



Copilot for Microsoft 365

Your AI assistant at work



Wade Walker
VP Cloud Services
wadew@biggreenit.com



Lindsay Cowan
Account Manager, West
lindsayc@biggreenit.com



Austin Kelly
Account Manager, East
austink@biggreenit.com

Today's Agenda

Introductions

About Big Green IT

What is Copilot for Microsoft 365?

Using Copilot for Microsoft 365: See the options for using Copilot with your Microsoft applications

The Art of Prompting: How to get the results you're looking for

Security Measures: Discover how Copilot keeps your company data secure, ensuring privacy and compliance

Live Demo: See Copilot for Microsoft 365 in action using applications such as Teams, Excel, Word, and PowerPoint

Q&A/Wrap Up

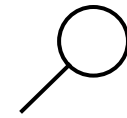


About Big Green IT: Connecting Enterprise Business to the Microsoft Cloud Ecosystem

- Your “Cloud Journey”
- Elevating companies to the cloud
- Build upon the Microsoft Cloud platform
- Leverage our expertise for Microsoft Cloud consulting, licensing, implementation and support
- Together we can help you develop a modern infrastructure with an ecosystem of products and services that are:
 - Secure
 - Built to work together
 - Supported
 - Able to grow and pivot as business needs change



What is Copilot for Microsoft 365?





Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language
Models

+



Microsoft Graph
- Your Data -

+



Microsoft 365
Apps

+



The
Internet

Copilot for Microsoft 365



Unleash creativity

Harness the power of AI so you never have to start from scratch



Unlock productivity

Let AI 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

Copilot for Microsoft 365 is transforming work

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

64%

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

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads



68%

said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

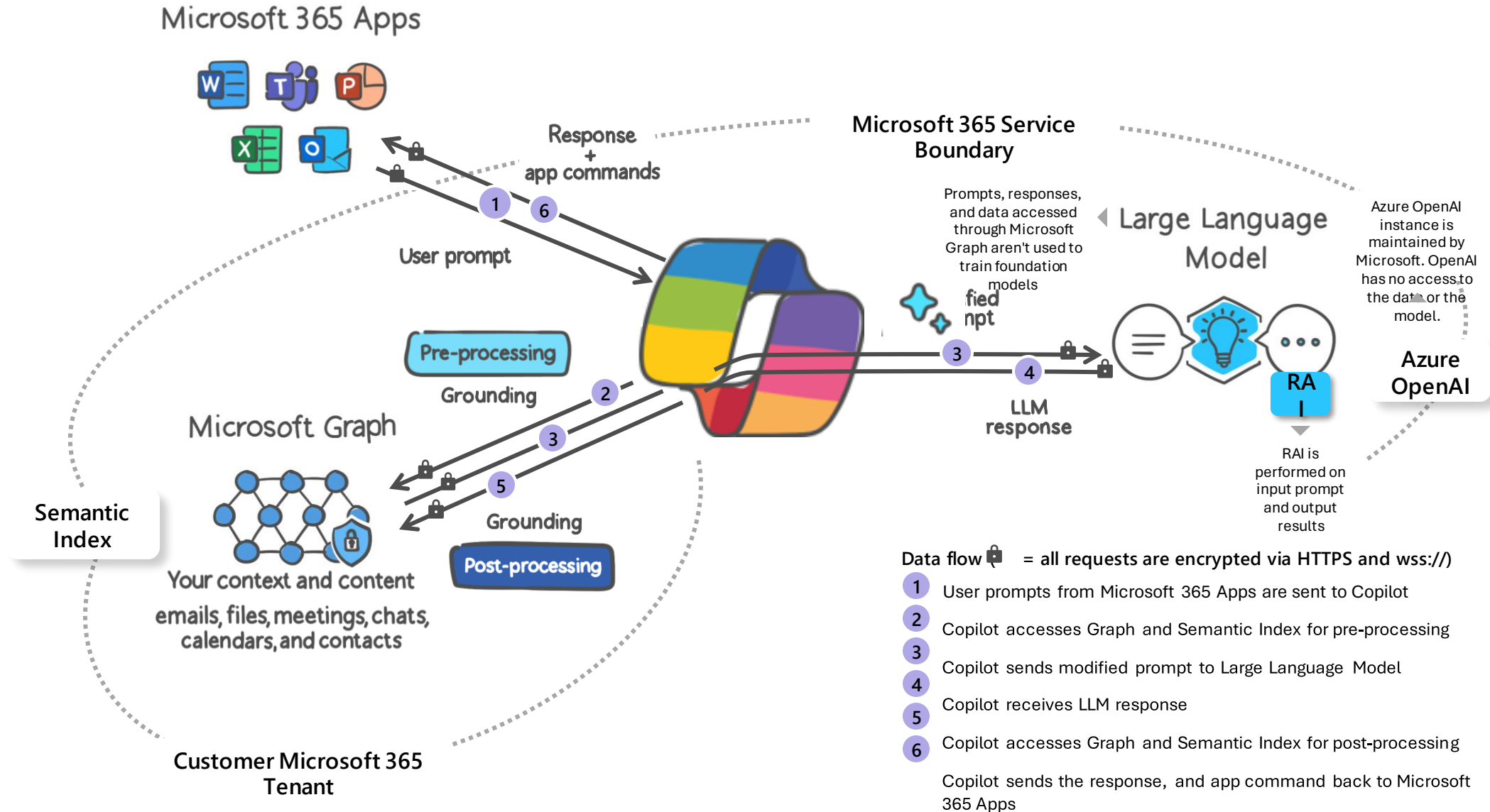


Alexis Blackwell

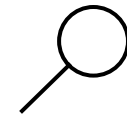
Arce Vol.10

Brooklyn, NY

Copilot for Microsoft 365 Basic Architecture



How can I use Copilot for M365?

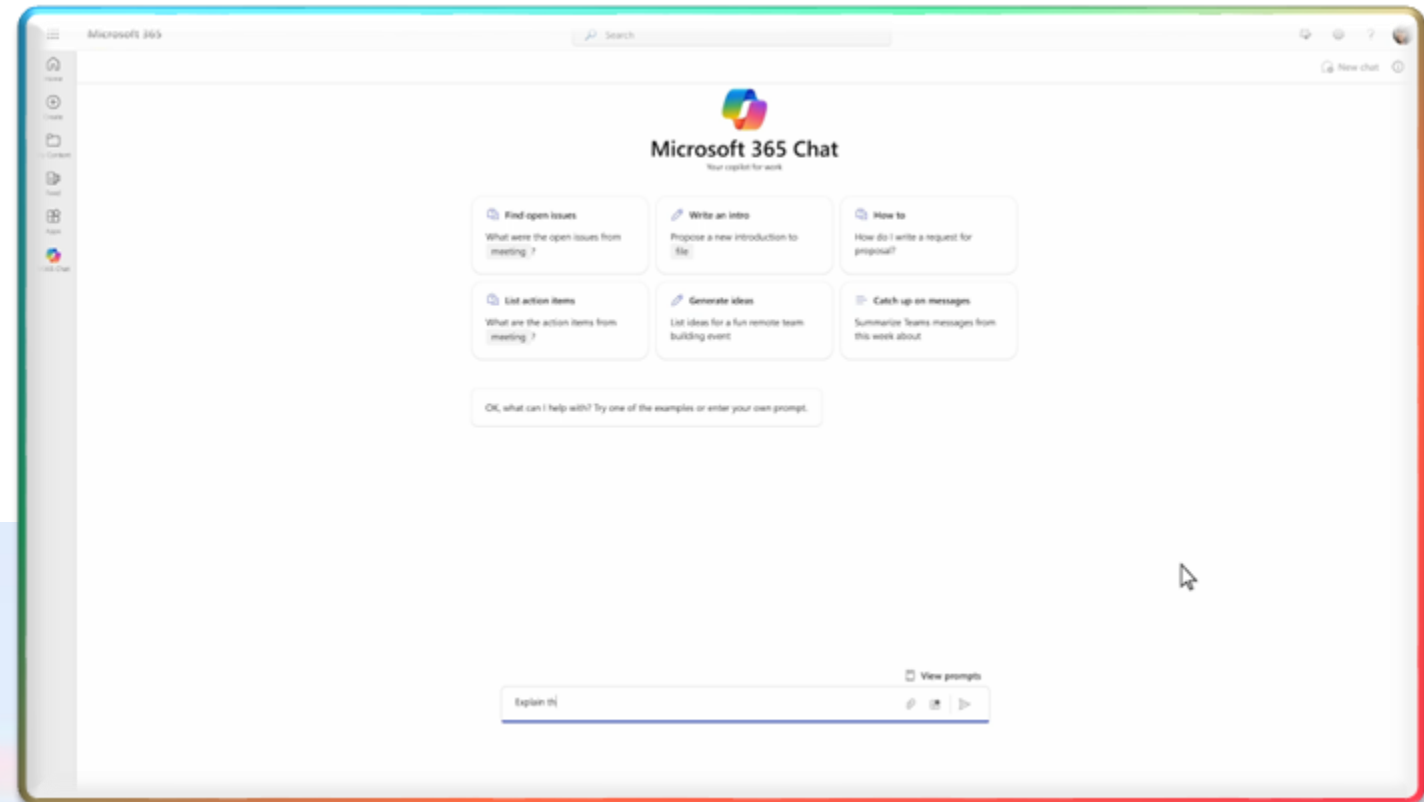


Copilot in M365 Chat

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.

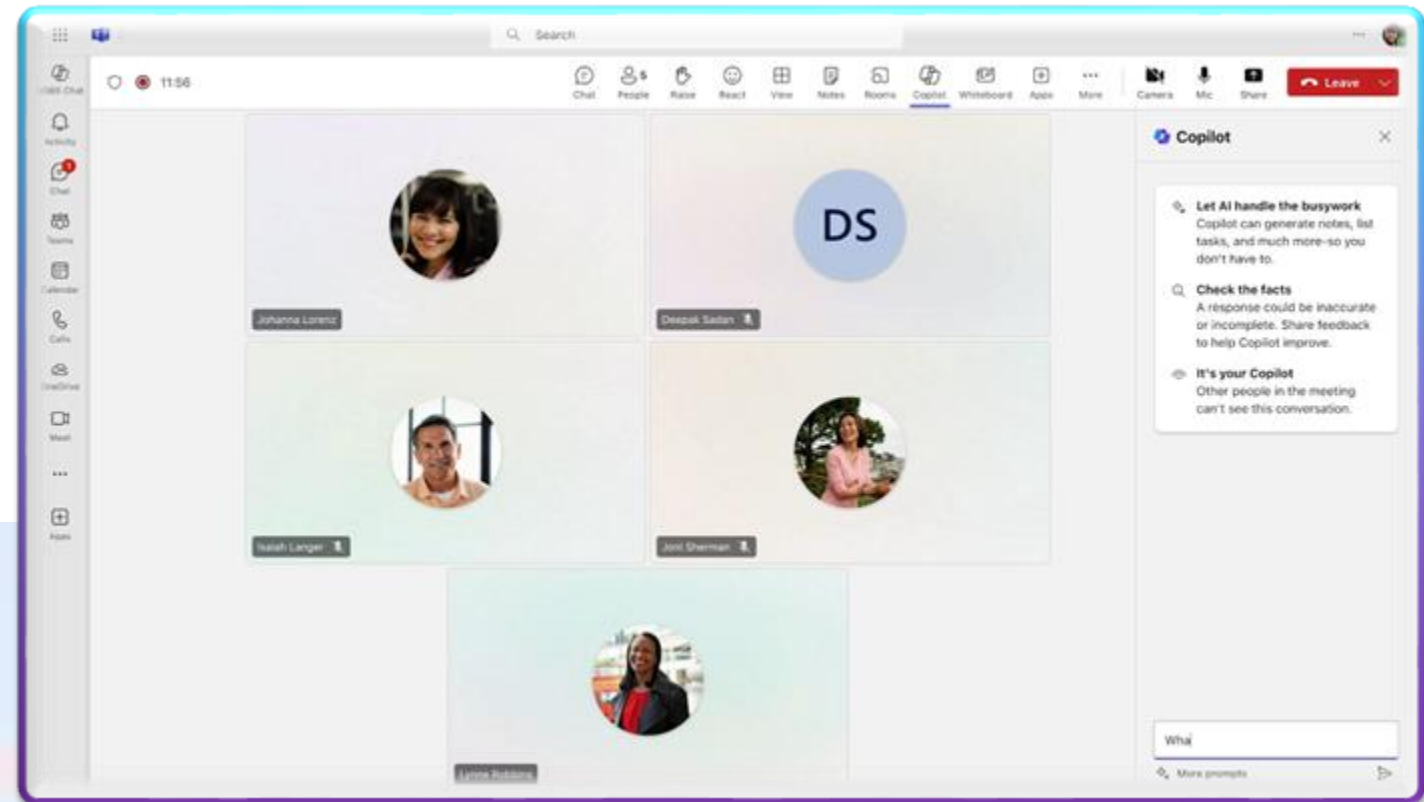


Copilot in Teams

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?



Copilot in Teams Meeting Recap

Intelligent recap

Copilot in Teams

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only

On-demand

Based on unique prompts

Conversational interaction, with citations.

Available real-time (during and after meeting)

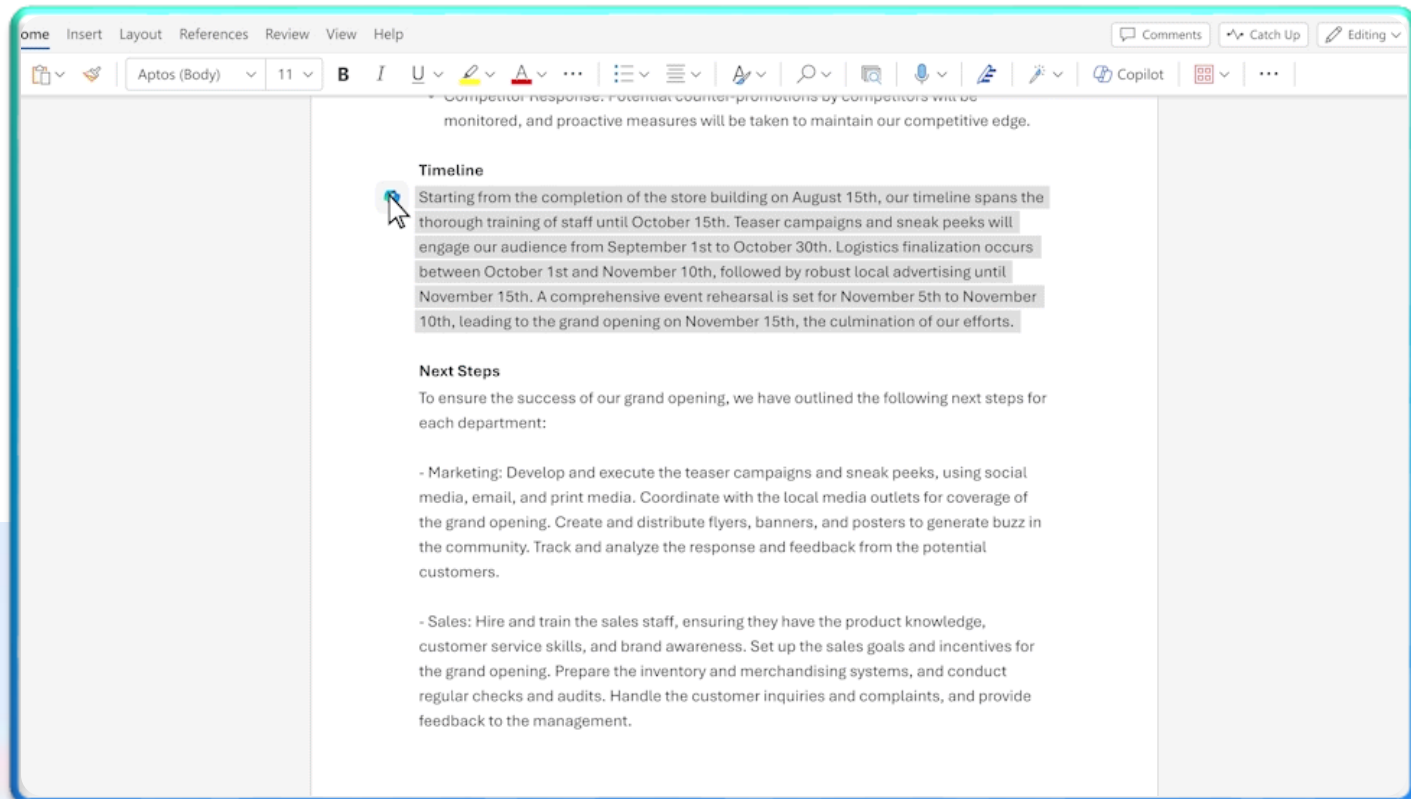
Use **built-in meeting summaries** and **ask any question** about the meeting

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.

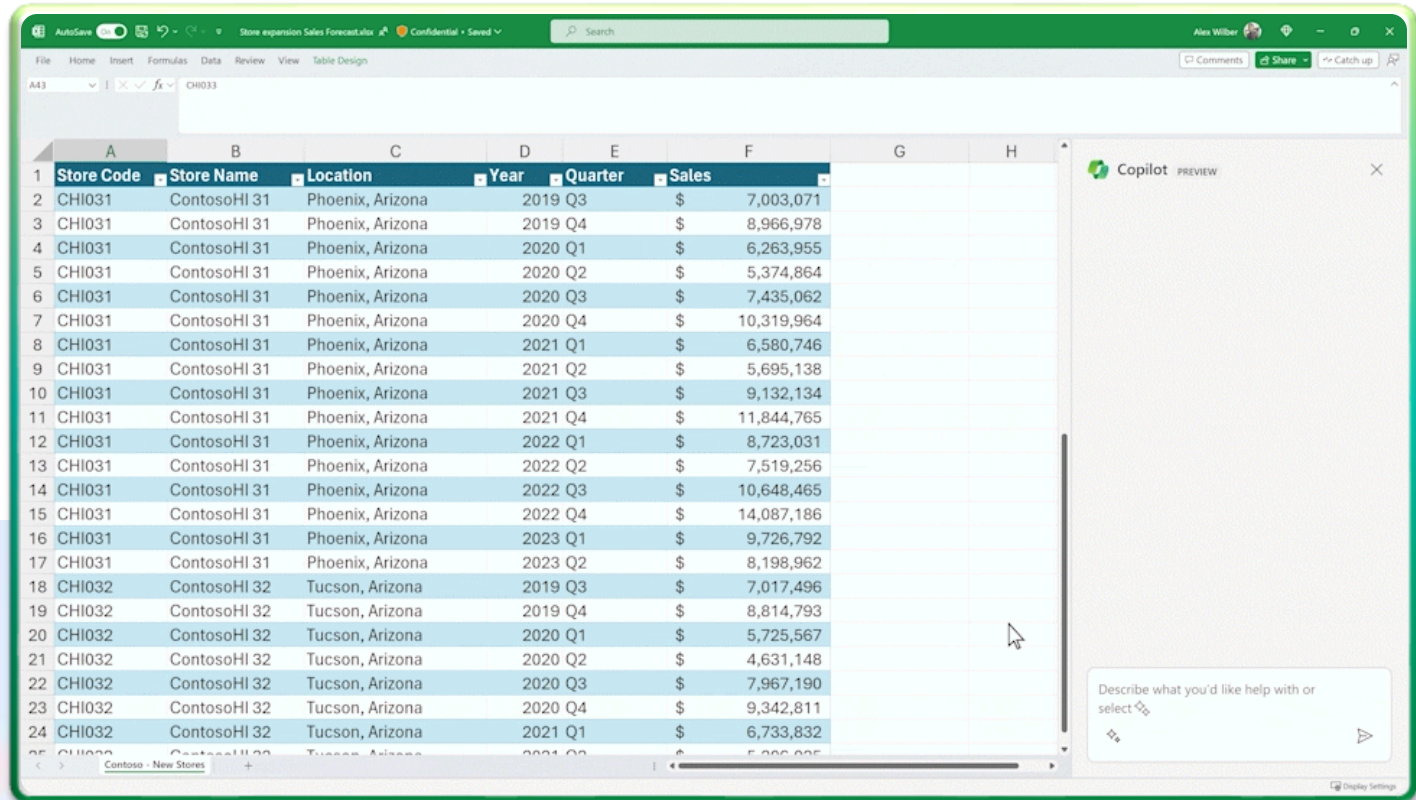


Copilot in Excel

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 various store codes and locations over time. The Copilot sidebar is open on the right, showing a 'Copilot PREVIEW' window with a prompt input field.

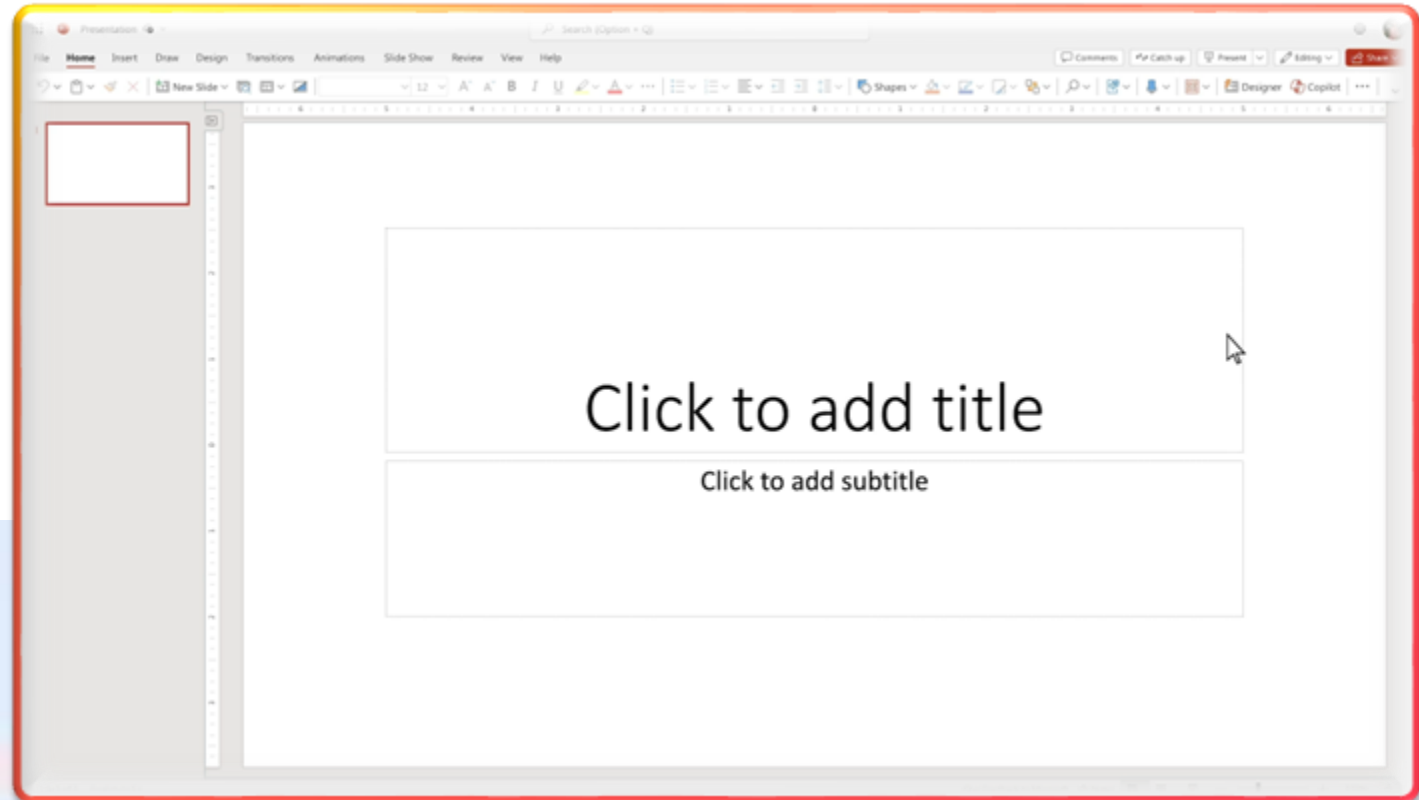
Store Code	Store Name	Location	Year	Quarter	Sales
CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q3	\$ 7,003,071
CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q4	\$ 8,966,978
CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q1	\$ 6,263,955
CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q2	\$ 5,374,864
CHI031	ContosoHI 31	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
CHI032	ContosoHI 32	Tucson, Arizona	2021	Q2	\$ 5,000,000

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.



Ideas for Copilot *Web*

Write something new

You've got a brilliant idea you want to share with the world. But you don't know how to put it into words. Don't worry, just tell Bing what you want to write and how you want to write it...

Get summaries

Get the gist of something without reading everything. Just tell Bing what you want to know a summary of, and it will give you a concise summary of the main points – whether it's a book, a tv show...

Ask follow up questions

Each conversation you have in a Bing Chat keeps the context of your initial questions. This allows you to clarify past questions and get more information without starting over...

Comparison made easy

You don't have to waste time browsing different sites or typing multiple questions. Just say what you want to compare and how detailed you want the comparison to be. Bing will do the rest...

Create an image directly in Copilot

Create images directly from your words. You just type what you want to see, and Bing Chat will generate it for you. You can also ask Bing Chat to modify or improve the image...

Change the tone or style of what you write

Not only can Bing help you write, but it can also spice up your writing with different tones and styles. Just tell Bing what you want and watch the magic happen...



How can I be sure Copilot will generate exactly what I'm looking for?



The *Art* of Prompting

Prompts are how you ask Copilot for Microsoft 365 to do something for you.

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?"
- ✓ **Summarize information:**
"Write a session abstract of this [presentation]."
- ✓ **Edit text:**
"Check this product launch rationale for inconsistencies."
- ✓ **Create engaging content:**
"Create a value proposition for [Product X]."
- ✓ **Transform documents:**
"Transform this FAQ doc into a 10-slide onboarding guide."
- ✓ **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

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

The *Art* of Prompting Continued...

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.

Be professional.

Using polite language improves Copilot's response.

Use quotation marks.

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

Communicate clearly.

Pay attention to punctuation, grammar, and capitalization.

Start fresh.

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

Do's

- ✓ **Be clear and specific.**
Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.
- ✓ **Keep it conversational.**
Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.
- ✓ **Give examples.**
Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.
- ✓ **Ask for feedback.**
Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.
- ✓ **Check for accuracy.**
Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.
- ✓ **Provide details.**
Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.
- ✓ **Be polite.**
Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

Don'ts

- ✗ **Be vague.**
When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.
- ✗ **Request inappropriate or unethical content.**
Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.
- ✗ **Use slang, jargon, or informal language.**
This may cause Copilot to give low-quality, inappropriate or unprofessional responses.
- ✗ **Give conflicting instructions.**
Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.
- ✗ **Interrupt or change topics abruptly.**
This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

Goal: *Create a meeting agenda for an upcoming Sales & Marketing meeting*

Prompt

“Create an agenda for a sales team meeting”

Certainly! Here's a Sales Team meeting agenda that you can use to ensure a productive discussion with your sales representatives:

1. Lead Generation:
 - Discuss techniques.
 - Improve skills.
2. Question Development:
 - Create buyer questions.
 - Adapt over time.
3. Objection Response:
 - Role-play confident answers.
4. Qualifier Development:
 - Evaluate leads.
 - Identify prospects early.

Additional topics:

- Accomplishments
- Critical Objectives
- Upcoming Projects
- Feedback

Prompt

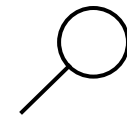
“Create a meeting agenda for the internal Sales & Marketing team on 2/27/21 using recent Teams Chats and Meeting Recordings”

Here is a possible meeting agenda for the sales team based on the information I found:

1. Review the NCE renewal season.
2. Share the forecast and the progress on co-sell opportunities
3. Update on the AVD campaign and upcoming webinars.
4. Prepare for the Copilot presentation at XXX on Friday.
5. Coordinate the communication with clients about the acquisition and the press release.

This agenda is based on the information found in the transcript of the Weekly Sales Meeting organized by Wade Walker. The meeting is scheduled for next Monday at 11 AM and will last until 12 PM. Attendees include Austin Kelly, Jonas Nordling, Ryan Walker, Debbie Reguera, Keri LaRue, and Lindsay Cowan.

What does Copilot for M365 licensing look like?





Microsoft Copilot for Microsoft 365

\$30.00

user/month

(Annual commitment)

Achieve more than ever
before using AI.

- ✓ Integrated with Teams, Word, Outlook, PowerPoint, Excel, and other Microsoft 365 apps
- ✓ AI-powered chat with Microsoft Copilot
- ✓ Connect to your data in third-party apps using Copilot Studio
- ✓ Enterprise-grade security, privacy, and compliance

A product license for Microsoft 365 Business Standard, Business Premium, E3, E5 or Office 365 E3 or E5 is required to purchase Copilot for Microsoft 365.



Generally Available



Microsoft Copilot

Copilot

Copilot for Microsoft 365

Free

\$30

Foundational Capabilities

Web grounding

Commercial Data Protection

Enterprise-Grade Data Protection

Graph Grounding

Microsoft 365 Apps

Copilot Studio



Does Copilot for M365 have proper security?



Microsoft's AI principles



Fairness



Reliability
& Safety



Privacy &
Security



Inclusiveness



Transparency



Accountability

Microsoft Cloud — AI you can trust

Your data is **your** data.

Your data is **not** used to train the OpenAI foundation models without permission.

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

Customer Copyright Commitment

Use Copilot services with confidence

Microsoft stands
behind their
Copilot customers

Microsoft is
sensitive to the
concerns of
authors

Copyright
guardrails are built
into the product



Microsoft 365 + Copilot Security



Grounded in
your business data

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



Comprehensive
security, compliance, & privacy

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



Architected to protect
data

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



Integrated into the
apps you use every day

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



Individual user & admin
always in control

User decide what to use, modify, or discard.



Designed to
learn new skills

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



Security and Compliance controls for Copilot for Microsoft 365

Essential security controls



Copilot + M365 Business Standard

Multi-factor Authentication
with security defaults

Device-based access & security controls
for M365 resources

Basic content and keyword search
for Copilot generated data

Comprehensive security controls



Copilot + Microsoft 365 Business Premium

Everything in M365 Business Standard, plus:

Conditional Access policies based on identity, device, location, & network

Terms of use policies to accept before getting access

Restrict saving business data and files to approved applications only

Protect sensitive M365 data from exfiltration and improper use (files & emails only)

eDiscovery, litigation hold and retention policies



Security and Compliance controls for Copilot for Microsoft 365

Baseline security



Copilot +
Office 365 E3

Multi-factor Authentication
with security defaults

Manual sensitivity labels
for Copilot generated content
(Office only)

Core security controls



Copilot +
Microsoft 365 E3

Conditional Access
policies based on identity, device,
location, & network

Manual sensitivity labels
for **non-Microsoft** documents
(e.g., pdf)

Endpoint management
capabilities

Best in class security controls



Copilot +
Microsoft 365 E5

User/session risk
and access control

Automatic sensitivity labels
for **non-Microsoft** documents
(e.g., pdf)

Discover and evaluate the
risk of 400+ **AI apps** & implement
controls to for their use at work


Can I see a demo of Copilot for M365? 

Next Steps & Resources

- ✔ **Schedule your Copilot for Microsoft 365 Assessment with Big Green IT:** a readiness assessment to ensure technical requirements are met, and an envisioning session to identify use cases that facilitate the creation of an implementation plan. Contact Sales@BigGreenIT.com
- ✔ Learn how [Copilot for Microsoft 365 works](#)
- ✔ Leverage the [Resources for Adoption](#)
- ✔ [Introduction to Copilot for Microsoft 365 Learning Path](#)

Copilot feature comparison

 For Individuals

 For Organizations

	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
	Free	\$20	Free	\$30
Foundational Capabilities	●	●	●	●
Web Grounding	●	●	●	●
Commercial Data Protection	●	●	●	●
Priority Model Access		●		●
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		●		●
Copilot in Teams				●
Microsoft Graph Grounding				●
Enterprise-Grade Data Protection				●
Customization		Copilot GPT Builder		Copilot Studio

Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.