



# Copilot for Microsoft 365 Scenario Library

Demos, use cases, instructions, and prompt guidance

# The Pace and Volume of Work have only increased

64%

of employees don't have  
enough time or energy  
to do their job

3x

More meetings  
than 2020

18

Searches  
per day

# Copilot brings AI to everyone. Support roles like...

## Executive

CEO  
CIO  
CMO  
GM  
President  
Sr Manager  
Team Leader

## HR

Employment Specialist  
HR Assistant  
Recruiter  
Labor Relations  
Payroll Specialist  
Learning Lead

## Operations

Operations Analyst  
Operations Manager  
Quality Control Lead

## Sales

Account Executive  
Quality analyst  
Onboarding Specialist  
Sales Associate  
Sales Engineer  
Sales Representative

## Marketing

Brand Manager  
Content Strategist  
Creative Director  
Graphic Designer  
Market Researcher  
Product Marketing Manager

## Finance

Accountant  
Financial Analyst  
Finance Manager  
Investment Manager  
Financial Advisor  
Risk Specialist

## IT

Cybersecurity Analyst  
Help desk Support  
Hardware Technician  
IT Project Manager  
Network Administrator  
Software Developer

# Use Cases

Keep  
**Executives**  
informed

Streamline  
**Finance**  
decisions

Boost  
**Marketing**  
speed and creativity

Amplify **IT**  
efficiency

Keep your  
**Operations**  
running smoothly

Help **HR** with  
hiring and  
engagement

Give your **Sales**  
team an AI assistant  
to close deals





# Copilot for Microsoft 365

## AI for Executives



## Your Personal AI Assistant

**68% of people**  
say they don't have enough uninterrupted  
focus time during the workday



# Prepare for a company-wide address

Executives are always pressed for time and Copilot simplifies many tasks in preparing for a meeting. But some things have to be perfect. Copilot also improves work quality so big events can happen flawlessly.

## 68% of people

say they don't have enough focus time during the workday

Microsoft WorkLab Work Trend Index, May 2023



**Microsoft Copilot**

Quickly catch up on the latest developments and discussions related to the announcement by summarizing email threads and chat conversations.



**Copilot in Teams**

Meet with the executive team to review each business unit's results. When closing the meeting ask Copilot to create action items from the conversation and assign owners.



**Copilot in Word**

Revise the draft of the speech, asking Copilot to make it resonate more with the workers at the speech location.



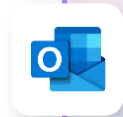
**Copilot in PowerPoint**

Revise the presentation slides changing out a few images with suggestions from Copilot.



**Copilot in Teams**

Review last quarter's address by glancing over the meeting recap and asking Copilot about the numbers that were presented to ensure consistency.



**Copilot in Outlook**

Thank the team for watching the address by asking Copilot to draft a response that can be personalized in tone and length, even on the go.

[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)

# Prepare for a company-wide address



## Catch up

On chats and emails by prompting Microsoft Copilot

**Summarize** my emails and chats from the past week that mention the year-end results.



## Gather team input

From the meeting recap prompt Copilot in Teams

**Generate a list** of the key points made by each speaker.



## Revise the speech

Within the Word document select a paragraph and Copilot will offer several ways you could rewrite it

**Rewrite with Copilot.**



## Create the invitation

From a new email select Draft with Copilot

**Draft a detailed email** thanking all employees for attending the year-end review. Make the tone friendly and mention how excited we are to continue our progress in the new year.



## Review last quarter's speech

From the meeting recap prompt Copilot in Team

**Summarize the meeting** and list the key points. Tell me all of the revenue numbers that were presented



## Revise the presentation slides

Within the presentation prompt Copilot

**Add an image** of an inspiring landscape of a mountain to match the company motto – "We overcome every obstacle"







# A day in the life of an Executive

7:00 AM

Tanya starts the day with a customer call in her hotel room. She uses Copilot to monitor for any disagreements.



Copilot in Teams

**What are some good follow up questions** to make sure I understand the customer's issue with the last delivery?

8:30 AM

After the call, Tanya summarizes her email threads from the day before and uses Copilot to create replies getting through all of her email in only 20 minutes.



Copilot in Outlook

**Reply in a professional tone** with a short email saying that I am sorry for the issue with the product and we will have a response by 3 pm this afternoon.

9:00 AM

Tanya has a few more minutes so she uses Copilot to catch up on the meetings she missed while flying in. She sends a few chats to provide instructions on the critical issues.



Copilot in Teams

**What was the main issue** faced by the customer and what was the proposed solution and timing?

7:00 PM

The issue is finally under control and Tanya can get back to her speech. She isn't happy with the introduction, so she asks Copilot to suggest some humorous opening lines for her speech. With a few tweaks she has the perfect start.



Copilot in Word

**Give me some suggestions** of humorous ways to begin this speech.

3:00 PM

A critical production issue has occurred, and Tanya needs to get up to speed quickly. She asks Copilot for a summary of the emails and chats related to the issue



Microsoft Copilot

**Summarize** all of the email and chats that mention the melt shop from the past two hours.

2:00 PM

After a long session of meetings at a customer site, Tanya gets a chance to have a look at her speech for tomorrow and make a few updates. She uses Copilot to add a new section on bonus plan updates.



Copilot in Word

**Add a new paragraph** based on [Contoso Bonus Plan for FY23](#).



Tanya leads a product development team



# Copilot for Microsoft 365 AI for HR



Banish your busywork

**3 in 4 people**  
would be comfortable using  
AI for administrative tasks

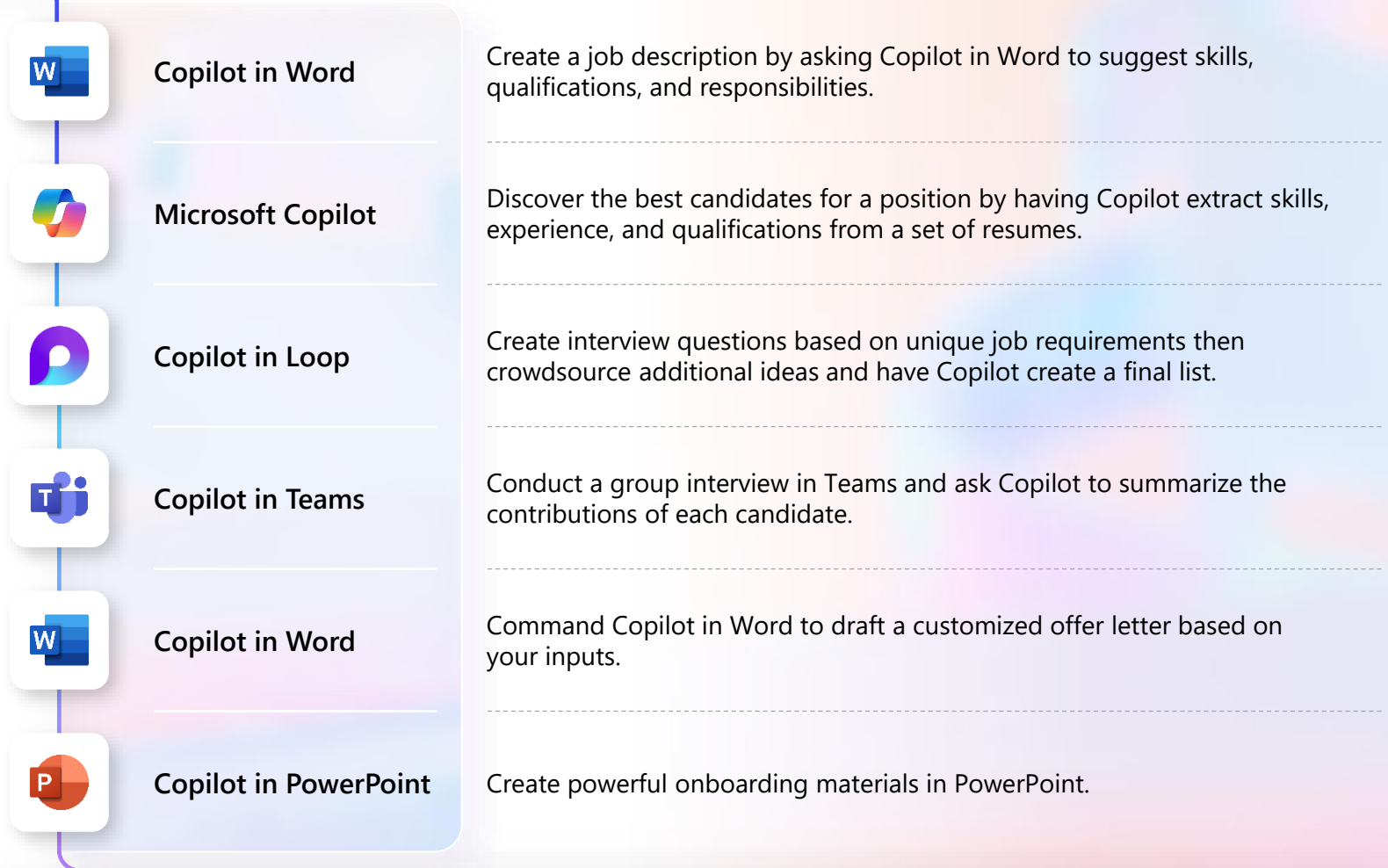
# Copilot for Microsoft 365 augmented hiring workflow



Hiring and onboarding typically costs a full year's salary for each employee lost to attrition. Copilot for Microsoft 365 can help you create a more efficient hiring process that reduces costs and help ensure that you are selecting the most suitable candidates.

**3 in 4 people**

would be comfortable using AI for administrative tasks



[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)

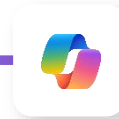
# Copilot for Microsoft 365 augmented hiring workflow



## Create a job description

Starting from a blank document prompt Copilot in Word

Create a job description for a senior animation designer role, based on the [Design Team Core Responsibility](#) document.



## Discover qualified candidates

Prompt Copilot in Microsoft Copilot

Based on [Candidate #1 resume](#) provide a summary of the skills, experience, and qualifications of the candidate.



## Create interview questions

Prompt Copilot in Loop to create a set of interview questions

Create a set of interview questions for the position of Senior Animation Designer. Ask about previous experience, goals, and include some questions about personal interests.



## Conduct an interview

During the interview prompt Copilot in Teams

What would some good follow up questions be based on what we have already discussed and are there any questions that I have not answered?



## Create an offer letter

Starting in a new email prompt Copilot in Word prompt

Create an offer letter to Maya for the position of Senior Animation Designer with a start date of March 16<sup>th</sup>. Include details on our benefits from our [Benefits Handbook](#).



## Create onboarding materials

Starting with a new presentation prompt Copilot

Create a presentation from [Word document link to Senior Animation Designer Job Description] Create an overview the job responsibilities .



# A day in the life of an HR manager

8:00 AM

Omar starts the day at home with an interview for a new teller candidate. He commands Copilot to suggest follow up questions and summarize the key points the candidate made.



Copilot in Teams

What are some good follow up questions to learn more about this person's skills and experience?

9:35 AM

At the office Omar summarizes some chat threads that occurred overnight at a subsidiary and can quickly assess the situation and provide guidance to his team to address the issue.



Copilot in Teams

Summarize this thread and include the key issues and suggestions for resolution along with who had the suggestions.

10:00 AM

Omar asks Copilot to create a summary of the organization's new compliance handbook to ensure it has the key points. He then commands Copilot to fill in the missing sections.



Copilot in Word

Summarize the [Contoso Compliance Handbook](#) in about four paragraphs for an executive and also provide a list of key points.

4:00 PM

Omar has missed a few calls and emails. He commands Copilot to summarize the email threads and then uses the summaries to draft responses.



Copilot in Outlook

Summarize this thread.

2:00 PM

Omar commands Copilot to add a slide to his presentation that can be used to explain the team's initiatives.



Copilot in PowerPoint

Add a slide about potential HR initiatives

1:00 PM

The bank has recently initiated some employee experience initiatives, so Omar checks the latest attrition numbers in Excel and asks Copilot to add some calculations and produce a chart for his presentation to his leadership team.



Copilot in Excel

Add a column that averages the other columns for each month.



Omar leads HR for a regional bank



# Copilot for Microsoft 365

## AI for Operations



Capture actions to keep operations running

**80% of people**  
would be comfortable using AI to summarize  
meetings and action items



# Solve a production issue with Copilot for Microsoft 365



Production issues cost money so solving them quickly is always a top priority. Using Copilot for Microsoft 365 to identify issues and find solutions can reduce the cost of lost production.

## 80% of people

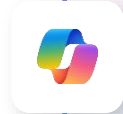
would be comfortable using AI to summarize meetings and action items

Microsoft WorkLab Work Trend Index, May 2023



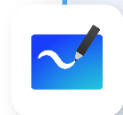
### Copilot in Excel

Discover production defect rates for Six Sigma reporting using Copilot in Excel to suggest new calculations and produce charts.



### Microsoft Copilot

Discover solutions to similar production issues using Microsoft Copilot to search internal files.



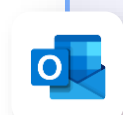
### Copilot in Whiteboard

Organize the ideas after a whiteboarding session for potential solutions.



### Copilot in Teams

Hold a weekly meeting to track the implementation of the solution. Use Copilot to summarize each meeting and list open items.



### Copilot in Outlook

Create an email to the engineering and production employees thanking them for their extra work in resolving the issue.



### Copilot in PowerPoint

Create a presentation on the root cause analysis based on the analysis report.

[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)

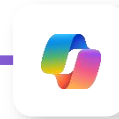
# Solve a production issue with Copilot for Microsoft 365



## Analyze production data

Using a table of Six Sigma data select the prompt Show data insights

Show data insights.



## Discover past solutions

From Microsoft365.com prompt Copilot in Microsoft Copilot

Find information on troubleshooting our current production equipment from across the equipment manuals. Look for information on how to reset the processor.



## Brainstorm new solutions

After collecting the ideas click on Organize using Copilot in Whiteboard

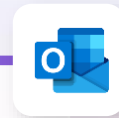
Organize



## Summarize the weekly status meeting

From the meeting recap prompt Copilot in Teams

Summarize the meeting and list the action items discussed and their current status.. List all of the decisions that were made and issues that were resolved.



## Thank employees for their work

Starting in a new email prompt Copilot in Outlook

Create an email thanking all the people who helped to identify the issue and implement the solution. Include that we resumed full production on Tuesday at 6 pm and limited the shutdown to 3 days.



## Create a root cause analysis report

Starting with a new presentation prompt Copilot

Create a presentation that summarizes [Word document link to Production issue root cause analysis report.docx]



# A day in the life of an Operations manager



7:00 AM

Megan meets with the production team at the overseas manufacturing site to discuss changes required for new product updates.



Copilot in Teams

**What are some good follow up questions** to make sure I understand the impact on the manufacturing process for each product update we discussed?

8:30 AM

At the office Megan reviews the manufacturing cost impacts of suggested product design changes.



Copilot in Excel

**Add a column** that totals the additional costs for the priority 1 updates.

9:00 AM

Megan asks Copilot to create a new presentation based on the Product Design Guidelines and then she copies in the charts from the cost analysis.



Copilot in PowerPoint

**Create a presentation** from [Word document link to Project Contoso Product Design Guidelines]

4:00 PM

Megan needs to finish up the leadership white paper for her new product proposals. She asks Copilot to revise some of the sections and adds an executive summary.



Copilot in Word

**I need to share the main points** in an executive summary. Write three paragraphs that include why these points are important to our company.

2:00 PM

After a lunch meeting, Megan uses Copilot to summarize her new emails and draft responses. She also reviews the recap of a meeting she missed and asks Copilot to list her action items.



Copilot in Teams

**What are the action items from the meeting** include who proposed the item and who was designated as being responsible.

11:00 AM

Catching up on requests for time off, Megan asks Copilot to find all emails from this month asking for time off. The requests all look good, so she asks Copilot to draft approval messages.



Microsoft Copilot

**Find all of the emails** I received this month where people are asking for time off.

Megan leads a product development team



# Copilot for Microsoft 365 AI for Sales



Give your sales team an AI assistant

**86% of people**  
are looking for AI to assist with  
finding the right information



# Deliver better sales presentations with an AI assistant

From conducting industry research to creating proposals, Copilot works alongside sales teams, handling administrative and routine, repetitive tasks. As a result, they can save time and focus on building pipeline and closing deals. .

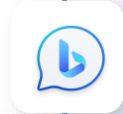
## 86% of people

are looking for AI to assist with finding the right information



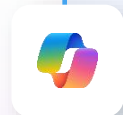
**Copilot in Loop**

Refine the customer discovery session goals and components using Copilot in Loop.



**Microsoft Copilot**

Discover information on the customer using Microsoft Copilot to summarize their Annual Report for goals, risks, and financial information.



**Microsoft Copilot**

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.



**Copilot in PowerPoint**

Refine a sales presentation with a new slide using customer details from the email summary and visuals relevant to their industry.



**Copilot in Teams**

Give the customer your full attention in the meeting by relying on Copilot to handle note taking. Ask Copilot to summarize the meeting and provide detailed action items.



**Copilot in Word**

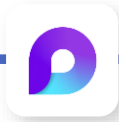
Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.

[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)

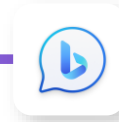
# Deliver better sales presentations with an AI assistant



## Refine a discovery session

Prompt Copilot in Loop

**Create a set of questions** for a customer discovery session focused on the primary use cases for the product.



## Discover company information

Prompt Microsoft Copilot in the Edge browser sidebar

**Summarize** the Contoso annual report including goals, risks, and financial metrics.



## Find the asks in your emails

From the Microsoft Copilot app in Teams prompt

**Provide me with a bulleted list** of notes from my emails mentioning Fabrikam over the last two weeks.



## Update the sales presentation

In the existing presentation prompt

**Add a slide about** [copy in email summary from Microsoft Copilot] and include an image appropriate for the medical industry.



## Summarize the meeting

From the meeting recap prompt Copilot in Teams

**Summarize the meeting** and list the action items discussed and their current status.



## Create the proposal

Starting with a new document prompt Copilot

**Create a proposal based on** [Contoso Sales Presentation.pptx](#) and [Sales Meeting Notes.docx](#).



# A day in the life of a Sales Lead

8:00 AM

Cassandra needs to prepare for her big pitch to Contoso so she summarizes the emails and chats from her main client.



Microsoft Copilot

**Summarize** all of the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 AM

Cassandra commands Copilot to create a message to confirm the meeting.



Copilot in Outlook

**Draft an email** to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 AM

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot to create some amazing charts to showcase the value of the offer.



Copilot in Excel

**Show all data insights.**

4:00 PM

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and commands Copilot to summarize the conversation to quickly catch up.



Copilot in Teams

**Summarize this chat** and make sure to include the key points and who made them.

2:00 PM

It's time for the pitch. Cassandra can focus on her presentation knowing Copilot is taking notes. She commands Copilot to list the questions asked so she can be sure everything gets answered during the call.



Copilot in Teams

**What questions were asked** during the meeting that have not been answered?

11:00 AM

Cassandra puts the final touches on the pitch presentation by adding a slide based on the summary of the annual report she had Copilot draft.



Copilot in PowerPoint

**Add a slide** based on [copy in annual report summary]



Cassandra is a sales lead at Contoso





# Copilot for Microsoft 365

## AI for Marketing



No one needs to start from scratch

**73% of people**  
are comfortable using AI for creative work



# Create a marketing pitch in record time

From developing strategic marketing plans, to collaborating with other teams, to composing copy, Copilot works alongside marketing teams, so they can focus on turning ideas into qualified revenue opportunities.

**73% of people**  
are comfortable using AI  
for creative work



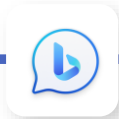
[Learn more](#)

[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)

# Create a marketing pitch in record time



## Discover market research

In the Edge sidebar prompt

**Give me the latest information** on the top five markets for new widgets and the key competitors in those markets with a description of their products.



## Discover market trends

Select the Show data insights prompt in Copilot in Excel

**Show data insights.**



## Create a promotion plan

Prompt Copilot in Word

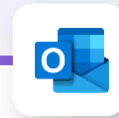
**Generate a promotion plan** for the widget market and include 10 potential taglines that would be appropriate for markets in Latin America.



## Create a pitch deck

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

**Create presentation from** [Word document link to Contoso widget design document.docx]



## Create an offer letter

Starting in a new email, prompt Copilot in Outlook

**Draft a promotional email** using the tagline "A better widget for all" and highlight the following product features listed below

- Lasts a long time
- Etc.



## Create social media posts

Start a new chat and prompt Copilot

**Create a series** of LinkedIn posts based on [Contoso Product Description](#) and [Contoso Marketing Plan](#).



# A day in the life of a Marketing Manager

8:00 AM

Daichi uses Copilot to prepare a brief to give to the agencies bidding on a new advertising campaign.



Copilot in Word

Prepare a brief outlining the advertising strategy from [Contoso widget marketing plan](#). Include sections on target market, pricing, tone, imagery, and taglines.

8:30 AM

Daichi meets with his team to brainstorm feature enhancements based on customer feedback. Copilot categorizes the ideas for easier discussion.



Copilot in Whiteboard

Categorize the ideas.

10:00 AM

Daichi must analyze the marketing data from the latest round of surveys. He uses Copilot to prepare charts so he can see the trends in the data.



Copilot in Excel

Show all data insights.

4:00 PM

Daichi needs to catch up on email before he heads out for the day. Copilot speeds the work by summarizing email threads and preparing draft responses.



Copilot in Outlook

Ask for more details.

2:00 PM

Daichi updates the roadmap deck to reflect the commitments from the engineering team meeting.



Copilot in PowerPoint

Add a slide based on [copy in bulleted list of roadmap updates]

11:00 AM

Daichi meets with the engineering team to plan the development of new features. During the meeting he uses Copilot to understand the prioritization of the features.



Copilot in Teams

Create a table to categorize the features discussed so far by priority.



Daichi is a marketing manager at Contoso



# Copilot for Microsoft 365 AI for Finance



Streamline financial decisions

**79% of people**  
are comfortable using AI  
for analytical work

# Complete an acquisition with Copilot for Microsoft 365



From forecasting to financial reporting to drafting stakeholder communications, Copilot works alongside finance teams, so their time is spent on the high-value tasks that make the biggest impact.

**79% of people** are comfortable using AI for analytical work



**Microsoft Copilot**

Summarize the due diligence information from the operations and legal team.



**Copilot in Excel**

Discover the organization's past financial information and verify revenue projections.



**Copilot in Teams**

Meet with the legal team and business development to decide how to structure the deal and get a list of the required legal notifications.



**Copilot in Word**

Add a section to the offer sheet discussing some conditions for the deal based on the meeting transcript.



**Copilot in Excel**

Refine the deal analysis based on the customer negotiations and changes in the economic environment.



**Copilot in PowerPoint**

Create a presentation summarizing the deal for the leadership team.

[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)



# Complete an acquisition with Copilot for Microsoft 365



## Summarize due diligence reports

From the Teams apps prompt Copilot in Microsoft Copilot

Summarize the information in [Fabrikam financial data](#), [Fabrikam operations analysis](#), [Fabrikam integration plan](#).



## Analyze financial data

Using a table to

Show data insights.



## Meet with legal

In the recap tab for the meeting

List all of the legal notifications required for the offer sheet.



## Create an executive presentation

From a new presentation

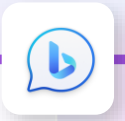
Create presentation from [Word document link to Deal Summary.docx] Be sure to include a summary slide, a conditions slide, and a financials slide



## Refine Deal analysis

From the table in Excel prompt

Add a column to reduce the projected revenue by 3%



## Update offer sheet

From a new line select Draft with Copilot

Add a new section on the conditions for the deal based on [Legal team meeting transcript.docx](#)



# A day in the life of a Financial Analyst

8:00 AM

Hillary begins her day in Excel looking at the latest COGS estimates for a new product. She uses Copilot to filter the data to get the view she wants.



Copilot in Excel

**Sort the data** by product feature and then filter out the Priority 2 features.

9:30 AM

She later meets with her manager and IT to discuss reporting requirements updates from the sales organization. She asks Copilot to summarize the requirements.



Copilot in Teams

**Summarize the meeting** and be sure to list all the reporting requirements that were mentioned.

10:00 AM

Hillary finally gets to her main project for the day and reviews the due diligence information on a potential acquisition target. She asks Copilot to create a summary.



M365 Chat

**Summarize the information in** [Fabrikam financial data](#), [Fabrikam operations analysis](#), [Fabrikam integration plan](#).

4:00 PM

Hillary heads back into Excel to update the acquisition numbers with the latest what-if scenarios and create some charts to go into the business planning presentation.



Copilot in Excel

**What is the impact** of doubling the IT integration budget on the revenue per month?

2:00 PM

Hillary needs to catch up on a chat she started in the morning. She asks Copilot to summarize the thread.



Copilot in Teams

**Summarize this thread** calling out where my name was mentioned and any action items for me.

11:00 AM

After creating an overview of the acquisition in Word, she asks Copilot to turn the document into a presentation for the business development team.



Copilot in PowerPoint

**Create a presentation from** [Word document link to Fabrikam acquisition overview.docx]



Hillary is a financial analyst at Contoso



# Copilot for Microsoft 365 AI for IT



Capture actions to keep operations running

**76% of people**  
are comfortable using AI  
for administrative tasks

# Deploying a critical update with Copilot for Microsoft 365



Planning for a critical update is essential, but there is never enough time. Copilot helps you take care of the simple tasks so you can focus on the details and avoid any issues.

## 76% of people

are comfortable using AI for administrative tasks

Microsoft WorkLab Work Trend Index, May 2023



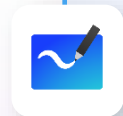
**Microsoft Copilot**

Create a project plan for the upcoming rollout based on a previous project plan and product documentation.



**Copilot in Teams**

Meet with the team to discuss the plan and use Copilot to keep track of unanswered questions.



**Copilot in Whiteboard**

Whiteboard potential risks with the team and command Copilot create an initial list. Then categorize all the items at the end of the session.



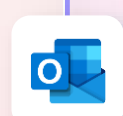
**Copilot in Word**

Revise procedures and change management documents for support teams and admins.



**Copilot in PowerPoint**

Create a presentation for the CIO on the rollout. Use Copilot to create slides based on the project plan.



**Copilot in Outlook**

Create an email to send the updated documentation to the support team.

[Copilot Product Documentation](#)

[Copilot for Microsoft 365 Adoption Site](#)

[How to use Copilot](#)

# Deploying a critical update with Copilot for Microsoft 365



## Create a project plan

From the Teams apps prompt Copilot in Microsoft Copilot

Summarize the information in [Fabrikam product documentation](#).



## Discuss the plan

From the meeting recap prompt Copilot in Teams

Summarize the meeting and list the action items discussed and their current status.



## Brainstorm risks

After collecting all of the ideas Click on Summarize in Copilot in Whiteboard

Summarize.



## Deliver the updates

Starting from a new email select Draft with Copilot

Draft a detailed email from the file [Fabrikam support procedures](#). Make the tone friendly.



## Create an executive update

Starting in a new presentation

Create a presentation from [Word document link to Fabrikam upgrade project plan.docx]



## Revise support procedures

On a new line of the procedure document click on the Draft with Copilot icon

Insert a paragraph on single sign on issue resolution using information from [Fabrikam product documentation](#).



# A day in the life of an IT administrator

7:30 AM

Will arrives at the office and commands Copilot to check his emails and chats for any urgent issues. He uses Copilot in Outlook to draft replies confirming resolution for each issue.



Microsoft Copilot

**Summarize** any incidents that have been reported last night from my email and chat messages.

8:00 AM

He attends the daily standup to discuss priorities for the day. During the meeting Will uses Copilot to check for unanswered questions.



Copilot in Teams

**Tell me** if there are any unanswered questions and make some suggestions for questions that should be asked.

9:00 AM

With no system issues to work on at the moment Will is able to make revisions to a project plan. He commands Copilot to fill in some missing sections.



Copilot in Word

**Create a paragraph** on system setting changes from the [Fabrikam system upgrade documentation](#)

4:00 PM

At the end of the day Will has some time to research new devices for the next laptop upgrade. He commands Copilot to produce a report on the best laptops for business users.



Microsoft Copilot

**What are the most popular** laptops for enterprise organizations this year?

3:00 PM

Will returns to Teams to catch up on a meeting he missed when he had to troubleshoot a server issue. He checks out the recap and asks for the key points and action items.



Copilot in Teams

**Summarize this meeting** and provide the key points and action items

1:30 AM

Will revises his presentation for a meeting with HR on his recommendations for a new employee experience solution that HR has requested. He uses Microsoft Copilot to summarize the product website and then turns it into a slide.



Copilot in PowerPoint

**Add a slide** based on [copy summary of the web site]



Will is an IT administrator at Contoso

See how the apps work – Click on the icon for a demo







# 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

# How to use: Copilot in PowerPoint

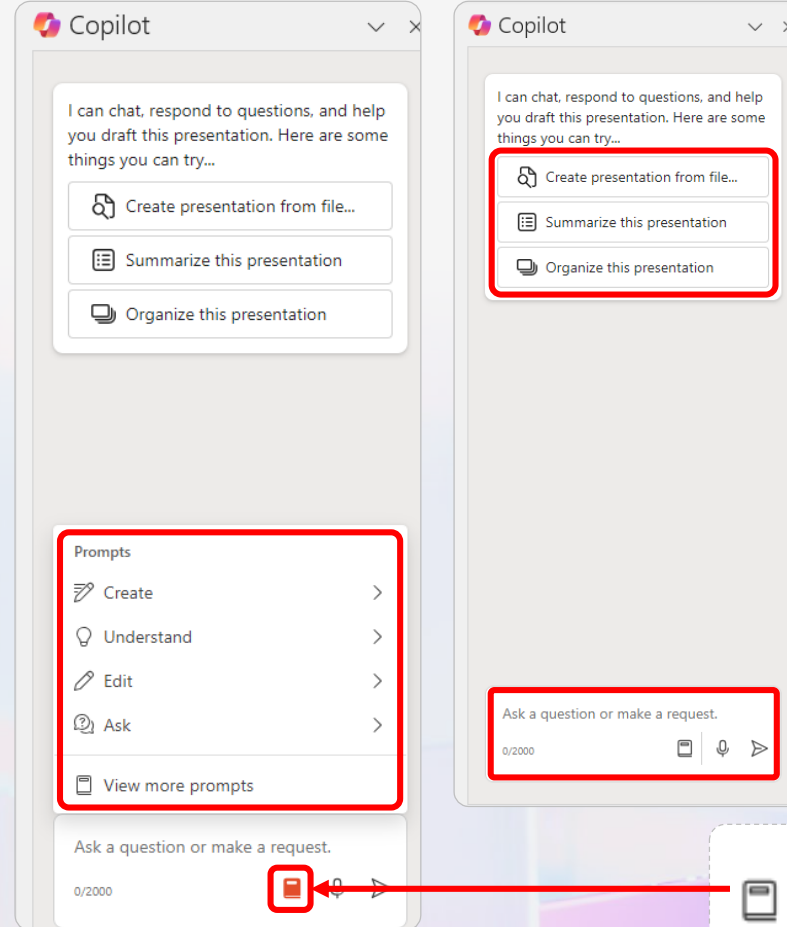
Note the specific prompts shown may vary

## Sample use cases

- Turn an idea into a presentation
- Turn a Word doc into a presentation
- Improve an existing presentation
- Prepare to give a presentation by summarizing key points and creating slide notes

## Use the Copilot chat pane to

- Create
  - Create a presentation from a description
  - Create a presentation from a Word document URL
- Refine (Edit)
  - Add a slide about a topic
  - Add an image based on a description
  - Change the text format
  - Organize the presentation by adding an agenda and creating Sections
- Summarize (Organize)
  - Create a summary
  - Show key slides – Provides a list of slides with important information
- Discover (Understand)
  - Show action items and next steps
  - Ask questions about the presentation
- Command (Ask)
  - Reformat text
  - Create a new slide



Select a predefined prompt in the Copilot sidebar. You can then add more context

Ask general knowledge questions or ask for creative ideas. You'll need to review any content for factual mistakes

Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation

# Find more PowerPoint prompts to try in Copilot Lab



## Add an agenda

Add an agenda slide



## Add images

Add a relevant image to this slide



## Add a summary

Add a slide that summarizes this presentation



## Add a slide

Add a slide about [the benefits of meditation].



## Get a head start

Create a presentation about [team icebreaker activities]



## Generate ideas

Create a presentation about how to [effectively volunteer for non-profit organizations] with a slide about impact



## Create presentations

Create a new presentation based on `file`



## Organize your thoughts

Organize this presentation into sections



## Rewrite this slide

Rewrite the slide to be more persuasive



## Stay on track

Show action items



## Extract key information

Summarize this presentation



## Stay on track

What are the dates and deadlines mentioned in this presentation?



# How to use: Copilot in Word in the document

Note the specific prompts shown may vary

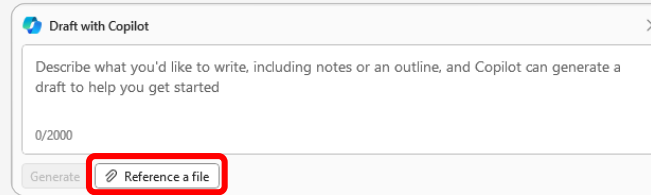


## Sample use cases

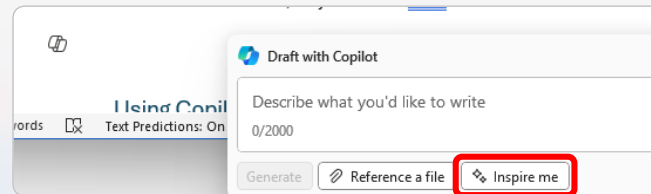
- Turn an outline or idea into text
- Rewrite existing text for length, tone, new phrasing
- Add tables based on the text

## What can you do in the document

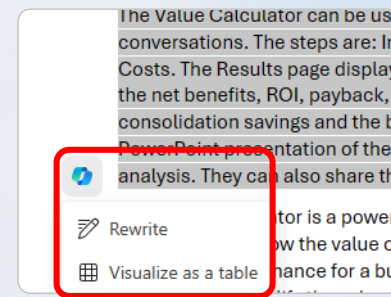
- **Draft with Copilot** – Add content to the Word doc
  - Start from a blank page to create new content using **Reference a file** (up to 3 Word or PowerPoint files) or providing a topic for ungrounded content (ungrounded content will not necessarily be factual)
  - Add new content at any point using **Inspire Me** (to build on existing content), referencing a file for new grounded content, or providing a topic for ungrounded content (ungrounded content will not necessarily be factual)
- Add suggested image (next to the title)
- Put information into a table using **Visualize as a table**




Provide ideas or reference a file



Provide ideas, reference a file, or let Copilot write



Rewrite or add a table

 **Summary of the Value Guide**

Add an image

# How to use: Copilot in Word in the Copilot chat pane



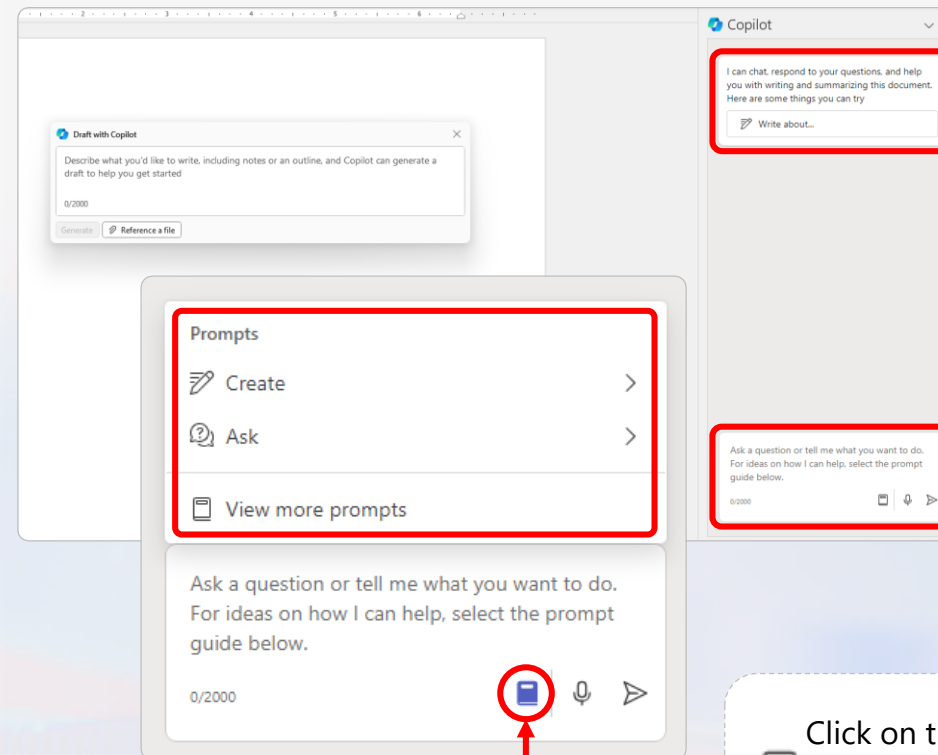
Note the specific prompts shown may vary

## Sample use cases

- Rewrite existing text for length, tone, new phrasing
- Summarize or answer questions about an existing document

## Use the Copilot chat pane to

- Create
  - Create a presentation from a description
  - Create a presentation from a Word document
- Refine
  - Add a slide about a topic
  - Add an image based on a description
  - Change the text format
  - Organize the presentation by adding an agenda and creating Sections
- Summarize
  - Create a summary
  - Show key slides – Provides a list of slides with important information
  - Show action items and next steps
  - Ask questions about the presentation
- Command (Ask)
  - Ask general questions



Select a predefined prompt in the Copilot sidebar. You can then add more context.

Ask general knowledge questions or ask for creative ideas. You'll need to review any content for factual mistakes

Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation



# Find more Word prompts to try in Copilot Lab

## Write an introduction

Write an intro paragraph for this document and make it sound [professional]



## Summarize this doc

Summarize this document [in 3key points]



## List pros and cons

List the pros and cons of [the different project ideas mentioned in this document]



## Add a paragraph

Add a paragraph that captures [the argument of this document]



## Change the font

Change the font to [Segoe UI, 12point]



## Create an overview

Create a high-level overview of [agile product development]



## Outline a business plan

Draft a business plan outline for a [sustainable marketing company]



## Take notes in a meeting

Draft a one-page template that I can use to take notes for a meeting. Include sections for the date and topic



## Understand quickly

Explain this document in three sentences



## Brainstorm team building ideas

Give me ideas for icebreaker activities for a new team



## Improve this document

Give me specific examples from this document on how I can improve it for [a leadership review?]



## Write more confidently

How can I more concisely describe [time management]?



# How to use: Copilot in Teams for chat

Note the specific prompts shown may vary



## Sample use cases

- Catch up on a chat thread with a summary or by getting key points and action items
- Draft a new chat entry in the thread

## In the Teams chat window

- Rewrite a draft and adjust for length and tone

## Use the Copilot chat pane to

- Ask questions about the content of the chat – does not work in Channels
- Summarize over a period of time
- Ask about decisions, open items, tasks
- Ask what a specific person said
- Ask about links

When creating a chat entry click on the Copilot icon to show the **Rewrite** and **Adjust** prompts when drafting a new chat

Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation

When creating a chat entry click on the Copilot icon to show the **Rewrite** and **Adjust** prompts when drafting a new chat

Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation

# How to use: Copilot in Teams during a meeting

Note the specific prompts shown may vary

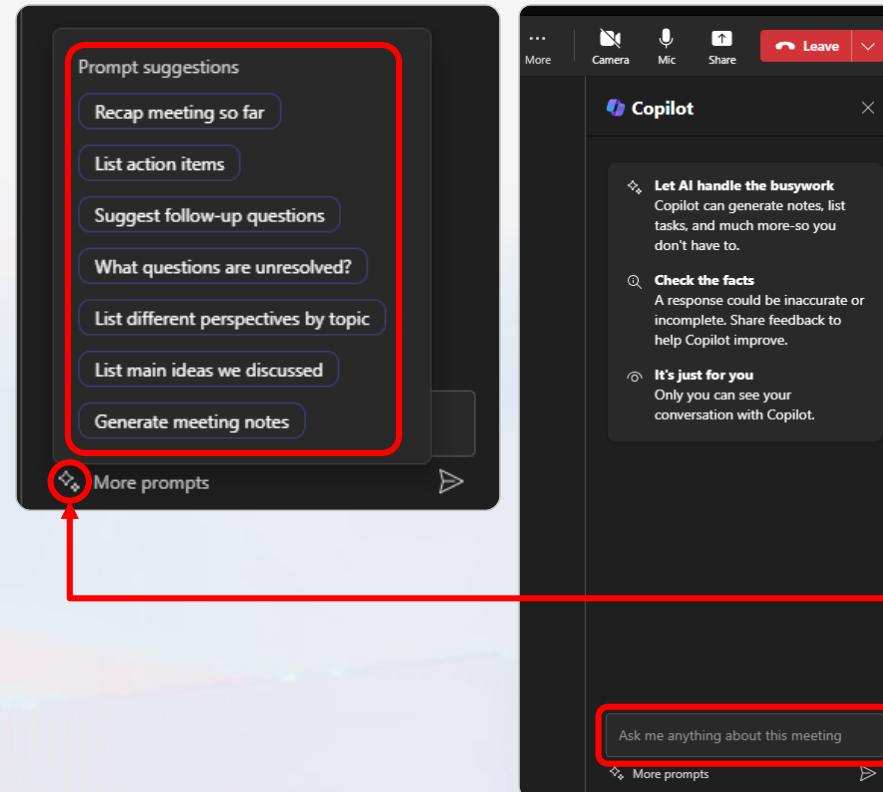


## Sample use cases

- Get help during a meeting with a summary, key points, sentiment, or potential questions
- Catch up on a meeting with a summary or by asking questions
- Works during 1:1 and group calls, Meet Now, Scheduled private meetings, recurring meetings, Channel meetings

## Use the Copilot chat pane to

- Get a summary of the meeting so far
- Key discussion points
- Who said what or what people said
- Where do people disagree
- Suggest action items



Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation



# How to use: Copilot in Teams after a meeting

Note the specific prompts shown may vary



## Sample use cases

- Catch up on a meeting with a summary or by asking questions
- Works for scheduled meetings with a transcript (1:1 and group)

## Use the Copilot chat pane on the Recap tab to

- Recap the meeting
- List action items
- Follow up questions
- Highlight the different perspectives on a topic
- List main ideas

The screenshot displays the Microsoft Teams Copilot interface. At the top, the 'Copilot' icon is highlighted with a red box. Below it, the 'Content' section shows 'No files were shared.' and tabs for 'Notes', 'AI notes', 'Mentions (5)', and 'Transcript'. A 'Meeting notes' section is visible below. A 'Prompt suggestions' panel is overlaid on the interface, listing several prompts: 'Recap the meeting', 'List action items', 'Suggest follow-up questions', 'What questions are unresolved?', 'List different perspectives by topic', 'List main ideas we discussed', and 'Generate meeting notes'. A red circle highlights the 'More prompts' icon in the bottom right of the Copilot chat pane, with a callout box pointing to it that says: 'Click on the **Prompt Guide** icon to show the prompts to ask questions about the meeting content'.



# Find more Teams prompts to try in Copilot Lab

## Find action items

Are there any action items for me?



## Compare Ideas

For each idea discussed, identify the pros and cons formatted as a table with 3 headers: idea, pros, cons.



## What are the options?

Create a table of the options discussed with pros and cons



## List ideas

List 5 ideas discussed



## Get the schedule

List the key dates in a table



## Get clarity

List the different opinions and suggest clarifying questions to ask for each



## What decisions were made

Did the team achieve consensus on a decision and what was it?



## Be prepared

What are the goals and topics from the meeting? Format each section with a bolded heading, and bolded names



## Keep meetings moving

What questions can the group ask to generate more ideas or insights? Limit each to 30-60 characters



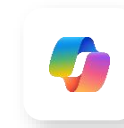
## Summarize meetings

Summarize what was discussed about



# How to use: Copilot in Microsoft Copilot

Note the specific prompts shown may vary



## Your AI assistant for search and summarization

- Search for important information from across the company
- Catch up on or summarize content from a specific source or channel like a person, all Teams chat, or a meeting
- Get updates on a project
- Reference up to three items from files, meetings, people, and emails.

## Use the Copilot chat pane to

- Ask questions about Microsoft Graph content
  - Reference up to three items
  - Reference Word, PowerPoint, Excel, PDF files
  - Reference meetings, people, and emails
- Ask general questions to Copilot

The screenshot shows the Microsoft 365 Chat interface. At the top, it says "Microsoft 365 Chat" and "Your copilot for work". Below this are six prompt cards arranged in a 2x3 grid:

- What's new?**: What's the latest from , organized by emails, chats, and files?
- Get key info**: List key points from
- Share meeting notes**: Draft an email with notes and action items from
- What did they say?**: What did  say about
- Where was I mentioned?**: Summarize emails where I was mentioned recently. Make it detailed, highlighting the sender and categorizing by topic of the email.
- Draft an FAQ**: Create an FAQ based on

Below the grid is a text input field with the placeholder: "OK, what can I help with? Try one of the examples or enter your own prompt."

At the bottom right, there is a button labeled "View prompts" which is highlighted with a red box. Below the input field are icons for editing, adding attachments, and sending.

Click on the **View Prompts** to open Copilot LAB and see more suggestions

# Find more Microsoft Copilot prompts in Copilot Lab



## ☰ What's new?

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



## ☰ Get key info

List key points from **file**



## ☰ Catch up on meetings

Recap **meeting** summarizing key takeaways and actions items as separate sections including who's responsible



## 📄 Share meeting notes

Draft an email with notes and action items from **meeting**



## 🗨️ What did they say

What did **person** say about



## ☰ Where was I mentioned?

Summarize emails where I was mentioned recently. Make it detailed, highlighting the sender



## 📄 Draft an FAQ

Create an FAQ based on **file**



## 🗨️ Find open issues

What were the open issues from **meeting** ?



## 📄 Write an intro

Propose a new introduction to **file**



## 🗨️ How to

How do I write a request for proposal?



## 🗨️ List action items

What are the action items from **meeting** ?

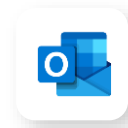


## 📄 Generate ideas

List ideas for a fun remote team building event



# How to use: Copilot in Outlook



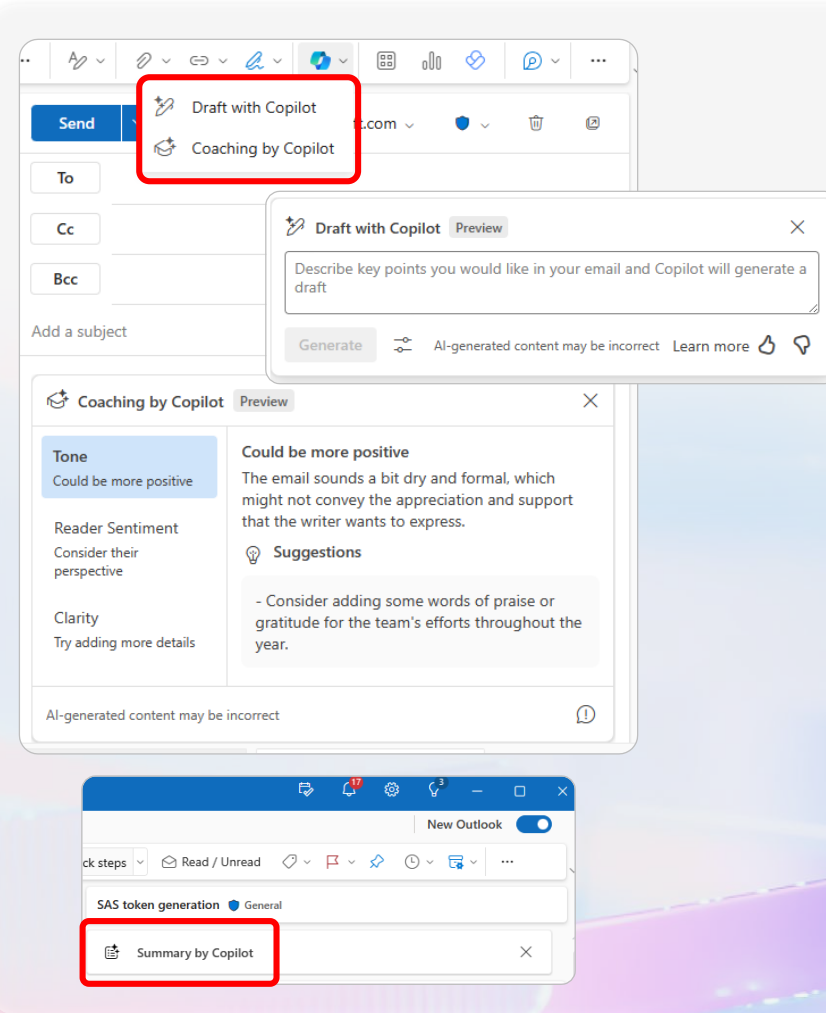
Note the specific prompts shown may vary

## Sample use cases

- Catch up on an email thread with a summary or by getting key points and action items
- Draft a new email or reply to a thread

## Use the Copilot chat pane to

- New Email
  - Draft with Copilot
    - Provide a topic or key points for a new email – Copilot can access information in the current thread
    - Select tone and length
- Will revise an existing draft
  - Coaching by Copilot
    - Will provide suggestions on tone, sentiment, and clarity
- Summary by Copilot
  - Get a summary of an email thread with citations



Have Copilot create a draft on a new topic or an existing thread.

Get suggestions from Copilot to improve your email.

At the top of each email. Generate a summary of the email or thread

# How to use: Copilot in Excel



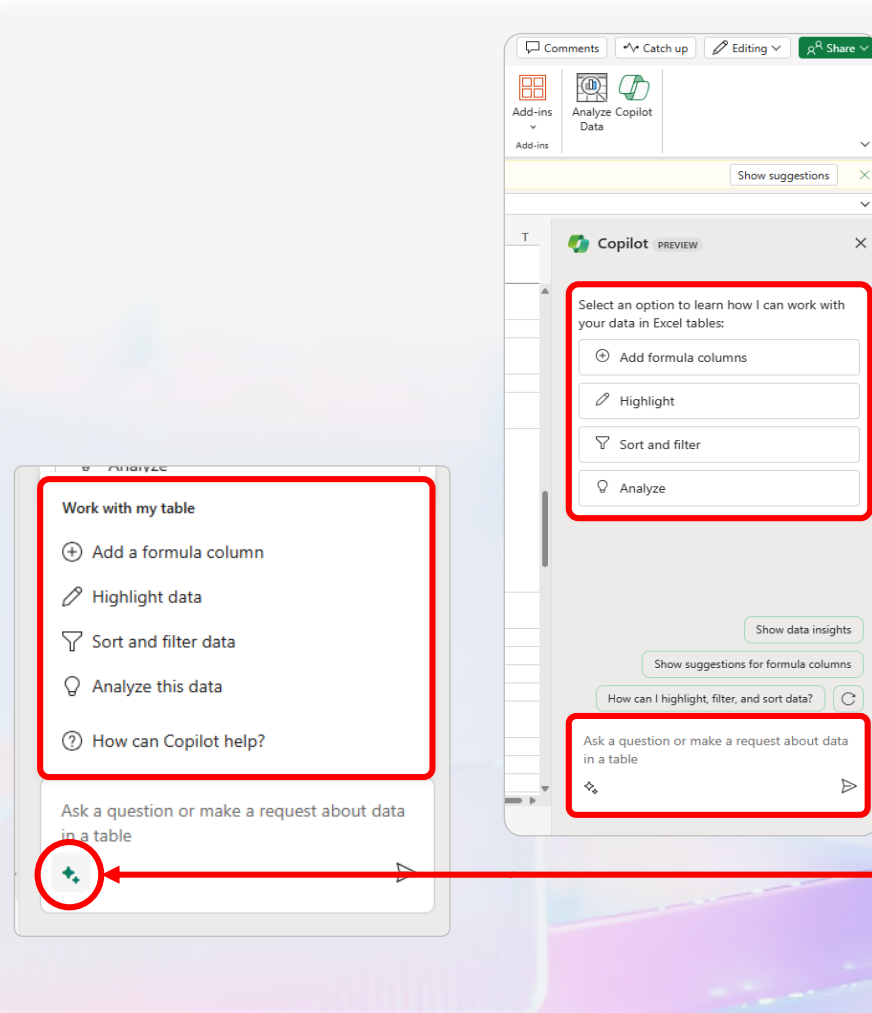
Note the specific prompts shown may vary

## Sample use cases

- Get help identifying trends or outliers
- Create charts to highlight information

## Use the Copilot chat pane to

- Add formula columns – Describe what you want to do or use a suggestion
- Add a row with a formula
- Change text font or update cell color
- Create a pivot chart
- Highlight specific content
- Filter and sort the data



Click on the **Prompt Guide** icon to show the prompts to understand and manipulate data in a table



# Thank You!



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