



Microsoft 365 Copilot for Executives

Transform the way you work
with the power of AI.





Agenda

Microsoft 365 Copilot Training for Executives

Time	Topic	Session
10 mins	Introduction	Introduction & workshop expectations
		What is Microsoft 365 Copilot?
5 mins	Prompting basics	Learn how to write prompts for Copilot to get the best results.
40 mins	Demonstrations & live interactions	<p>Together, we'll walk through examples of how Copilot can be used to accomplish tasks large and small. We'll show executive-aligned examples in:</p> <ul style="list-style-type: none">• Outlook• Word• Microsoft 365 Pages• Excel• Teams
5 mins	Closing	Next steps and lesson recap



Microsoft 365 Copilot



Your AI assistant for work



Microsoft 365 Copilot

Natural Language



Large language
models (LLMs)

+



Your own
Company data

+



Best in class data
protection

+



Microsoft
365 apps

Microsoft 365 Copilot brings AI into the apps you use every day



Microsoft 365 Copilot





Microsoft 365 Copilot

Runs on trust



Your data is **your** data



Your data is **not** used to train the foundation AI models

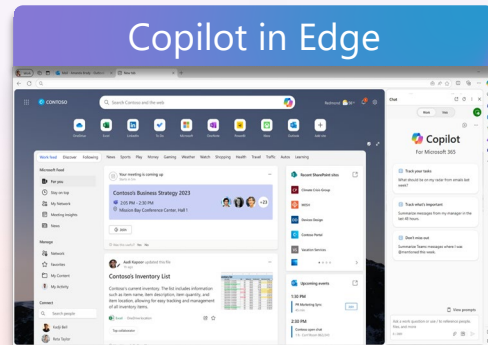
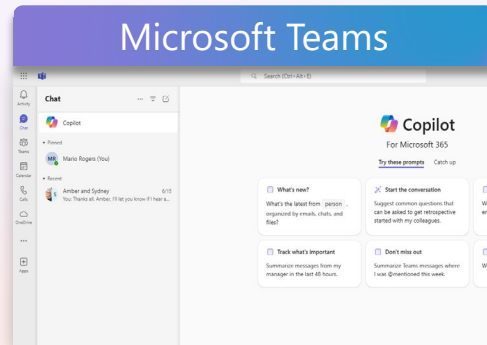
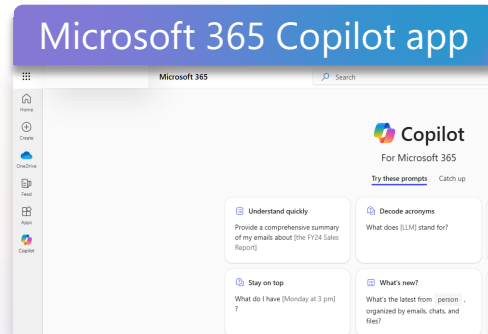
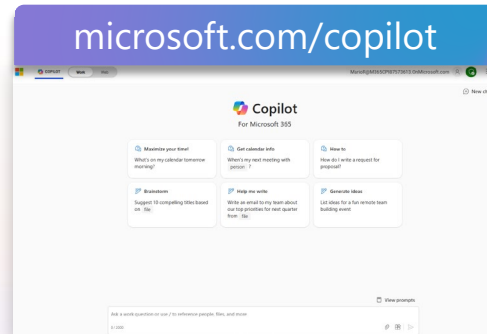


Your data is **protected** by the most comprehensive enterprise compliance and security controls

Microsoft 365 Copilot chat experiences

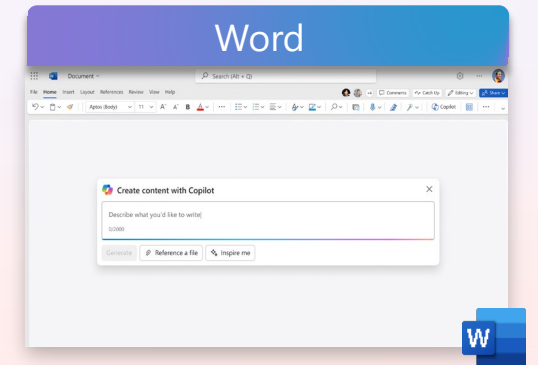
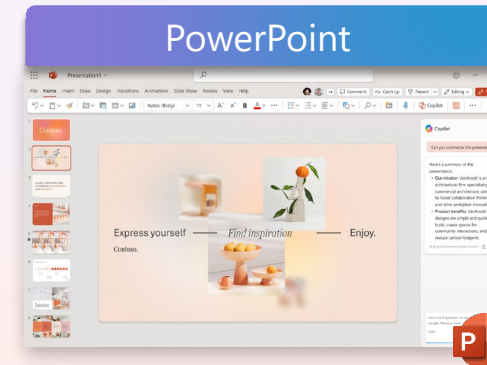
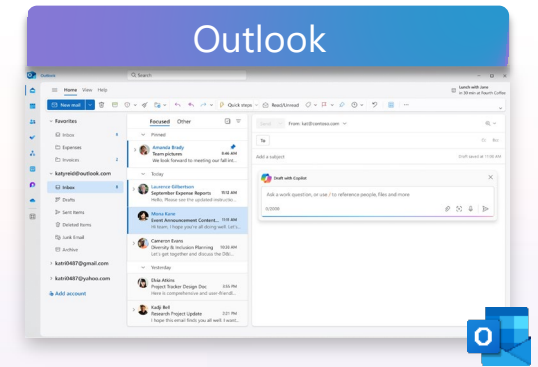
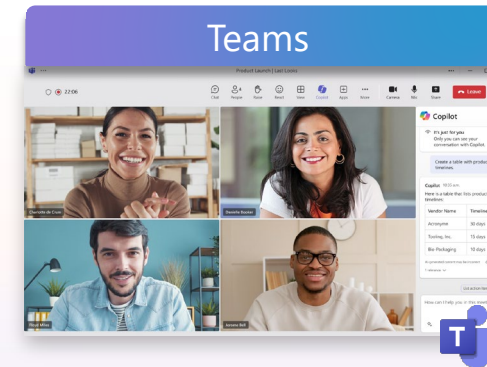
Copilot Chat for Work and Web

Ground Copilot prompts in the latest web information and work data



In-app Chat

Ask, create, and edit in the apps you use everyday



Prompting basics





Learn how to prompt Copilot

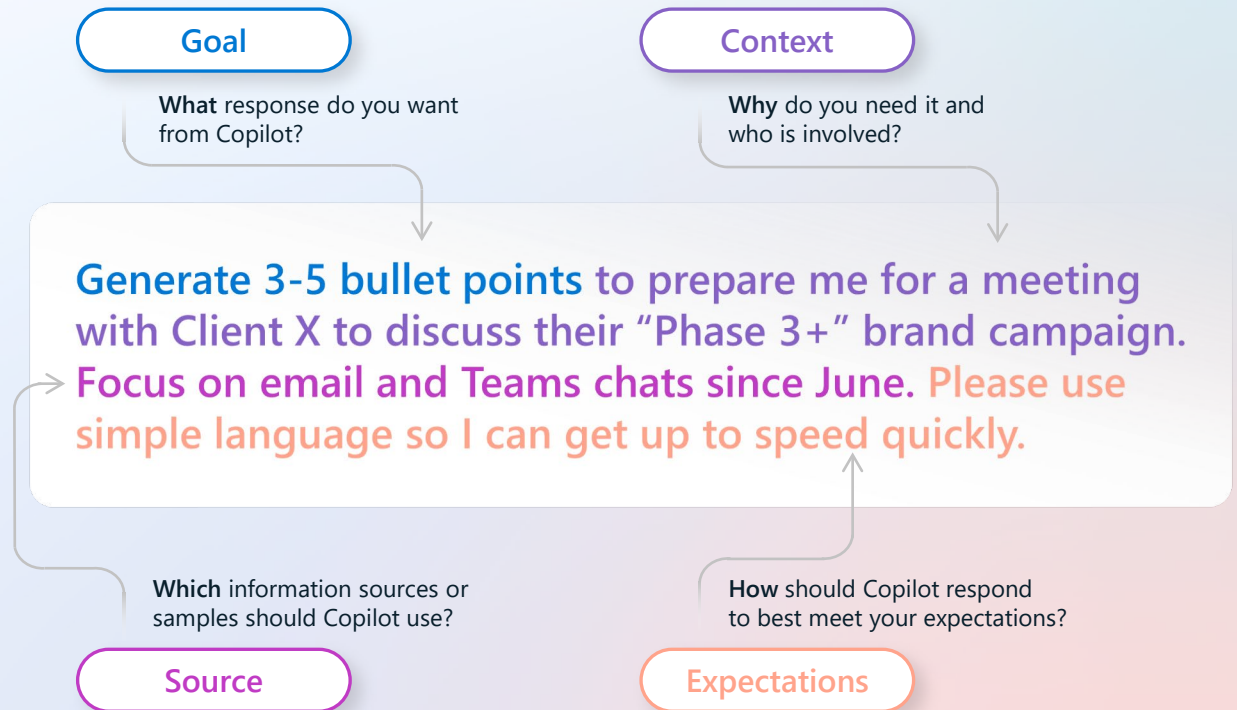
1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- ✓ **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]."

2. Include the right prompt ingredients

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





Learn how to prompt Copilot

3. Keep the conversation going

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.

Helpful hints to keep in mind

Know Copilot's limitations

Copilot is limited to your current conversation, so give lots of details.

Use quotation marks

This helps Copilot know what to write, modify, or replace for you.

Explore with Copilot Prompt Library

Filled with example prompts that you can edit to make your own.

Communicate clearly

Pay attention to punctuation, grammar, and capitalization.

Start fresh

Avoid interrupting and type "new topic" when switching tasks.

Be professional

Using polite language improves Copilot's response.





Saving prompts



WorkWeb

New chat

Copilot

Your AI assistant for work

Stand out on socials
What are some tips for writing a great LinkedIn post?

Going on holiday?
Write some funny Out of Office email responses to use while I'm on vacation from [January 25 to February 9]

Interview warning signs
What are some red flags to watch out for during an interview?

Code a binary search in Python
Write a Python script to perform binary search

Show me the result
Execute and explain this code...

Graph the data quickly
Create a pie chart showing the market share of smartphones in the United States

Ask me anything...

0 / 16000

View prompts

In **Copilot Prompt Gallery**, you can bookmark and view your saved prompts

Copilot Prompt Gallery

Suggested

Saved

Created by all

Task

Find the right questions
Suggest common questions that can be asked to get a retrospective started with my colleagues

Interview warning signs
What are some red flags to watch out for during an interview?



Sharing prompts



Copilot Prompt Gallery

Microsoft prompts

Your prompts

Task

Find the right questions

Suggest common questions that can be asked to get a retrospective started with my colleagues

Stand out on socials

What are some tips for writing a great LinkedIn post?

Going on holiday?

Write some funny Out of Office email responses to use while I'm on vacation from [January 25 to February 9]

Understand trends

Share some trends in remote work and hybrid offices

Interview warning signs

What are some red flags to watch out for during an interview?

Code a binary search in Python

Write a Python script to perform binary search

Show me the result

Execute and explain this code...

Graph the data quickly

Create a pie chart showing the market share of smartphones in the United States

Get more done

What are 5 - 6 ways to procrastinate?

See all prompts

In **Copilot Prompt Gallery**, you can copy links to prompts and share them with colleagues.

The link will open a new Copilot Chat with the prompt already filled.

View prompts

What are 5 warning signs to watch out for during an interview? For each, give examples and suggest what they might reveal about a job. Then help me understand how I can prepare better to spot these red flags.

208 / 16000

Top 10 to "Try First"

with Microsoft 365 Copilot



1

Recap 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.

→ Draft an email with notes and action items from meeting



2

Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon



3

Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

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

→ Give me a bulleted list of key points from file



5

Tell me about a topic/project ...

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

→ Tell me what's new about topic organized by emails, chats, and files?



6

Give me some ideas for ...

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

→ Suggest 10 compelling taglines based on file



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did person say about topic



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.

→ Rewrite with Copilot



10

Translate a message

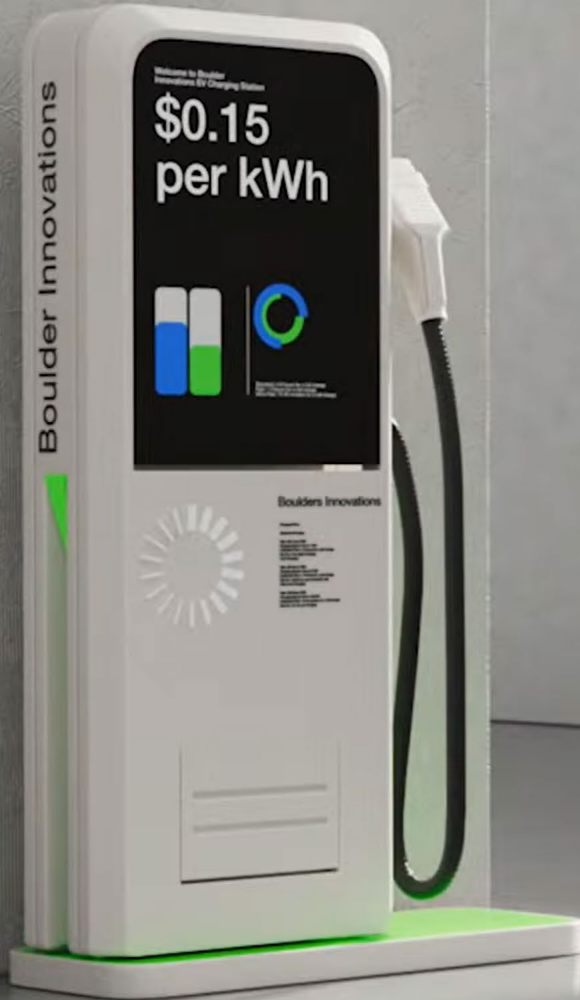
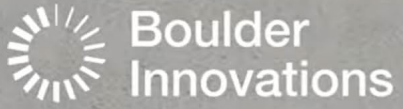
– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

For more prompts, visit Copilot Prompt Gallery at: aka.ms/CopilotLab

Let's see it in action





Meet Boulder Innovations





Boulder Innovations

Pioneering the Future of EV Charging Infrastructure

Mission: Accelerate the transition to sustainable transportation through accessible, reliable, and intelligent charging solutions.



- Founded in 2014 by former renewable energy engineers
- Headquarters in Boulder, CO with offices in San Francisco, Chicago, and expanding to Europe
- 850 employees across engineering, manufacturing, sales, IT, and administration
- **Flagship Product:** ChargeHub Pro - premium commercial EV charging solution
- **Strategic Initiatives:**
 - European market expansion
 - Launch of affordable residential product line (ChargeHub Home)
 - IT security improvements
 - Customer experience enhancement



Meet Maya Faye

Executive Team, Boulder Innovations





Copilot in Outlook

Email Analysis and Summary



Scenario:

Maya reviews a complex 25+ message thread with VanArsdel Ltd. about distribution partnership. She uses Copilot to get caught up quickly and gain actionable insights.



Copilot in Word

Drafting an agreement



Scenario:

Maya leverages Copilot to create a detailed legal document based on the email negotiations, without having to manually reference the complex thread or involve legal resources for the initial draft.



Microsoft 365 Pages

Collaborative research



Scenario:

Maya initiates collaborative research on EU charging regulations by creating a Microsoft 365 Page and inviting her team. Copilot helps structure comprehensive regulatory information that the team can build upon together in real-time.



Copilot in Excel

Sales analysis



Scenario:

Maya quickly gains insights from sales data without needing advanced Excel skills. The *Analyze Data* feature helps her explore relationships between different data points and identify important trends in sales channels.



Copilot in Teams Meetings

Notes and action items



Scenario:

Maya reviews a previous cross-functional meeting about residential product development. Without taking notes during the meeting, she can now generate organized departmental summaries, action items with clear ownership, and a professional follow-up email.

Questions?



Copilot Resources

Copilot Adoption Page

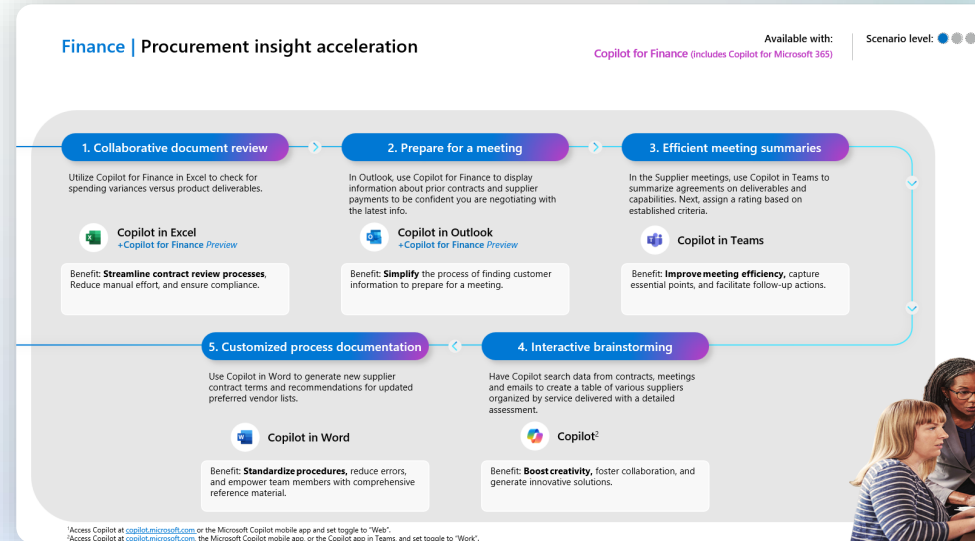
adoption.microsoft.com/copilot

Copilot Scenario Library

adoption.microsoft.com/copilot-scenario-library

The Great Copilot Journey

aka.ms/greatcopilotjourney



Start using Microsoft Copilot >

Functional scenarios

- Customer Service
- Finance
- Human Resources
- Information Technology
- Legal
- Marketing
- Marketing Communications
- Operations
- Sales

Looking for downloadable content?
Download our functional scenario kits, scenario guides, and day in the life guides to accelerate your Copilot implementation.
[View downloads >](#)

Using Copilot in Customer Service

Using Copilot in Finance

Using Copilot in Human Resources

Using Copilot in Information Technology

Using Copilot in Legal

Using Copilot in Marketing

Using Copilot in Marketing Communications

Using Copilot in Operations

Using Copilot in Sales



Thank you for attending





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