

Microsoft

# Microsoft Copilot Executive Session

# Meet the Speaker



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**MS-900 | SC-900 | MB-910**



# Agenda

- 1 Welcome
- 2 What: Introduction to Microsoft 365 Copilot
- 3 How: Becoming AI Ready
- 4 Why: Getting Started with Copilot
- 5 Q&A



# The WHAT

**What options are available?**

# Microsoft 365 Copilot



Unlock productivity and unleash creativity

## Copilot Offerings

**Copilot Chat**



**Copilot For Business**



**Microsoft 365 Copilot**



**Copilot Studio**



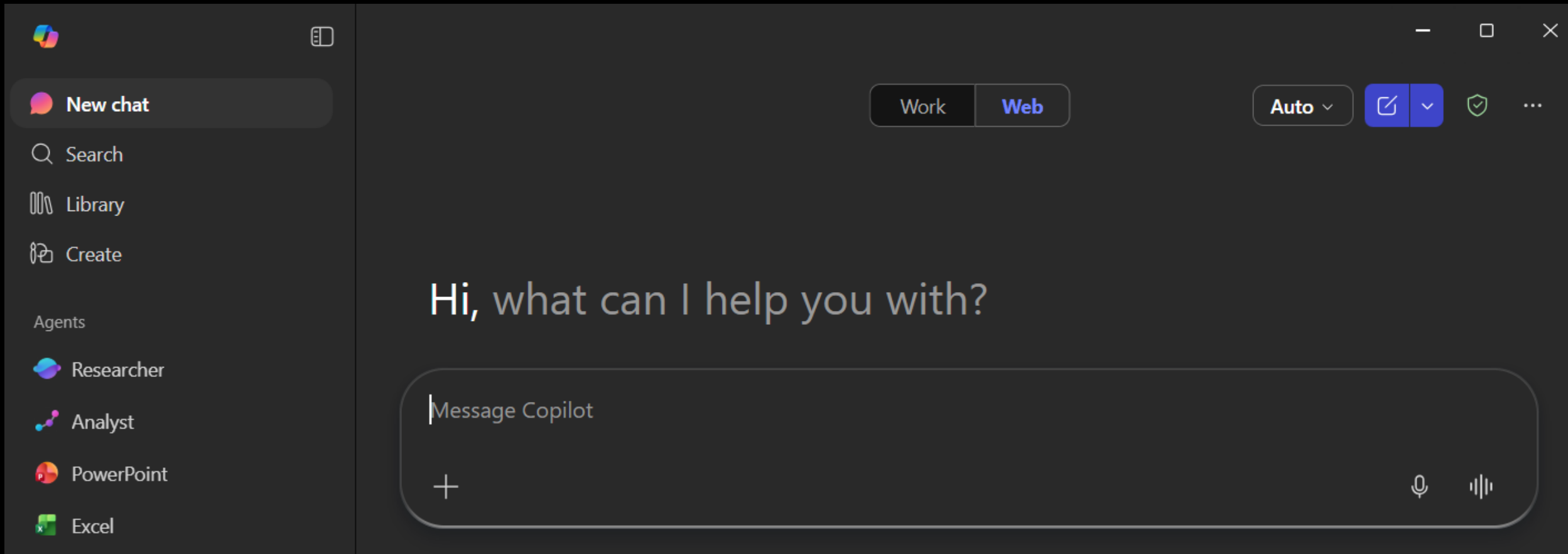
**Introducing**



**Microsoft 365 Copilot Chat**



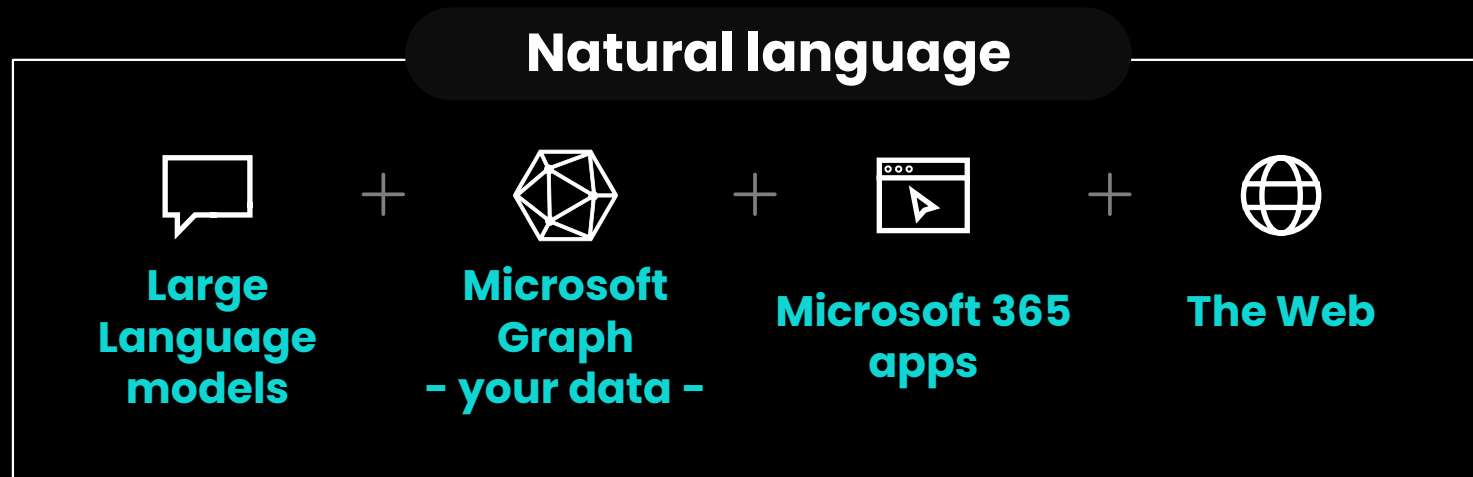
# Microsoft 365 Copilot Chat



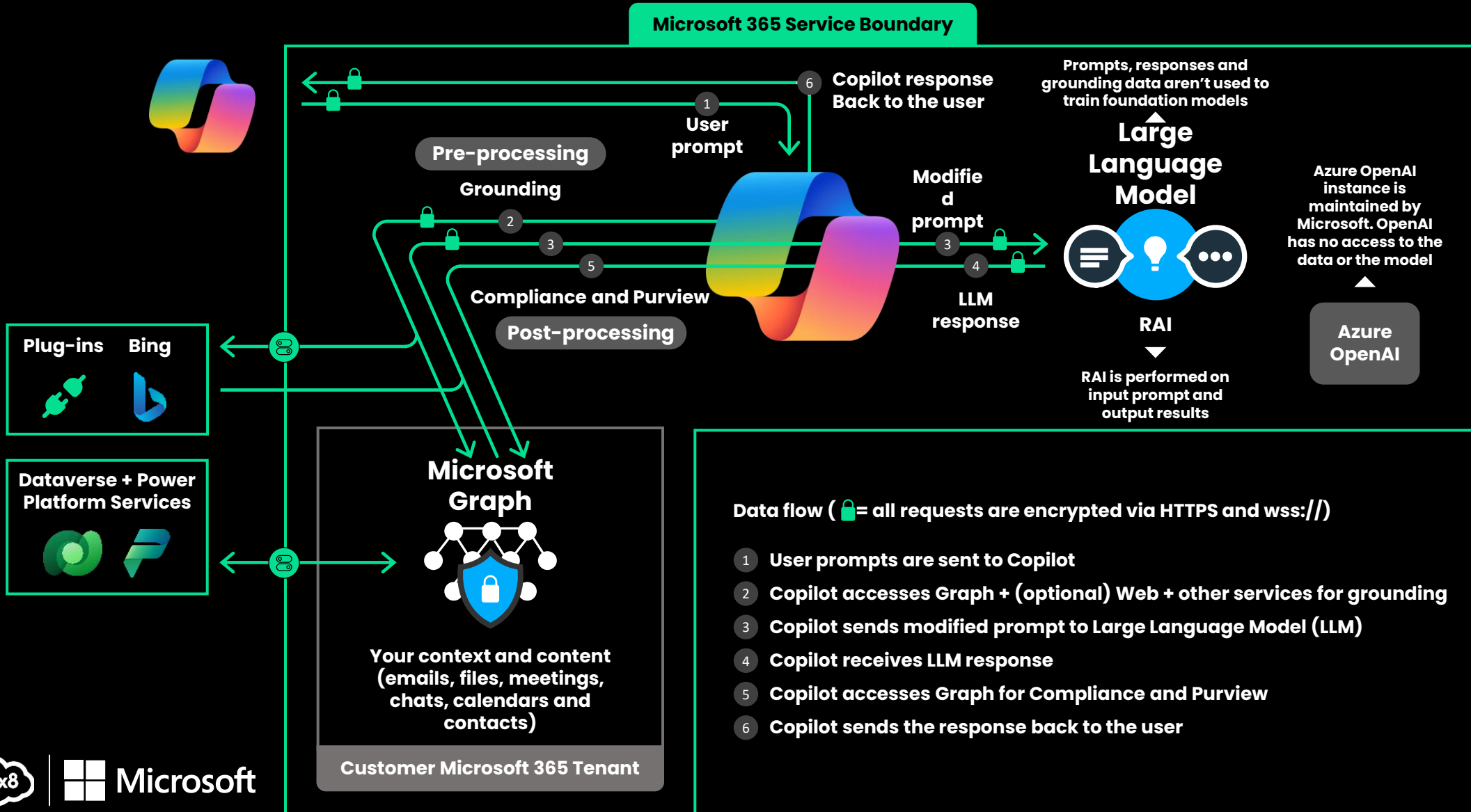
# Microsoft 365 Copilot



Unlock productivity and unleash creativity



# Microsoft 365 Copilot Architecture



# Microsoft 365 Copilot Offerings in market today



## Microsoft 365 Copilot Chat

- Leverage secure, web-connected AI chat built on the latest large language models.
- Access Copilot Chat within select Microsoft 365 applications.
- Utilize metered access to AI agents for flexible usage.
- Retain IT oversight with enterprise-grade data protection and agent management.



## Microsoft 365 Copilot

**Includes everything in Microsoft 365 Copilot Chat, plus:**

- AI chat powered by business data for deeper insights
- Seamless Copilot access within Microsoft 365 apps
- Build and deploy custom agents using Copilot Studio
- Enterprise-level security, privacy, and compliance throughout



## Microsoft 365 Copilot for Business

- Designed specifically for small businesses.
- Supports up to 300 users.
- Requires an M365 B-SKU license as a prerequisite.

1. Copilot Chat is available at no additional cost to all Microsoft Entra ID users with an eligible Microsoft 365 subscription. An Azure subscription is required to use agents and is priced on a metered basis.



# Microsoft 365 Copilot Lineup

● = Included ▲ = Included-Metered

		Microsoft 365 Copilot Chat	Microsoft 365 Copilot for Business <sup>5</sup> \$21/ user/ month	Microsoft 365 Copilot Enterprise \$30/user/month
Licensing	Seats	All users	Up to 300 users	All users
	Pre-requisite	O/E/B/F SKUs	B-SKUs	O/E/B/F SKUs
Chat	Copilot Chat – Web grounded (powered by GPT 4o)	●	●	●
	Copilot Chat – Work grounded (shared tenant Graph data, 3rd party data via graph connectors, personal data)		●	●
	Copilot Pages	●	●	●
	File upload <sup>1</sup>	●	●	●
	Code Interpreter <sup>1</sup>	●	●	●
	Image generation <sup>1</sup>	●	●	●
Agents <sup>2</sup>	Create agents powered by Copilot Studio <sup>3</sup> , including SharePoint agents	●	●	●
	Discover and pin agents	●	●	●
	Use agents grounded on web data	●	●	●
	Use agents grounded in work data (work data in your tenant’s Microsoft Graph and 3 <sup>rd</sup> party data via graph connectors)	▲	●	●
	Use agents that act independently and autonomous actions	▲	▲	▲
Personal assistant	Copilot reasons over personal work data (i.e. Outlook, OneDrive, meeting transcripts)		●	●
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		●	●
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)		●	●
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		●	●
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		●	●
	Copilot in PowerPoint (Narrative Builder, presentation translation, generate company branded slides or images)		●	●
	Copilot Actions		In preview	In preview
Copilot Control System	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview	In preview
	Enterprise Data Protection (EDP)	●	●	●
	IT management controls	●	●	●
	Agent management	●	●	●
	SharePoint Advanced Management		●	●
	Copilot Analytics to measure usage and adoption <sup>4</sup>		●	●
	Pre-built reports and advanced analytics to measure ROI		●	●

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio [here](#). 4. Basic reporting in Microsoft Admin Center available for Copilot Chat. 5. Microsoft 365 Copilot for Business includes a fixed set of capabilities. Microsoft 365 Copilot for Enterprise may expand to include additional features over time.



**At launch, Business will have the same features . However, have right to adjust differences between the business and enterprise**

SKU

# Copilot Studio

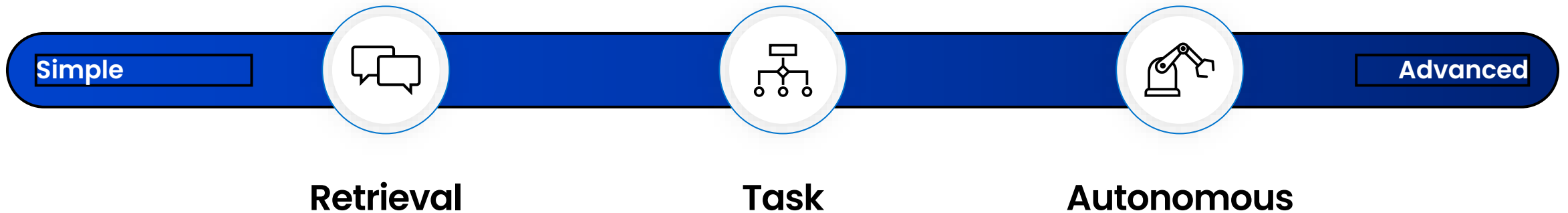


## Creating Agent for Business Processes



# What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team or organization

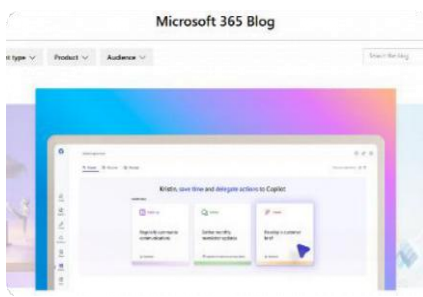


← Agents vary complexity and capabilities depending on your need →

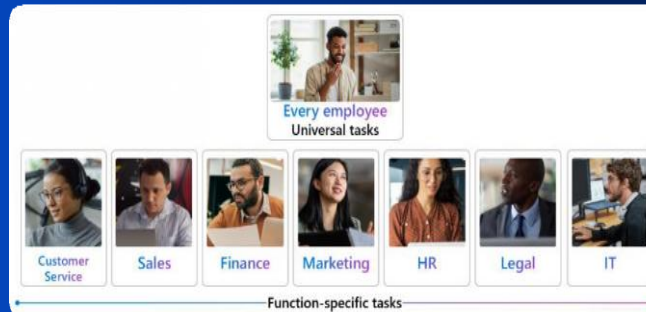
# Copilot Chat and Agent Starter Kits

## [Copilot Chat Success Kit](#) [Copilot Agents Success Kit](#)

### Latest Agent Blogs



### Copilot Chat Scenarios



### Chat and Agent user resources



### IT Set up and Controls Guide

#### Summary of protections & IT controls<sup>1</sup> for M365 Copilot Chat vs. Microsoft 365 Copilot

	Microsoft 365 Copilot Chat	Microsoft 365 Copilot
<b>Identity Protection</b>	<ul style="list-style-type: none"> <li>Identifiers, responses, and web queries are not used to train the Microsoft 365 Copilot</li> <li>Phishing, malware, and web queries are flagged and isolated for review, efficiency, and control</li> <li>GDPR and DORA controls apply to Copilot prompts, responses, and data within the Microsoft 365 service boundary</li> <li>Copilot respects your organization's identity model, user permissions, and policies in private data, backups, and logs</li> <li>PowerShell scripts based on user-generated, web-based actions, and actions</li> </ul>	<ul style="list-style-type: none"> <li>Identifiers, responses, and web queries are not used to train the Microsoft 365 Copilot</li> <li>Phishing, malware, and web queries are flagged and isolated for review, efficiency, and control</li> <li>GDPR and DORA controls apply to Copilot prompts, responses, and data within the Microsoft 365 service boundary</li> <li>Copilot respects your organization's identity model, user permissions, and policies in private data, backups, and logs</li> <li>PowerShell scripts based on user-generated, web-based actions, and actions</li> </ul>
<b>Microsoft 365 Copilot Chat</b>	<ul style="list-style-type: none"> <li>Control user access controls in role for web search queries, what are encrypted and de-identified</li> <li>Agent access, workload, publication, and deployment</li> <li>Agent access and usage through "users"</li> <li>See governance links for discovery, manage, and submit file access through SharePoint Advanced Management</li> <li>Available Microsoft 365 Copilot agents in Microsoft 365 education</li> <li>Five Insights pre-built reports and advanced analytics to measure ROI</li> <li>Copilot Activity API for development of custom reporting on Copilot and agent usage</li> </ul>	<ul style="list-style-type: none"> <li>Control user access controls in role for web search queries, what are encrypted and de-identified</li> <li>Agent access, workload, publication, and deployment</li> <li>Agent access and usage through "users"</li> <li>See governance links for discovery, manage, and submit file access through SharePoint Advanced Management</li> <li>Available Microsoft 365 Copilot agents in Microsoft 365 education</li> <li>Five Insights pre-built reports and advanced analytics to measure ROI</li> <li>Copilot Activity API for development of custom reporting on Copilot and agent usage</li> </ul>
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### Agent Overview Guide

#### Low-code options for creating agents<sup>4</sup>

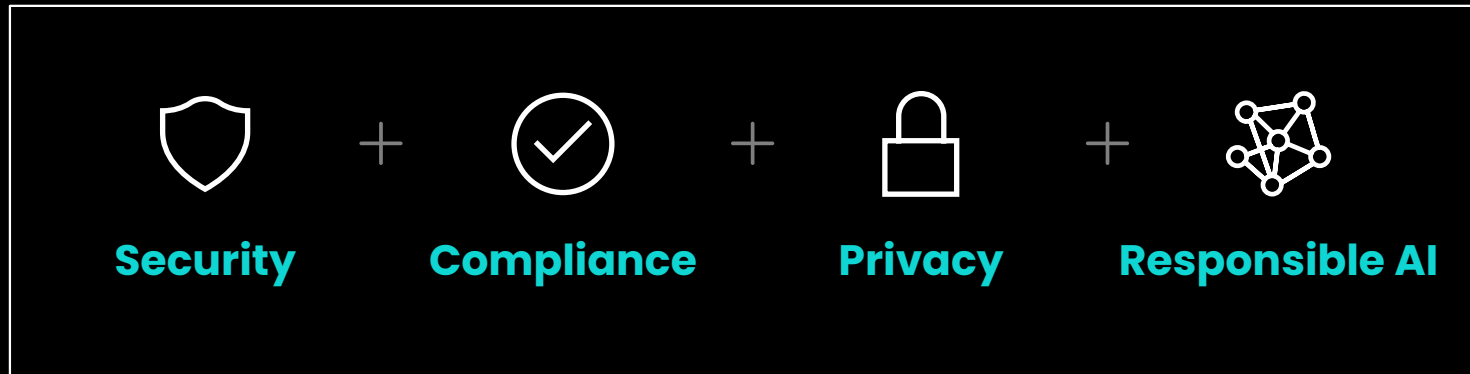
	Copilot Studio agent builder <sup>1</sup>	SharePoint	Copilot Studio
<b>Target audience</b>	Business IT	Business IT	IT
<b>When to use</b>	<ul style="list-style-type: none"> <li>When you want to create a custom agent that can interact with a specific data source or system</li> <li>When you want to create a custom agent that can interact with a specific data source or system</li> </ul>	<ul style="list-style-type: none"> <li>When you want to create a custom agent that can interact with a specific data source or system</li> <li>When you want to create a custom agent that can interact with a specific data source or system</li> </ul>	<ul style="list-style-type: none"> <li>When you want to create a custom agent that can interact with a specific data source or system</li> <li>When you want to create a custom agent that can interact with a specific data source or system</li> </ul>
<b>When to build</b>	<ul style="list-style-type: none"> <li>When you want to create a custom agent that can interact with a specific data source or system</li> <li>When you want to create a custom agent that can interact with a specific data source or system</li> </ul>	<ul style="list-style-type: none"> <li>When you want to create a custom agent that can interact with a specific data source or system</li> <li>When you want to create a custom agent that can interact with a specific data source or system</li> </ul>	<ul style="list-style-type: none"> <li>When you want to create a custom agent that can interact with a specific data source or system</li> <li>When you want to create a custom agent that can interact with a specific data source or system</li> </ul>
<b>Agent capabilities</b>	<ul style="list-style-type: none"> <li>Business-oriented</li> </ul>	<ul style="list-style-type: none"> <li>Business-oriented</li> </ul>	<ul style="list-style-type: none"> <li>Business-oriented</li> <li>IT-oriented</li> </ul>
<b>When to use/avoid</b>	<ul style="list-style-type: none"> <li>Useful for creating agents that can interact with a specific data source or system</li> </ul>	<ul style="list-style-type: none"> <li>Useful for creating agents that can interact with a specific data source or system</li> </ul>	<ul style="list-style-type: none"> <li>Useful for creating agents that can interact with a specific data source or system</li> </ul>
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# Microsoft 365 Copilot



**Built on Microsoft's comprehensive approach**



# The HOW

**How do I best prepare for adoption?**

# AI Readiness

Make sure you are prepared for AI.

Before purchasing an AI tool, it is important to take certain steps to ensure that your business is ready for AI. This includes developing an AI strategy, preparing for AI capabilities and ensuring that your security measures are in place. Security is a crucial aspect of being ready for AI, as it helps to safeguard your employees, business and data.

## Developing an AI strategy

### 1. Business Strategy

- Adopt AI principles
- Consult on AI outcomes
- Prepare for AI capabilities
  - Cloud migration
  - License optimization
  - User training and expectations

### 2. Transformation Strategy

- Unified security
- Identity access
- Data management.
  - Governance
  - Orchestration
  - Estate modernization/migration

### 3. Drive Adoption

- Start with a pilot projection
- Build business buy-in
- Monitor your AI solutions



# Preparing for an Era of AI



## AI Goals

What are your organization's goals for using AI & what pain point can be addressed?



## Capabilities

What are your organization's current capabilities in terms of AI?



## Data Strategy

Does your organization have a data strategy in place



## Infrastructure

Does your organization have the necessary infrastructure and resources to support AI initiatives?

# Secure and govern Copilot with Microsoft Security



## Security



## Compliance



## Privacy



## Responsible AI



### Secure access

- **Manage organization-wide search with Restricted SharePoint Search controls**
- **Restrict or block risky access with conditional access**
- **Control the use of Copilot on devices with device and application management**



### Protect sensitive data

- **Protect access to sensitive data in Copilot interactions with sensitivity labeling**
- **Keep confidential information within your business with DLP policies**
- **Understand user activities and detect risky access to Copilot with audit logging**



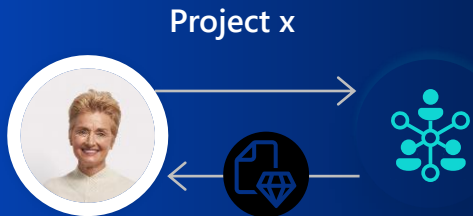
### Govern Copilot usage

- **Retain and log Copilot interactions with retention and deletion policies**
- **Find information on Copilot interactions with search and export capabilities**
- **Manage cases and apply legal hold to investigate security and compliance incidents**

# Security and governance challenges

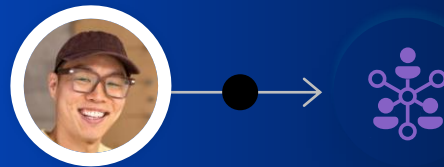
1

**Identity oversharing:**  
Users may access sensitive data via AI apps they're not authorized to view or edit



2

**Data risks:**  
Users may inadvertently leak sensitive data to AI apps



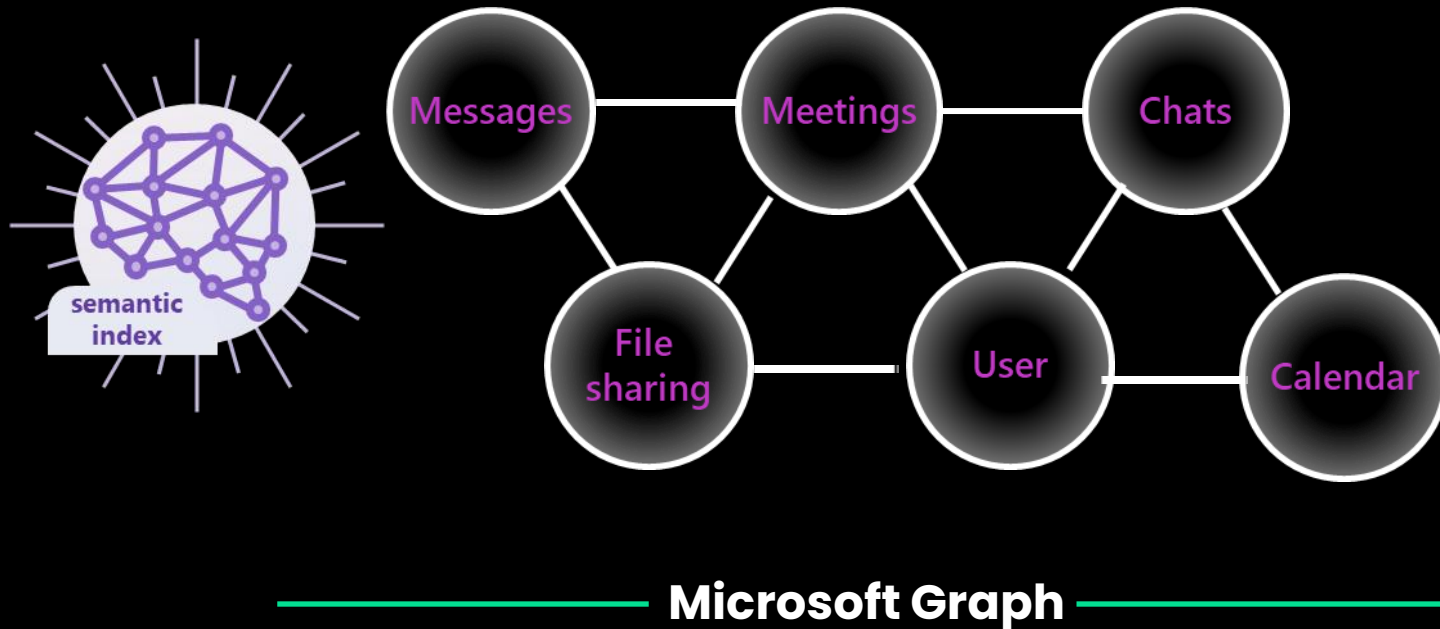
3

**Non-compliant usage:**  
Users use AI apps to generate unethical or other high-risk content



# Prepare your environment for a better Copilot for Microsoft 365 experience

Implement good content management practices to prepare your organizational data



- Review data governance policies, protect sensitive organizational data, and prevent content oversharing. Microsoft 365 allows you to:
- Classify Teams to ensure the right people are invited to the right forums
- Apply sensitivity labels or restrict permissions in Microsoft 365 apps by using Information Rights Management (IRM)
- Set up retention labels and policies for email

# The WHY

**Why does this matter for you?**

# Why is AI Readiness and Adoption Important for SMBs?

The technology landscape for SMBs is rapidly changing. AI is now seen as a scalable, affordable resource – not limited by headcount or expertise. This is redefining how businesses grow and compete. Over the past year, Copilot has helped provide immediate value for these organizations when it comes to improving business processes, productivity and much more. The landscape has changed from a futuristic approach to a tool that is providing immense value to businesses.

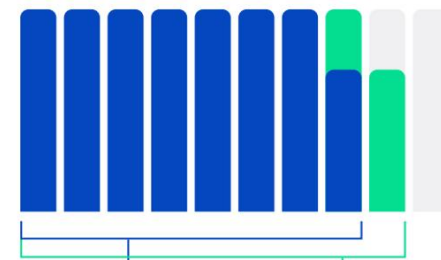
SMBs using Microsoft 365 Copilot are already seeing transformative results.

**353%**

projected ROI over a three-year period<sup>1</sup>

132% low-end ROI<sup>1</sup>

AI has quickly evolved from a futuristic concept to a practical, indispensable tool in everyday work.



76%

of SMB workers were using AI tools in 2024<sup>1</sup>

86%

of SMB workers are using AI tools in 2025<sup>1</sup>

# AI transformation supports business growth through better productivity, creativity, and operations.



## Personal productivity

- **Individual efficiency**
- **Time savings**
- **Increase creativity**



## Business value

- **Revenue growth**
- **Cost optimization**
- **Employee wellbeing**

# The Who?

**Who will benefit from using AI?**

# Impact By Role Function

## Business owner/operator

With **Copilot in Outlook**, business owners start their days catching up on emails, summarizing them, and quickly crafting personalized responses.

With **Copilot in Word**, they can draft project plans while reviewing and crafting compelling visualizations for budgets and project resources in **Copilot in Excel**.

They can also recap meetings using **Copilot in Teams** to assign and track follow-up tasks for different team members.

## Marketing manager

**Copilot in Teams** helps marketing managers organize meeting notes of their brainstorm sessions on launching a new market. **Copilot in Word** drafts a targeted promotion plan based on Copilot-generated Teams meeting notes.

**Copilot in PowerPoint** creates customer profiles and the promotion plan. **Copilot in Word** helps draft the email and create illustrations. **Copilot in Outlook** composes the email and attaches the campaign brief.

## Sales representative

Using **Copilot in Outlook**, a salesperson finds new leads by surfacing emails from new senders and write with persuasive language about company offerings. With Copilot, they can reach more potential customer in less time.

They can use Outlook data from previous customer emails to then draft a sales presentation faster with **Copilot in PowerPoint**. Lastly, **Copilot in Teams** will generate meeting notes for the presentation.

## Financial analyst

To analyze a spike in sales, a financial analyst opens **Copilot in Excel** to analyze past performance of the product and create graphs from the data.

**Copilot in Loop** includes the graphs and data in a shared link through Loop, Outlook, and Teams, while **Copilot in Teams** facilitates team collaboration and decision-making.

**Copilot in Outlook** finds customer account details like balance statements and invoices and summarizes the data for a financial analyst.

# Impact by Workflow

1

## Effective Meetings

---

- Quickly catch up on meetings you missed
- Summarize a meeting and identify next steps
- Run a more effective meeting

2

## Data Analysis

---

- Get answers from across all your data
- Instantly uncover key insights
- Create powerful and professional visualizations

3

## Content Creation

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- Jumpstart creativity and write and edit like a pro
- Quickly catch up on the key points of a document or presentation
- Create documents, presentations, charts and tables

4

## Email Processing

---

- Draft email replies instantly
- Personalize the tone and length, even on the go
- Quickly summarize a long email thread



# Impact by Function

1

## HR

---

- Communicate policies and draft job descriptions
- Create stunning training materials
- Easily respond to job applicants' or employees' emails

2

## Marketing

---

- Identify relevant market trends and segments
- Create the first draft for a project
- Summarize campaign results with powerful visuals

3

## Sales

---

- Have better sales conversations and close more deals
- Create sales presentations and proposals
- Analyze sales data from previous quarters

4

## IT

---

- Create a project plan for a product roll-out
- Stay up to date on various project calls and chats
- Identify patterns in data and solve issues faster

5

## Finance

---

- Simplify financial reporting and planning
- Identify performance improvements
- Report metrics using professional charts



# Hands on scenarios

Current product use cases

## PowerPoint (web)

### Writing

- Create first drafts
- Add more content
- Edit content and format
- Transform existing content into PowerPoint

### Reading

- Summarize deck content
- Extract next steps

## Outlook (web)

### Writing

- Reply to thread
- Author new email
- Get Coaching on an email

### Reading

- Summarize long threads

## Word (web)

### Writing

- Create first drafts
- Add more content

### Reading

- Summarize long documents
- Ask questions about document content

## Teams

### In-meeting

- "Catch me up"
- Ask questions about discussion so far
- General business chat
- Wrap up

### Post-meeting

- Create notes and actions
- Recap and querying

### Chat

- Summarize and ask questions about content in a group, meeting, or 1-1 chat

## Loop (web preview)

### Writing

- Brainstorm
- Collaborative authoring
- Collaborative planning



# Hands on scenarios

## Copilot and Word

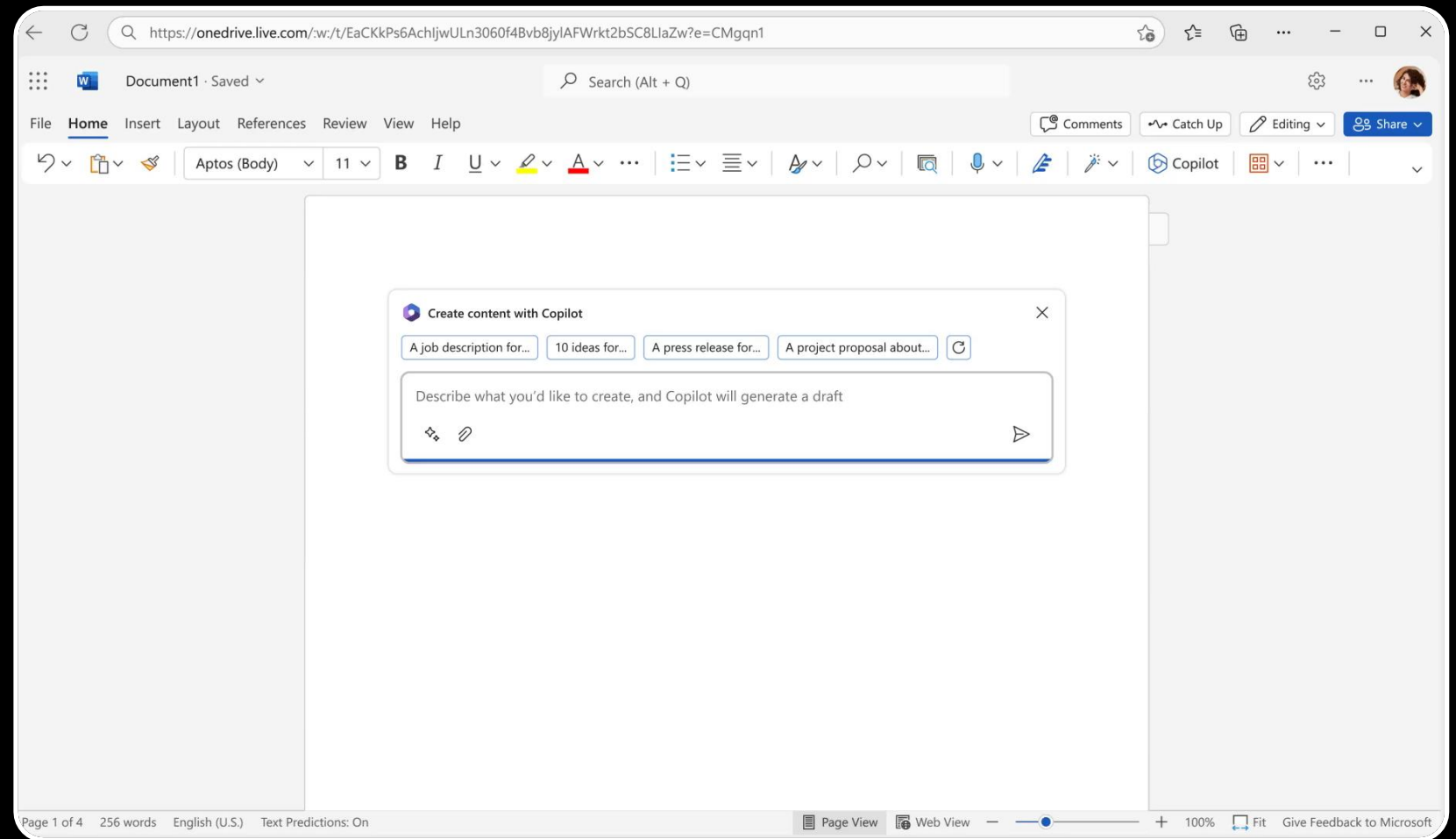
### Word (web)

#### Writing

- Create first drafts
- Add more content

#### Reading

- Summarize long documents
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# Hands on scenarios

## Copilot and Excel

### Excel (web)

#### Data

- Analyze data sets
- Forecast and predict trends
- Edit content and format

#### Visualization

- Create charts and graphics
- Visualize data sets with ease

The screenshot displays the Microsoft Excel (web) interface. The main window shows a spreadsheet titled "Store expansion Sales Forecast.xlsx" with columns for Store Code, Store Name, Location, Year, Quarter, and Sales. The data is organized into rows for different store locations (CHI031 and CHI032) across various quarters from 2019 to 2023. A Copilot sidebar is visible on the right, with a search bar and a "Describe what you'd like help with or select" prompt.

Store Code	Store Name	Location	Year	Quarter	Sales
CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q3	\$ 7,003,071
CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q4	\$ 8,966,978
CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q1	\$ 6,263,955
CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q2	\$ 5,374,864
CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q3	\$ 7,435,062
CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q4	\$ 10,319,964
CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q1	\$ 6,580,746
CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q2	\$ 5,695,138
CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q3	\$ 9,132,134
CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q4	\$ 11,844,765
CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q1	\$ 8,723,031
CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q2	\$ 7,519,256
CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q3	\$ 10,648,465
CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q4	\$ 14,087,186
CHI031	ContosoHI 31	Phoenix, Arizona	2023	Q1	\$ 9,726,792
CHI031	ContosoHI 31	Phoenix, Arizona	2023	Q2	\$ 8,198,962
CHI032	ContosoHI 32	Tucson, Arizona	2019	Q3	\$ 7,017,496
CHI032	ContosoHI 32	Tucson, Arizona	2019	Q4	\$ 8,814,793
CHI032	ContosoHI 32	Tucson, Arizona	2020	Q1	\$ 5,725,567
CHI032	ContosoHI 32	Tucson, Arizona	2020	Q2	\$ 4,631,148
CHI032	ContosoHI 32	Tucson, Arizona	2020	Q3	\$ 7,967,190
CHI032	ContosoHI 32	Tucson, Arizona	2020	Q4	\$ 9,342,811
CHI032	ContosoHI 32	Tucson, Arizona	2021	Q1	\$ 6,733,832



# Hands on scenarios

## Copilot and PowerPoint

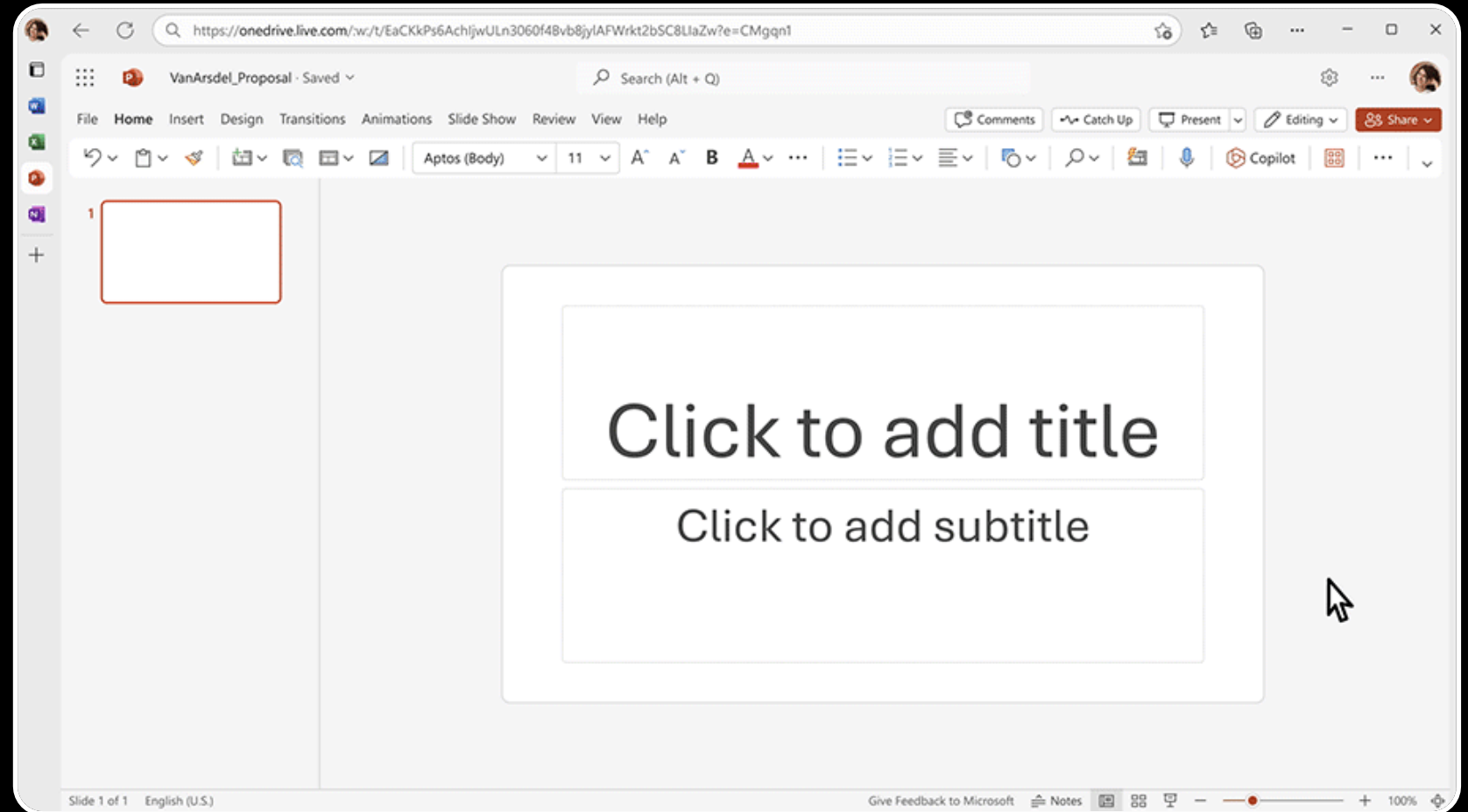
### PowerPoint (web)

#### Writing

- Create first drafts
- Add more content
- Edit content and format
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#### Reading

- Summarize deck content
- Extract next steps



# Hands on scenarios

## Copilot and Outlook

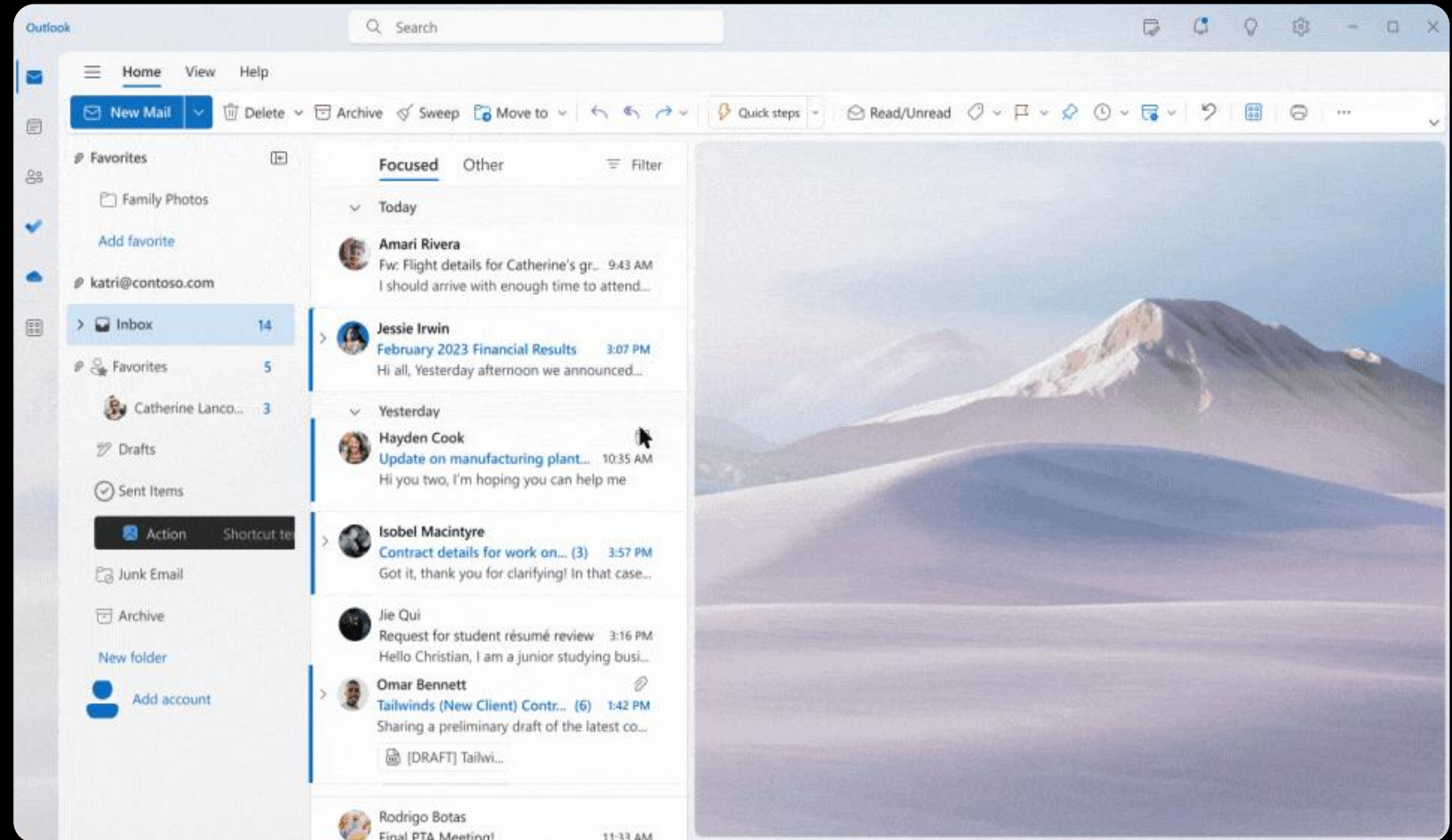
### Outlook (web)

#### Writing

- Reply to thread
- Author new email
- Get Coaching on an email

#### Reading

- Summarize long threads



# Prompting



- Create a one-page brief for the sales team based on this [document].
- Create a 1-page summary of this document, create a table of pros and cons.
- Create an email invitation template based on this [document]. Create 5 options for a subject line



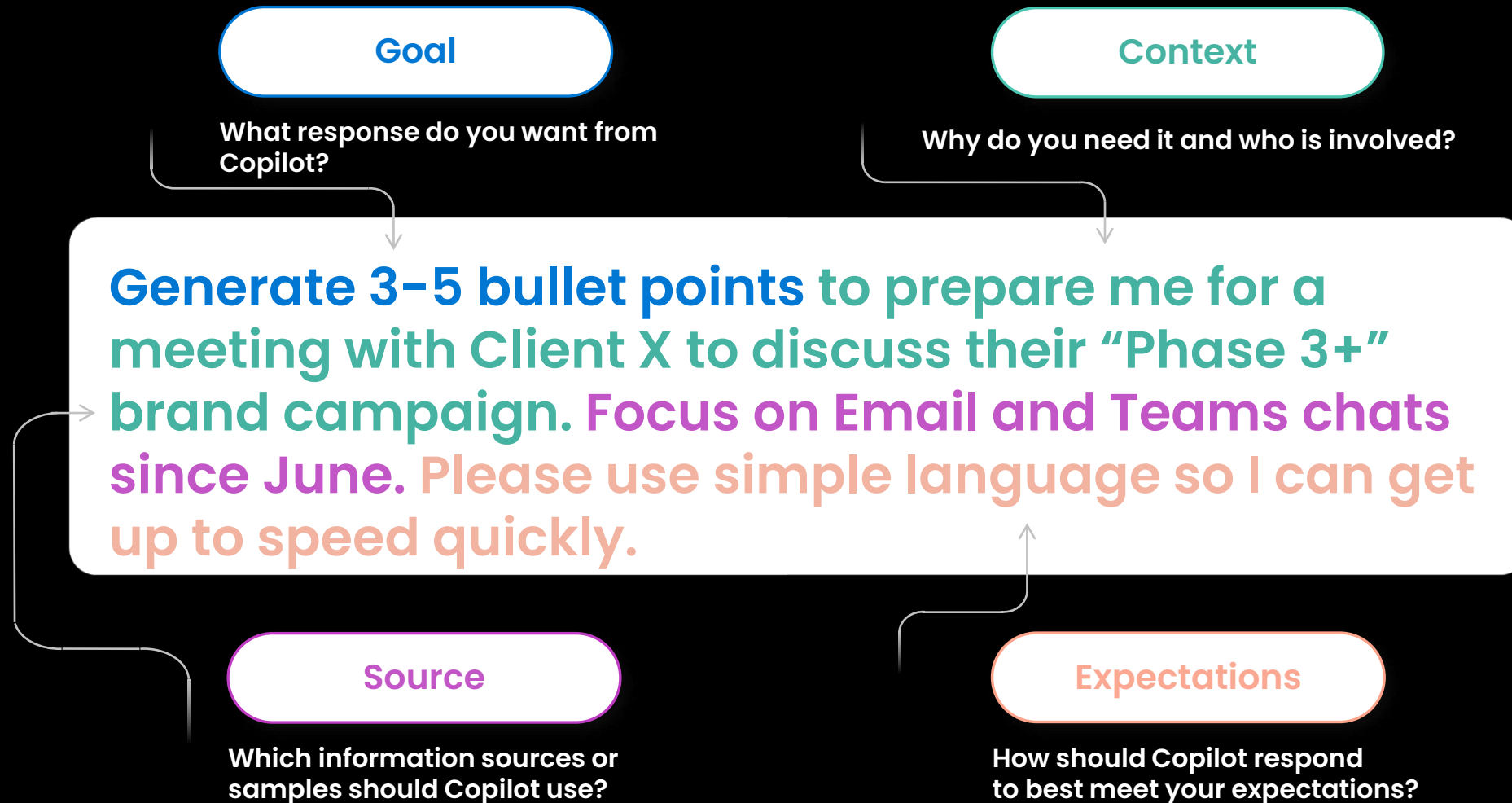
- Summarize this meeting, and list any action items
- Recap the last 10 minutes of this meeting / what was [person] discussing?



- Create a one-page executive summary of the chats, emails, and documents about [customer].
- Can you provide a list of documents I've recently collaborated on with [person]
- List any emails or teams messages I haven't replied to in the past 24 hours

# 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.



# Q&A

