



Microsoft 365 Copilot 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

Click on the use case you'd like to review

Keep
Executives
informed

Keep your
Operations
running smoothly

Streamline
Finance
decisions

Help **HR** with
hiring and
engagement

Boost
Marketing
speed and creativity

Amplify **IT**
efficiency

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





Microsoft 365 Copilot 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 365 Chat

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.



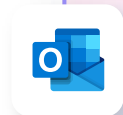
Copilot in PowerPoint

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.

[Learn more](#)

[Copilot Admin Documentation](#)

[Microsoft 365 Copilot Adoption Site](#)

[How to use Copilot](#)

Prepare for a company-wide address



Catch up

On chats and emails by prompting Microsoft 365 chat

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

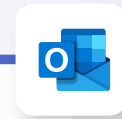
Generate a list of the key points made by each speaker.



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 365 Chat

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



Microsoft 365 Copilot AI for HR



Banish your busywork

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



Microsoft 365 Copilot augmented hiring workflow

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

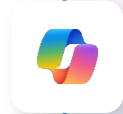
3 in 4 people

would be comfortable using AI for administrative tasks



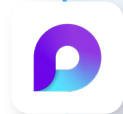
Copilot in Word

Create a job description by asking Copilot in Word to suggest skills, qualifications, and responsibilities.



Microsoft 365 Chat

Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.



Copilot in Loop

Create interview questions based on unique job requirements then crowdsource additional ideas and have Copilot create a final list.



Copilot in Teams

Conduct a group interview in Teams and ask Copilot to summarize the contributions of each candidate.



Copilot in Word

Command Copilot in Word to draft a customized offer letter based on your inputs.



Copilot in PowerPoint

Create powerful onboarding materials in PowerPoint.

[Learn more](#)

[Copilot Admin Documentation](#)

[Microsoft 365 Copilot Adoption Site](#)

[How to use Copilot](#)

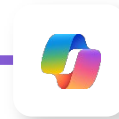
Microsoft 365 Copilot augmented hiring workflow



Create a job description

Starting from a blank document prompt Copilot in Word

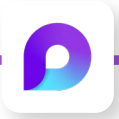
Create a job description for a senior animation designer role, based on the [Design Team Core Responsibility](#) document.



Discover qualified candidates

Prompt Copilot in Microsoft 365 Chat

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

Create an offer letter to Maya for the position of Senior Animation Designer with a start date of March 16th. 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



Microsoft 365 Copilot 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 Microsoft 365 Copilot

Production issues cost money so solving them quickly is always a top priority. Using Microsoft 365 Copilot 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 365 Chat

Discover solutions to similar production issues using Microsoft 365 Chat 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.

[Learn more](#) | [Copilot Admin Documentation](#) | [Microsoft 365 Copilot Adoption Site](#) | [How to use Copilot](#)

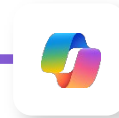
Solve a production issue with Microsoft 365 Copilot



Analyze production data

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

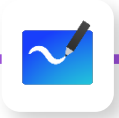
Show data insights.



Discover past solutions

From Microsoft365.com prompt Copilot in Microsoft 365 Chat

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

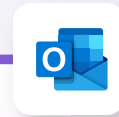
Organize.



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 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 365 Chat

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

Megan leads a product development team



Microsoft 365 Copilot AI for Sales



Give your sales team an AI assistant

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

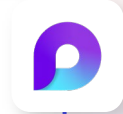


Deliver better sales presentations with an AI assistant

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. .

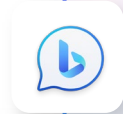
86% of people

are looking for AI to assist with finding the right information



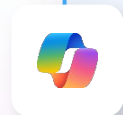
Copilot in Loop

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



Bing Chat Enterprise

Discover information on the customer using Bing Chat Enterprise to summarize their Annual Report for goals, risks, and financial information.



Microsoft 365 Chat

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.

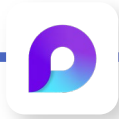
[Learn more](#)

[Copilot Admin Documentation](#)

[Microsoft 365 Copilot Adoption Site](#)

[How to use Copilot](#)

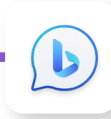
Deliver better sales presentations with an AI assistant



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 Bing Chat Enterprise in the Edge browser sidebar

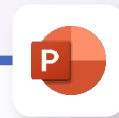
Summarize the Contoso annual report including goals, risks, and financial metrics.



Find the asks in your emails

From the Microsoft 365 Chat 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 365 Chat] 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 365 Chat

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



Microsoft 365 Copilot AI for Marketing



No one needs to start from scratch

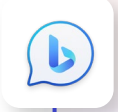
73% of people
are comfortable using AI for creative work



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



Bing Chat Enterprise

Utilize Bing Chat Enterprise to discover market research data and understand the key competitive offerings in each targeted market.



Copilot in Excel

Discover trends and outliers in the latest market research to identify which markets to target with promotions.



Copilot in Word

Command Copilot to draft a targeted promotion plan with suggested taglines.



Copilot in PowerPoint

Create a pitch deck for the product using the design documentation from engineering.



Copilot in Outlook

Create a promotional email using the product tagline and some bulleted items from the promotional plan.

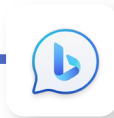


Microsoft 365 Chat

Command Copilot to create a series of social media posts based on the marketing content.

[Learn more](#) | [Copilot Admin Documentation](#) | [Microsoft 365 Copilot 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

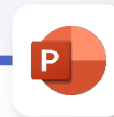
Show data insights.



Create a promotion plan

Prompt Copilot in Word

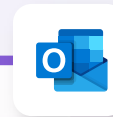
Generate a promotion plan for the widget market and include 10 potential taglines that would be appropriate for markets in Latin America.



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



Microsoft 365 Copilot AI for Finance



Streamline financial decisions

79% of people
are comfortable using AI
for analytical work



Complete an acquisition with Microsoft 365 Copilot

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 WorkLab Work Trend Index, May 2023



Microsoft 365 Chat

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.

[Learn more](#) | [Copilot Admin Documentation](#) | [Microsoft 365 Copilot Adoption Site](#) | [How to use Copilot](#)

Complete an acquisition with Microsoft 365 Copilot



Summarize due diligence reports

From the Teams apps prompt Copilot in Microsoft 365 Chat

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



Analyze financial data

Using a table to

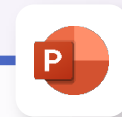
Show data insights.



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

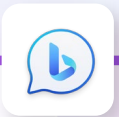
Create presentation from [Word document link to Deal Summary.docx] Be sure to include a summary slide, a conditions slide, and a financials slide



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.



Microsoft 365 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



Microsoft 365 Copilot AI for IT



Capture actions to keep operations running

76% of people
are comfortable using AI
for administrative tasks



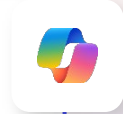
Deploying a critical update with Microsoft 365 Copilot

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



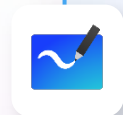
Microsoft 365 Chat

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.



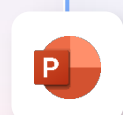
Copilot in Whiteboard

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



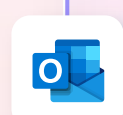
Copilot in Word

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.

[Learn more](#)

[Copilot Admin Documentation](#)

[Microsoft 365 Copilot Adoption Site](#)

[How to use Copilot](#)

Deploying a critical update with Microsoft 365 Copilot



Create a project plan

From the Teams apps prompt Copilot in Microsoft 365 Chat

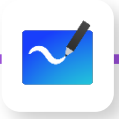
Summarize the information in [Fabrikam product documentation](#).



Discuss the plan

From the meeting recap prompt Copilot in Teams

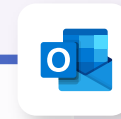
Summarize the meeting and list the action items discussed and their current status.



Brainstorm risks

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

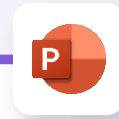
Summarize.



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 365 chat

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.



Bing Chat Enterprise

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 Bing Chat Enterprise 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

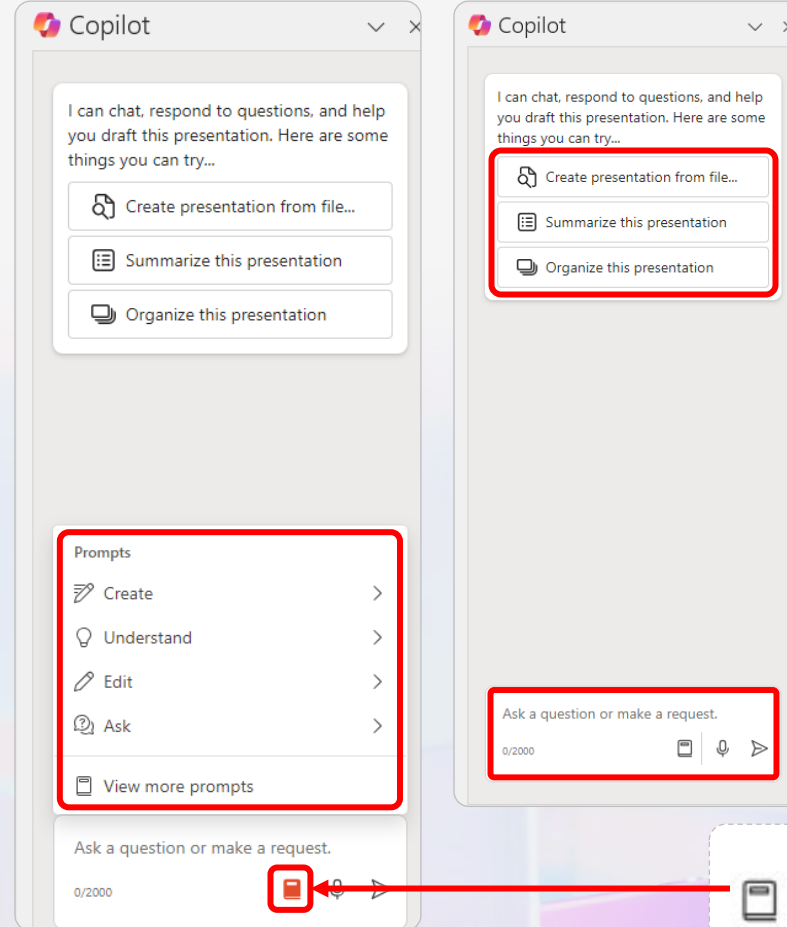
Note the specific prompts shown may vary

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

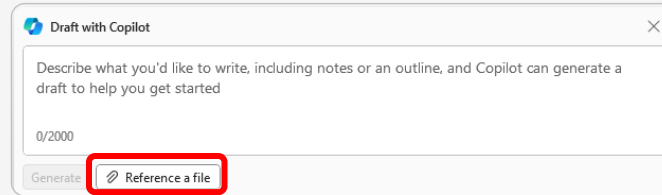
Note the specific prompts shown may vary

Sample use cases

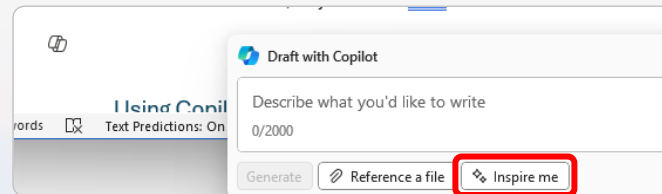
- Turn an outline or idea into text
- Rewrite existing text for length, tone, new phrasing
- Add tables based on the text

What can you do in the document

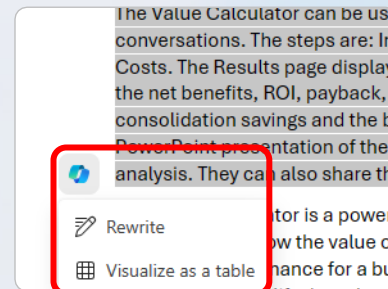
- **Draft with Copilot** – Add content to the Word doc
 - Start from a blank page to create new content using **Reference a file** (up to 3 Word or PowerPoint files) or providing a topic for ungrounded content (ungrounded content will not necessarily be factual)
 - Add new content at any point using **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

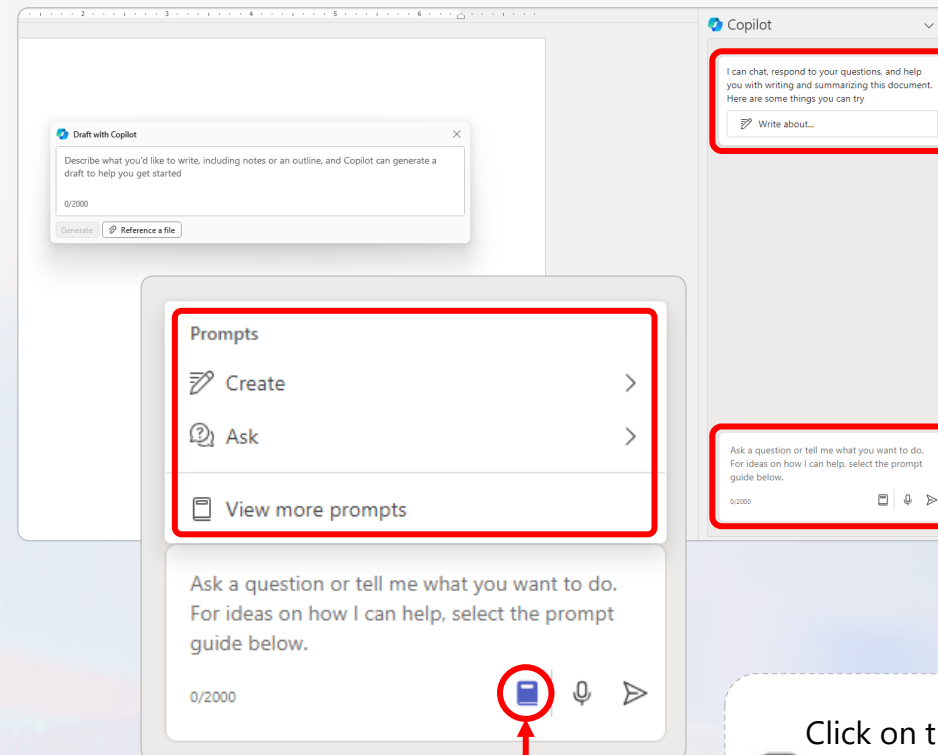
Note the specific prompts shown may vary

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

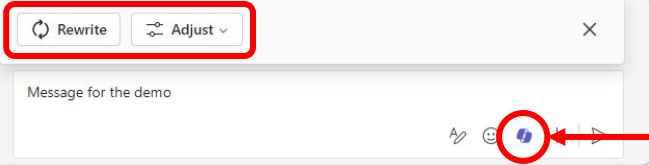
- Rewrite a draft and adjust for length and tone

Use the Copilot chat pane to

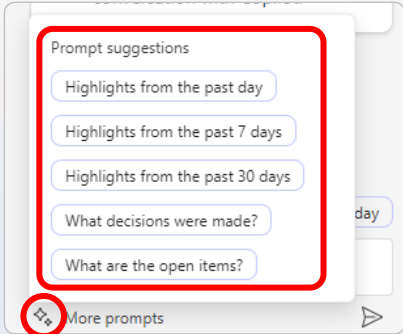
- Ask questions about the content of the chat – does not work in Channels
- Summarize over a period of time
- Ask about decisions, open items, tasks
- Ask what a specific person said
- Ask about links

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

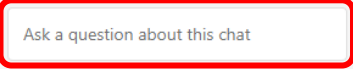
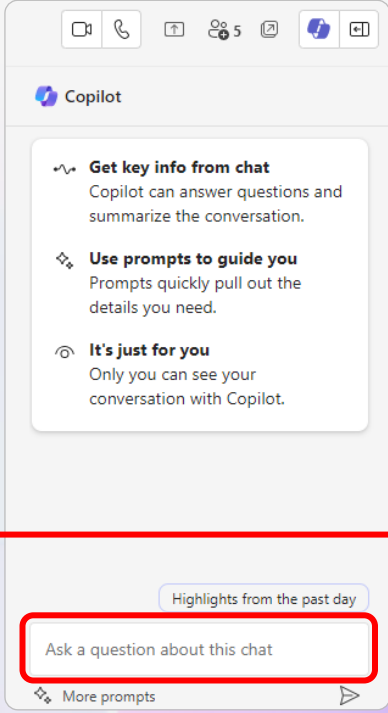
Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation



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

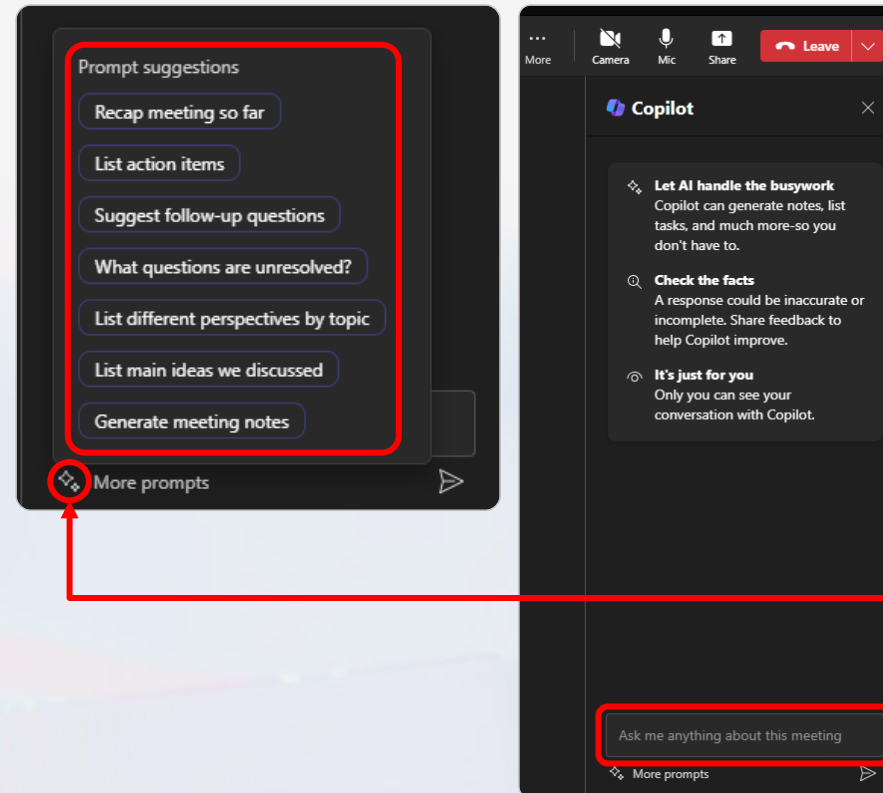
Note the specific prompts shown may vary

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. The main content area shows a meeting recap with the title 'Mobile into' and a 'Microsoft Stream' video player. Below the video, there are tabs for 'Notes', 'AI notes', 'Mentions (5)', and 'Transcript'. A 'Generated by AI. Be sure to check for accuracy.' notice is visible. A 'Meeting notes' section is partially visible. On the right, a 'Copilot' chat pane is open, showing a 'Prompt Guide' icon (a diamond with four dots) circled in red. A red arrow points from this icon to a callout box that reads: 'Click on the **Prompt Guide** icon to show the prompts to ask questions about the meeting content'. The 'Prompt Guide' icon is also visible at the bottom of the chat pane. The chat pane contains the following text: 'Let AI handle the busywork', 'Check the facts', and 'It's just for you'. Below this is a text input field with the placeholder 'Ask me anything about this meeting' and a 'More prompts' button.

Prompt suggestions

- Recap the meeting
- List action items
- Suggest follow-up questions
- What questions are unresolved?
- List different perspectives by topic
- List main ideas we discussed
- Generate meeting notes

More prompts



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 365 Chat

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, the Microsoft 365 logo is displayed above the text "Microsoft 365 Chat" and "Your copilot for work". Below this, there 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 text: "OK, what can I help with? Try one of the examples or enter your own prompt." At the bottom of the interface is a search bar with the placeholder text: "Ask a work question or use / to reference people, files, and more". To the right of the search bar is a "View prompts" button, which is highlighted with a red box. Below the search bar are three icons: a pencil, a grid, and a play button.

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



Find more Microsoft 365 Chat 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

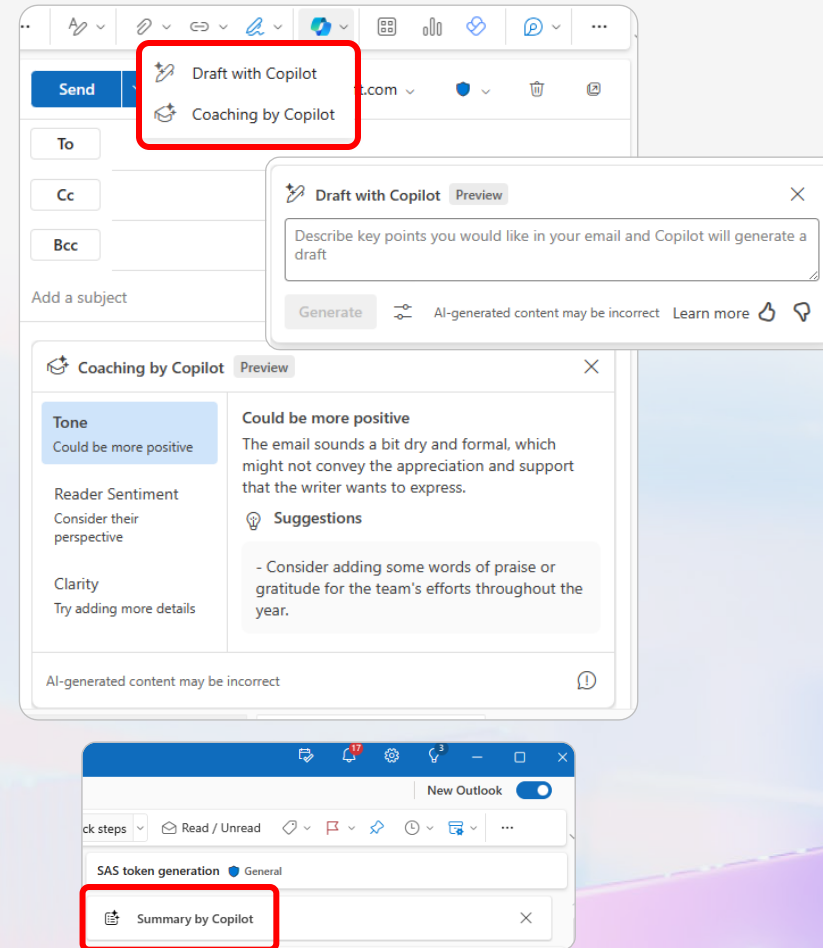
Note the specific prompts shown may vary

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

Work with my table

- ⊕ Add a formula column
- 🖌 Highlight data
- 🔍 Sort and filter data
- 💡 Analyze this data
- ❓ How can Copilot help?

Ask a question or make a request about data in a table

⚙️

Select an option to learn how I can work with your data in Excel tables:

- ⊕ Add formula columns
- 🖌 Highlight
- 🔍 Sort and filter
- 💡 Analyze

Show data insights

Show suggestions for formula columns

How can I highlight, filter, and sort data?

Ask a question or make a request about data in a table

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



Thank you!