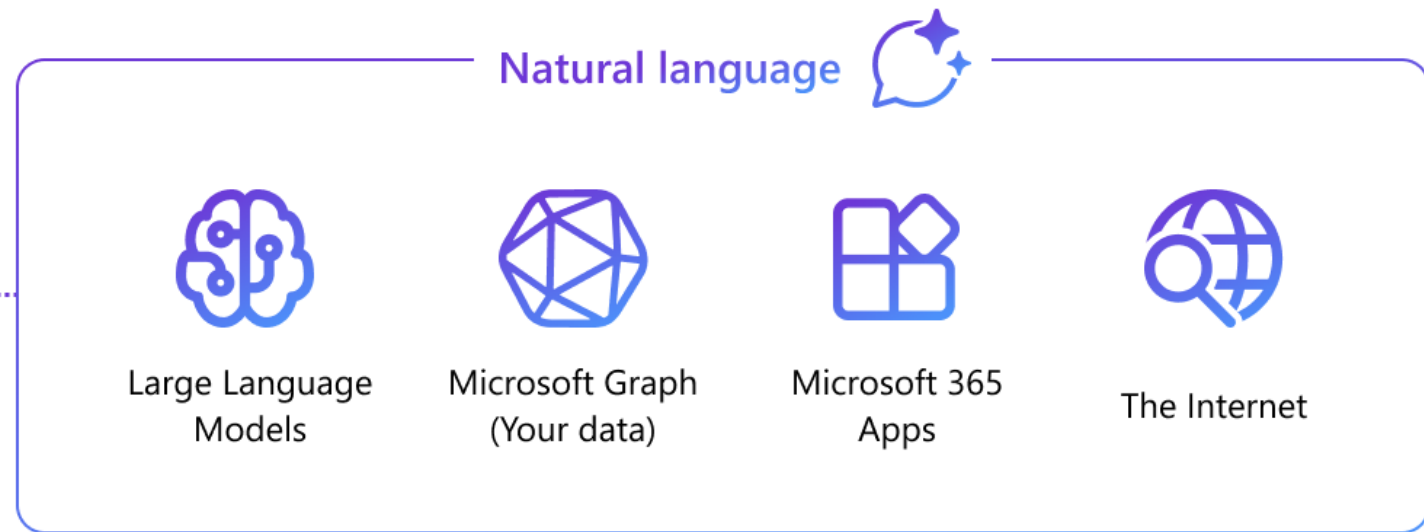
70%

Indicated they would delegate as much as possible to AI

77%

Didn't want to give up Copilot

What is Copilot for Microsoft 365?

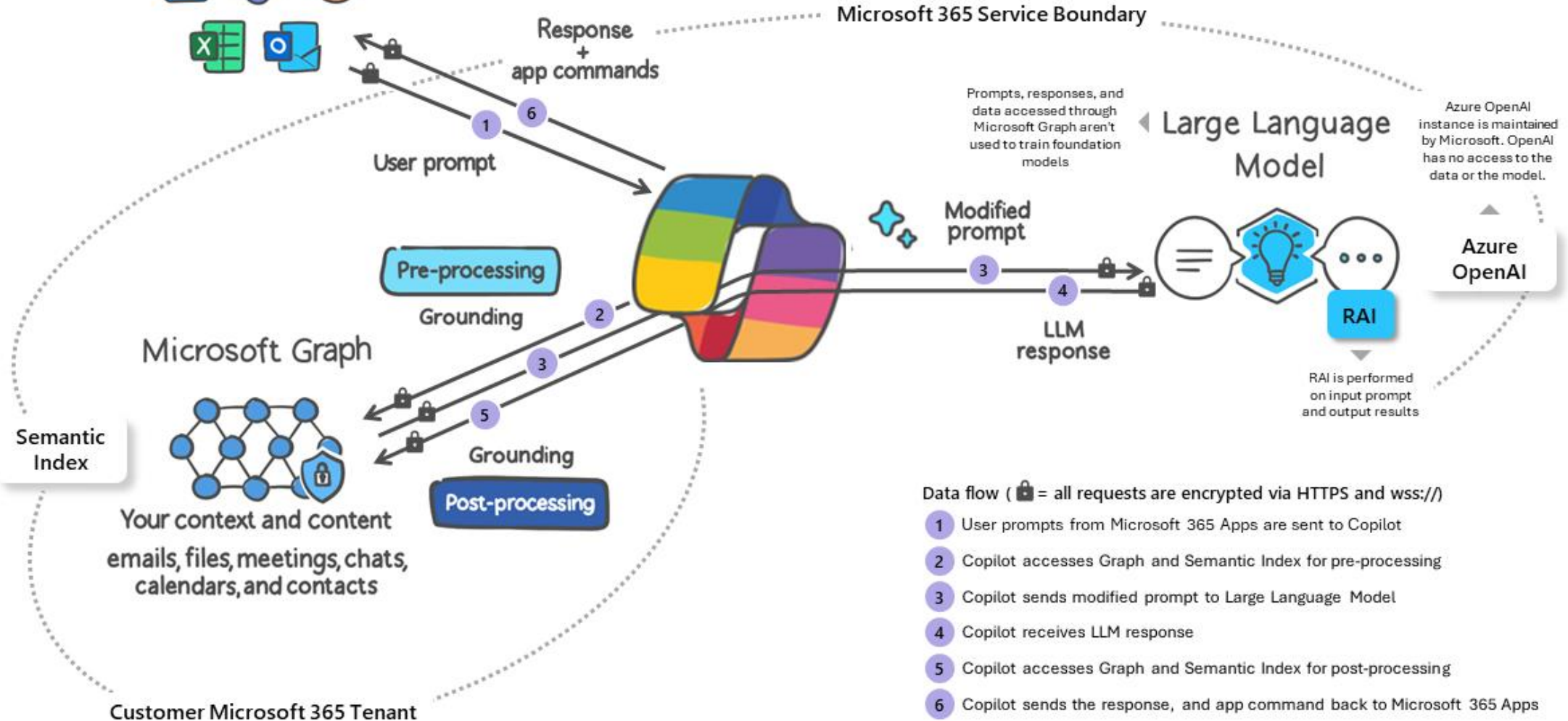


Microsoft 365 Apps



Microsoft 365 Copilot

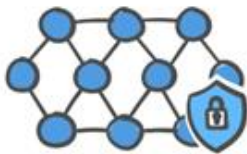
Microsoft 365 Service Boundary



Pre-processing

Grounding

Microsoft Graph



Semantic Index

Your context and content
emails, files, meetings, chats,
calendars, and contacts

Post-processing

Customer Microsoft 365 Tenant



Modified prompt

LLM response

Large Language Model



RAI

RAI is performed on input prompt and output results

Azure OpenAI instance is maintained by Microsoft. OpenAI has no access to the data or the model.

Azure OpenAI

Data flow (🔒 = all requests are encrypted via HTTPS and wss://)

- 1 User prompts from Microsoft 365 Apps are sent to Copilot
- 2 Copilot accesses Graph and Semantic Index for pre-processing
- 3 Copilot sends modified prompt to Large Language Model
- 4 Copilot receives LLM response
- 5 Copilot accesses Graph and Semantic Index for post-processing
- 6 Copilot sends the response, and app command back to Microsoft 365 Apps



Copilot for Microsoft 365



Grounded in
your business data

Copilot for Microsoft 365 has real-time access to both your content and context in Microsoft Graph.



Comprehensive **security, compliance, and privacy**

Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365.



Architected to **protect data**

Your data never leaves its secure partition, and it is never used for training purposes.



Integrated into the
apps you use every day

Word, Excel, PowerPoint, Outlook, Teams, and more.



Individual user and admin
always in control

User decides what to use, modify, or discard.

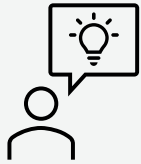


Designed to
learn new skills

As Copilot learns about processes, it can perform more sophisticated tasks and queries.



Copilot for Microsoft 365



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 have yet to learn

The Art (and Science) of Prompting

The Art and Science of Prompting



Tell Copilot what you need



Include the right
prompt
ingredients

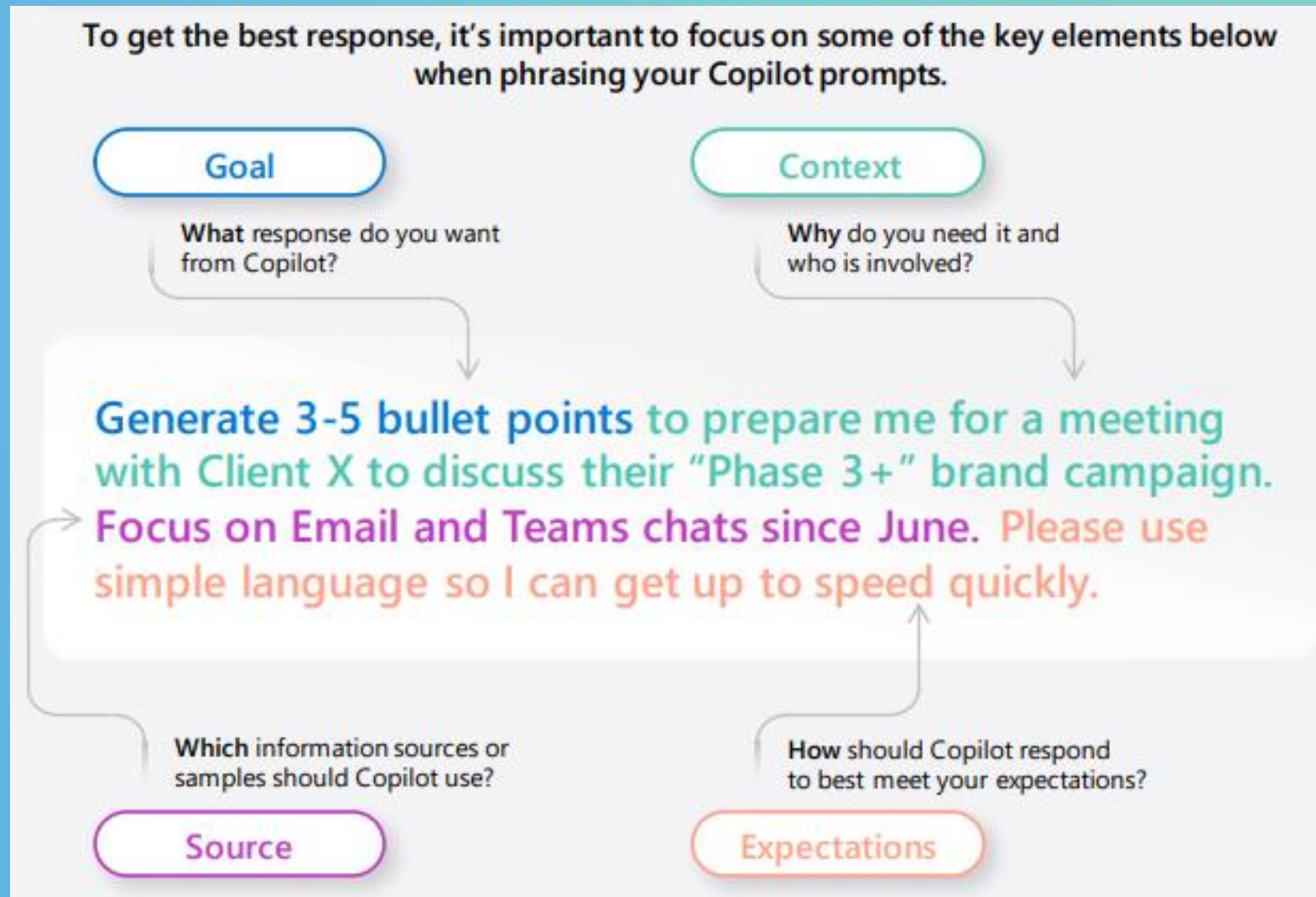
Goal
Context
Source
Expectations



Keep the conversation going
(turns)

Prompts are how you ask Microsoft 365 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.

The Art and Science of Prompting



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



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

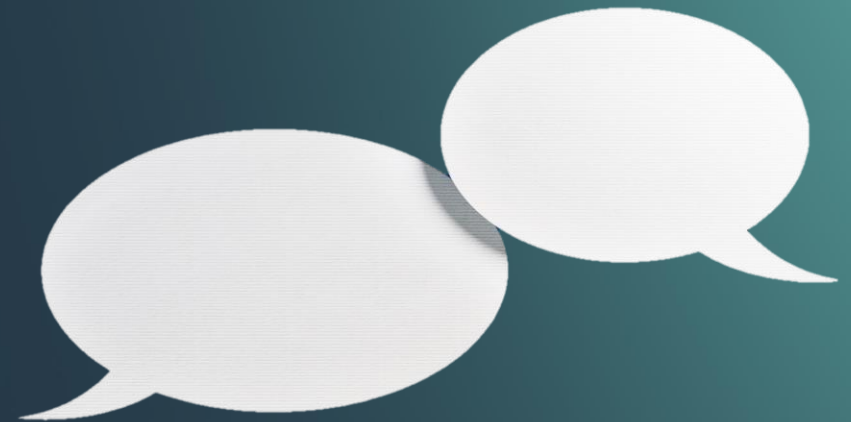
Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Prompting Do's

- Be clear and specific
- Keep it conversational – Give feedback
- Give examples
- Ask for feedback
- Check for accuracy
- Provide Context

Prompting Don'ts

- Be vague
- Request Inappropriate Content
- Give conflicting instructions
- Interrupt or change topics abruptly

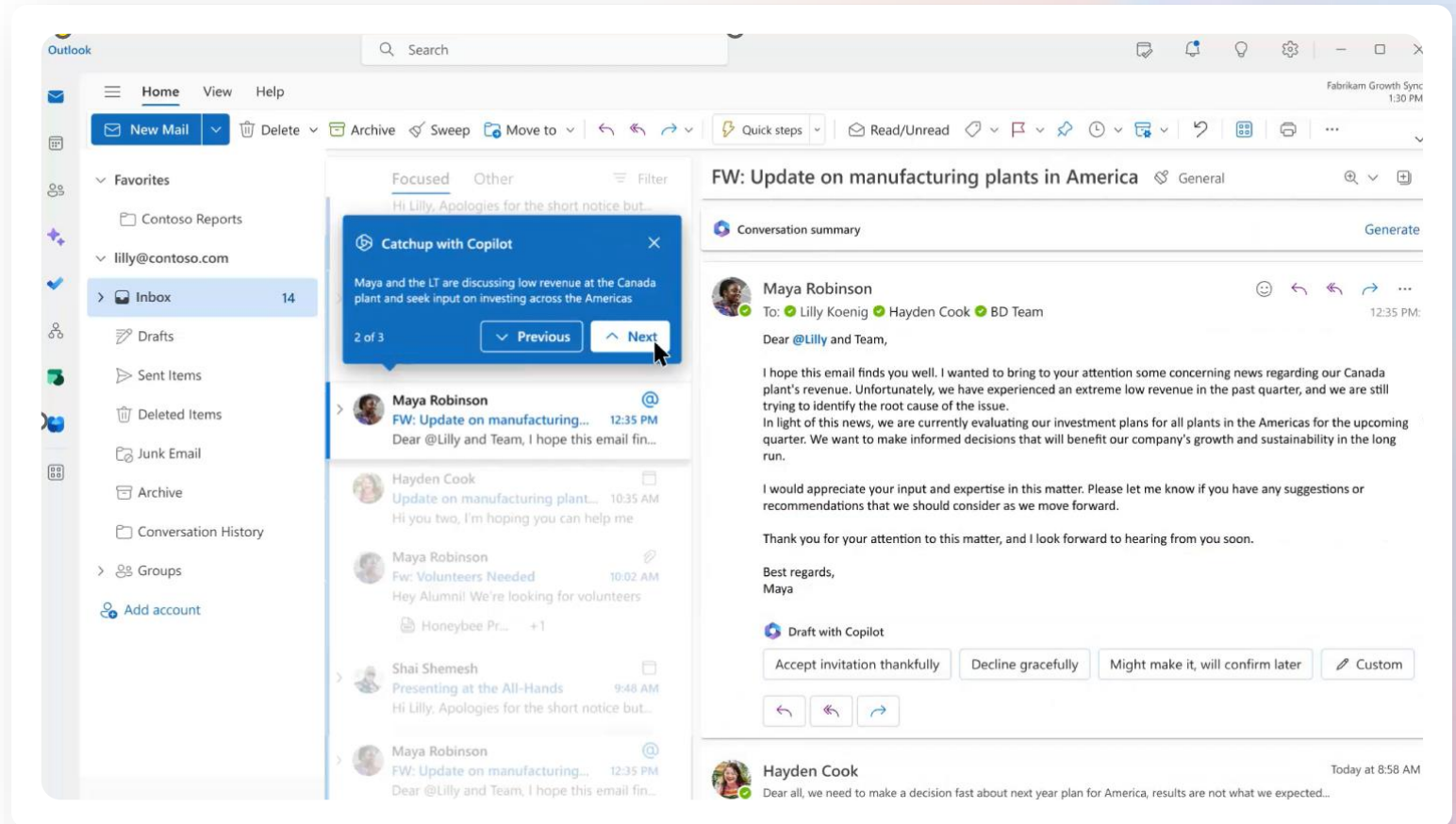


Copilot works with you in cleaning your inbox and messages

Copilot in Outlook

Some example prompts you can ask Copilot

- Summarize the emails I missed while I was out. Flag important items.
- Draft a response thanking them and asking for more details; shorten this draft and make the tone professional.
- Invite everyone to a “lunch and learn” about new product launches next Thursday at noon.



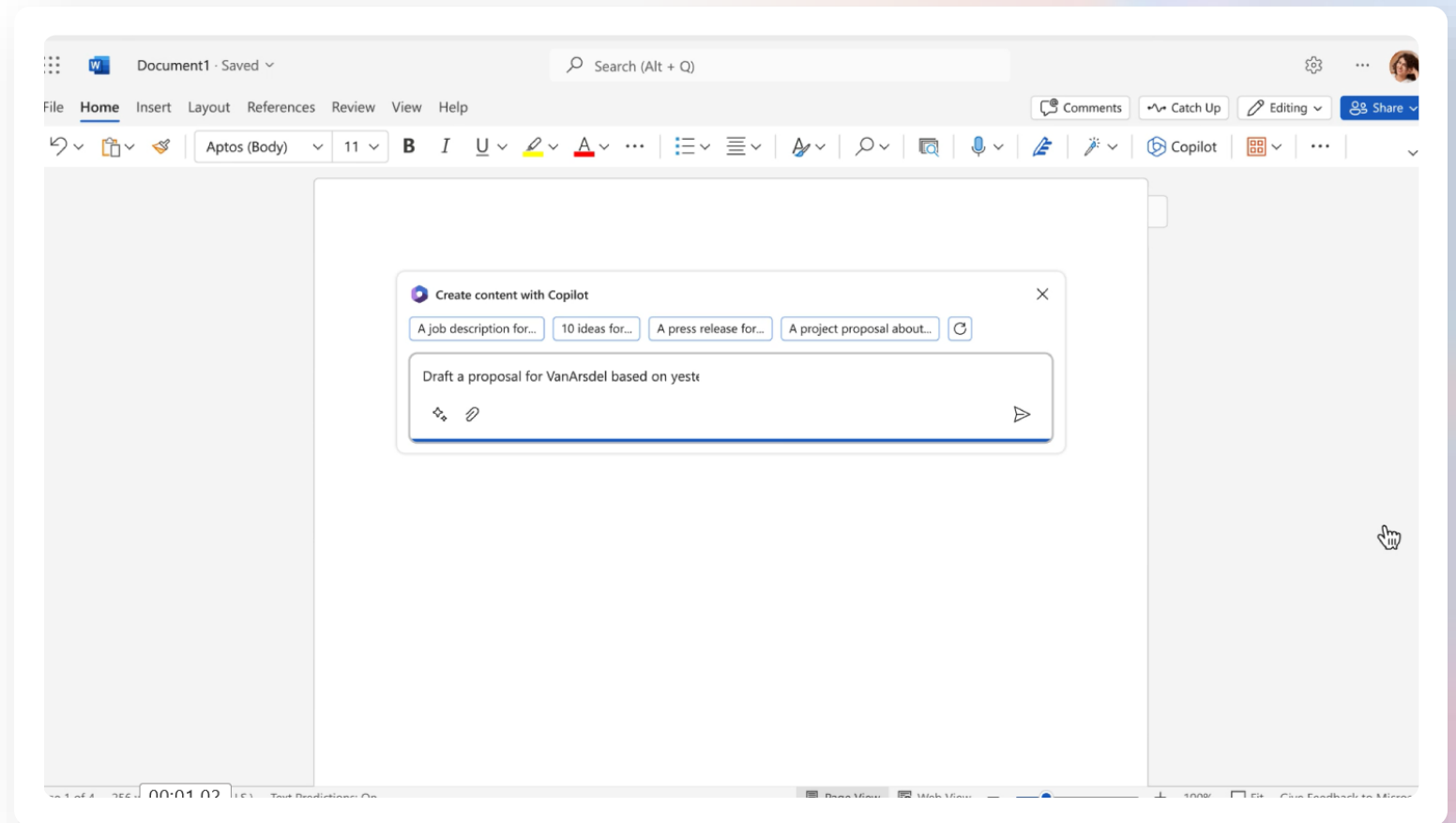
The screenshot displays the Outlook web interface. On the left, the navigation pane shows folders like 'Inbox' (14 items) and 'Drafts'. The main area shows an email thread. A blue 'Catchup with Copilot' popup is overlaid on the thread, displaying a summary: 'Maya and the LT are discussing low revenue at the Canada plant and seek input on investing across the Americas'. Below the popup, the email thread is visible, including messages from Maya Robinson, Hayden Cook, and Shai Shemesh. The right pane shows a draft response for Maya Robinson's email, with Copilot-generated suggestions like 'Accept invitation thankfully', 'Decline gracefully', and 'Might make it, will confirm later'.

Copilot writes, edits, summarizes, creates right alongside you

Copilot in Word

Some example prompts you can ask Copilot

- Draft a two-page project proposal based on the data from [document] and [spreadsheet].
- Make the third paragraph more concise. Change the tone of the document to be more casual.
- Create a 1-page draft based on this rough outline.

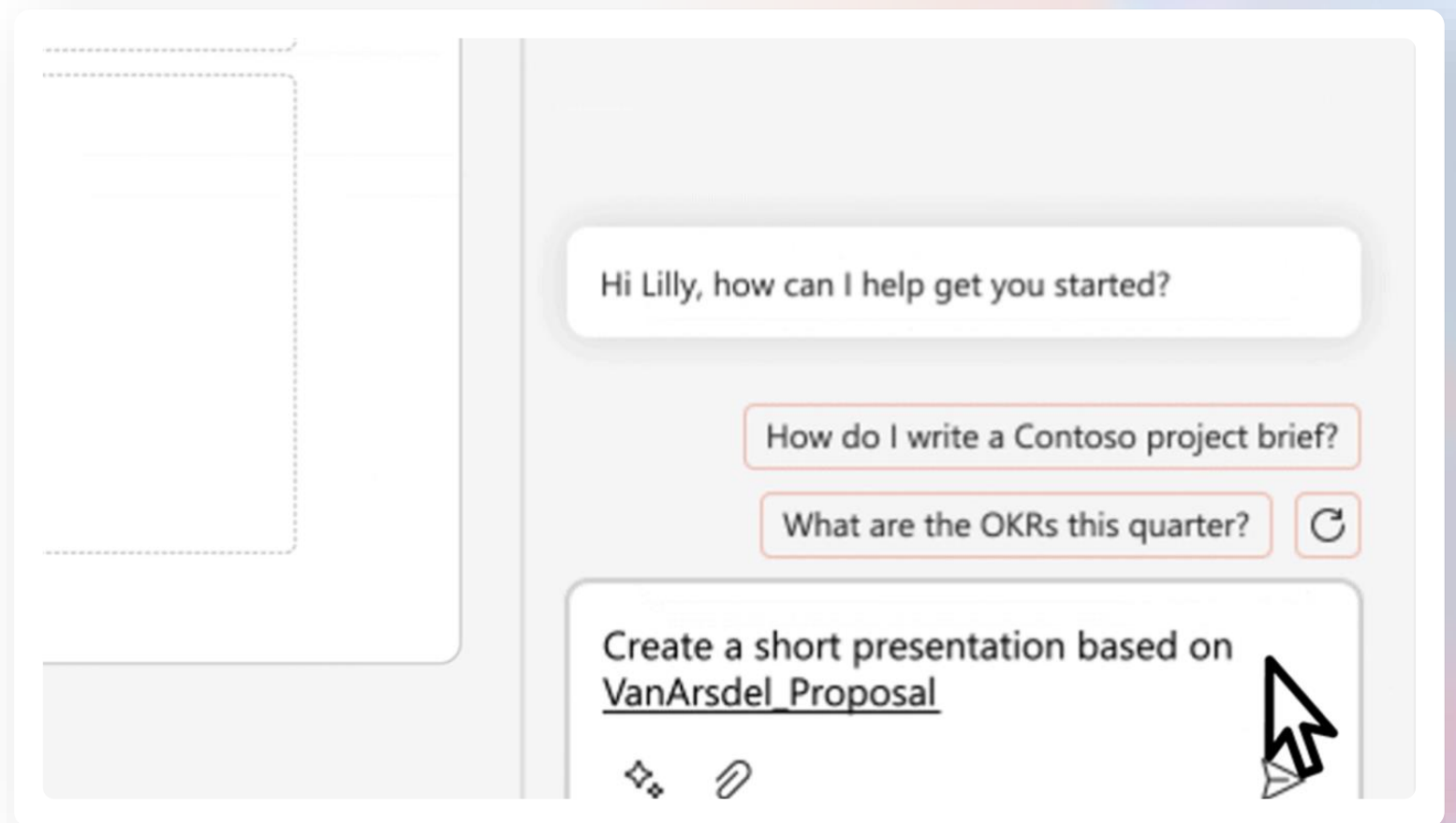


Copilot helps you turn your ideas into stunning presentations

Copilot in PowerPoint

Some example prompts you can ask Copilot

- Create a five-slide presentation based on a Word document, include relevant stock photos.
- Consolidate this presentation into a three-slide summary.
- Reformat these three bullets into three columns, each with a picture.

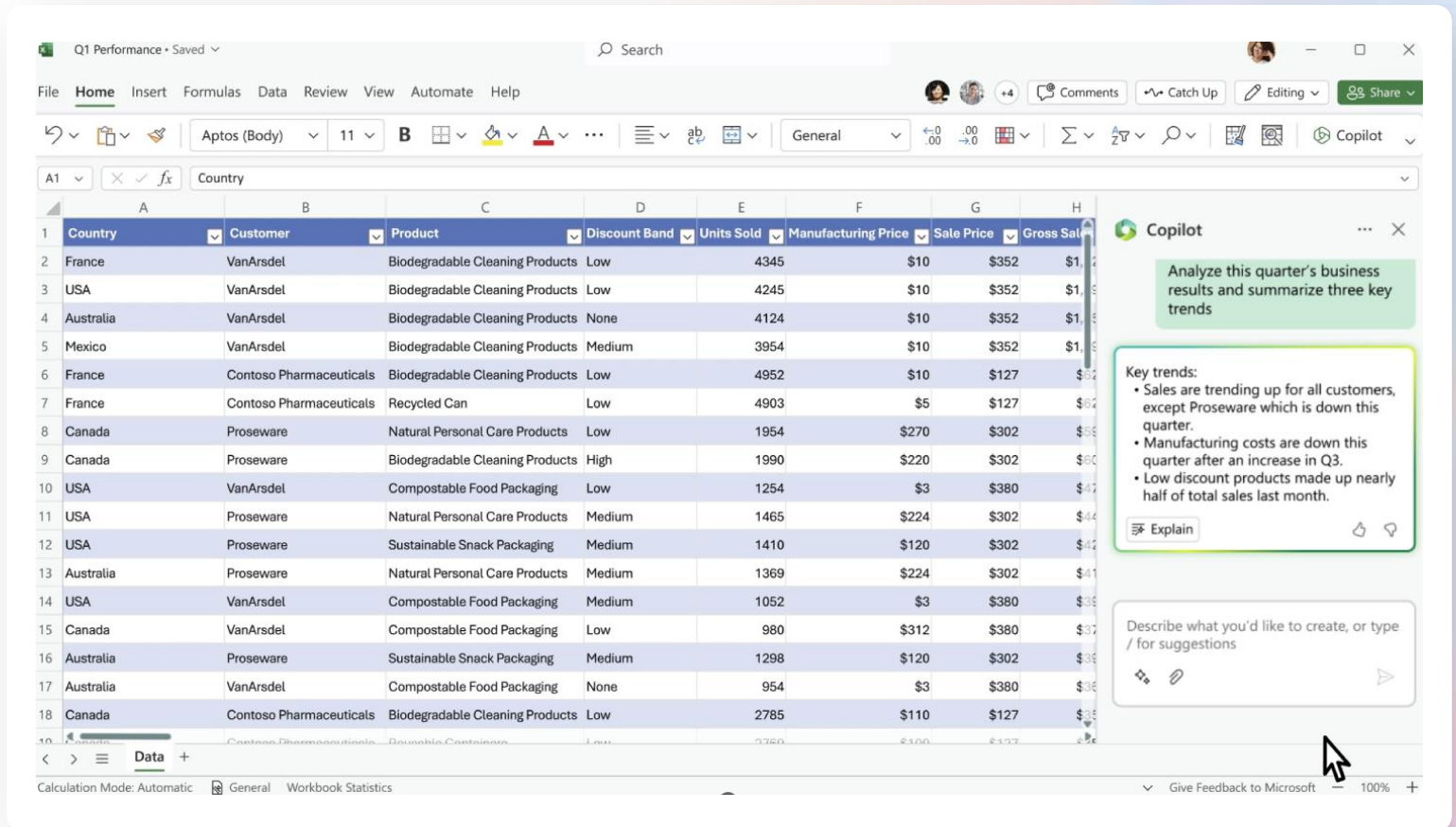


Copilot works alongside you to help analyze and explore your data

Copilot in Excel

Some example prompts you can ask Copilot

- Give a breakdown of the sales by type and channel. Insert a table.
- Project the impact of [variable] and generate a chart to help visualize it.
- Model how a change to the growth rate for [variable] would impact my gross margin.



The screenshot shows the Microsoft Excel interface with a data table and the Copilot sidebar. The data table has the following columns: Country, Customer, Product, Discount Band, Units Sold, Manufacturing Price, Sale Price, and Gross Sales. The Copilot sidebar is on the right, displaying a prompt: "Analyze this quarter's business results and summarize three key trends". Below the prompt, it shows "Key trends:" with three bullet points: "Sales are trending up for all customers, except Proseware which is down this quarter.", "Manufacturing costs are down this quarter after an increase in Q3.", and "Low discount products made up nearly half of total sales last month." There is an "Explain" button and a thumbs up/down icon. At the bottom of the sidebar, there is a text input field: "Describe what you'd like to create, or type / for suggestions" with a search icon and a right arrow.

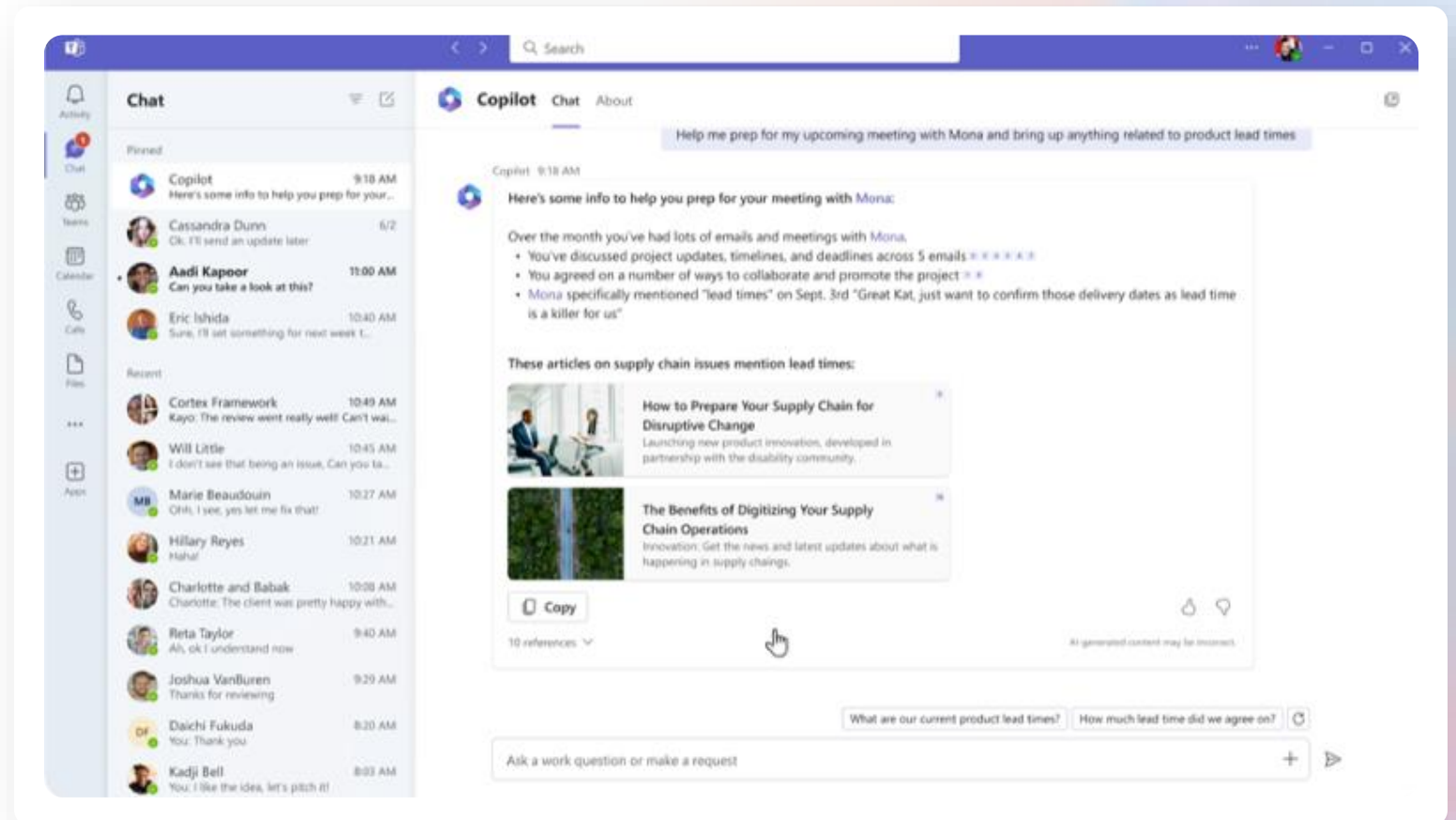
Country	Customer	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales
France	VanArsdel	Biodegradable Cleaning Products	Low	4345	\$10	\$352	\$1,530
USA	VanArsdel	Biodegradable Cleaning Products	Low	4245	\$10	\$352	\$1,500
Australia	VanArsdel	Biodegradable Cleaning Products	None	4124	\$10	\$352	\$1,472
Mexico	VanArsdel	Biodegradable Cleaning Products	Medium	3954	\$10	\$352	\$1,412
France	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	4952	\$10	\$127	\$629
France	Contoso Pharmaceuticals	Recycled Can	Low	4903	\$5	\$127	\$623
Canada	Proseware	Natural Personal Care Products	Low	1954	\$270	\$302	\$591
Canada	Proseware	Biodegradable Cleaning Products	High	1990	\$220	\$302	\$600
USA	VanArsdel	Compostable Food Packaging	Low	1254	\$3	\$380	\$477
USA	Proseware	Natural Personal Care Products	Medium	1465	\$224	\$302	\$441
USA	Proseware	Sustainable Snack Packaging	Medium	1410	\$120	\$302	\$425
Australia	Proseware	Natural Personal Care Products	Medium	1369	\$224	\$302	\$413
USA	VanArsdel	Compostable Food Packaging	Medium	1052	\$3	\$380	\$399
Canada	VanArsdel	Compostable Food Packaging	Low	980	\$312	\$380	\$372
Australia	Proseware	Sustainable Snack Packaging	Medium	1298	\$120	\$302	\$390
Australia	VanArsdel	Compostable Food Packaging	None	954	\$3	\$380	\$361
Canada	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	2785	\$110	\$127	\$354

Copilot works alongside you, to bring together data from your documents, presentations, emails, calendar, notes, and contacts



Some example prompts you can ask Copilot

- Summarize the chats, emails, and documents about [customer].
- What is the next milestone on [project]. Are there any risks?
- Write a planning overview in the style of [file A] that contains the timeline from [file B] and incorporates the project list in the email from [person].





Demo: A Day in the Life of TechSphere Solutions

A human-imagined & AI-generated journey



TechSphere Solutions & Project Voyager

TechSphere Solutions

- Software and AI company located in Nevada, USA
- Mission: To revolutionize field operations with innovative technology.
- Vision: Enable businesses to achieve peak efficiency and connectivity.

Project Codename “Voyager”

- Current software project scheduled to be released in 2025
- Voyager optimizes operations via real-time updates, smart scheduling, and detailed analytics.
- Designed to boost efficiency, enhance decision-making, and elevate customer satisfaction.

The Team

- **Alex Rivera:** Leads projects to success.
- **Jordan Lee:** Guides technical excellence.
- **Mia Chen:** Connects Voyager with markets.
- **Samira Patel & Derek Huang:** Craft Voyager's backbone and user experience.

Inbox

Mia Chen; Jordan Lee; ... [Important] Kickoff - D...

Today

Microsoft on behalf of your orga... Copilot feedback logs ... 9:43 AM

Alex Rivera MTG | Project "Codena... 8:43 AM

Last week

James Spignardo "Voyager" Sales Projecti... Thu 4/11

This month

You have new messages in Teams James and Snerdley sent... Thu 4/4

[Important] Kickoff - Detailed Plan for New Software Product Launch

Summary by Copilot



Mia Chen

To: Jordan Lee; Alex Rivera; Samira Patel; Codename Voyager

Fri 3/22/2024 4:26 PM

All,

Jordan's point on inclusivity is vital. As we refine our marketing strategy, let's ensure our messaging is universally appealing and accessible. This commitment to inclusivity should be a cornerstone of our project's identity.

Best, Mia

Reply Reply all Forward



Jordan Lee

Team, Building on Derek's point, ensuring our software is accessible is crucial. Let's not forget about inclusiv...

Fri 3/22/2024 4:25 PM



Alex Rivera

Good morning

Blank document

Welcome to Word

Insert your first table of cont...

Banner calendar

Horizontal calendar (Sunday...

More templates →

Search

Recommended for You

Voyager Application Source Code Overview

Introduction

TechSphere Solutions proudly presents Voyager, our flagship mobile software solution crafted to streamline efficiency in field operations. This document delves into the technical scaffolding that powers Voyager, offering developers and stakeholders a transparent view into its architectural design, functionality, and innovation at its core.

Technology Stack

Voyager harnesses a robust technology stack, meticulously chosen to ensure scalability,

Voyager Application Source Code...

You recently opened this

Thu at 4:55 PM

Voyager User Experience Design Guide

Introduction

TechSphere Solutions introduces the Voyager User Experience (UX) Design Guide as a comprehensive manual for crafting an intuitive and engaging interface for Voyager, our flagship mobile solution aimed at optimizing field operations. This guide articulates our commitment to user-centric design, ensuring that every interaction with Voyager is straightforward, efficient, and satisfying.

Design Principles

- Simplicity:** Keep interfaces clean and uncluttered.
- Consistency:** Use familiar UI elements and color schemes to reduce the learning curve.
- Feedback:** Provide immediate and meaningful feedback for user actions.
- Accessibility:** Ensure the app is usable by people with a wide range of abilities.

User Research

Detailed insights from user interviews, surveys, and field studies conducted across various industries to understand the challenges faced in field operations. Key findings

Voyager User Experience Design...

You recently opened this

Thu at 4:55 PM

Voyager - Sales Battlecard

Voyager by TechSphere Solutions	
Product	Mobile software solution
Industry	Mobile software industry
Target Market	SMBs within the logistics and supply chain sectors in North America and Europe.
Value Proposition	All above insights for enhanced decision-making and operational efficiency.

Voyager - Sales Battlecard

You edited this

Tue at 1:49 PM

Recent Pinned Shared with Me



Name

Date modified



Voyager Application Source Code Overview

Codename Voyager » Shared Documents » Working Project Docs

Thu at 4:55 PM



Voyager User Experience Design Guide

Codename Voyager » Shared Documents » Working Project Docs

Thu at 4:55 PM



Home



New



Open

Account

Feedback

Options

Inbox

 [Draft] Mia Chen; Jord...
 [Important] Kickoff - D...

Today

 Microsoft on behalf of your orga...
 Copilot feedback logs ... 9:43 AM
 A global administrator in your or...

 Alex Rivera
 MTG | Project "Codena... 8:43 AM
 No preview is available.

Last week

 James Spignardo
 "Voyager" Sales Projecti... Thu 4/11
 Hi Alex, I hope you're doing well ...

This month

 You have new m...
 James and Snerdley sent... Thu 4/4
 Hey Alex. I can squeeze you in for...

[Important] Kickoff - Detailed Plan for New Software Product Launch

Summary by Copilot

Send To: Codename Voyager

We are at a crucial stage of this project, and I want to emphasize how important it is to stay on top of all the details as we move forward. Our success will depend on our ability to execute our plan with precision and attention to detail. We can't afford to lose sight of our vision or compromise on quality.

I am so proud of the work we have done so far as a team, and I appreciate your dedication and enthusiasm. You are all amazing, and I am lucky to work with you. Let's keep up the good work, and support each other as we face new challenges. Remember, every detail counts, and we all have a role to play in making this project a success. Let's continue to push ourselves to achieve excellence in all that we do.

Thank you for your hard work and commitment. If you have any questions or concerns, please don't hesitate to reach out to me. I am here to help you in any way I can.

Sincerely,
 Alex Rivera

Pinned

All apps >



Edge



Word



Excel



PowerPoint



Visual Studio
2022



Ubuntu on
Windows



Settings



OneNote



File Explorer



Recommended

More >



Dev Home
Recently added



Microsoft Teams
Recently added



Outlook (new)
Recently added



MTG Project Codename Voyager S...
Derek Huang edited



Voyager - Sales Battlecard
You edited



MTG | Project "Codename Voyager...
21h ago



Alex Rivera



Search



11:33 AM

4/16/2024



Windows 11 Enterprise Evaluation
Windows License valid for 90 days
Build 22621.01_release.220506-1258



Search



Your status message is showing in chat and channels when people message or @mention you.



Activity



Chat



Teams



Calendar



Calls



OneDrive



Copilot



Viva Insights



Apps

New chat



Copilot

For Microsoft 365

What's new?

What's the latest from **person**, organized by emails, chats, and files?

How to

How do I write a request for proposal?

Don't miss out

Summarize Teams messages where I was @mentioned this week.

Get calendar info

When's my next meeting with **person** ?

Help me write

Write an email to my team about our top priorities for next quarter from **file**

Prep for that meeting

Help me prepare for **meeting**

View prompts

Use / to insert people, files and more



April 2024

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
OneDrive	23	24	25	26	27	
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Add calendar

My calendars

Calendar

Show all

Today < > April 16-17, 2024

Home C	Tue 16	Wed 17
2 PM		
3 PM		
4 PM	Test of Transcription Microsoft Teams Meeting Jordan Lee	
5 PM	Voyager Make-Up Meeting Microsoft Teams Meeting Alex Rivera	
6 PM		
7 PM		
8 PM		
9 PM		



Webinar Part 2

Tuesday, April 30 @ 11:00 AM EST

Copilot for Microsoft 365 Use Cases that Create Positive ROI

- Learn how to identify Copilot use cases
- Calculate ROI and get executive buy-in
 - **Get our Copilot for Microsoft 365 calculator!**
- Understand technical readiness so you can start your pilot with confidence

Save Your
Spot!





THANK YOU FOR JOINING US | [PROARCH.COM](https://proarch.com)