

Microsoft 365 Copilot Readiness 3-Hours Workshop



PEAKUP



Copilot for Microsoft 365

Your AI assistant at work

“Today marks the next major step in the evolution of how we interact with computing, which will fundamentally change the way we work and unlock a new wave of productivity growth.”

“With our new copilot for work, we’re giving people more agency and making technology more accessible through the most universal interface – natural language.”



Satya Nadella

Chairman and CEO, Microsoft

The pace of work is outpacing our ability to keep up

AI-powered tools represent an enormous opportunity

64%

of people have struggled with finding time and energy to get their work done.

3x

Amount by which time spent in Microsoft Teams meetings and calls has increased per week since February 2020.

70%

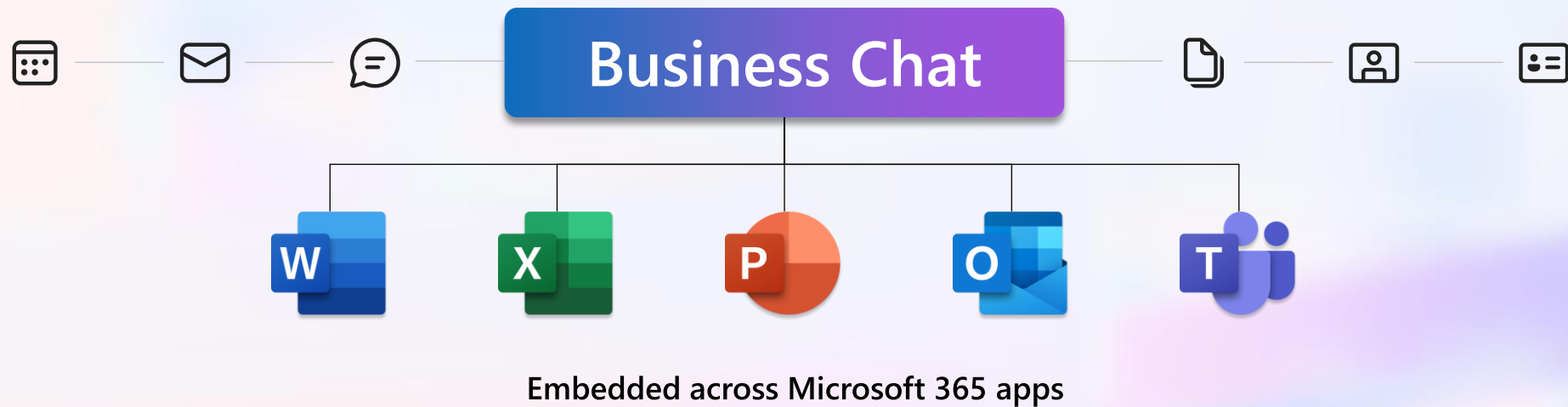
Share of people who would delegate as much as possible to AI to lessen their workloads.

2x

Likelihood of a leader to say AI will provide value by boosting productivity vs. cutting headcount.



Microsoft 365 Copilot





Microsoft 365 Copilot

Built on Microsoft's **comprehensive approach**



Security



Compliance

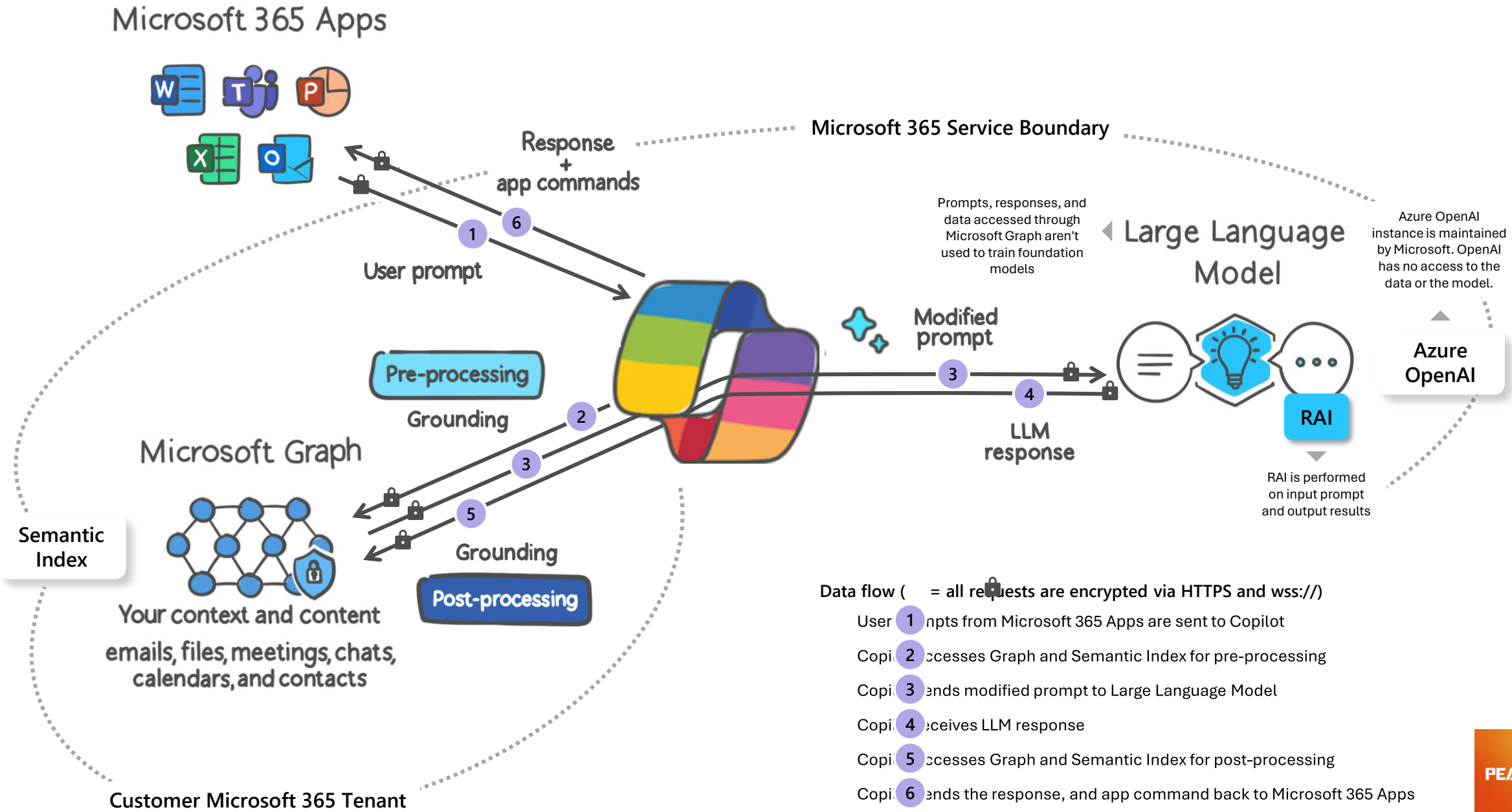


Privacy



Responsible AI

Copilot for Microsoft 365 basic architecture



Microsoft 365 Copilot Benefits



Unleash creativity

Harness Copilot's power so you never start from scratch



Unlock productivity

Copilot summarize actions for you, and optimize your time



Uplevel skills

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

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Copilot Lab

More prompts to try

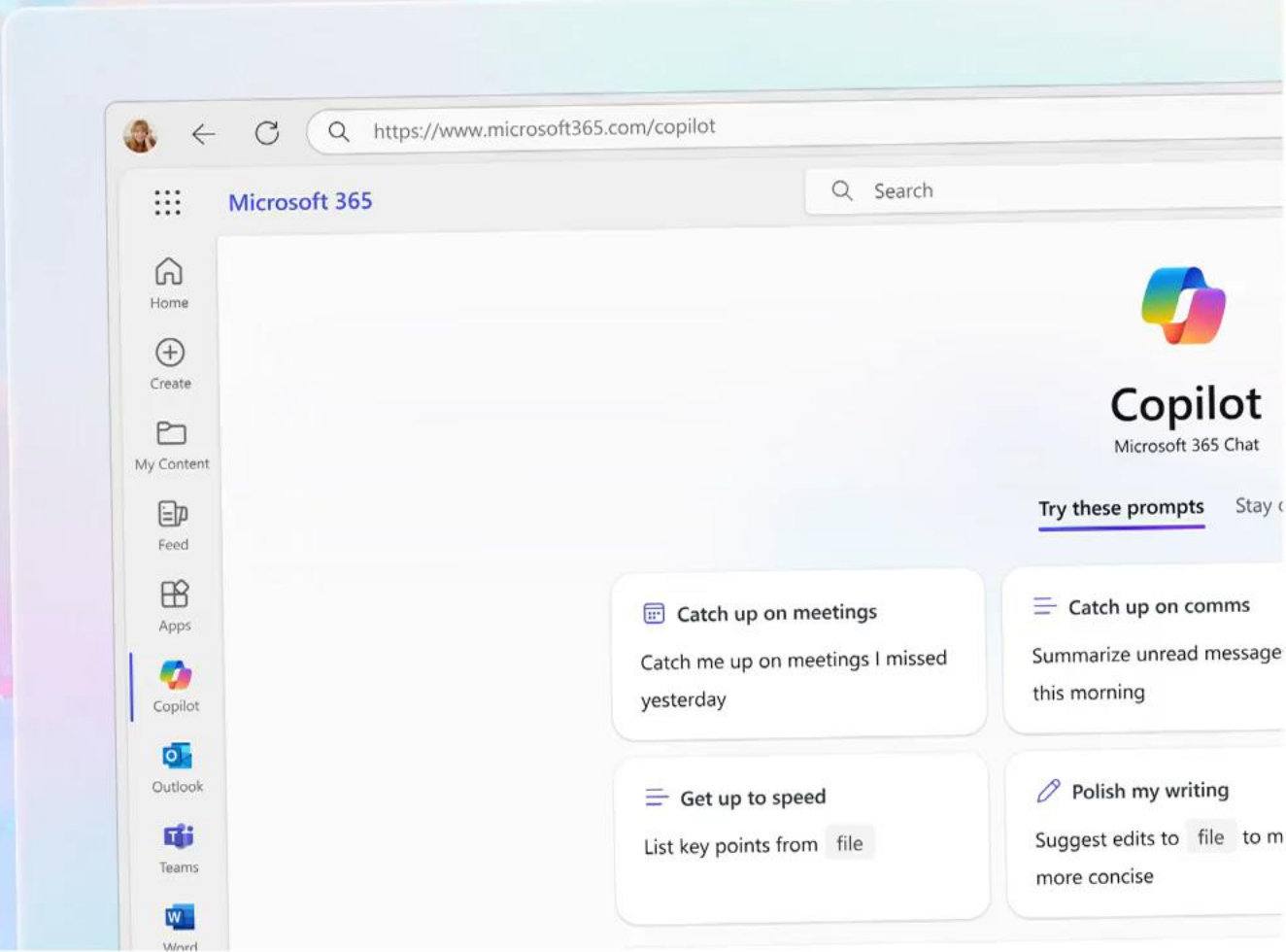
Work Personal

Apps Categories

- What's new?**
What's the latest from person, organized by emails, messages, and files?
- Get key info**
List key points from file
- Summarize**
Provide a summary of my recent emails
- Draft an FAQ**
Create an FAQ based on file
- Where was I mentioned?**
Summarize emails where I was mentioned recently. Make it detailed, highlighting the sender and categorizing by topic of them.
- Describe concisely**
Summarize level overview [topic]
- Write an intro**
- Prepare for a meeting**
- How to**

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Copilot in M365 Chat



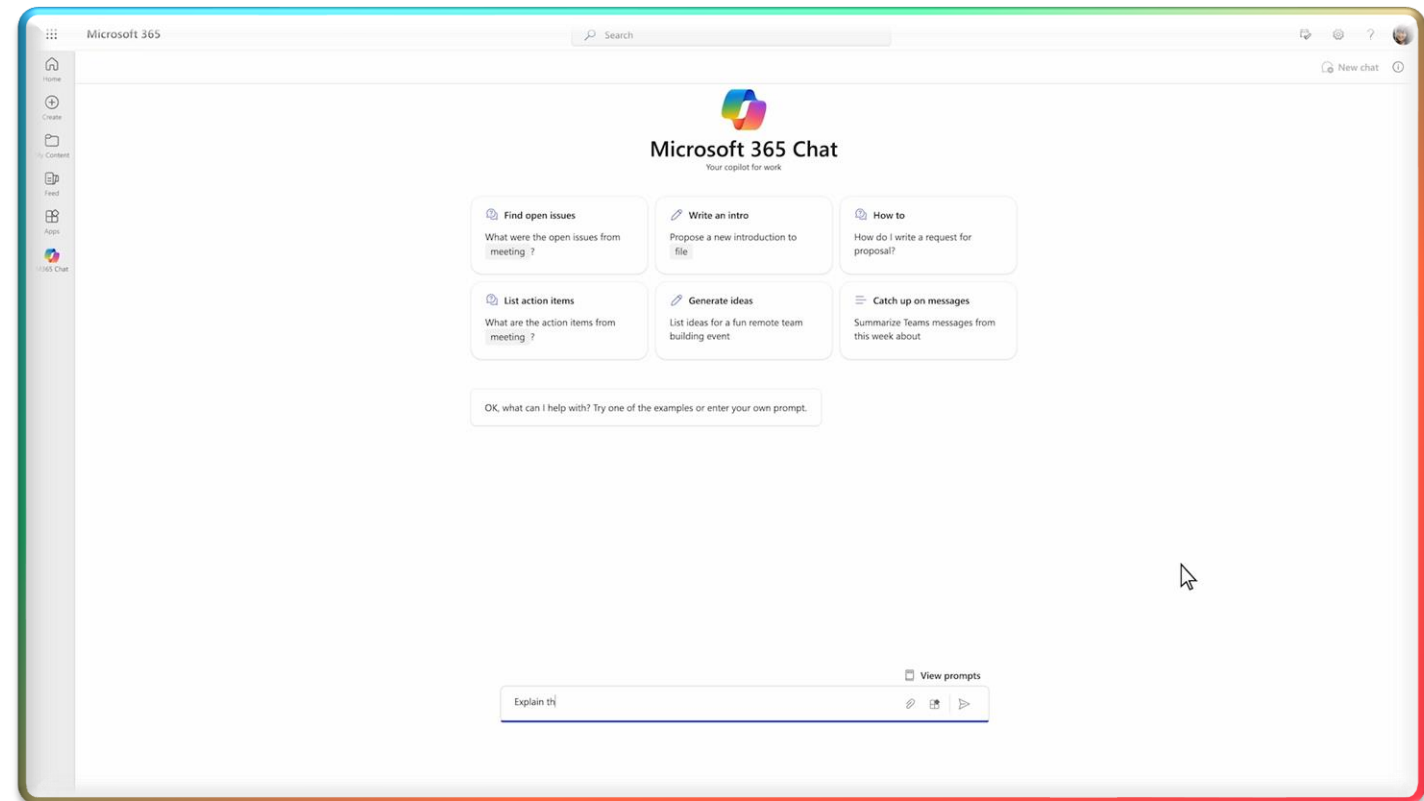


Copilot

Goes far beyond simple questions and answers to tame the complexity, eliminate the drudgery, and reclaim time at work.

With **Copilot** now you can

- Comb across all your work data to solve the most complex problems at work.
- Find whatever you need in your files (even if you forgot they existed), connect the dots across your content.
- Integrate with the apps you use to run your business.



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Copilot in Teams Meetings

The screenshot displays the Microsoft Teams interface during a meeting. The top navigation bar includes a search bar and navigation arrows. The meeting title is "Core accounts business review". The meeting time is "Mar 16, 10:00 AM". The interface shows a "Shared content" section with a file named "Proseware Proposal.pptx". Below this is a video player showing a hand pointing at a screen. The "Notes" section is expanded, showing a summary of the meeting content generated by Copilot. The summary includes a list of key points: a \$230K revenue shortfall, a 15% inventory surplus, and a discussion about discounting scenarios and Proseware as a leading opportunity. The "Notes" section also includes a list of topics discussed during the meeting, such as "Proseware negotiation strategy" and "Core accounts round table".

Core accounts business review

Mar 16, 10:00 AM

Shared content

Proseware Proposal.pptx

Notes

Core accounts.loop

Quarterly results and forecasts for Core Account

Summary

Based on what attendees said in the meeting

- \$230K revenue shortfall in this quarter
- Inventory 15% surplus (renewable products and recycled n
- Account leads to propose discounting scenarios to lower i
- Proseware was discussed as a leading opportunity

Notes

- Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal.
- The team identified a new opportunity with Proseware th

Speakers

Topics

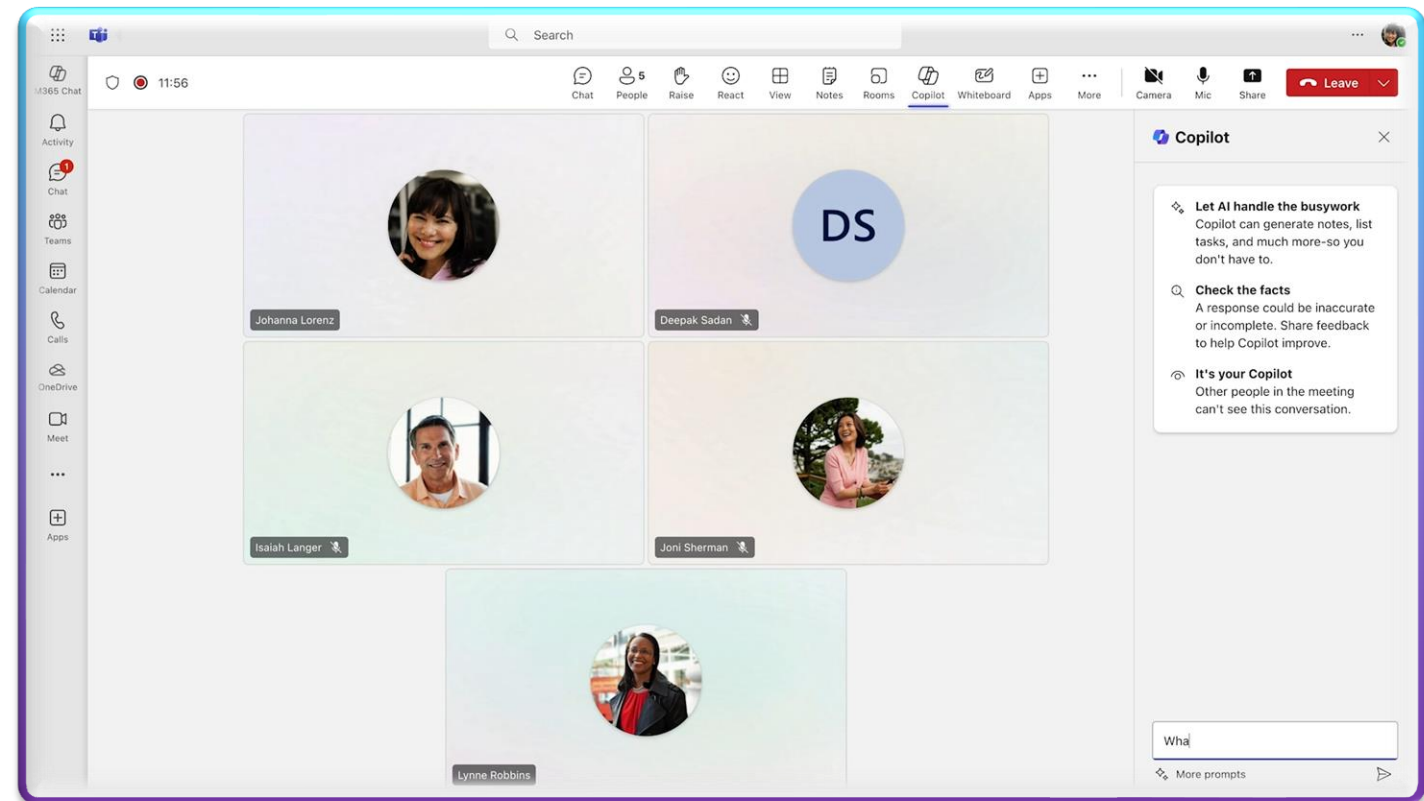
- Proseware negotiation strategy
- Core accounts round table

Copilot in Teams

Copilot helps you run effective meetings, get up to speed, organize key discussion points, and summarize actions.

With **Copilot** now you can:

- Summarize what you've missed in a meeting.
- Create a table of pros and cons for *[topic]*.
- What decisions were made, and what are some suggested next steps?



- Built-in and automated
- Standardized
- Video, speaker, and chapter markers
- Available after meeting only

The screenshot displays a Microsoft Teams meeting interface. At the top, a purple callout box labeled 'Intelligent recap' points to the meeting summary section. This section includes a video player for the meeting, a list of speakers with their speaking durations, and a 'Content' area with links to 'Product Roadmap...', 'Marketing budget...', and 'Marketing demo f...'. Below this, there are tabs for 'Notes', 'AI notes', 'Mentions (3)', and 'Transcript'. The 'AI notes' section contains text generated by AI, such as 'Serena wants to look at the product roadmap before she and Danielle commit to more feature enhancements.' and 'Danielle explains that they are on track for new product release in December. But they will need to keep an eye on beta testing results. She will follow up on that.' Below the notes are 'Follow-up tasks' listed for Danielle and Jon Shammass. To the right, a blue callout box labeled 'Copilot in Teams' points to the Copilot sidebar. The sidebar shows a prompt 'Create a table with pros and cons of option 1' and a table with two columns: 'Pros' and 'Cons'. The table contains the following data:

Pros	Cons
Wider range of potential leads	Less persuasive
Simpler, faster sign-up process	Difficult to segment audience
Streamlines multiple campaigns	Less engaging

Below the table are options to 'Copy', 'Elaborate on each pro and con.', and 'List more options.' There is also a text input field for asking questions about the meeting.

- On-demand
- Based on unique prompts
- Conversational interaction, with citations.
- Available real-time (during and after meeting)

Use built-in meeting summaries and ask any question about the meeting

*Intelligent recap is also available in Teams Premium

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Copilot in Outlook

The screenshot displays the Outlook interface for a meeting recap. At the top, the Outlook logo and a search bar are visible. The meeting title is "Marketing Sync - meganb@contoso.com" with an event titled "Meeting recap". The specific meeting is "Profitable Projects Pitch & Plan" held on Wednesday 9/8/2023, from 11:00 AM to 12:00 PM. A video conference grid shows six participants. Below the grid, there are controls for "Speakers", "Topics", and "Chapters". The "AI notes" button is highlighted in blue. A warning message states "AI-generated content may be incorrect". The "Meeting notes" section includes a list of key points: Daniela highlighted the effectiveness of before-and-after images, Seren's suggestion was added to the team, and Babak suggested conducting a prosperous home improvement project.

Outlook

Search

Marketing Sync - meganb@contoso.com

Event [Meeting recap](#)

Profitable Projects Pitch & Plan | Wednesday 9/8/2023, from 11:00 AM to 12:00 PM

Content

Product Roadmap...

Notes AI notes

AI-generated content may be incorrect

Meeting notes

- > Daniela highlighted the effectiveness of before-and-after images in their effectiveness. Seren's suggestion into the team
- > Babak suggested conducting a prosperous home improvement project.

Speakers Topics Chapters

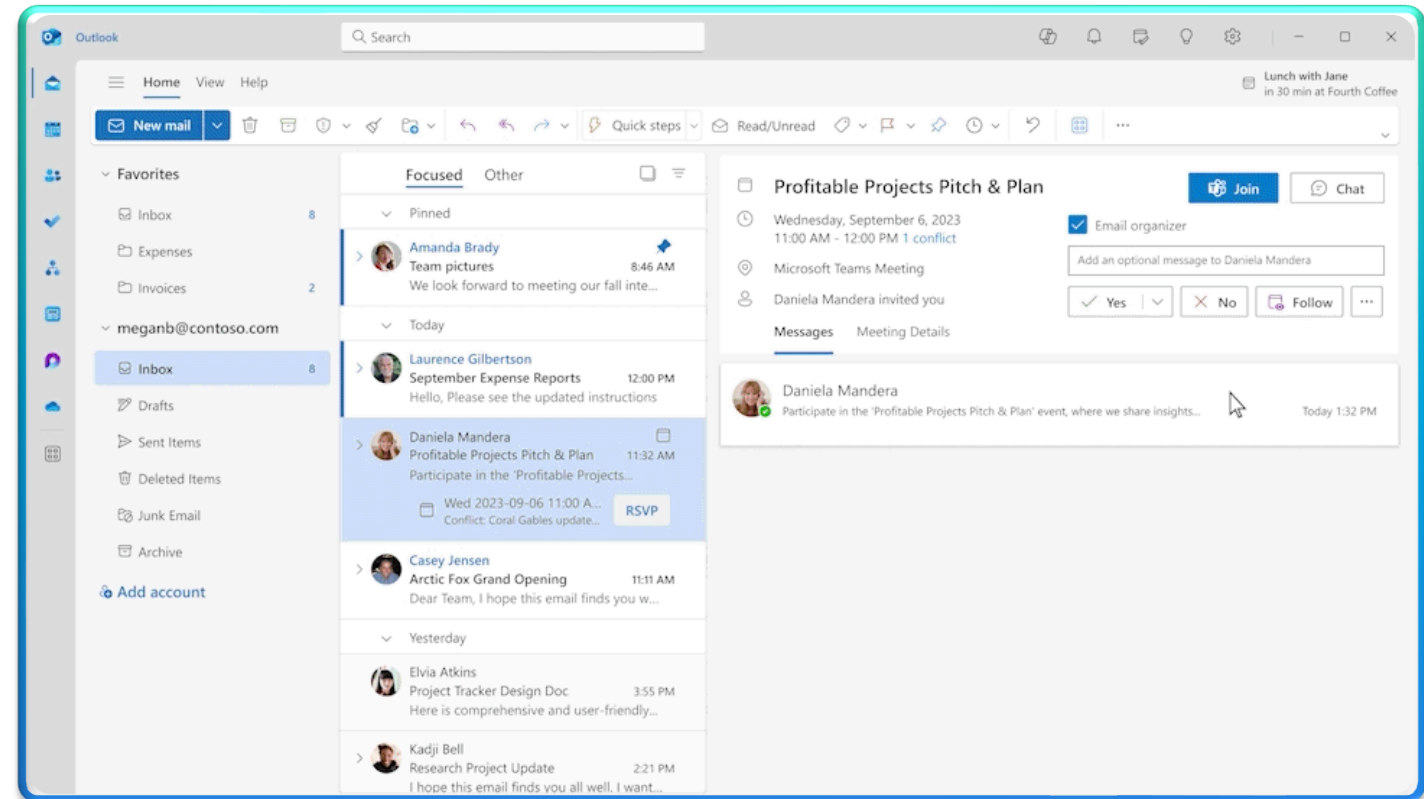
Serena Davis

Copilot in Outlook

Helps you stay on top of your inbox and create impactful communication in a fraction of the time.

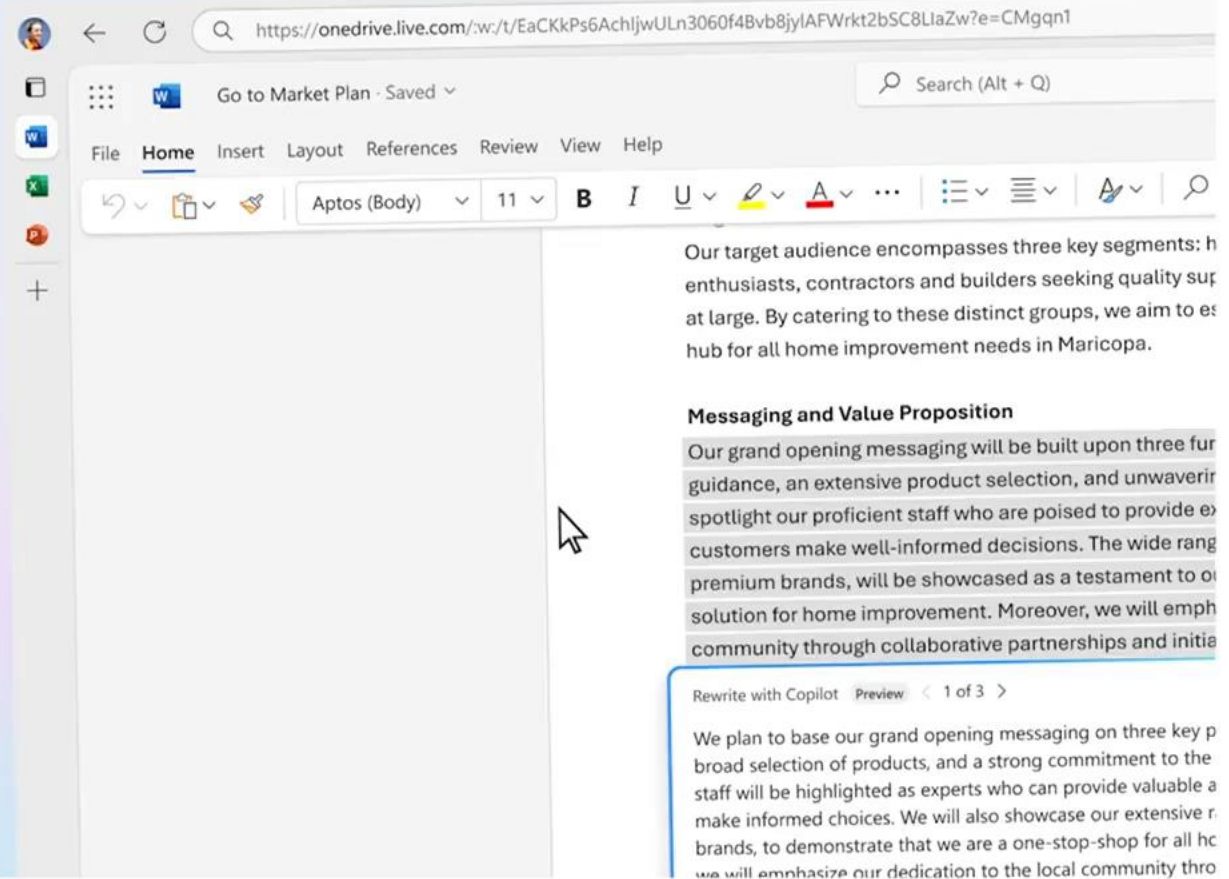
With **Copilot** now you can:

- Summarize an email thread and suggest action items, replies, and follow-up me
- Choose “Sounds like me” to match your unique writing style and voice.
- Follow along with a Teams meeting right from Outlook. Organizer will be notified to record it and Copilot will notify you when the recording is ready.



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Copilot in Word



The screenshot shows a Microsoft Word document with the following content:

Our target audience encompasses three key segments: he enthusiasts, contractors and builders seeking quality sup at large. By catering to these distinct groups, we aim to es hub for all home improvement needs in Maricopa.

Messaging and Value Proposition

Our grand opening messaging will be built upon three fur guidance, an extensive product selection, and unwaverir spotlight our proficient staff who are poised to provide ex customers make well-informed decisions. The wide rang premium brands, will be showcased as a testament to oi solution for home improvement. Moreover, we will emph community through collaborative partnerships and initia

Rewrite with Copilot Preview < 1 of 3 >

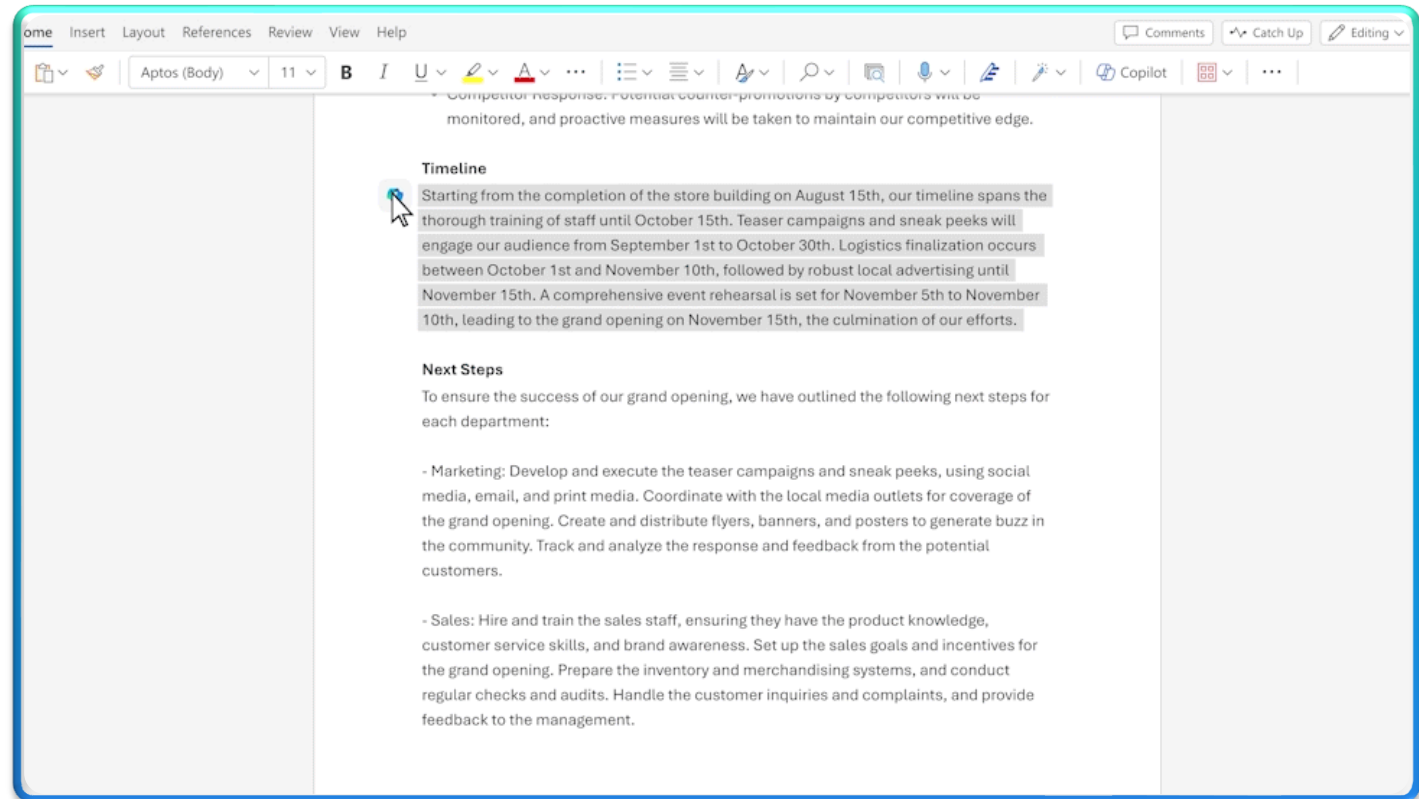
We plan to base our grand opening messaging on three key p broad selection of products, and a strong commitment to the staff will be highlighted as experts who can provide valuable make informed choices. We will also showcase our extensive r brands, to demonstrate that we are a one-stop-shop for all hc we will emphasize our dedication to the local community thro

Copilot in Word

Transforms the writing process to make you more creative and efficient.

With **Copilot** now you can:

- Create a summary of any document to share as a recap or quickly get up to speed.
- “Rewrite” a paragraph or save time on formatting by asking Copilot to generate a table from your copy.
- Create custom graphics right in the document with Microsoft Designer, which will pull from stock images, or your own uploads in the chat.




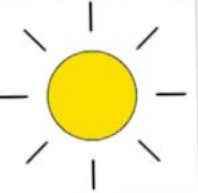


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Copilot in Excel

The screenshot shows the Microsoft Excel interface with Copilot's Python code editor open. The code is used to generate a 5-day weather forecast. Below the code, a table displays the forecast results, including weather icons and labels for each day.

```
File Home Insert Formulas Data Review View
B7 PY # Create a DataFrame of the weather forecast results
forecast_df = pd.DataFrame({
    'Weekday': [(datetime.now() + timedelta(days=day)).strftime('%A') for day in range(len(predicted_weather_conditions))],
    'Weather Forecast': predicted_weather_conditions
})
```

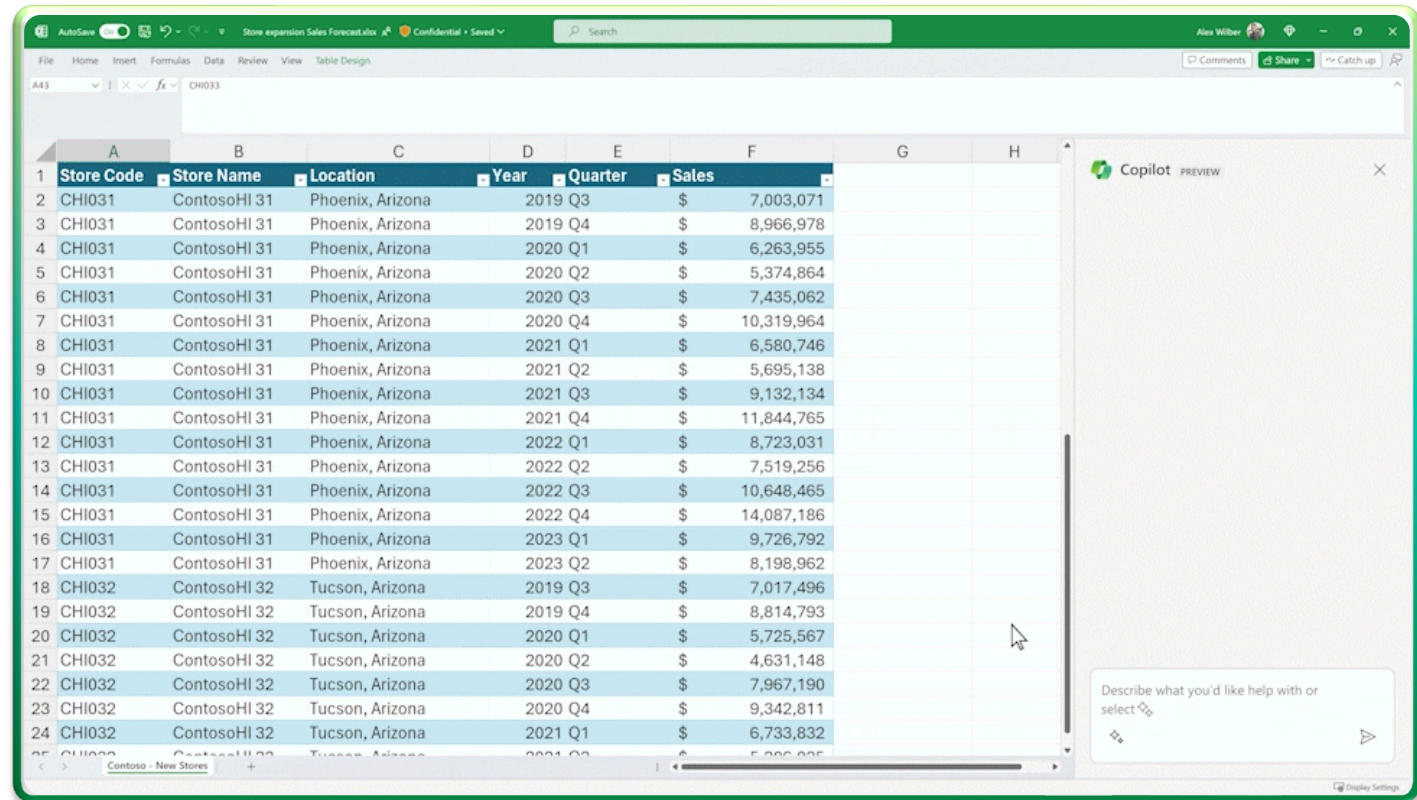
	A	B	C	D	E
1	5 Day Weather Forecast				
2	<i>Generates a forecast (sunny, rainy, cloudy), based on historical data for temperature, humidity and</i>				
3					
4	Historical Data	◇ DataFrame			
5	Weather Labels	◇ DataFrame			
6	Model	◇ DecisionTreeClassifier			
7	Full Forecast	◇ DataFrame			
8					
9					
10	Weekday	Wednesday	Thursday	Friday	Saturday
11	Weather Forecast	cloudy	cloudy	rainy	sunny

Copilot in Excel

Enables anyone to analyze and visualize data like a data analyst.

With **Copilot** now you can:

- Create powerful, professional visualizations, generate forecasts, and save time sorting through data with Python in Excel.
- Prompt: “make all cells red where the value is under 1000,” filter and sort your data
- Ask questions about your data to instantly uncover key insights.

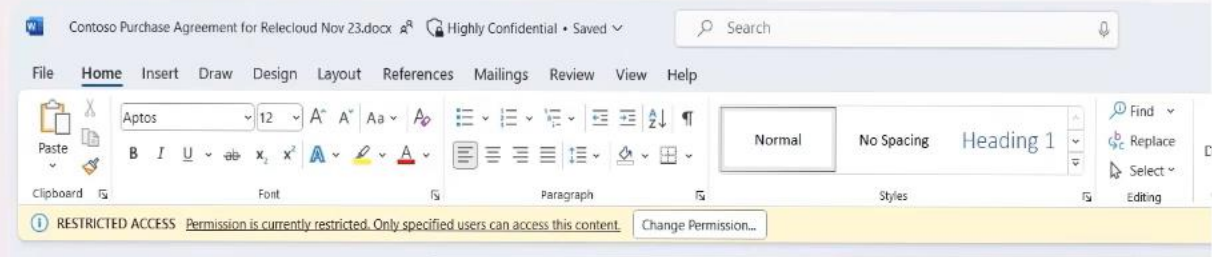


The screenshot displays the Microsoft Excel interface with a data table and the Copilot sidebar. The table contains sales data for two store locations: Phoenix, Arizona and Tucson, Arizona, spanning from 2019 to 2023. The Copilot sidebar is open on the right, showing a 'PREVIEW' tab and a text input field for prompts.

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

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Copilot with Data security



Purchase Agreement

This purchase agreement ("Agreement") is made as of the date of signature by and between Contoso Electronics, a company incorporated under the laws of California, with its principal place of business at 123 Main Street, Los Angeles, CA 90001 ("Seller"), and the undersigned buyer ("Buyer").

1. Product and Price

Seller agrees to sell and Buyer agrees to buy 1500 Mark 3 quadcopters ("Product") at a price of \$120 per quadcopter, for a total of \$180,000 ("Purchase Price"), subject to the terms and conditions of this Agreement.

2. Delivery

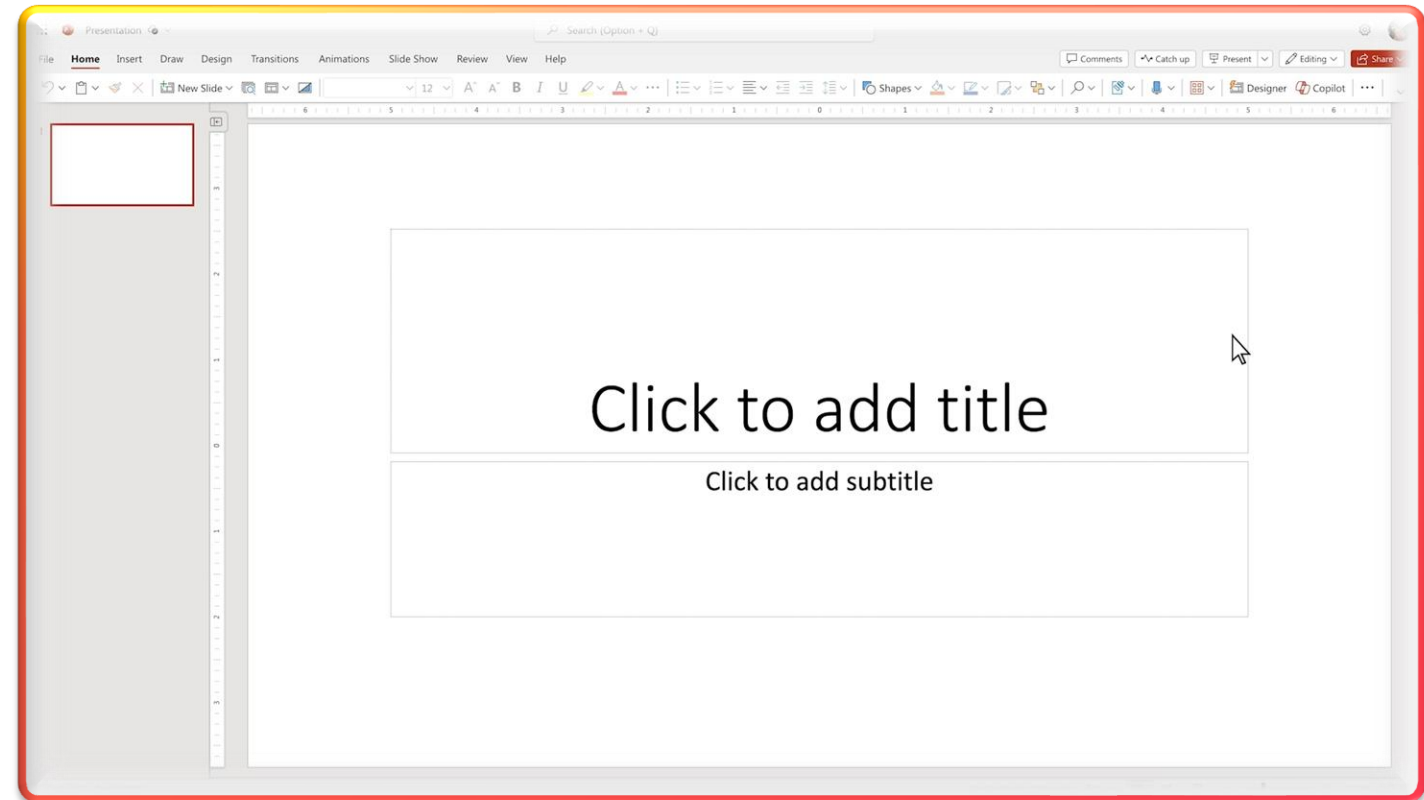
Seller will deliver the Product to Buyer's designated address, as indicated below, no later than November 15, 2023 ("Delivery Date"). Seller will bear the risk of loss or damage to the Product until delivery to Buyer. Buyer will inspect the Product upon delivery and notify Seller of any defects or non-conformities within 10 days of delivery. If Buyer fails to notify Seller within such period, Buyer will be deemed to have accepted the Product as delivered.

Copilot in PowerPoint

Copilot helps you turn your ideas into stunning presentations.

With **Copilot** now you can:

- 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.

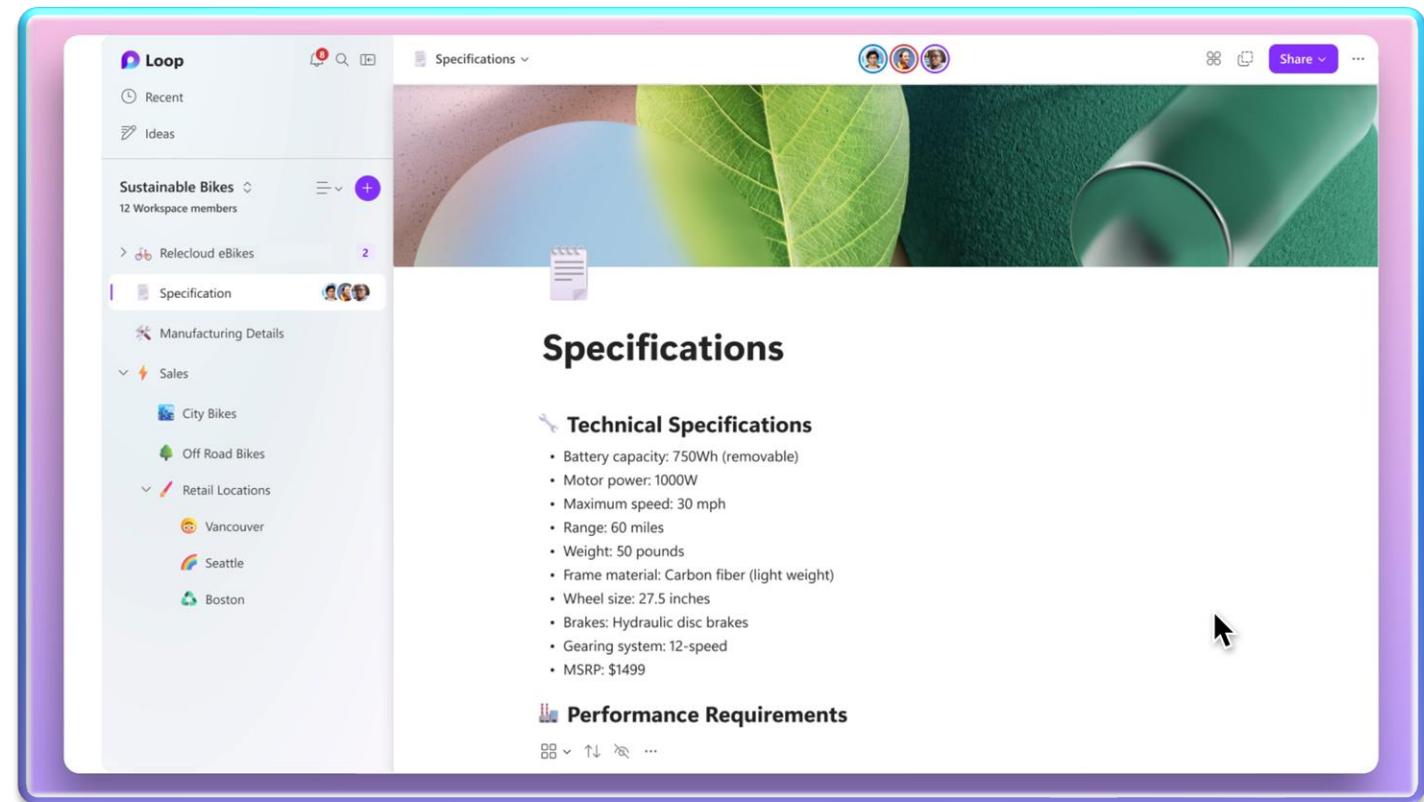


Copilot in Loop

Unlocks the power of shared thinking, helps cocreate, stay up to date, and pick up where others left off.

With **Copilot** now you can

- Create a summary of any document to share as a recap or quickly get up to speed.
- “Rewrite” a paragraph or save time on formatting by asking Copilot to generate a table from your copy.
- Create custom graphics right in the document with Microsoft Designer, which will pull from stock images, or your own uploads in the chat.

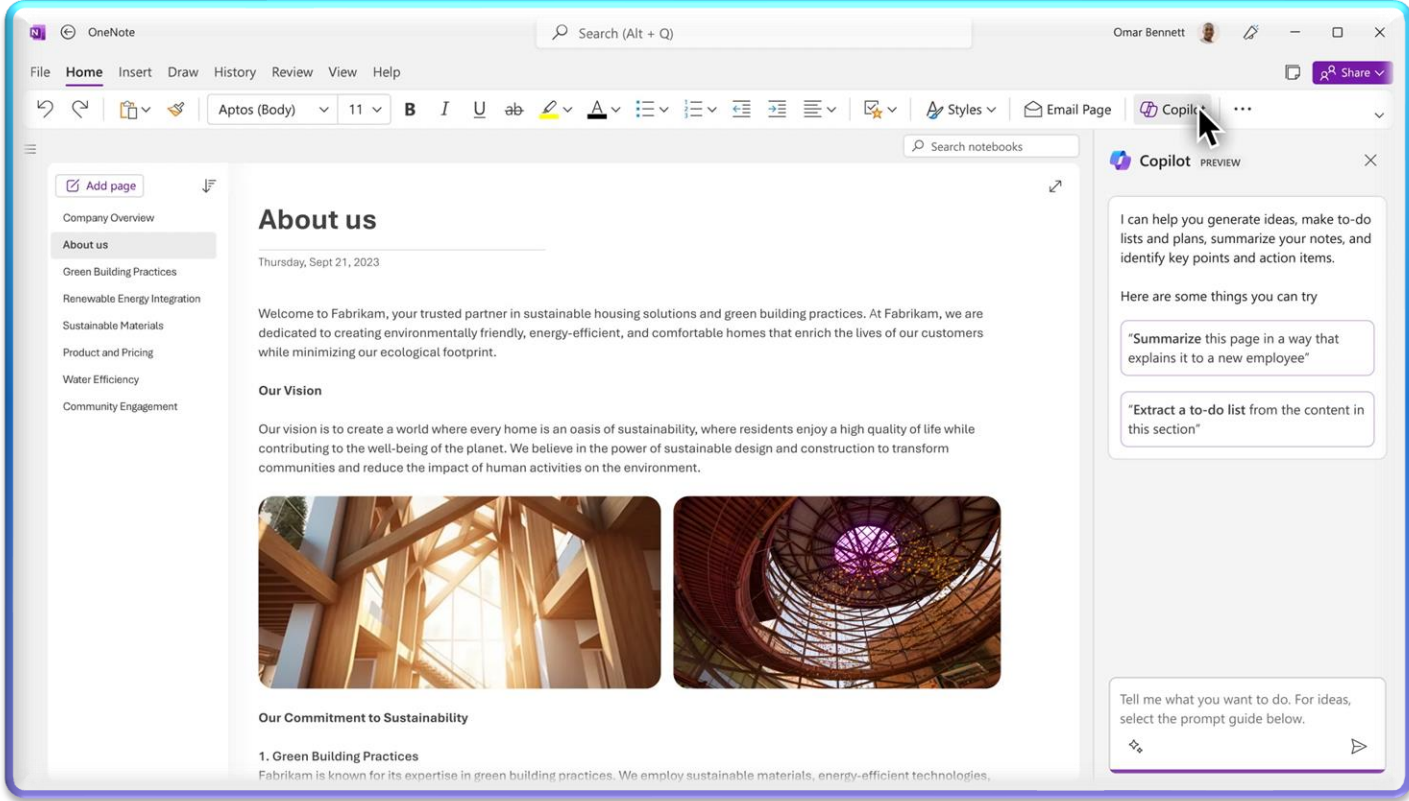


Copilot in OneNote

Helps you find all the insights and information you need.

With Copilot now you can

- Ask open-ended questions related to an individual file or get a summary of the content, without ever opening a file across OneDrive and SharePoint.



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Copilot in Viva Sales

The screenshot displays the Outlook web interface. At the top, there is a search bar and navigation tabs for Home, View, and Help. Below this is a toolbar with options like New Mail, Delete, Archive, Sweep, and Move to. The main area is divided into a 'Focused' tab and a list of emails. The selected email is from Maya Robinson with the subject '[EXTERNAL] Re: XL Recycled bottles' and a timestamp of 12:55 PM. The email body starts with 'Hi, Thanks for your time, this is a great su...'. Below it is another email from Alberto Burgos, Kevin Smith.. with the subject '[External] Pricing Information' and a timestamp of 9:00 AM. The interface also shows a 'Conversation summary' section on the right, which contains a bulleted list of key points from the email thread. A 'Close as won' button is visible below the summary, and a mouse cursor is hovering over it. At the bottom of the summary, it says '3 references'. The email thread continues with an email from Wanda Howard with the subject '[External] Urgent: Open cases are...' and a timestamp of 4:22 PM, and another from Kristin Patterson with the subject '[External] Fw: Help with concerns...' and a timestamp of 3:07 PM.

Outlook

Search

Home View Help

New Mail Delete Archive Sweep Move to

Focused Other

Today

MR Maya Robinson
[External] Re: XL Recycled bottles 12:55 PM
Hi, Thanks for your time, this is a great su...

AB Alberto Burgos, Kevin Smith..
[External] Pricing Information 9:00 AM
Hi all, according to our discussion yesterday

Yesterday

Wanda Howard
[External] Urgent: Open cases are... 4:22 PM
Can you share a link to the marketing do

Kristin Patterson (2)
[External] Fw: Help with concerns... 3:07 PM
+1 - This should be ASAP

[EXTERNAL] RE: XL Recycled bottles

Conversation summary

- Maya approved the deal
- Maya is looking for pricing for the XL product
- She requested pricing for 5000 and 10,000 Un 10 countries.
- The launch date for their new product is Marc

Close as won

3 references

MR Maya Robinson
To: Samantha Cantrell
Hi,
Thanks for your time, this is a great summary of

Which data does Copilot use?

Microsoft Cloud Runs on trust

Your data is **your data**

Your data from any fine-tuning is **not used to train** the foundation AI models

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

Designed for the needs of the enterprise



Grounded in
your customer's business data

Microsoft 365 Copilot has real-time access to both your customer's *content and context* in Microsoft Graph.



Comprehensive
security, compliance, and privacy

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



Architected to protect
Your customer's data

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



Integrated into the
apps your customer uses every day

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



Individual user and admin
always in control

The 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.



Thank You!



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