WORKSHOP SERIES

PART 1

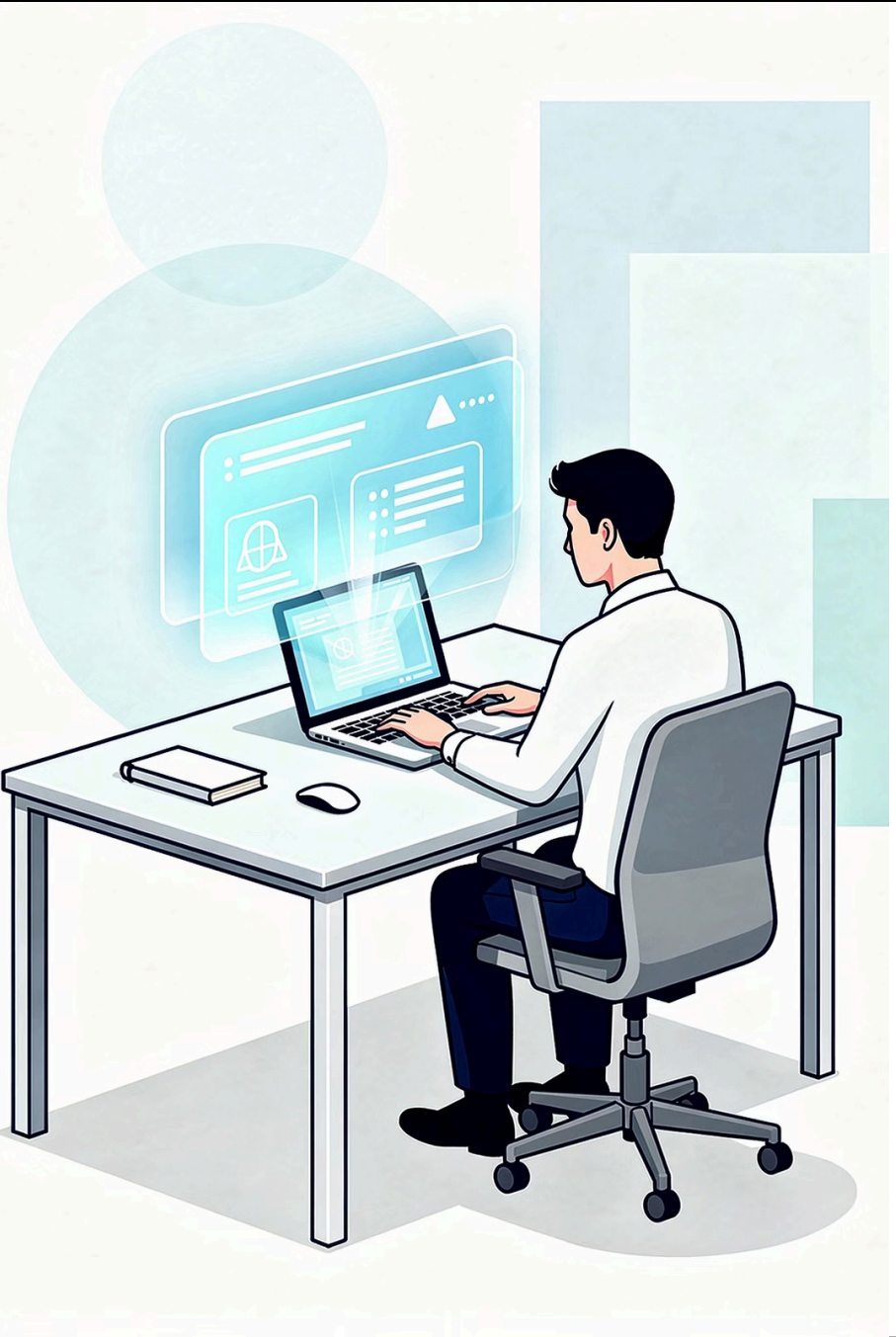
MASTERING MICROSOFT COPILOT

Tips, Tricks & Best Practices

Harnessing AI to Boost Individual and Team Productivity

365apps.pro

Cloud Experts



Mastering Microsoft 365 Copilot

Your definitive guide to harnessing AI-powered tools across Microsoft 365 — boosting individual and team productivity, streamlining daily workflows, and unlocking smarter ways of working.

What is Microsoft 365 Copilot?

Microsoft 365 Copilot is your AI-powered assistant, built directly into the apps you already use every day — Word, Excel, PowerPoint, Outlook, Teams, and more. It is designed to boost both individual and team productivity by automating repetitive tasks, surfacing relevant insights, and helping you work more creatively and efficiently.

Crucially, Copilot leverages your organisation's own data securely, operating within your existing Microsoft 365 permissions and compliance boundaries — so sensitive information stays protected.

What Copilot Does

- Drafts, summarises, and rewrites content
- Analyses data and generates insights
- Creates presentations and reports
- Catches you up on missed conversations
- Respects your org's data permissions

The Productivity Challenge

Today's knowledge workers are overwhelmed. Power users manage **250+ emails, 150+ chat messages, and switch between 11 or more apps** every single day. Constant meetings and relentless context-switching consume hours that could be spent on meaningful, high-value work.

250+

Emails Daily

Average inbox volume for power users

150+

Chat Messages

Teams and other platform messages per day

11

Apps Used

Average number of tools switched between daily

57%

Time Lost

Of working hours spent on communication overhead

Copilot: Your Always-On Assistant

Draft & Create

Generate first drafts, proposals, and presentations in seconds — not hours.

Summarise & Analyse

Condense long threads, reports, and meetings into clear, actionable takeaways.

Collaborate Faster

Keep your team aligned by seamlessly integrating insights across apps.

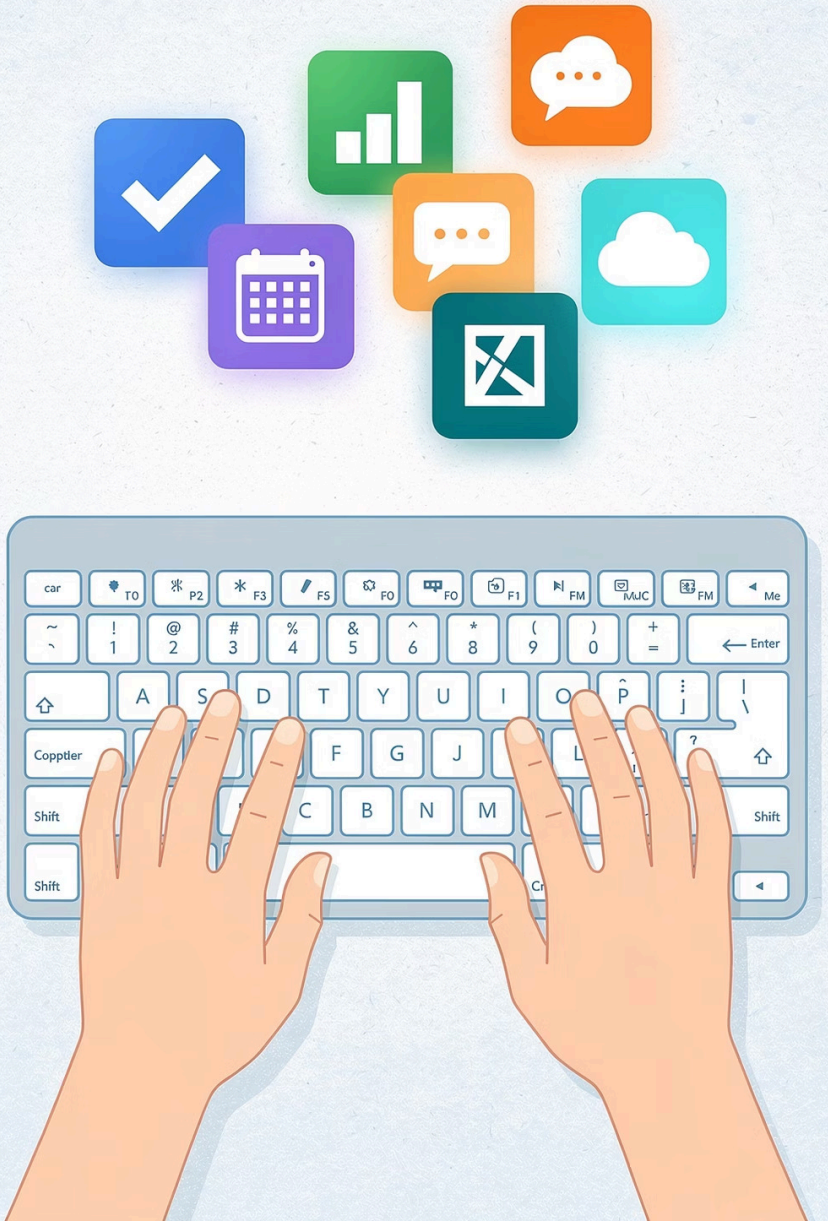
Focus on What Matters

Reclaim time from routine tasks and direct energy toward strategic thinking.

CHAPTER 2

Copilot in Action

Everyday productivity boosts across your favourite Microsoft 365 apps.



Taming Your Inbox with Outlook Copilot

Email overload makes it hard to stay focused. Outlook Copilot helps you summarise threads, write replies, and surface what needs attention.

→ **Summarise Long Threads**

Instantly capture decisions, open questions, and next steps.

→ **Draft Replies in Your Tone**

Write polished responses that sound like you.

→ **Prioritise Intelligently**

Spot urgent, high-impact emails before they get buried.

→ **Schedule Meetings Effortlessly**

Find the best time and draft the invite faster.

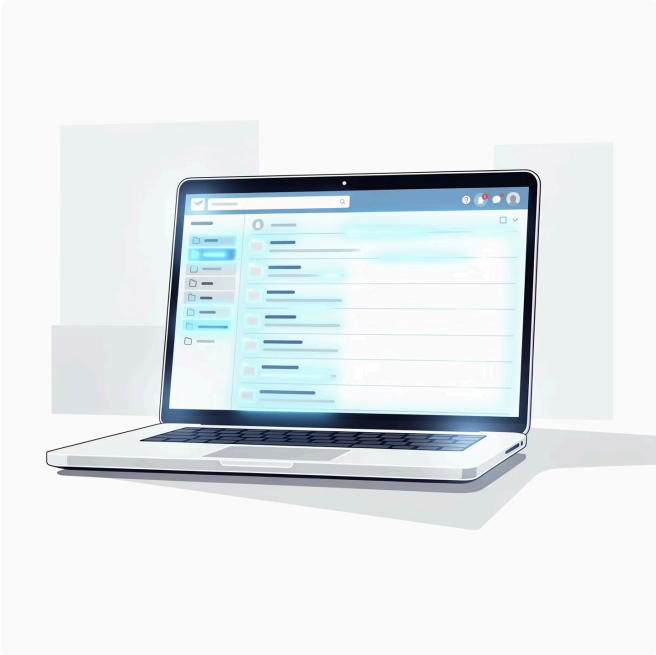
→ **Coach Your Writing**

Improve tone, clarity, and conciseness before sending.

→ **Follow-Up Reminders**

Nudge important emails so nothing slips through.

Try This Prompt:
"Summarise my unread emails from today, highlight any action items, and flag messages that need an urgent reply."



Building Documents in Seconds with Word Copilot

Staring at a blank page is a thing of the past. Word Copilot takes your rough ideas, bullet points, or attached research and transforms them into well-structured, polished drafts — complete with headings, formatting, and professional language. You can brainstorm headlines, rewrite copy for tone and clarity, and seamlessly incorporate key insights from recent meetings.

Try This Prompt:
"Draft a proposal for the Q3 marketing campaign based on the attached research document. Include an executive summary, key objectives, and a proposed timeline."

Data Analysis Made Easy with Excel Copilot

You no longer need to be a spreadsheet expert to unlock the power of your data. Excel Copilot analyses trends, builds PivotTables, creates charts, and generates forecasts — all through natural language instructions. Simply describe what you want to understand, and Copilot does the heavy lifting.

Analyse Trends

Identify patterns across large datasets without writing a single formula.

Build PivotTables

Generate dynamic summaries and breakdowns of complex data instantly.

Create Forecasts

Project future outcomes and visualise predictions with confidence.

Try This Prompt: "Show this month's expenses compared to last month and project next month's spending based on current trends."

Instant Presentation Magic with PowerPoint Copilot

Creating compelling presentations used to take hours of design work and careful content curation. PowerPoint Copilot changes that entirely. Paste in bullet points or a research document, and Copilot suggests professional slide designs, adds relevant visuals, and drafts speaker notes — producing a polished deck in a fraction of the time.

- **From bullet points to full decks** — with layouts, visuals, and themes applied automatically
- **Transform existing documents** — convert Word reports or meeting notes directly into slides
- **Draft speaker notes** — add context and talking points to every slide effortlessly

> **Try This Prompt:** "Create a 10-slide presentation from the key points in the Q2 sales report, including a summary slide and recommendations."

Copilot Cowork: Seamless Collaboration

Copilot Cowork revolutionises how we approach complex projects within Microsoft 365.

It extends beyond single-turn interactions, allowing tasks to evolve over minutes or hours, coordinating actions across multiple applications to produce real, integrated outputs.

This secure, intelligent framework ensures your data remains protected, operating within existing Microsoft 365 permissions and compliance boundaries, fostering unprecedented levels of teamwork and efficiency.

Explore the full potential of Copilot Cowork and redefine your team's workflow: Learn more

Staying Connected in Teams with Copilot

Catch Up Instantly

Missed a meeting? Get a full summary of decisions, key discussion points, and assigned action items — even if you weren't present.

Real-Time Support

During live meetings, Copilot can track who said what, capture follow-ups, and generate notes as the conversation unfolds.

Seamless Integration

Push meeting summaries and action items directly into shared documents, keeping the whole team aligned without extra effort.

Try This Prompt: "What were the key decisions and action items from the project sync meeting I missed this morning?"

CHAPTER 3

Advanced Strategies for Power Users

The Power of Effective Prompting

The quality of Copilot's output is directly tied to the quality of your prompts. Mastering prompt writing is the single most impactful skill for getting the most from AI — and it's easier than you think.

1

Be Specific

Clearly state your goal, desired format, tone, and length. Vague prompts produce vague results.

2

Provide Context

Reference relevant documents, emails, or previous conversations to ground Copilot's responses in your actual work.

3

Iterate and Refine

Don't settle for the first response. Ask Copilot to revise, expand, simplify, or reframe until the output meets your needs.

4

Use Chain-of-Thought

Ask Copilot to "explain its reasoning step by step" for more complex analytical or strategic tasks — you'll get richer, more accurate results.

Introducing Copilot Notebooks

Copilot Notebooks are your AI-powered long-form workspace — a dedicated environment for gathering, organising, and interacting with large amounts of content in one place. Unlike standard chat interactions, Notebooks support prompts of up to **18,000 characters**, enabling far more nuanced and context-rich responses.

Access Notebooks via the left-hand navigation at **microsoft365.com/copilot** and start building intelligent, structured workspaces around your most important projects.

Knowledge Bases

Compile research, policies, and FAQs into a living, queryable resource.

Project Management

Centralise briefs, updates, and decisions for seamless project oversight.

Client Proposals

Build tailored, well-structured proposals using all your relevant context.

Leveraging Copilot Chat and Agents

Copilot Chat gives you a secure, AI-powered conversational experience grounded in both web content and your Microsoft 365 data. It works side-by-side with your open documents in Word, Excel, PowerPoint, and Outlook — aware of the content you're working on in real time.

Secure AI Chat

Enterprise-grade protection powered by the latest AI models — your data stays within your compliance boundary.

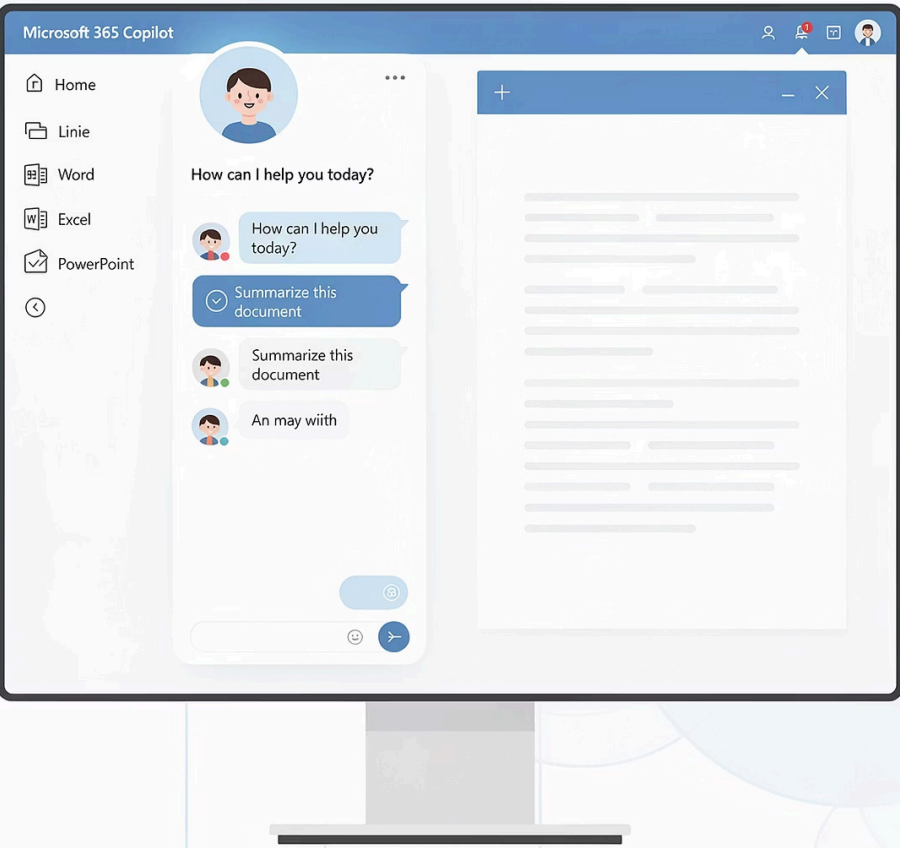
Researcher Agent

Deep-dive into complex topics, synthesise sources, and generate structured research outputs automatically.

Analyst Agent

Streamline data-heavy tasks with a pre-built agent designed for analysis, reporting, and insight generation.

Access Note: Standard Copilot Chat access is available free; priority access and advanced agents require a Microsoft 365 Copilot licence.



Unlock Deeper Insights with Copilot Chat

The Copilot Chat experience places AI assistance right alongside your work — so you can ask questions, get context, and take action without ever leaving the app you're in. From surfacing insights buried in files to drafting responses on the fly, it's a seamless, intelligent layer over your entire Microsoft 365 environment.

CHAPTER 4

Driving Adoption & Building Habits

The Microsoft 365 Copilot Adoption Playbook

Successful AI adoption doesn't happen by accident — it requires deliberate planning, the right governance structures, and a phased approach. Microsoft's Copilot Adoption Playbook provides a proven framework to get your organisation up and running effectively.

1

Prepare Your Business

Review security settings, data governance policies, and content management practices before rollout.

2

Assign Seats Strategically

Prioritise initial licences for teams with the highest Microsoft 365 app usage to maximise early impact.

3

Create an AI Council

Form a cross-functional group including executive sponsors, IT leaders, and change management representatives.

4

Measure and Iterate

Track usage, gather feedback, and continuously refine your rollout strategy based on real outcomes.

Onboarding and Engagement Strategies

Why Engagement Matters

The most powerful AI tools only deliver value when people actually use them confidently. Structured onboarding, peer learning, and visible champions are what turn occasional users into habitual adopters.

Create a Copilot User Community

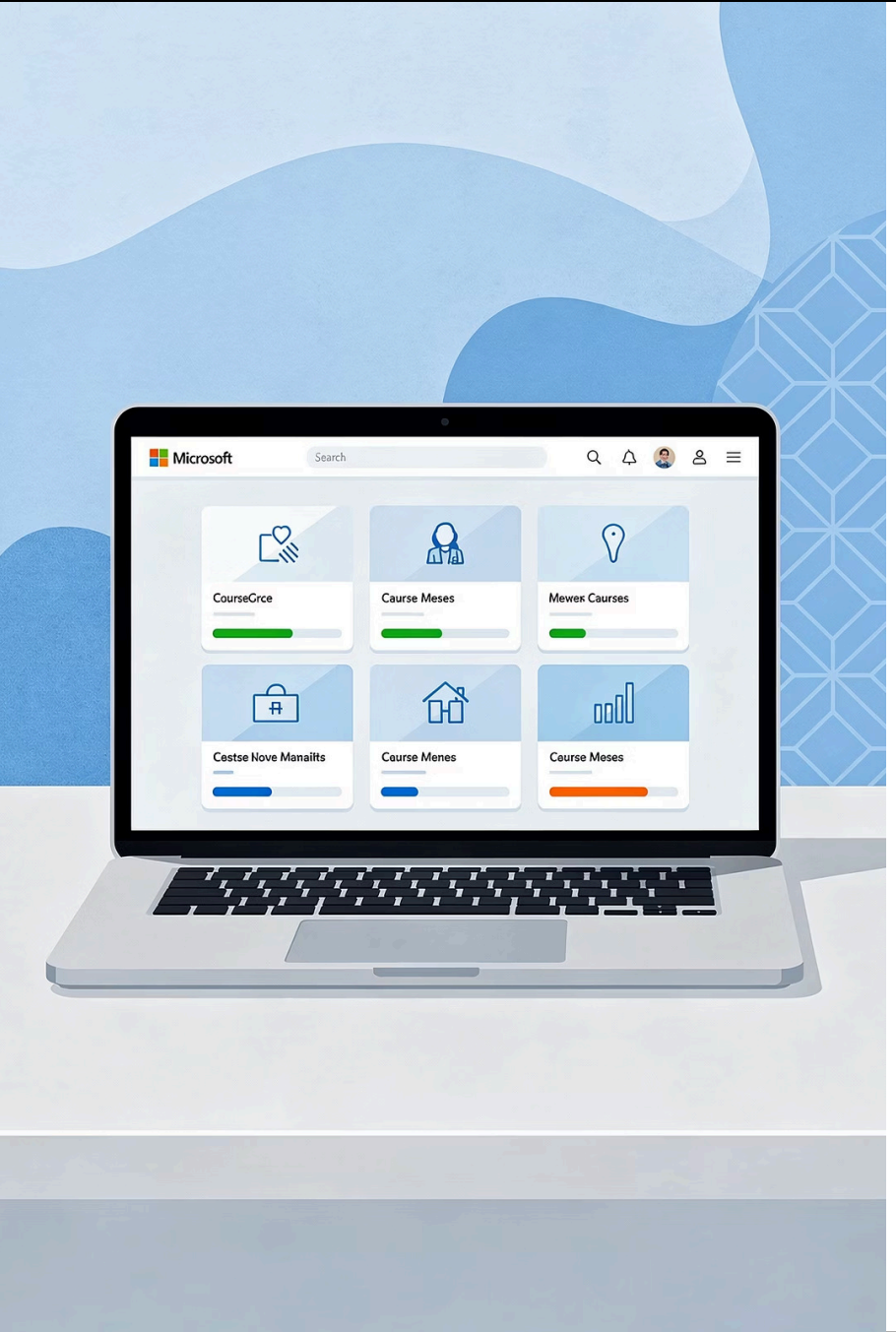
Foster peer-to-peer learning through dedicated channels, regular showcases, and shared prompt libraries where colleagues exchange practical tips.

Identify Copilot Champions

Empower enthusiastic early adopters to demonstrate real benefits, answer questions, and inspire their peers to experiment.

Build New Work Habits

Provide structured training, clear communication about what Copilot can and cannot do, and set realistic expectations from day one.



Copilot Academy: Your Learning Hub

Copilot Academy, available through **Viva Learning** on the web or in Microsoft Teams, provides structured, role-based learning paths to help every member of your organisation build AI skills quickly and confidently.

App-Specific Paths

Dedicated learning journeys for Excel, Word, PowerPoint, Teams, Outlook, and the M365 Copilot app.

Role-Based Learning

Tailored courses for Executives, Marketing, Sales, IT, HR, and other departments — relevant from day one.

Short & Actionable

Bite-sized videos and courses designed so learners can apply new skills immediately in their daily work.

Seamless Integration for Maximum Impact

Microsoft 365 Copilot is not a standalone tool — it's woven into every app in your existing environment. This means AI assistance is available wherever your work already happens, eliminating the friction of switching between platforms and enabling a truly connected, intelligent workspace.

Measuring Impact and Seeing Results

To sustain investment and build momentum, organisations need to demonstrate the tangible value Copilot delivers. A structured measurement framework helps you track progress and connect AI adoption to real business outcomes.

Track Usage & Engagement

Monitor adoption rates across teams and apps through the Microsoft 365 admin centre and Viva Insights dashboards.

Identify Productivity Gains

Measure improvements in task completion times, document quality, and meeting efficiency before and after adoption.

Gather User Feedback

Run regular pulse surveys to understand employee experiences, identify friction points, and prioritise further training.

Connect to Business Outcomes

Link Copilot usage data to KPIs such as deal velocity, content output, customer response times, and team satisfaction scores.

CHAPTER 5

The Future is AI-Powered

Embracing the AI-Powered Future

Microsoft 365 Copilot represents far more than a productivity tool — it signals a fundamental shift in how knowledge work gets done. The organisations and individuals who thrive will be those who treat AI as a genuine collaborative partner, not just a shortcut.

Continuous learning and a willingness to adapt are essential. As Copilot evolves with new capabilities and deeper integrations, staying curious and experimenting regularly will be what separates good users from exceptional ones. By mastering Copilot today, you empower yourself and your entire team to achieve more — with less friction, greater creativity, and meaningful impact.

A New Way of Working

AI augments human judgement, creativity, and strategic thinking.

Continuous Growth

Commit to regular learning as Copilot capabilities expand rapidly.

Collective Impact

When teams adopt AI together, the compounding productivity gains are transformational.

Your Next Steps

The best time to start with Microsoft 365 Copilot is right now. Begin small, experiment often, and build on each success. Here's how to get started today:

Explore Copilot Academy

Visit Viva Learning and select the role-based path most relevant to your work. Complete your first short course this week.

Experiment with Prompts

Choose one daily task — an email reply, a document draft, or a data summary — and try Copilot on it today. Iterate until it's right.

Join Your Copilot Community

Connect with your organisation's Copilot user community. Share what's working, ask questions, and learn from your peers.

Start Transforming Your Workday

Set a goal to use Copilot in at least three tasks per day for your first two weeks. You'll be amazed at the time you reclaim.

Remember: Every expert was once a beginner. The most important step is simply to start.