Agenda and houskeeping guidelines for the training

1. Introduction
2. Copilot Demo Session
3. Practice Time!
4. Questions, Answers & Check out

Every question is a good question!

Please raise your digital hand in Teams.

We are all in this together

Overview of how Copilot for M365 works

Copilot for M365

Copilot for M365 is your AI companion in Microsoft 365 with secure access to company data in the Microsoft Cloud, integration into the M365 apps (Word, PowerPoint, Outlook, Teams, etc.) and priority access to the most powerful AI models.

Large Language Model

Pre-trained AI model

+

Microsoft Graph API

Data of your company

+

Microsoft 365 Apps

Applications for output and interaction

What data can Copilot and Copilot for M365 access?

Copilot for M365

Data that Copilot for M365 can access:

- Data and content stored in Teams and on SharePoint in the customer tenant (authorization of the respective user is decisive)
- Data and content stored on my own OneDrive
- Data that has been shared with me via the "Share" function in the customer tenant

Data that Copilot for M365 cannot access:

- Data and content stored on the company‘s file shares
- Local data on my device
- Data from Internet sources (websites, social media, etc.)
- Data from third-party systems (SpeakAp, CMS, ERP, etc.)

Copilot

Data that Copilot can access:

- Internet sources

Data that Copilot cannot access:

- Company data in M365 and other systems

PHATte Top 6 use cases for getting started

Addition of content
Is there still a gap in your existing concept for a specific topic? Ask Copilot to complete a first draft of the missing content.

Summarize content, messages and meetings
Have Copilot summarize the content in bullet points. You can also provide Copilot with a structure of headings for the requested summary.

Brainstorming on topics
You can ask Copilot to give you a certain number of ideas on a topic or on how to solve a problem.

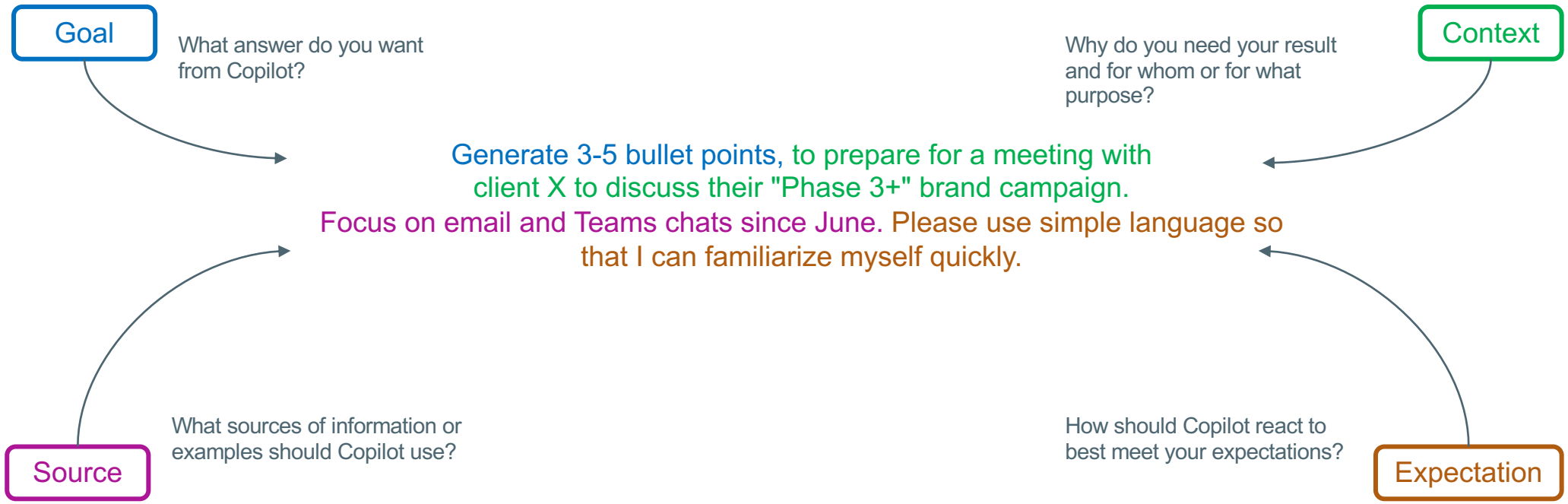
Coaching in the creation of e-mails
Copilot can support you in creating emails. Your messages will stand out with their consistent style and clarity.

Find documents
You know that a colleague has already created a document on a topic and shared it with you? Ask Copilot about it and refine your request with information such as the name of the colleague, the time period in which the document was created and other useful information.

Finding authors
You want to know who created a specific topic or document. Ask Copilot who created the document or SharePoint page on the topic.

Add the right prompt ingredients

In order to obtain an optimal answer, you can include the following content components in the formulation of your prompt. Further building blocks, such as a role/persona or an answer structure, can be added if required:



Lab session: Exercise description

Now it's your turn - test different use cases with Copilot and note your findings on the Whiteboard.

Teamwork in Breakout Rooms:

1. Chat
2. Outlook
3. Teams

Exercise

Write a prompt that you can use during your working day for your specific tasks. Try it out and improve it.

15 min per group

Short presentation

1 min per group

Show your prompt

Share your experience