

Copilot for Microsoft 365 Interactive Experience for Executives

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Agenda

- 1 Introduction to Copilot for Microsoft 365
- 2 An executive's guide to crafting effective prompts
- 3 Copilot for Microsoft 365 interactive experience

INTRODUCTION

Welcome to Microsoft 365 Copilot

Organizations across industries have gone from talking about AI to deploying it at scale. After just three months of using Copilot, 70% of users said they were more productive and 68% felt it improved the quality of their work. And the most effective Copilot users? They saved more than 10 hours per month.¹

This playbook, informed by insights from the Microsoft 365 Copilot Early Access Program, gives you actionable steps to become an AI-powered organization quickly, accelerate usage and engagement, and track progress and impact. It answers key questions, including:

- **Who** do I give the first Copilot seats to?
- **Where** can my organization get the most productivity gains?
- **How** do I get employees up and running quickly?
- **Why** is it important to build early momentum with Copilot?
- **When** will I start seeing business results?
- **What** are the ways to measure impact?



Your Copilot adoption roadmap

PHASE 1:

Get ready

Preparing your business for AI

- | | |
|--|--|
| Step 1
Review your security and data settings. | Step 2
Be intentional with seat assignments. |
| Step 3
Create an AI council. | Step 4
Help people build new work habits. |

PHASE 2:

Onboard and engage

Accelerating usage and engagement

- | | |
|--|--|
| Step 5
Create a Copilot user community. | Step 6
Identify champions to lead the way. |
| Step 7
Make ongoing training the standard. | |

PHASE 3:

Deliver impact

Tracking progress and business results

- | | |
|--|---|
| Step 8
Quantify impact with Microsoft Copilot Dashboard. | Step 9
Meet with your AI council regularly. |
| Step 10
Publicly celebrate successes. | |

PHASE 4:

Extend and optimize

Building agents into your business

- | | |
|--|--|
| Step 11
Tailor Copilot to your business. | Step 12
Optimize with role-based agents. |
|--|--|

”

This new generation of AI will remove the drudgery of work and unleash creativity. There's an enormous opportunity for AI-powered tools to help alleviate digital debt, build AI aptitude, and empower employees.”

Satya Nadella

Chairman and CEO
Microsoft²



Microsoft Copilot empowers **every user**



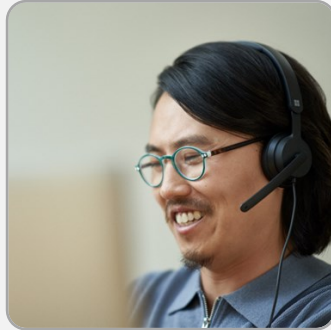
Sales and Marketing

Drive growth with AI that sparks marketing creativity and sharpens sales precision



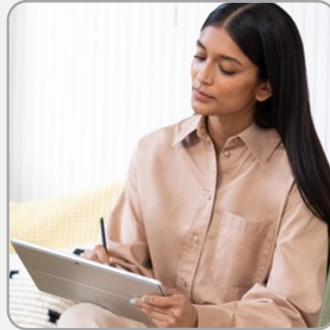
R&D

Enhance product development and innovation through insightful data analysis



Customer Service

Stay coordinated as a team to resolve more customer issues



Finance

Quickly search across all your data to solve your most complex problems



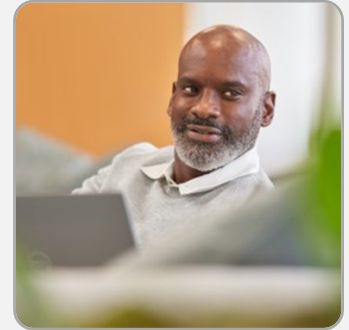
Operations

Simplify quality reporting and data validation



Data and IT

Effectively manage shared projects and track progress



HR

Store, access, and prioritize notes in a fraction of the time



Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language
Models



Microsoft Graph
- Your Data -

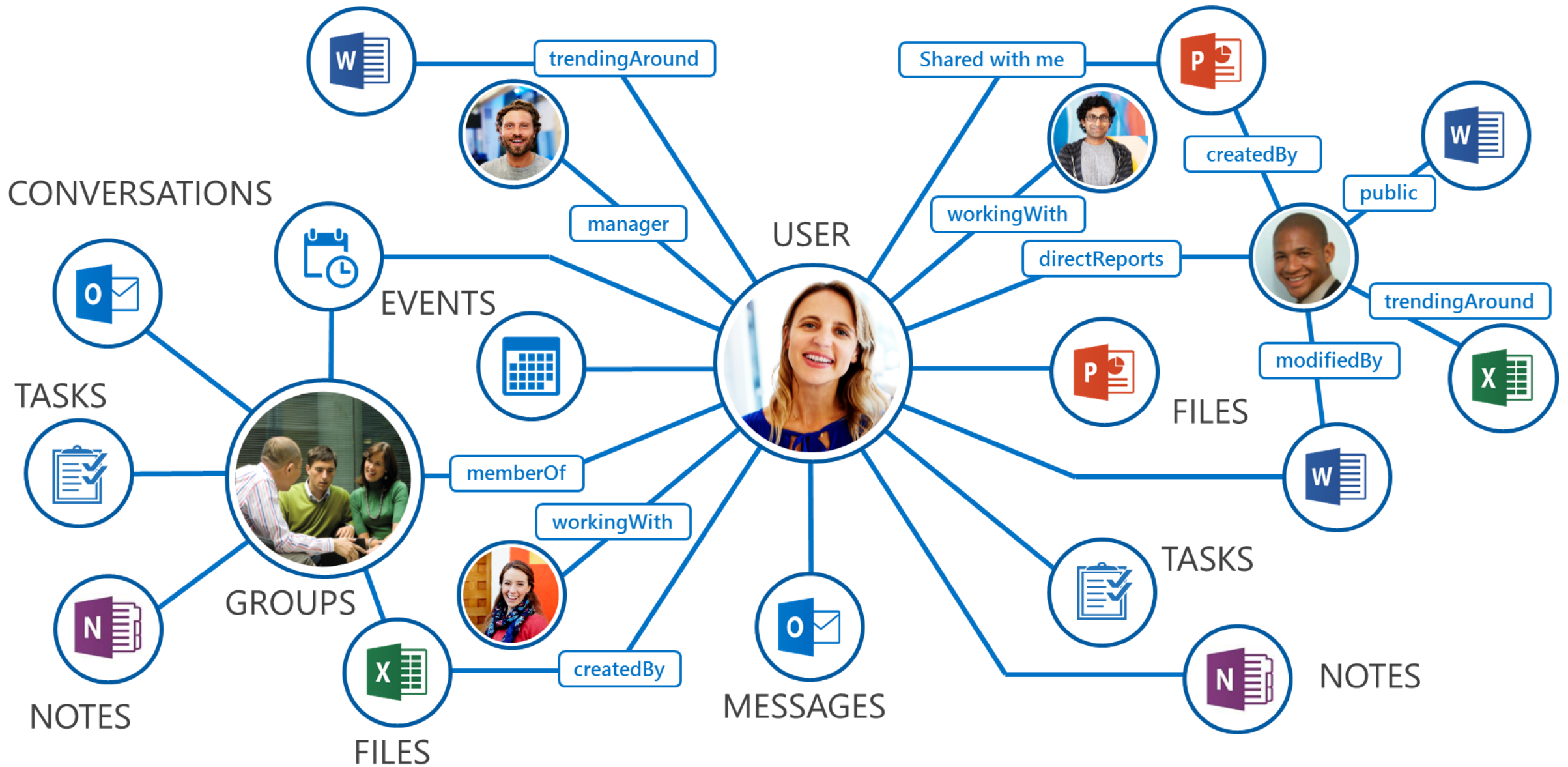


Microsoft 365
Apps



The
Web

Microsoft Graph



Microsoft's Responsible AI



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.

Microsoft is built on trust



1

Your data
is your data

2

Your data
is not used
to train or enrich
foundation
AI models

3

Your data and
AI models
are protected
at every step

4

Our Customer
Copyright
Commitment

3 essentials for Copilot success



Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Executive sponsorship
- ✓ Align AI to business strategy
- ✓ Providing clarity and prioritization
- ✓ **Best practice:** AI Council



Human change

Manage the human transformation with robust user enablement programs

- ✓ User enablement program
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Community of Practice and Copilot Dashboard



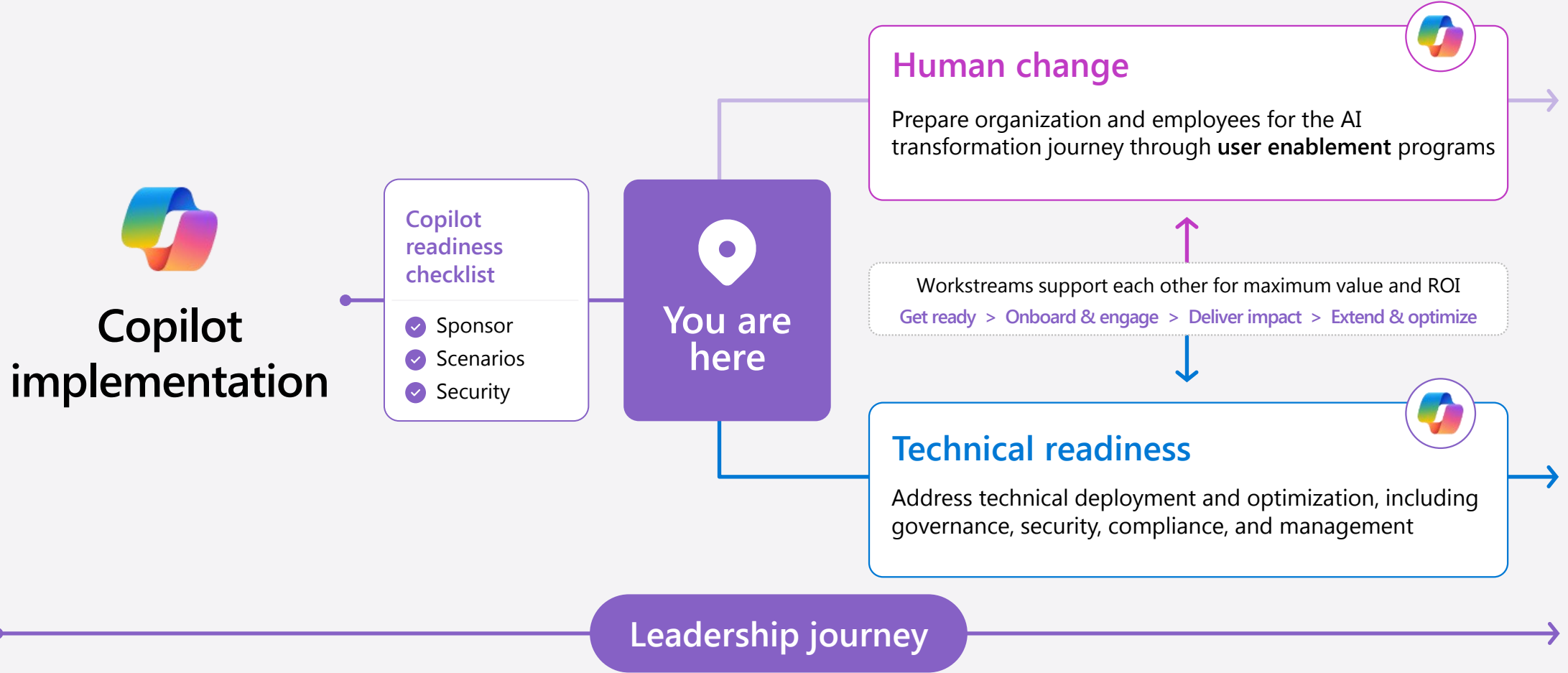
Technical readiness

Build and iterate technical skills to deliver on business results

- ✓ Secure your data infrastructure
- ✓ Policy review
- ✓ Extend to new high value line of business scenarios
- ✓ **Best practice:** Optimization Assessment

Responsible AI principles

Microsoft 365 Copilot implementation



3 essentials for Copilot success



Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Executive sponsorship
- ✓ Align AI to business strategy
- ✓ Providing clarity and prioritization
- ✓ **Best practice:** AI Council



You are
here

Responsible AI principles

Secure exec sponsorship

Ensure they understand the **ABCs**:

A

Active, visible, and consistent participation

B

Build a coalition with their executive peers

C

Communicate directly with employees to support landing the change

Executive Sponsors **should**:

- Help the project team identify and prioritize their top business needs.
- Encourage shared planning between user enablement and technical teams.
- Play a role in communicating the vision to leaders across the organization.
- Actively participate in and use Copilot to help drive and reinforce enablement.
- Promote the enablement program. Studies show engaged employees are **2.6x¹** more likely to fully support a successful AI transformation.

Executive Sponsors **may**:

- Lead or participate in the organizational AI Council.
- Have purchasing authority for licenses or services from supporting suppliers.
- Be directly accountable for Microsoft 365 or broader digital workplace initiatives.

Clarify AI value drivers



Organization and culture

Do you have an operating model to enable the adoption and use of AI?

Do you have top-down support?



Business strategy

What business outcomes are you driving?

How can AI help you achieve those outcomes?



Applied AI experience

Do your people have diverse experiences and skills with AI?

Is your organization collaborating to build experience?



AI governance

Are you implementing processes and controls that are transparent?

Are you governing data privacy and security?



Technology strategy

Do you have access to quality data?

Is your infrastructure set up to help you scale?

Create an AI Council

A cross-functional body unique to your needs

Oversees and guides the development, deployment and evaluation of AI capabilities

IT enablement team

Responsible for technical preparedness and rollout, providing onboarding support, as well as managing feedback and compliance.

Executive sponsor

Drives adoption and infuses confidence in the technology. Active champion that encourages integrating AI into day-to-day processes.

Change management team

Bridge between the AI council and employees, helping to monitor adoption progress, gather feedback, and foster a collaborative environment.

Risk management

Ensures compliance to AI regulations and ethical standards. Ensure organization's AI initiatives are transparent, accountable, and trustworthy.

Identify initial high-value Copilot scenarios

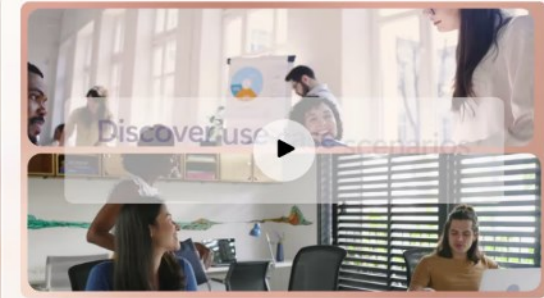


Copilot brings AI value across **lines of business**

Use the [Scenario Library](#) to identify top use cases and business metrics you would like to improve in that functional area.

Microsoft Scenario Library

Transform scenarios across your organization with AI.



Filter products ^

Functions Industries

Search Scenario Library

Functions/Roles

Executives

HR

Marketing

Sales

Customer Service

IT

Finance

Legal

Accessibility

Communications

Sustainability

Operations

Industries

Manufacturing

Retail

Financial Services

Government

Healthcare

Energy

Nonprofit

Education

Insurance

Use AI to automate routine tasks, quickly organize client information and generate actionable insights—freeing up more time for high-value customer service and decision making.

KPIs impacted

✓ Process cycle time

✓ Client retention

Value benefit

✓ Cost savings

1. Summarize and prioritize emails

Insurance underwriters receive large amounts of emails. Responding quickly to critical issues and requests for quotes helps improve customer satisfaction and can increase revenue.



Copilot in Outlook

Benefit: Copilot **organizes and summarizes** high-volume emails, surfacing urgent client requests and claims for immediate attention.



2. Prepare for customer meetings

Before a meeting, an agent reviews Copilot's summary of the client's coverage history, recent claims, and compliance status.

AI Agent³

+ Connection to CRM solution

Benefit: **Copilot generates a historical summary** of each customer by extracting relevant details from past emails, policy documents, and CRM notes.



3. Automate document drafting and editing

To quickly draft a renewal proposal, employees can leverage Copilot to suggest an outline and language based on similar past documents.



Copilot in Word

Benefit: Copilot **helps agents draft proposals, policy updates, and client communications**, using templates and previous successful examples.



6. Capture and summarize meeting notes

Copilot in Teams can help instantly organize meeting notes and follow-ups, making it easy for agents and managers to keep everyone aligned and informed.



Copilot in Teams

Benefit: Use Copilot in Teams to summarize call transcripts, action items, and follow ups that is ready to share with the team.



5. Prepare for client meeting

With Copilot in PowerPoint, employees can streamline how to create a presentation and prepare for the customer meeting.



Copilot in PowerPoint

Benefit: Turn insights into presentations that highlight the important points for a customer presentation.



4. Summarize the policy document

Ask Copilot to create a summary of the differences between the existing policy and the proposal.

Copilot Chat²

Benefit: Copilot can help quickly spot a spike in claims for a specific region, prompting a deeper investigation.

¹Access M365 Copilot Chat at m365copilot.com, or the Microsoft 365 Copilot Chat mobile app and set toggle to "Web".

²Access M365 Copilot Chat at m365copilot.com, the Microsoft 365 Copilot Chat mobile app, or the M365 Copilot Chat app in Teams, and set toggle to "Work".

³AI Agents allow Copilot to access your organization-specific apps. In the past this would have required an API call to get data from a system of record.

The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.

Use AI to automate claims processing to deliver better customer service, reduce costs and avoid mistakes.

1. Summarize customer support issues

Develop a Power Automate workflow to notify claims agents of issues with their customers.



Copilot in Power Automate

Benefit: **Prioritize customer issues** from a given time period.



2. Update a claims form

Use Copilot to update a claims form based on information in an email.



Copilot Chat²

Benefit: **Quickly update claims forms** without having to search for specific content.



3. Search repository

Use a custom agent built using Copilot Studio to find answers to common questions.



AI Agent³
+ Connection SharePoint repository

Benefit: **Quickly get answers to questions** about policy coverages.



6. Respond to the claim

Ask Copilot to draft a response to a customer claim based on the available documentation.



Copilot Chat²

Benefit: **Quickly draft email content** with the appropriate tone and depth.



5. Summarize FNOL call

Generate call transcripts from Teams Phone and create summaries of first notice of loss (FNOL) calls.



Copilot in Teams

Benefit: **Ensure call transcripts are captured** and important points are captured in a summary.



4. Prepare for a meeting

Summarize claim content prior to a settlement discussion.



Copilot Chat²

Benefit: **Quickly summarize documentation** across internal documents and customer calls and emails.

KPIs impacted

✓ Client retention

✓ Opex % of revenue

Value benefit

✓ Revenue growth

✓ Cost savings

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Use AI to assist with creating new customer policies and presenting proposals to customers.

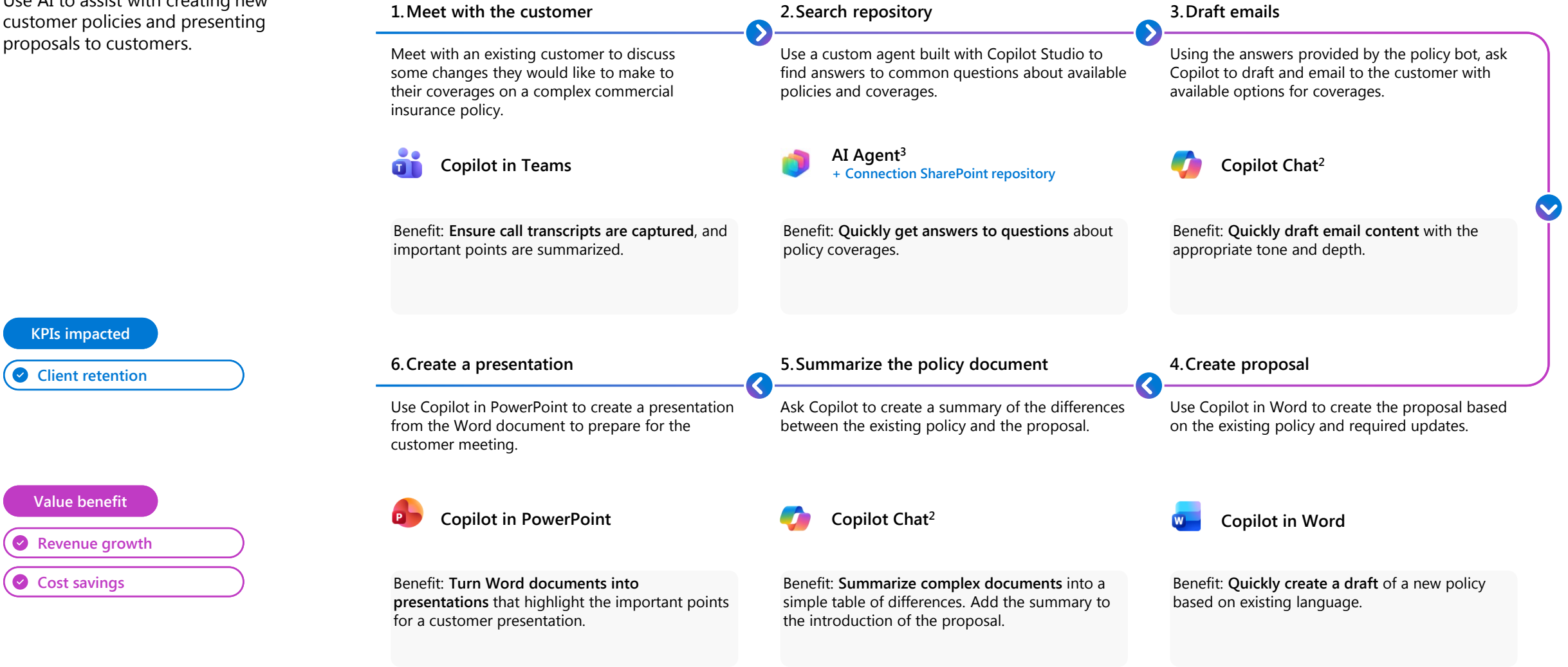
KPIs impacted

Client retention

Value benefit

Revenue growth

Cost savings



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Use AI to assist with creating new customer quotes and presenting proposals to customers.

1. Summarize and prioritize emails

Insurance underwriters receive large amounts of emails. Responding quickly to critical issues and requests for quotes helps improve customer satisfaction and can increase revenue.



Copilot Chat²

Benefit: **Summarize and prioritize** emails received that require attention and look deeper into the emails that are most urgent.

2. Conduct risk assessment

One of the emails is a request for a quote for a new commercial real estate property and requires a risk assessment of the property across key risk dimensions.



AI Agent³
+ Connection to Risk assessment solution

Benefit: **Run a risk assessment using in house risk assessment and insights tool** to summarize the insurers risk on the property address in the email and summarize the risk within Copilot.

3. Understand the customer

In addition to gathering property risk, the underwriter also provides customer information and history including other policies, history of compliance, fraudulent claims, etc.



AI Agent³
+ Connection to CRM solution

Benefit: **Copilot provides a historical summary of the customer** by extracting the customer's name from original email, sending to insurance history app, and providing a summary of existing properties for review.

5. Summarize and draft proposal

Summarize the information collected from each system for the property to create a risk assessment analysis and recommended quote.



Copilot in Outlook

Benefit: **Use Copilot to summarize and draft an email response** including background information and justification for the decision.

4. Estimate replacement costs

Understand what the replacement cost would be for the building based on parameters such as location, age, floor space, etc.



AI Agent³
+ Connection to Cost estimation tool

Benefit: **Create estimate for replacement costs in Copilot** using the insurance company's estimator app for building quotes and historical estimates.

KPIs impacted

✓ Manage risk

Value benefit

✓ Revenue growth

✓ Cost savings

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Use AI to assist with creating new customer policies and presenting quotes for coverage proposals to customers.

1. Summarize and prioritize emails

Insurance underwriters receive large amounts of emails. Responding quickly to critical issues and requests for quotes helps improve customer satisfaction and can increase revenue.



Copilot Chat²

Benefit: **Summarize and prioritize** emails received that require attention and look deeper into the emails that are most urgent.

2. Meet with the customer

Meet with an existing customer to discuss some changes they would like to make to their coverages on a complex commercial insurance policy.



Copilot in Teams

Benefit: **Ensure call transcripts are captured**, and important points are summarized.

3. Understand the customer

In addition to gathering property risk, the underwriter also provides customer information and history including other policies, history of compliance, fraudulent claims, etc.



AI Agent³ + Connection to CRM solution

Benefit: **Copilot provides a historical summary of the customer** by extracting the customer's name from original email, sending to insurance history app, and providing a summary of existing properties for review.

6. Summarize and draft a proposal

Use Copilot in PowerPoint to create a presentation from the Word document to prepare for the customer meeting.



Copilot in PowerPoint

Benefit: **Turn Word documents into presentations** that highlight the important points for a customer presentation.

5. Summarize the policy document

Ask Copilot to create a summary of the differences between the existing policy and the proposal.



Copilot Chat²

Benefit: **Summarize complex documents** into a simple table of differences. Add the summary to the introduction of the proposal.

4. Create proposal

Use Copilot in Word to create the proposal based on the existing policy and required updates.



Copilot in Word

Benefit: **Quickly create a draft** of a new policy based on existing language.

KPIs impacted

✓ Manage risk

✓ Client retention

Value benefit

✓ Revenue growth

✓ Cost savings

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Use AI to accelerate decision-making, improving accuracy, and ensuring regulatory compliance.

KPIs impacted

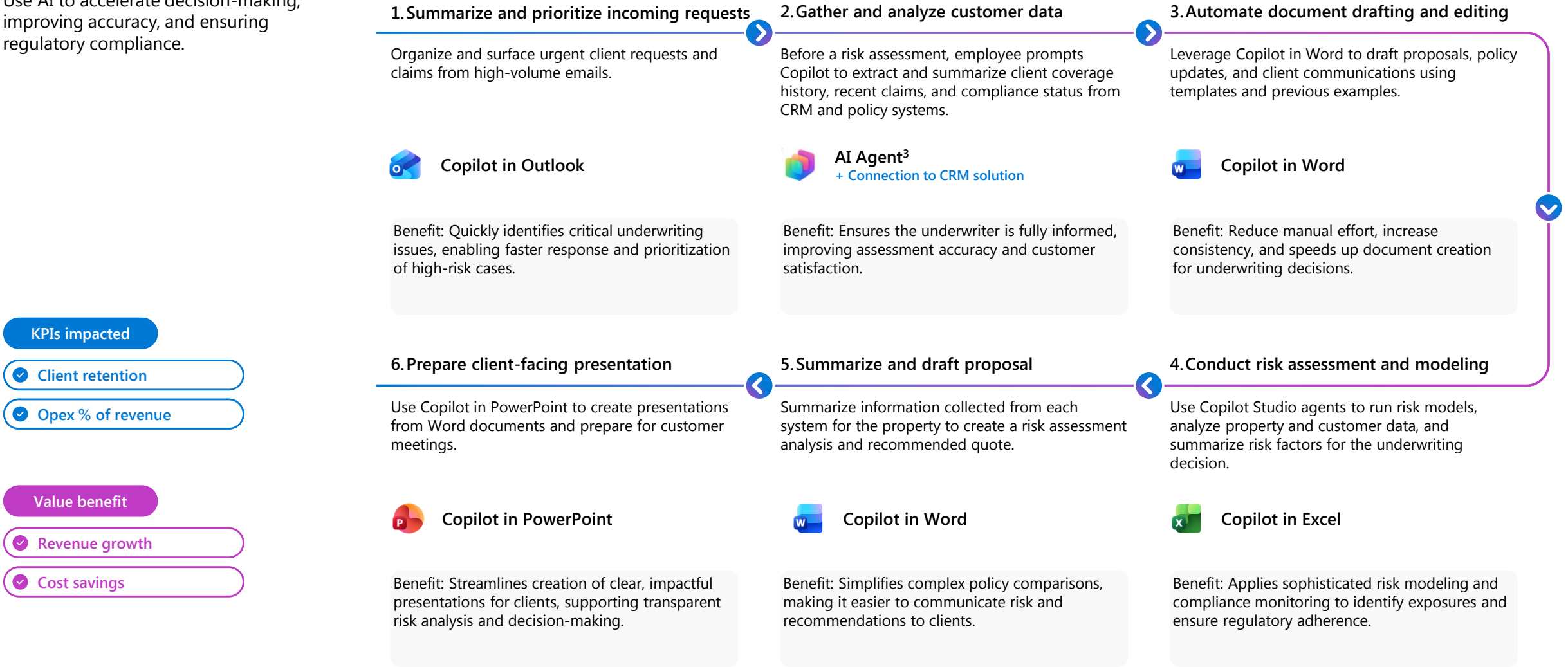
Client retention

Opex % of revenue

Value benefit

Revenue growth

Cost savings



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3 essentials for Copilot success



Human change

Manage the human transformation with robust user enablement programs

- ✓ User enablement program
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Community of Practice and Copilot Dashboard



You are here

Responsible AI principles

Microsoft 365 Copilot

Implementation executive summary

Copilot readiness checklist

HUMAN
CHANGE

1

Get ready

Select initial departments for rollout with the [Scenario Library](#). Target a critical mass of users for rapid impact.

- ✓ Identify your success team
- ✓ Be intentional with assignment and concentrate seats

2

Onboard & engage

Lay the foundation for an intelligent progression of AI skills with the [Great Copilot Journey](#)

- ✓ Deploy training and Champion programs, engagement community
- ✓ Make ongoing training the standard

3

Deliver impact

Review success measures with the [Copilot Dashboard](#) and the [User survey kit](#).

- ✓ Quantify of your investments and understand how employees are benefiting
- ✓ Build momentum with success stories and knowledge sharing

4

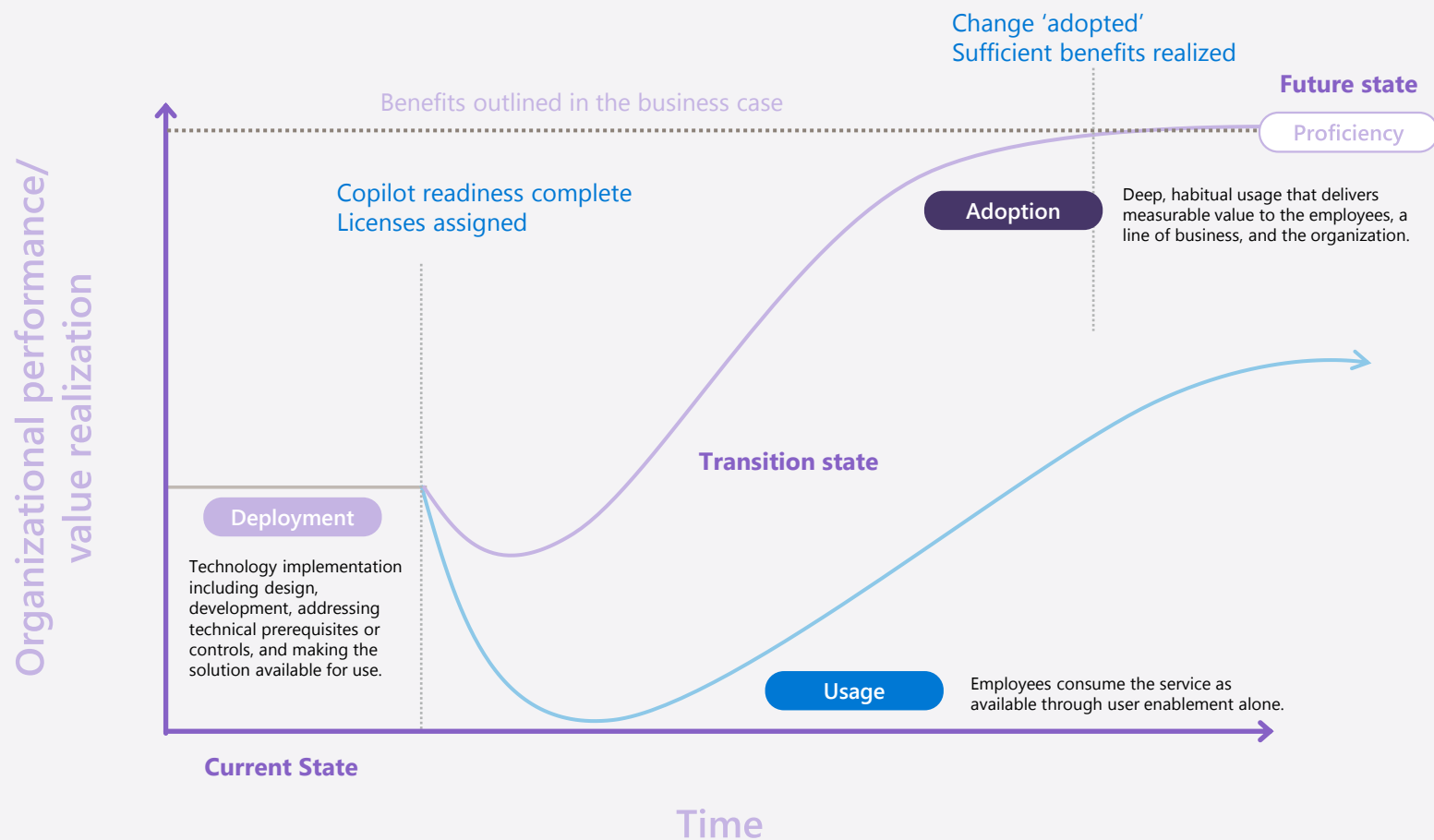
Extend & optimize

Extend to new scenarios and transform business processes.

- ✓ Identify new high value functional and line of business scenarios
- ✓ Recognize and reward success

Support continuous learning and optimization

Drive human change with best practices



With change management

Higher likelihood of Copilot adoption and benefits realization.

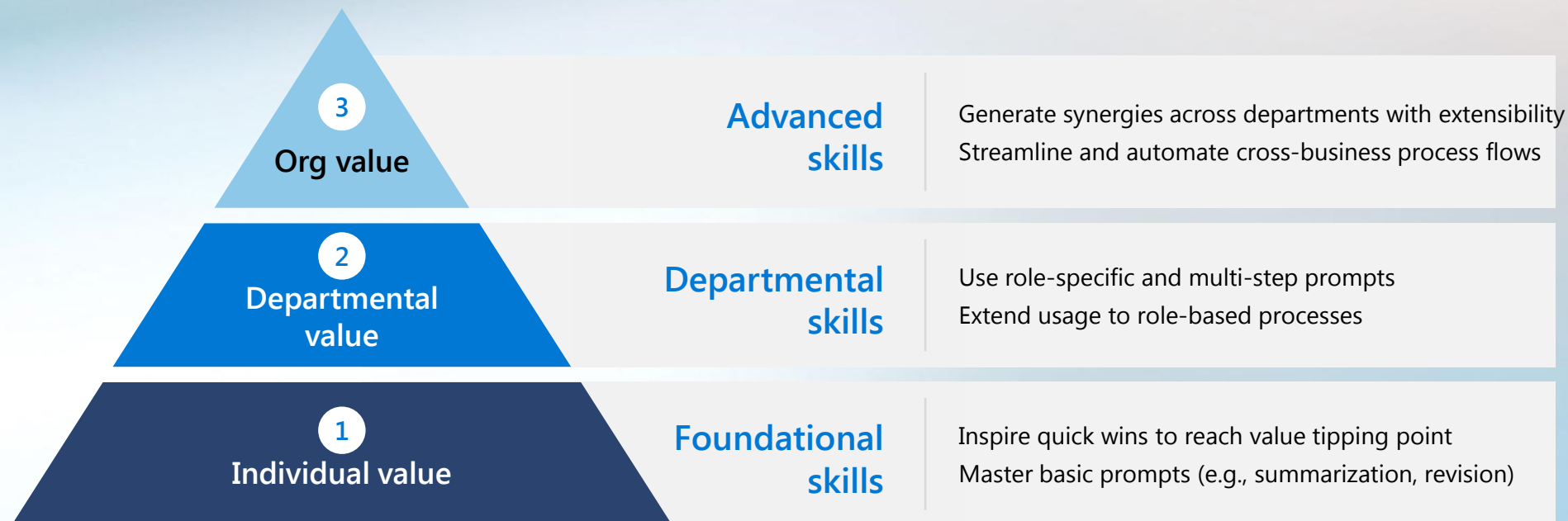
Without change management

More challenging transition, fewer employees 'on board,' and more resistance. Longer time to benefits realization.

7x

More likely to meet or exceed project objectives when have excellent change management practices, compared to poor change management practices (Prosci, 2024)

Lay the foundation for continuous learning and an intelligent progression of AI skills



- 1 Start with [top 10 prompts](#) that deliver immediate success (e.g., summarize a meeting, email thread).
- 2 Use the [Copilot Scenario Library](#) to train users on new departmental use cases and process improvement to impact departmental KPIs.
- 3 Extend to line of business systems to streamline and automate for organizational level impacts on revenue and costs.

Prioritize peer-to-peer learning through community engagement and knowledge sharing.

3 essentials for Copilot success



You are
here

Technical readiness

Build and iterate technical skills
to deliver on business results

- ✓ Secure your data infrastructure
- ✓ Policy review
- ✓ Extend to new high value line of business scenarios
- ✓ **Best practice:** Optimization Assessment

Responsible AI principles

Get ready

Perform the Microsoft 365 Copilot Optimization Assessment

Optimization Assessment

The [assessment](#) is designed to understand your current licensing profile, your collaboration tools, sensitive data handling, and security controls implemented today in your organization, helping you identify a clear path to deploying Microsoft 365 Copilot. The assessment consists of 26 questions and takes about 30 minutes to complete.

- [Complete the Microsoft 365 Copilot Optimization Assessment](#)
- Understand current licensing
- Understand identity management
- Understand current collaboration tools
- Understand current data locations
- Uncover opportunities to implement data security measures and improve data security posture to optimize user experience with Microsoft 365 Copilot



Microsoft Copilot for Microsoft 365 Optimization Assessment Results

Thank you for taking the time to complete the Copilot for Microsoft 365 Optimization Assessment. You've taken an important step to understand how far along your organization is in adopting AI. This report highlights the foundational elements you already have to help your organization prepare for its digital transformation journey and take full advantage of Copilot for Microsoft 365.

The answers you provided in the Copilot Optimization Assessment give us your Optimization Scores, which reflects your organization's potential ability to take advantage of Copilot for Microsoft 365 to help increase employee productivity and security posture.

Blockers Identified **0**

This score reflects any primary blockers to overcome to get ready for Copilot for Microsoft 365 and the new era of AI.

Microsoft 365 Copilot-ready users **67%** in your organization

5000 of 7500

Customer Baseline

Organizational Profile Readiness **90%**

19/16

Productivity Tool Readiness **80%**

16/20

Copilot for Microsoft 365 Deployment Path

Best in Class

Your organizational readiness score relates to your ability to drive adoption of Copilot for Microsoft 365 through effective organizational sponsorship and awareness of the capabilities of generative AI solutions.

Productivity and collaboration are the backbone of Copilot for Microsoft 365. A major benefit of AI is the opportunity to automate certain tasks and improve productivity to help employees focus on the work that matters most to your organization.

The Copilot deployment path is part of the overall technical readiness guidance developed to help customers get started with their Copilot deployments quickly and continue to optimize their data security along the way.

Extend & optimize



Explore

Identify new high value scenarios

- ✓ Gather data from service health reviews
- ✓ Prioritize via AI Council and leadership engagement
- ✓ Skill/acquire talent for extensibility opportunities



Expand

Understand Copilot Studio capabilities

- ✓ Build, automate, and administer agents
- ✓ Select extensibility scenarios



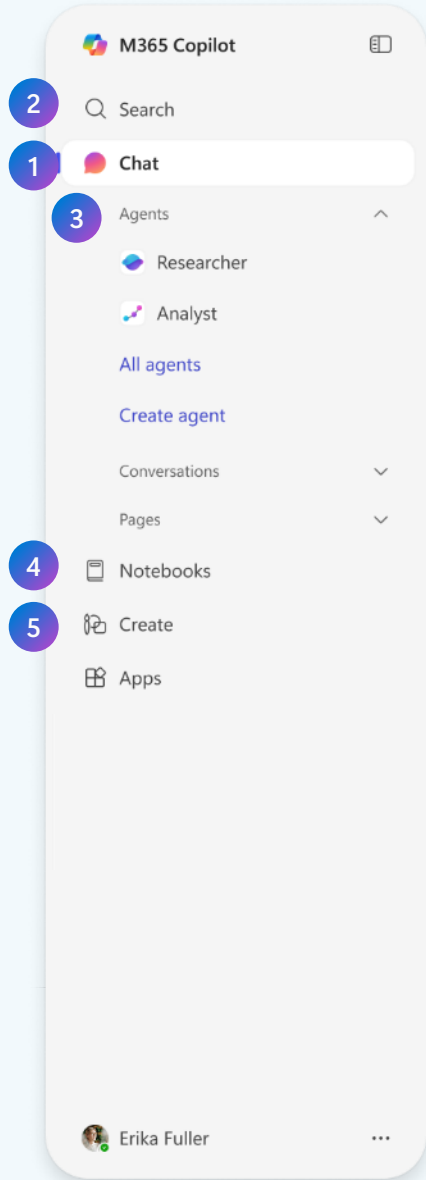
Extend

Scale Copilot users and skills

- ✓ Extend throughout organization
- ✓ Identify high value user cohorts for advanced skill building
- ✓ Optimize usage patterns

Get started with Copilot Chat

5 in 1 AI capabilities with Microsoft 365 Copilot



1

Chat

Secure AI chat powered by the latest models available and grounded in web and work data.

2

Search

AI-powered search that spans all your work data for fast and relevant results.

3

Agents

A broad ecosystem of pre-built agents available in the Agent Store and build your own agents in Copilot Studio.

4

Notebooks

Copilot is grounded in your project's diverse content types to provide targeted responses and engaging audio overviews.

5

Create

AI-generated images, posters, banners, videos, and more that are aligned to your organization's brand identity.

Get proactive
overviews of your day



Copilot
Chat

Analyze
budget Spend



Analyst

Prepare for
a customer meeting



Researcher

Create
strategy papers



Researcher

Create
interview guides



Researcher



Where Copilot wows

Never take meeting
notes again



Copilot in
Teams Meetings

Catch up on
missed meetings



Copilot in
Teams Meetings

Quickly
find content



Copilot
Search

Be prepared
for every meeting



Copilot in
Teams Meetings

Quickly onboard onto
new roles or projects

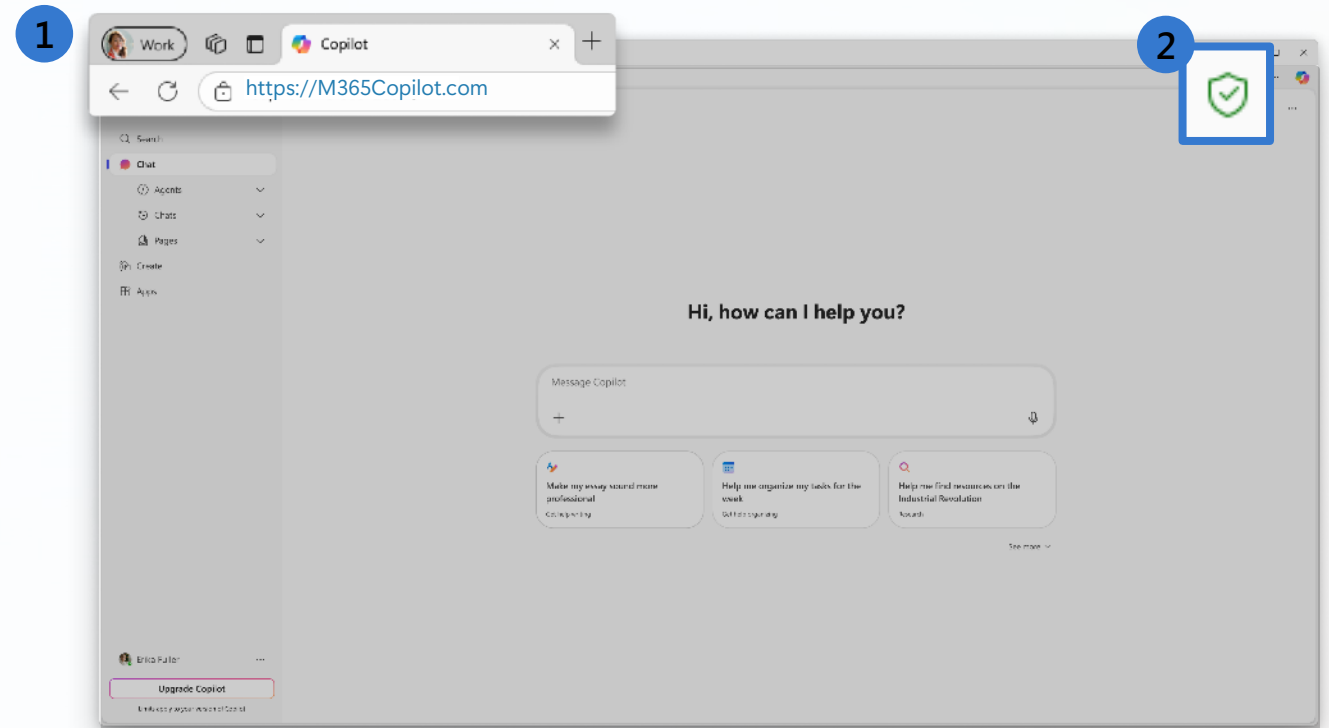


Notebooks

Sign in with your work account

- 1 Navigate to M365Copilot.com on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work or school account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat"



 If you are not signed in with your work or school account, enterprise data protection does not apply.

Get to know Chat

New Chat
Select the Chat module.

Prompt Box
Start your chat here.

Add content
Add files and images to the prompt and select agents to include in the prompt.

Chats
View your chat history and select chats to continue them.

Work IQ toggle
Choose to disable/enable Work IQ.

Auto – model selection
Button to Quick response, Think deeper and make manual model selections.

Enterprise data protection shield
– indicates your data is protected.

Start a temporary chat
– Chat without saving the content.

More options
– feedback and controls options.

Start dictation
Record a prompt

Start a voice chat
Have a conversation with Copilot

Prompt Gallery
Get started with prompt suggestions personalized to you. Clicking on the “...” will open the Prompt Gallery window.

[Get started with voice features in Microsoft 365 Copilot](#)

Note: “UI shown as of May 18, 2026. Product features and visuals may change.”

How to chat in 3 steps



1. Enter your prompt

Enter your detailed prompt in the prompt box. If you would like to reference a work file, email, or meeting, use the slash "/" key and start typing the name of the reference to find it. Use the "@" key to call an agent and start chatting with it.

Message Copilot

+

🎤



2. Check sources

Chat is transparent about the sources of its information. See these sources listed underneath the response.

Vet these sources and validate your answers.

Sources >



3. Continue the conversation

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail about [topic]." You can also select suggested prompts.

Chat response

Prompt

Hover over the prompt to see actions you can take

Edit the prompt

 Will copy the prompt into the prompt box for editing

Copy

 Copy the prompt to the clipboard to insert in another app

Save

 Save the prompt to the prompt gallery

Copy prompt link

 Create a link to the prompt you can share with others

Prompt response

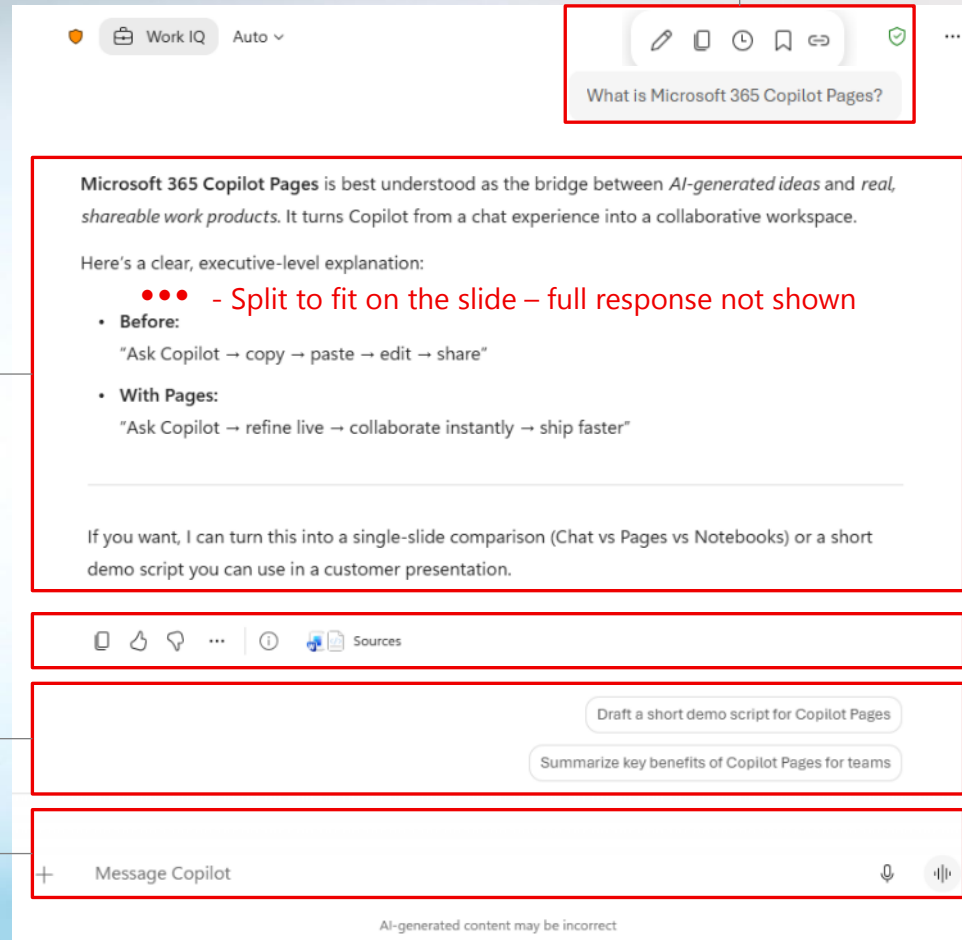
See the response here. Click on Sources to find references to files or web sites used

Multi-turn suggestions

Continue the conversation with these suggestions to enhance your response.

Prompt Box

Continue your chat here



Response options

Actions you can take with the prompt

Copy response

 Copy the response to the clipboard to paste in another location

I like something

 Provide positive feedback to your admin and Microsoft

I don't like something

 Provide positive feedback to your admin and Microsoft

More options

Share prompt and copy with response

 Create a link for the prompt in Copilot Chat. Copies the prompt and response with the link to provide context

Edit in pages

 Options to copy to a new Page or copy into an existing Page

Schedule this prompt

 Schedule a prompt for a later time

Read aloud

 Copilot will read the response to you

Open in Word

 Copy the response into a Word document for editing

Sources

Opens a sidebar with links to all sources

Note: "UI shown as of May 18, 2026. Product features and visuals may change."

Chat conversation history

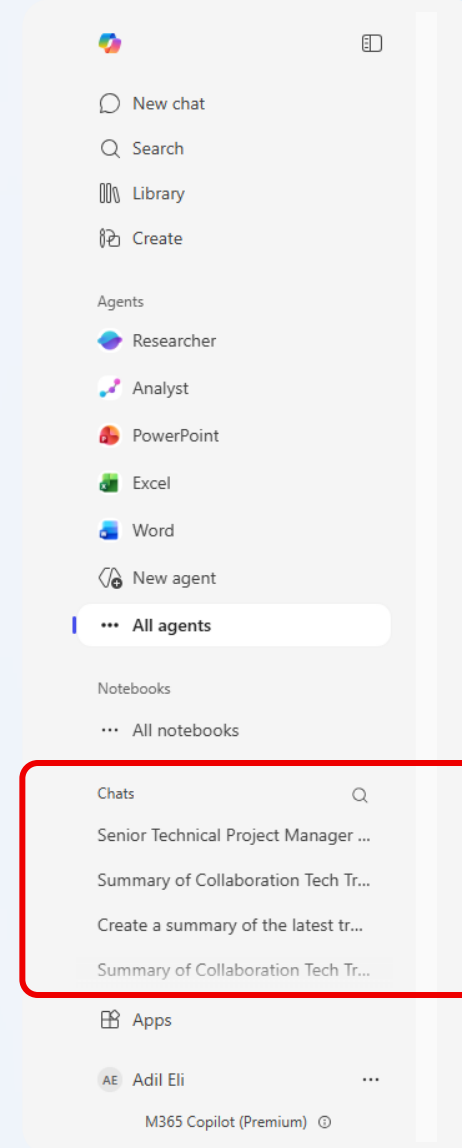
[Revisit your Microsoft 365 Copilot Chat history](#)



You'll find your chat history in the Microsoft 365 Copilot app. Look for Conversations under the Chat module.

You can continue any conversation with Copilot simply by selecting it from the list.

Copilot automatically generates a title for each chat that reflects what the chat seemed to be about. To rename or delete a conversation select the **More** button next to the conversation name and select either **Rename** or **Delete**.

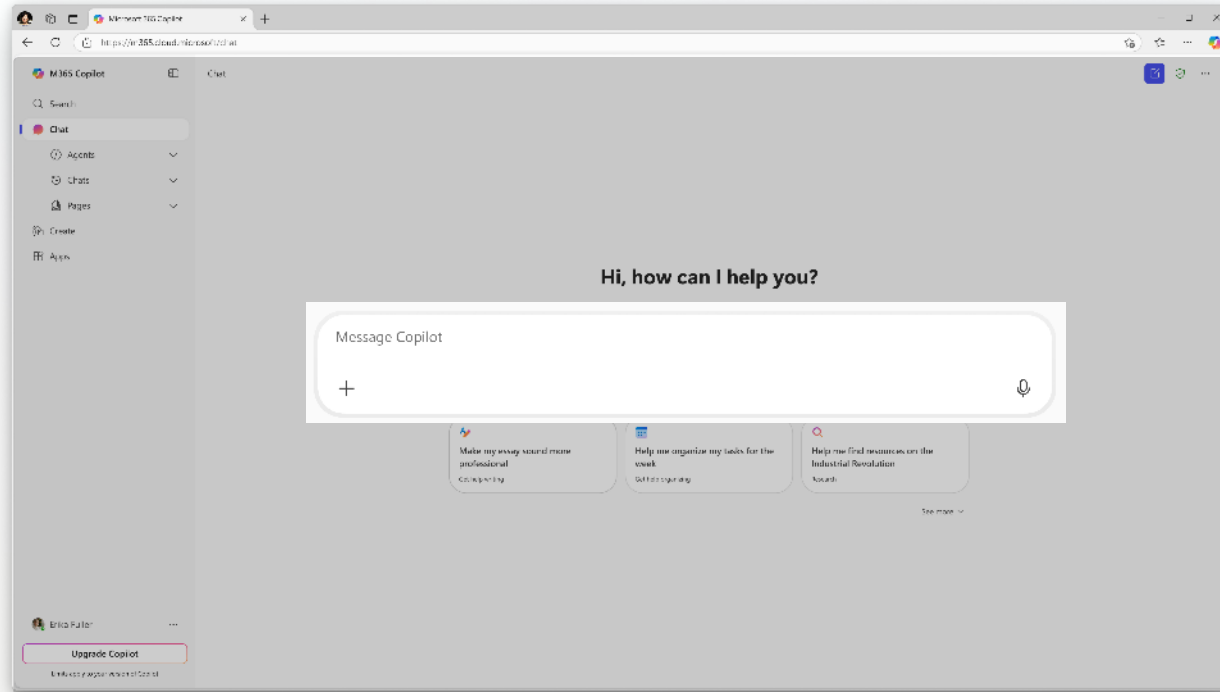


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An executive's guide to crafting effective prompts



What is a “prompt?”



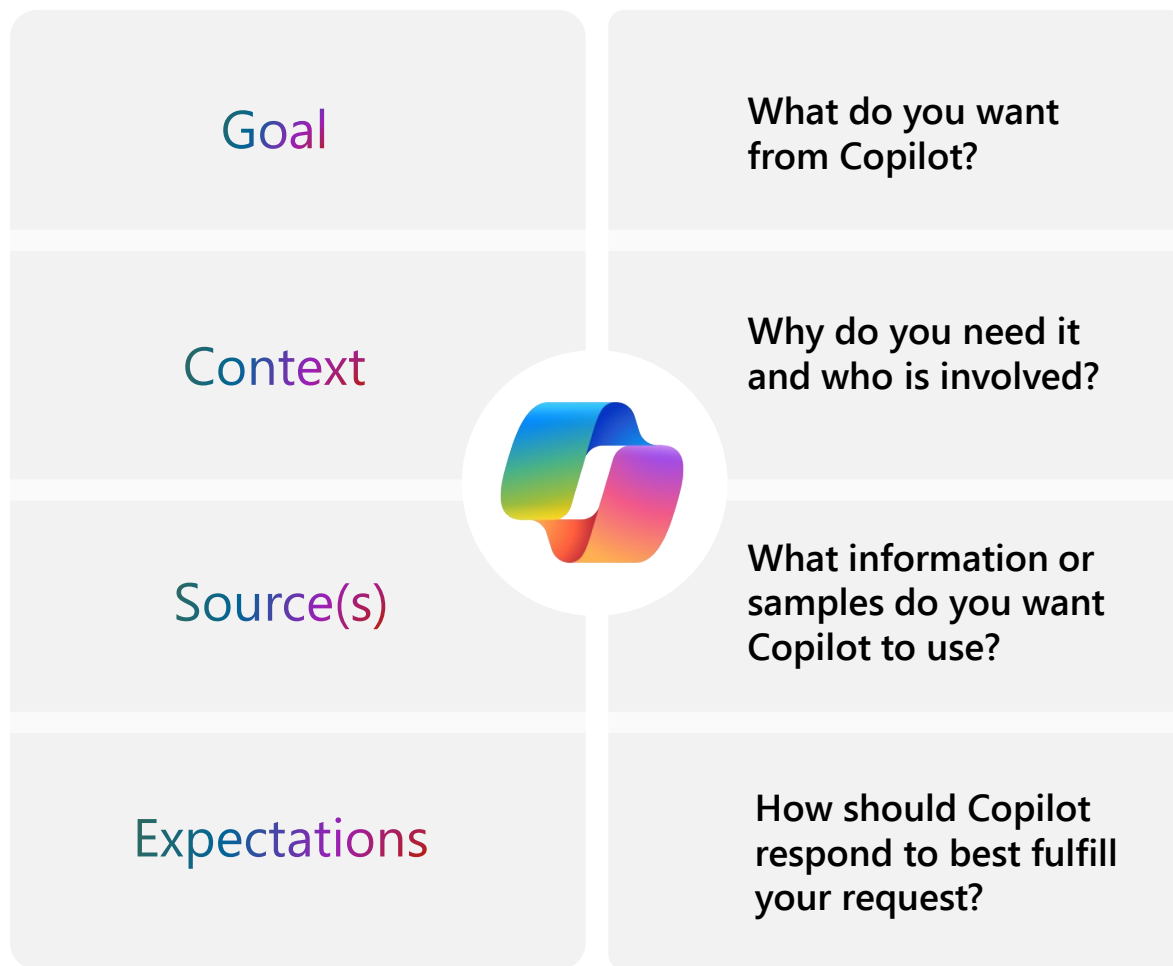
Prompts are how you have a conversation with Copilot

Use plain but clear language and provide context like you would with an assistant.

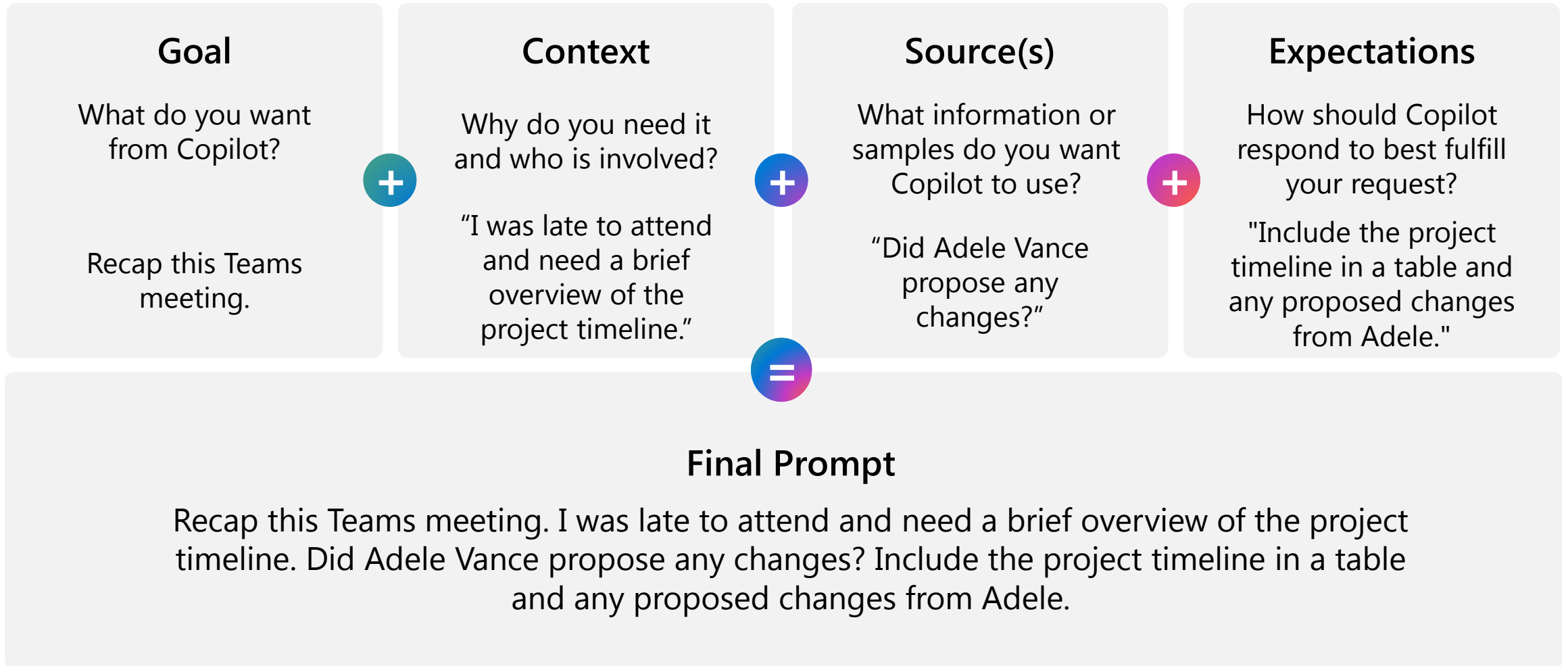
Enter your first prompt in the text box at the bottom of your screen, like *“Draft a cold call email to a customer.”*

Get started by entering your prompt in the text box

The art of the prompt



Highlight key decisions and actions from Teams meetings



Include a work source in your prompt

[Using Context IQ to refer to specific files, people, and more in Microsoft 365 Copilot and Copilot Chat](#)

Want Copilot to respond using information from a Word document, PowerPoint deck, or other file? Select the "+" icon in the prompt box or enter a "/" as part of your prompt. These both allow the same actions

- Select from a list of recent files
- Upload a local file from your machine
- Select a cloud file from SharePoint or OneDrive

Recent files box

Select from recent files. This selection box will appear if you select:

- + then Add work content
- / in the prompt box

Upload images and files

Select from local files on your computer.

You can access this by selecting:

- + then Upload images and files
- / in the prompt box then the upload icon from the recent files box

Attach cloud files

Select from SharePoint or OneDrive files.

You can access this by selecting:

- + then Attach cloud files
- / in the prompt box then the cloud icon from the recent files box

Add content selection box



Add work content

Upload images and files

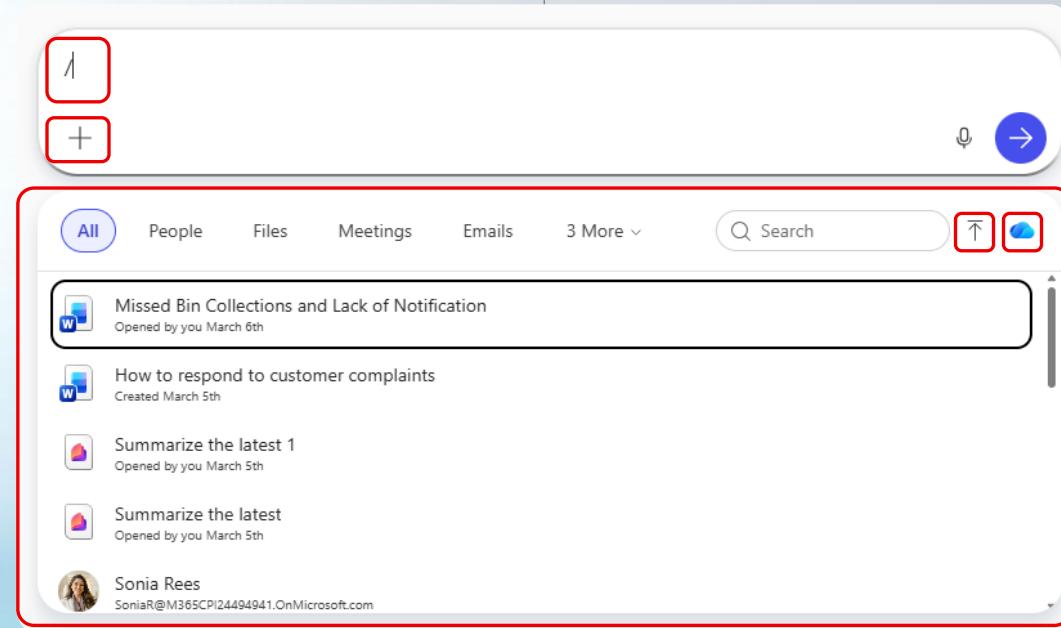
Attach cloud files

Researcher

Analyst

Designer

All agents



Note: "UI shown as of May 18, 2026. Product features and visuals may change."

Save, schedule, and share your favorite prompts



Find a prompt that is really helpful? Save it so you can easily send it again next time. Just hover over the prompt after you've sent it and select the bookmark icon. You can find your saved prompts in the Copilot Prompt Gallery.

You can also schedule the prompt to run automatically at a certain time or cadence by selecting the clock icon.

Think others would benefit from the prompt too? Select the link icon to copy a link to the prompt and share it with colleagues so they can try out the prompt too.

Today



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.

 Schedule a prompt

×

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.

 Repeat this prompt **every day at 3:00 PM until Sunday, May 4, 2025**

Starts

04/30/2025 

At

03:00 PM 

Every

1 

Day 

M

T

W

T

F

S

S

Run

5 

times

 Copilot 

This feature uses Power Automate to schedule an action, so you'll need to be signed in to set one up. A green check mark means you're good to go; otherwise select Try again. Once saved, the information will be sent to Power Automate. [Learn more](#)

Save

Note: "UI shown as of May 18, 2026. Product features and visuals may change."

Get prompt inspiration

Copilot Prompt Gallery helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

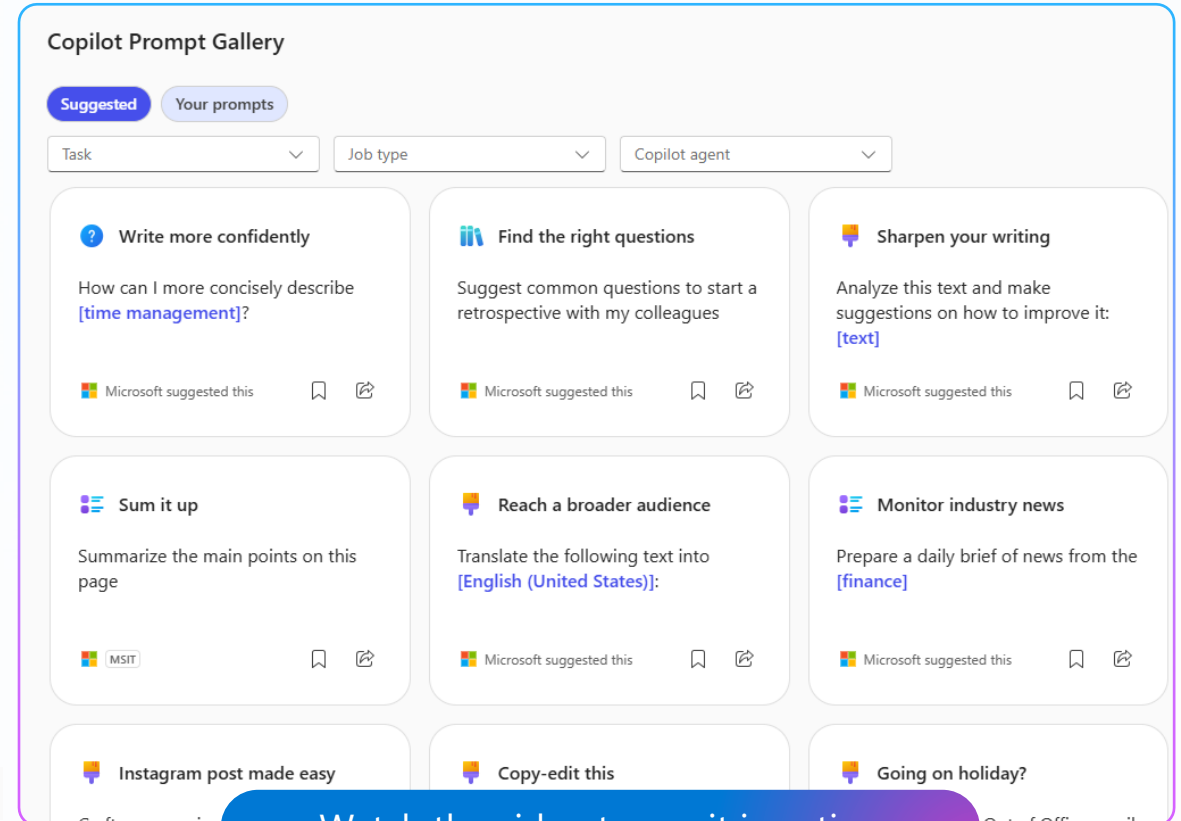
- Explore the curated selection of Copilot prompts
- View your saved prompts
- View prompts from your team
- Share your favorite prompts with colleagues
- Find prompting inspiration from others

Access the Prompt Gallery in Copilot Chat by

1. Clicking to **See more** prompts in Chat
2. Selecting **Prompt Gallery**

See more ▼

 Prompt Gallery See less ^



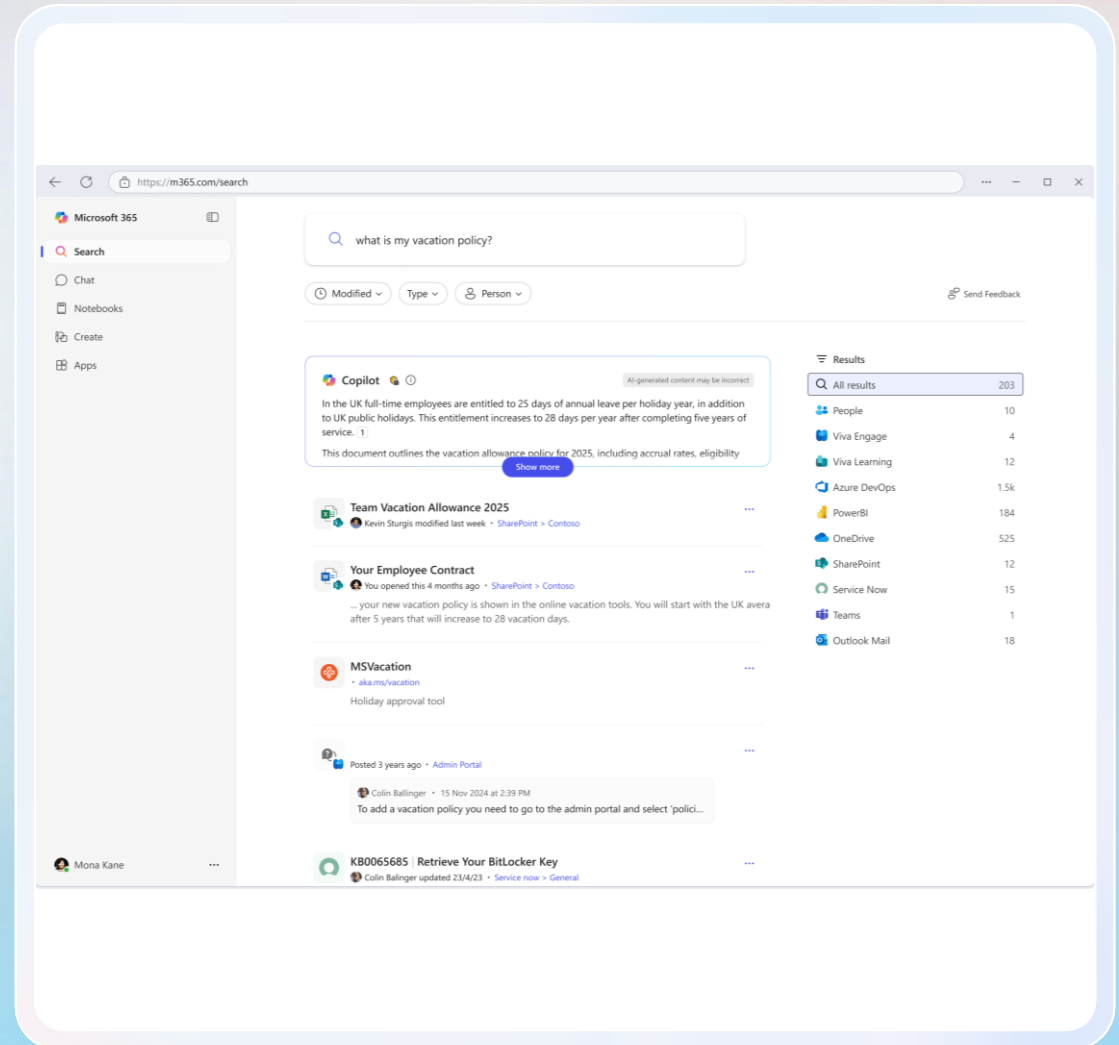
Search

Get started with Search in the Microsoft 365 Copilot App



Search in the Microsoft 365 Copilot app is where you go to find people, chats, meetings, and files. You'll also see recommendations, access recently used files, and review items shared with you.

- Search combines natural language understanding with semantic indexing to uncover relevant results.
- Search across Microsoft 365, on-premises, and other LOB applications and services using Copilot connectors.
- Allows admins to curate answers that provide concise, authoritative results that are especially relevant to your organization.



Note: "UI shown as of May 18, 2026. Product features and visuals may change."

Get started with Search

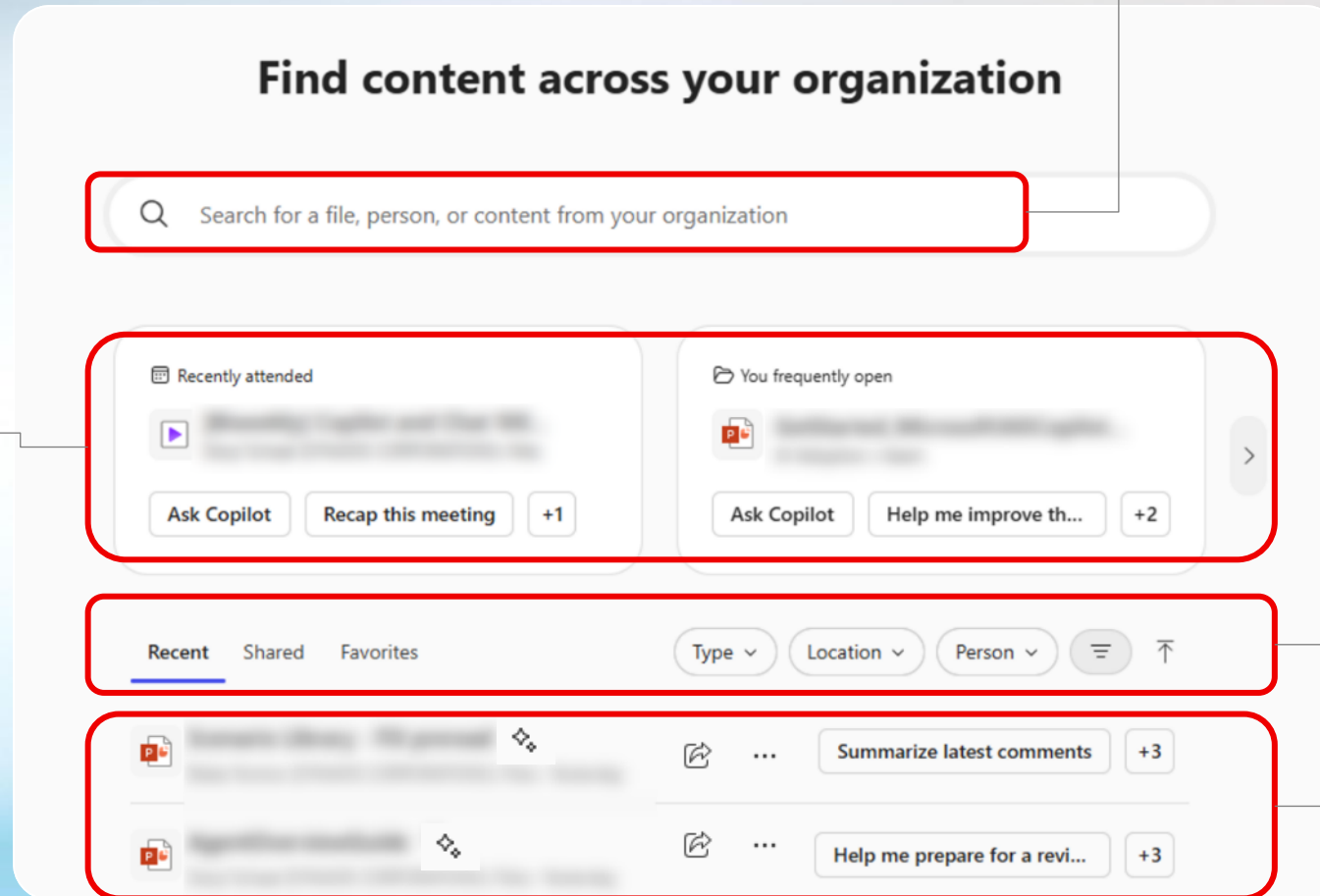
Recommended content

The Recommended section contains meeting recaps and files relevant to you, each with suggested prompts to help you locate the information you need

- Hover over item to open an expanded view with a summary
- Click on the item to open it
- Click on more options to perform other activities like Open, Share, Add to To Do, create a meeting, or Download
- Recommended prompts – Switch to chat and get information about the item

Prompt Box

Enter your search here



Filters

Use filters to narrow down search results in your Quick Access sections

- Recent – Files you recently worked on or accessed
- Shared – Files that other users in your organization have shared with you
- Favorites – Files that you have marked as a favorite
- Type – Based on application
- Location – Cloud files or email attachments
- Person – Select a person

Quick Access

Works the same as recommended content with the additional options of marking the item as a favorite or converting it to a PDF

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Search results

- Results**
Content that you may be looking for. Results include the content owner, security label, location, and a short description.
- **Copilot** – Copilot may produce a brief on the search
 - **Hover over item** – Expose the Overview button to see a summary
 - **Clink to open item**
 - **More options** – Will vary by content type, but generally open, share, or download the item

Prompt Box
Modify your search here

program evaluation report

SharePoint

Modified

Type

Person

Shared

Recent

Send Feedback

Progress evaluation report 2024

Mona Kane edited 4 hours ago • Mona Kane's OneDrive

...have been closely tracking a set of exceptions that block the vast majority of remaining...to gran as of a specific date without any other qualifying factors... of a proposal. MACC...

Program Evaluation

Kevin Sturgis modified last week • SharePoint > Contoso

...

Evaluation of Program 2023

You opened this 4 months ago • SharePoint > Contoso

... your new vacation policy is shown in the online vacation tools. You will start with the UK avera after 5 years that will increase to 28 vacation days.

1:1 week 23/2/25

You edited last week • Mona and Amanda's Loop Workspace

Topics: Update on priorities for the week: - Create Program Evaluation Report. Capacity: - Possibly too many task

Contoso Resources | Evaluation Reports Guidelines

https://contoso.sharepoint.com/sites/contoso/reports

Evaluation of Program 2025

You opened 3 years ago • Location

Shared team vision of the roadmap for our upcoming projects.

Results

All results203

People10

Viva Engage4

Viva Learning12

Azure DevOps1k+

PowerBI184

OneDrive525

SharePoint12

Service Now15

Teams1

Outlook18

Filters vary by results
Modified – Filter by when the file was last modified
Type – Based on application
Person – Filter by person

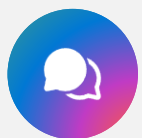
Filter results by location

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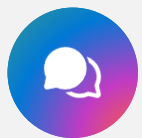
Demo 1

Microsoft Copilot



Demo 2

Copilot in Word



Demo 3

Copilot in PowerPoint



- What prompts would drive the best response?
- Discuss and try it.

Copilot for Microsoft 365 Interactive Experience



Get ready

- You will have 25 minutes to complete the objective.
- In your browser, enter "Word.new" and then save a new document as "Copilot Research" to your OneDrive account.
- Try different Copilots, experiment with prompts to see what works best, and enjoy the creative process!



Goal

Envision a new company or product.
Select any industry, real or imagined,
that fits your personal vision and
objectives.

You will perform three tasks:

- Brainstorm product or company ideas using Microsoft Copilot
- Develop a company or product concept using Copilot in Word
- Create a pitch deck using Copilot in PowerPoint





Interactive Experience

Brainstorm Ideas

Using [Microsoft Copilot \(Copilot.Microsoft.com\)](https://copilot.microsoft.com), brainstorm innovative ideas for a company or product. Examine the viability of these ideas by identifying their potential benefits and possible obstacles.

Concept Development

Using [Copilot in Word](#), articulate a comprehensive concept that includes the mission, vision, values, proposed offerings, target audience, and distinctive edge of your proposed company or product.

Investor Pitch

Using [Copilot in PowerPoint](#), create a pitch deck designed to capture the attention of your board of directors. Emphasize the unique value proposition, market potential, and competitive edge of your business idea or product concept.



In what ways can you see
your team incorporating
Microsoft Copilot?

Goal

Prepare for a meeting on a topic of your choice. Focus on effectively engaging key external or internal stakeholders through enhanced insights.

You will perform three tasks:

- Extract actionable insights using **Microsoft Copilot in Teams**
- Create an executive briefing using **Copilot in Word**
- Develop a strategic overview presentation using **Copilot in PowerPoint**



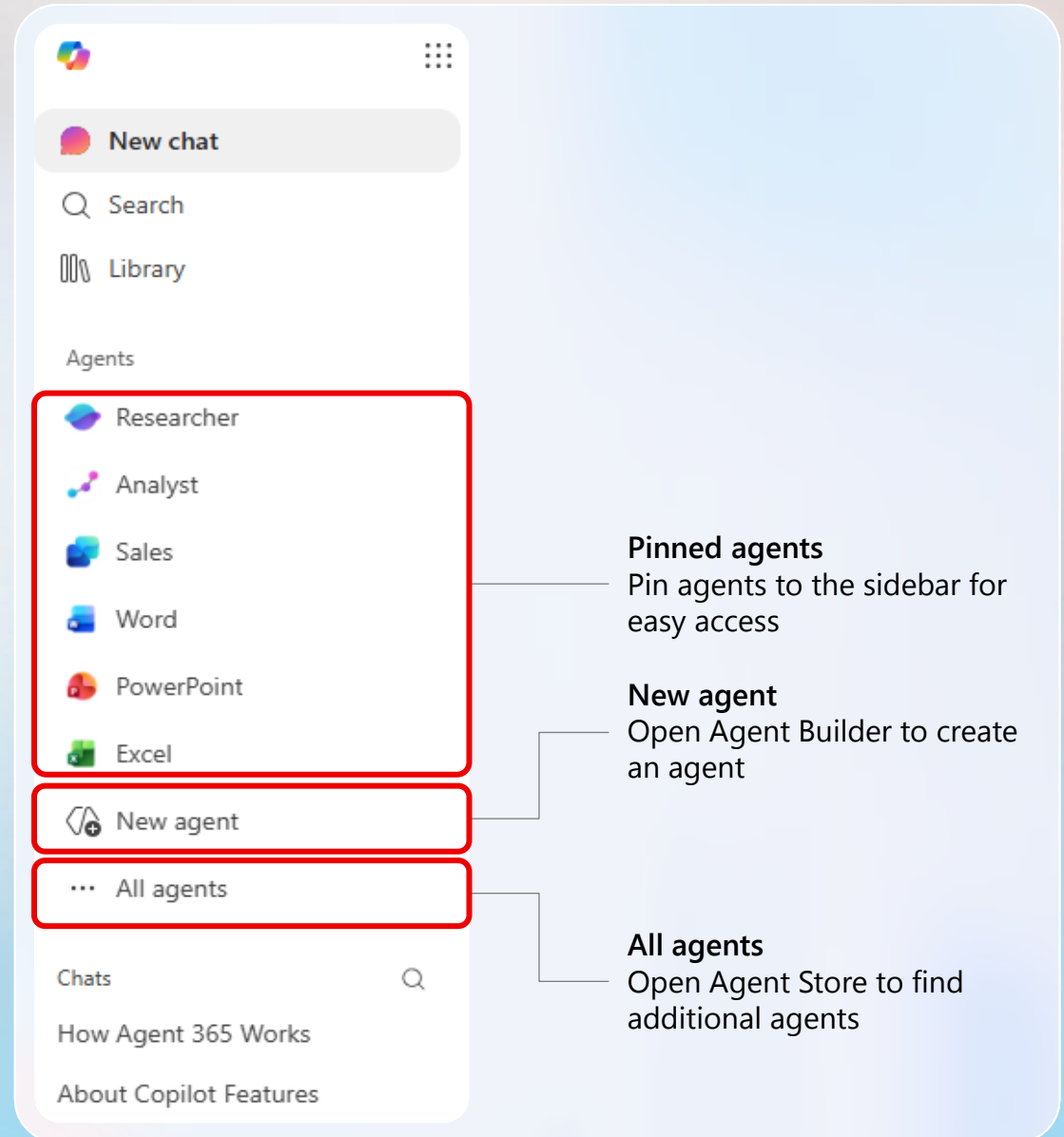
Agents

[Get started with agents in Microsoft 365 Copilot](#)



Agents extend what you can do with Microsoft 365 Copilot—you can customize your Copilot experience by connecting to your organization's knowledge and data sources, as well as by automating and executing business processes.

- Leverage agents built by Microsoft that use advanced reasoning like Researcher and Analyst or specialized agents like Facilitator for meeting management.
- From Microsoft to trusted third party agents, Agent Store is where you find agents that are ready to work for you.
- Build your own agents with Agent Builder using natural language or pro code tooling with the Microsoft 365 Agent SDK.



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Microsoft Agents

[Get started with agents in Microsoft 365](#)

Automate tasks with pre-built agents by Microsoft that are designed for work



Researcher

Premium



Analyst

Premium



Word

Basic



Excel

Basic



Facilitator

Premium



Planner

Premium



Coaches

Basic



PowerPoint

Basic

Agent Store



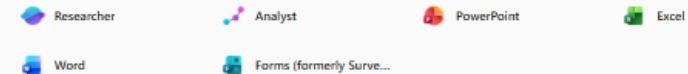
Agent Store provides teams instant access to purpose-built AI agents that solve real work problems—without the need for development—so organizations can move faster.

It is a governed, enterprise-ready marketplace where agents are discoverable, secure, and centrally managed, reducing shadow AI while helping to ensure agents integrate cleanly with existing identity, data, and admin controls.

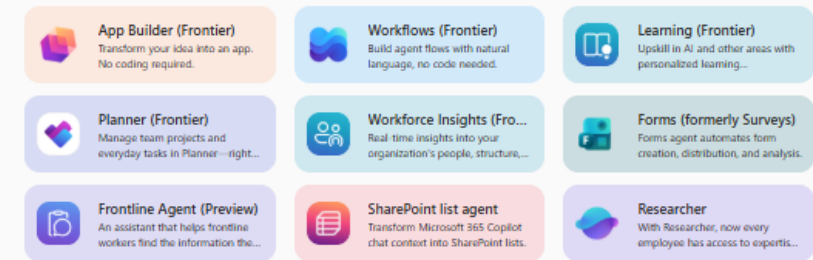
Agent Store

Find agents with the expertise to help you complete complex tasks

Your agents

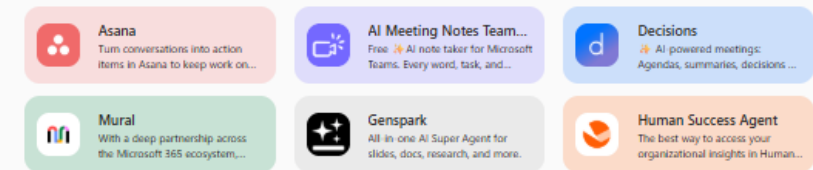


Built by Microsoft



[See more](#)

Featured



Create an agent
Add custom knowledge and skills to your agent with Copilot Studio.

Note: "UI shown as of May 18, 2026. Product features and visuals may change."

Create custom agents

[Build your own agent with Microsoft 365 Copilot](#)



Have a more specific task to get done? Create a custom agent easily – no coding needed.

Open Agent Builder by expanding the “Agents” option in the Copilot Chat menu and selecting “New agent”.

Create an agent from scratch by describing what you’d like your agent to do or select “Skip to Configure” to manually enter configuration information.

Or Start with an agent template by selecting “Create an agent” in the right-side pane of Copilot Chat and selecting one of the templates, like Prompt Coach or Writing Coach.

Create an agent that works the way you do

Create an HR support agent to answer common questions



Skip to configure →

Start with a template



Document Writing (F... Preview

Generate documents in your organization's style, tone, and...

Supports tuning



Expert Answers (Fron... Preview

Get answers quickly, grounded in your knowledge and in your format

Supports tuning



Document Validation ... Preview

Validate documents against guidelines and flag violations

Supports tuning



Text Translator

The Text Translator is a smart, multilingual agent designed to hel...



Corporate Comms Crafter

The Corporate Communications Crafter is a declarative agent...



Request for Proposal Genera...

The Request for Proposal Generator is a declarative agent designed to...



Customer Insights Assistant

An agent designed to help the team get to know their customers by...



Writing Coach

Writing Coach boosts effectiveness and supports refining writing.



Style Editing (Frontier) Preview

Match a distinct writing style, vocabulary, and tone

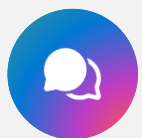
Supports tuning

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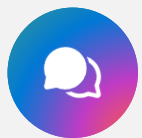
Demo 1

..Type Copilot App here..



Demo 2

..Type Copilot App here..



Demo 3

..Type Copilot App here..



- What prompts would drive the best response?
- Discuss and try it.