

E-book Series

 Microsoft 365

Crash Course in Copilot for Microsoft 365



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01

Understanding generative AI

First off, let's talk about the technology that's at the heart of Microsoft Copilot, generative AI.

What is generative AI and how does it work?

Generative AI is a type of artificial intelligence, or AI, that creates original content in response to user prompts. This content can take many forms, including an answer to a question, a summary of a meeting transcript or email thread, organizing tables of data, as well as forecasts and insights about that data.

Generative AI typically needs to understand and generate text, and one of the most common ways to do that is by using what's called a large language model, or LLM. LLMs are created by analyzing vast amounts of text data to identify intricate language patterns, recognize context, and learn how words relate to each other to convey meaning. Then they use that analysis to generate text in response to prompts by predicting the most probable next word based on the details and context of the prompt.



Which products were the most profitable this quarter?

→ What is a prompt?

Prompts are instructions or questions you use to tell Copilot what you want. They typically consist of up to four elements:

Goal: what you want from Copilot.

Context: why your request is necessary, who else is involved.

Expectations: how should Copilot respond, e.g., in a formal or casual tone.

Source: information or examples you want Copilot to use.

So, an LLM doesn't just go find information for you. It can actually apply its library of knowledge to generate a new idea or suggest a solution to a problem.

This also means that generative AI works using natural language. So, when you type a prompt, you can simply ask a question as if you were talking to another person.

Where does Copilot fit in?

To use generative AI, you need an app to orchestrate the interactions between the AI technology and the user. The app retrieves relevant information from the LLM and manages access to data. It is also where you enter a prompt and where the app displays the response.

This is exactly what Copilot does. And because the Copilot LLM is connected to the internet, as well as whatever work data an individual user may have access to, it can provide more accurate, relevant, and personalized responses to that user.

Copilot can also connect with other generative models or specialized tools to create more types of content besides text, such as images, data visualizations, or computer code.



02 Copilot compared to Copilot for Microsoft 365

Microsoft Copilot is an everyday AI companion that's free to all Microsoft consumer and commercial customers. Like all versions of Copilot, it can answer questions and respond to prompts, create content, and reason over data.

Plus, if you sign in with an Entra ID to use Copilot for work, your business data is protected. No prompt or response data is saved, Microsoft has no visibility into your Copilot data, and your data is not used to train any generative AI models. Plus, Copilot has access to the latest data on

the internet, so its responses will reflect current information.

Microsoft Copilot for Microsoft 365 goes one step further. It's an AI-powered assistant for work that supercharges productivity and creativity and transforms business processes. Integrated into the Microsoft 365 apps you use every day—such as Word, Excel, PowerPoint, Outlook, and Teams—Copilot combines the power of the latest LLMs with your document, presentation, email, meeting, chat, and other data in Microsoft Graph and on the internet.

Copilot for Microsoft 365 includes all the capabilities of Microsoft Copilot. Plus, it has the added benefit of using your existing Microsoft 365 policies and can only use data that each user already has access to themselves.



Copilot



Copilot for
Microsoft 365

	Copilot	Copilot for Microsoft 365
Foundational Capabilities	●	●
Web Grounding	●	●
Commercial Data Protection	●	●
Priority Model Access		●
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		●
Copilot in Teams		●
Enterprise-Grade Data Protection		●
Customization		Copilot Studio

03

What can Copilot for Microsoft 365 do?

By combining powerful LLMs with your work content, data, and context, Copilot for Microsoft 365 can take certain types of tasks off your plate, such as organizing your email inbox, or summarizing a meeting. You can then have it provide recommended actions based on the meeting discussion. This gives you more time for complex tasks and helps reduce mental fatigue and feelings of burnout or overload.

Organize your work

Because it inherits your Microsoft 365 security, privacy, identity, and compliance policies, your specific instance of Copilot has access to your individual universe of data—and only yours, no one else's. It knows your organizational structure, work patterns, communication patterns, which documents you're working on. It's like having your own personal assistant.

That means you can ask Copilot what's the latest on a certain project and have its response grouped by emails, chats, and

documents. This is an incredibly powerful way to stay in the loop.

You can also ask Copilot to summarize key emails from the past few days relating to a specific project. If you want, Copilot can present the response in a table, with columns for topic, a summary of the content, and any action items and deadlines where you are mentioned. It also includes links to references so you can go directly to the relevant message.

Let's say you need a recap from a recent meeting. You can ask Copilot to include a list of who attended, key decisions, any action items, and have it show important details in bold. You can then have Copilot draft an email based on the recap you just generated. For instance, if the meeting resulted in a decision to move a deadline, have Copilot include that in the draft. Or if the recap mentioned a new opportunity, have it included as well.

Those who use Copilot to amplify what they're already doing—not just as a search engine—gain value the fastest.



Pro tip: Build a daily habit

Regular use of Copilot helps employees quickly learn how to get better responses and take full advantage of the AI capabilities in their everyday routine.

Boost creativity

You can also use Copilot to help strengthen your writing. After having it summarize a long email thread, ask Copilot to draft a suggested reply. Then fine-tune the response as necessary to make it uniquely yours.

Stuck on how to start a new presentation? Describe what you want to Copilot, or have it use an outline, and it will help get

you going. Or you could ask Copilot to suggest compelling taglines based on your marketing documents and first draft.

You can also use Copilot to analyze and explore data, identify hidden trends, surface new insights, or create powerful visualizations. Then ask for suggestions about how to increase or reduce certain results you find in your data, or have it look for common themes in a variety of text documents.



Create a 10 slide presentation
from the press |



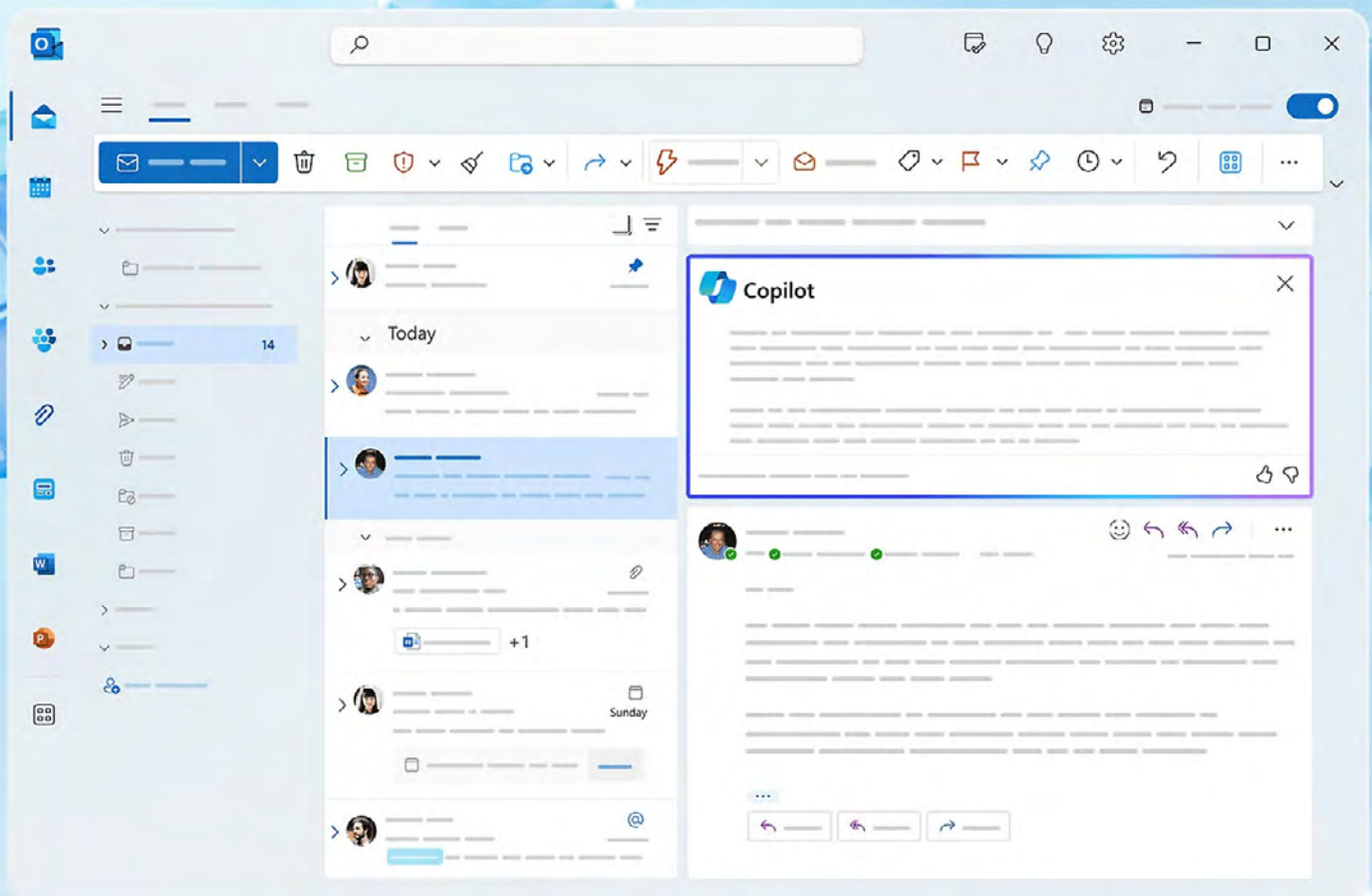
In Outlook

Heavy users can spend almost 9 hours a week dealing with email. Copilot can help reduce that burden by assisting with drafting new messages and replies, or by summarizing long conversations or finding specific information in a particular thread. It can even translate an email response from one language into another.

If you have Copilot draft a reply, it won't send anything on your behalf so you can—and should—review everything it

creates first. Copilot will even remind you if you try to send a reply it generated without editing it first.

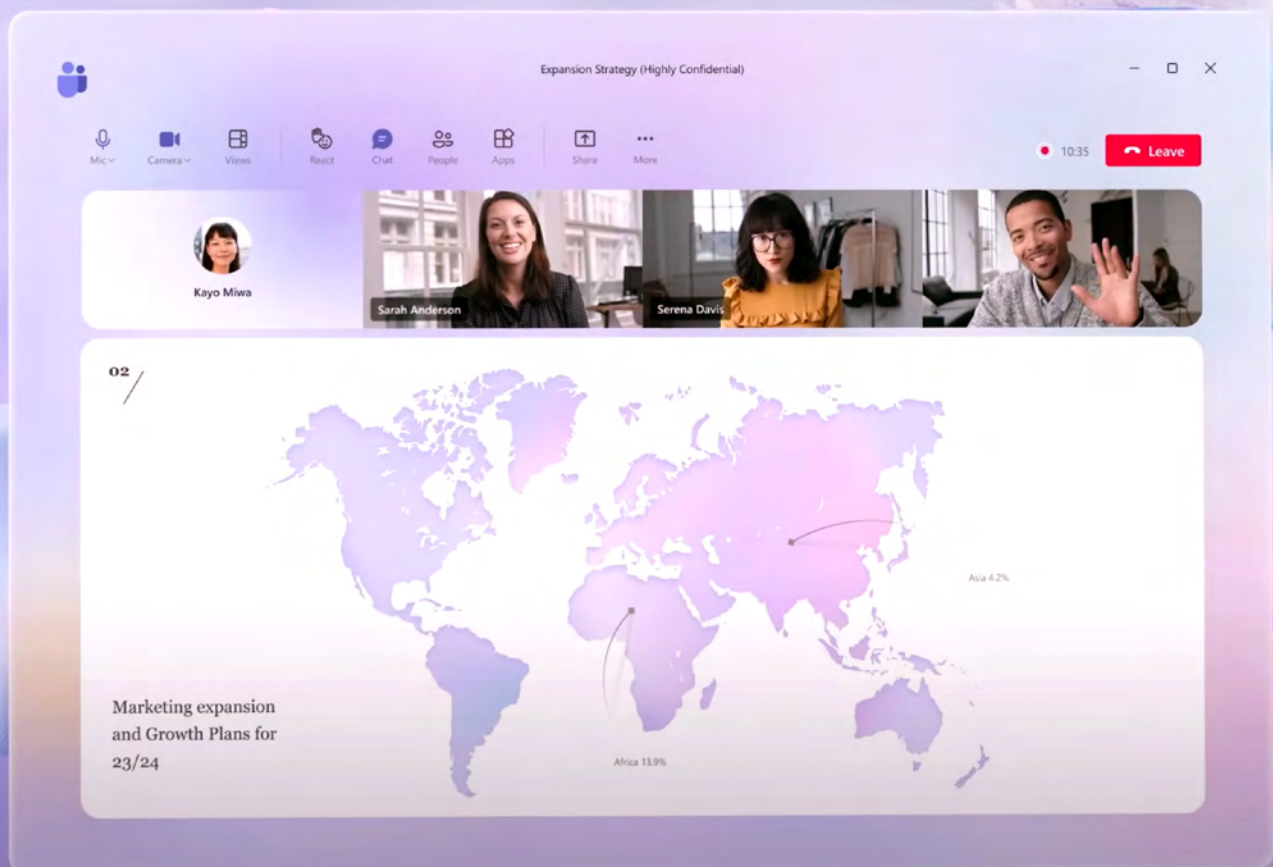
If the draft doesn't read like something you wrote, ask Copilot to "Sound like me." Because Copilot has access to emails you have already sent, it can adjust the response to match the way you usually write.



In Microsoft Teams

When there is a lot of discussion during a meeting, or in a chat or message thread, sometimes it can be hard to figure out what decisions were made. Copilot excels at sorting through all of the back-and-forth to pick out key thoughts, ideas, and action items, so you can focus on what's important.

You can also have Copilot assess the pros and cons of a new proposal, generate a list of questions to ask at your next meeting or in your next message, extract meeting agendas from chat history, identify the right people for action items, and easily schedule follow-up meetings.



In Word

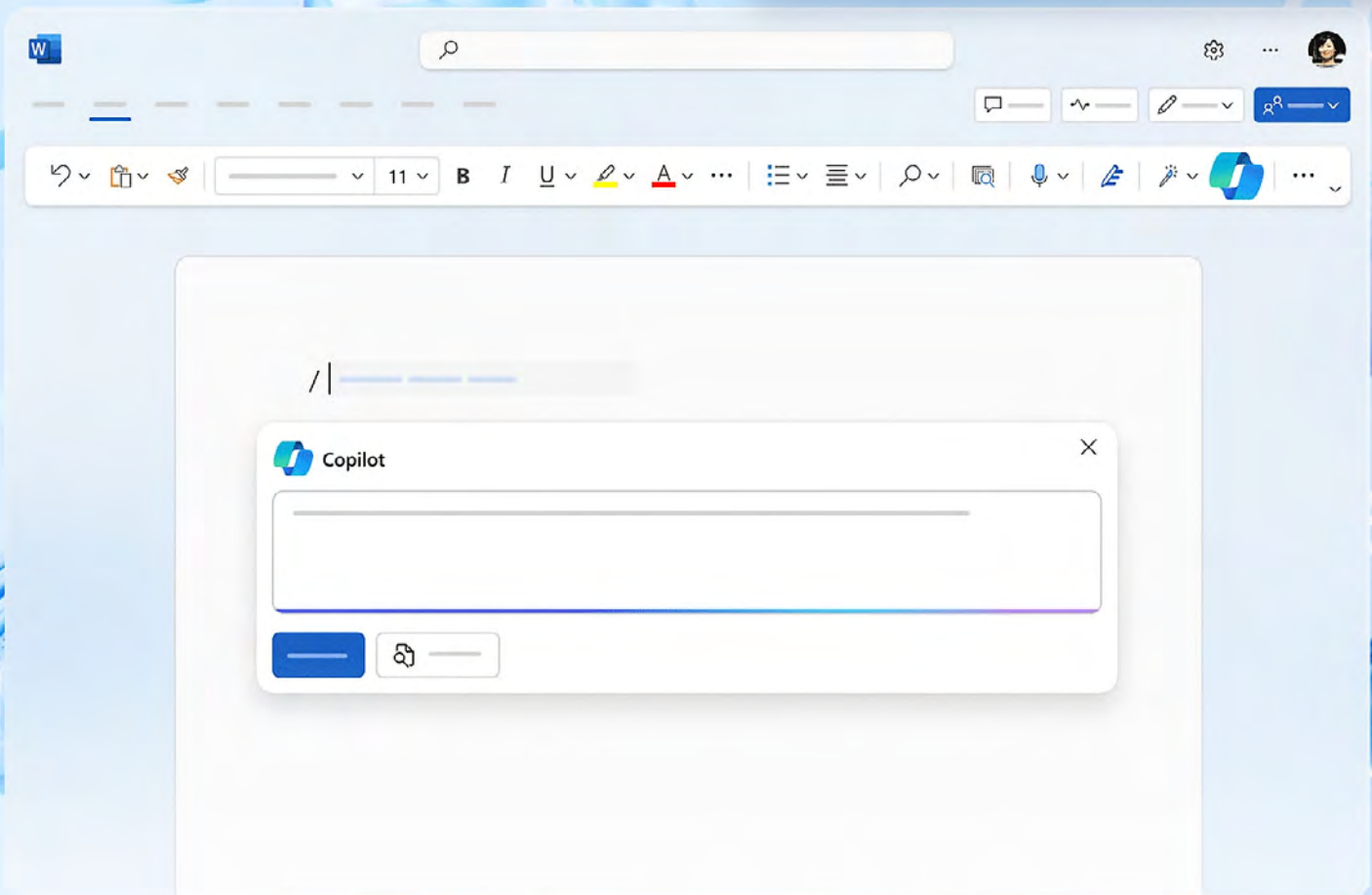
Just like with email or meetings, you can have Copilot analyze a Word document to identify key insights, challenges, and opportunities, or look for thematic patterns across multiple documents.

Copilot can also help with editing documents so that the writing is clear and professional. Or try having Copilot generate a completely new update for an existing file.

For instance, you can have Copilot create a marketing overview for a particular campaign. You might ask it to generate a 50-word elevator pitch, including a catchy tagline. Or have it explain the benefits of one of your company's proprietary technologies or products.

→ Pro tip: Think like a manager

Knowing how to delegate tasks to Copilot is essential. That means being able to create clear, concise prompts with defined parameters, evaluating the results, and deciding what to do next with the content Copilot generates.



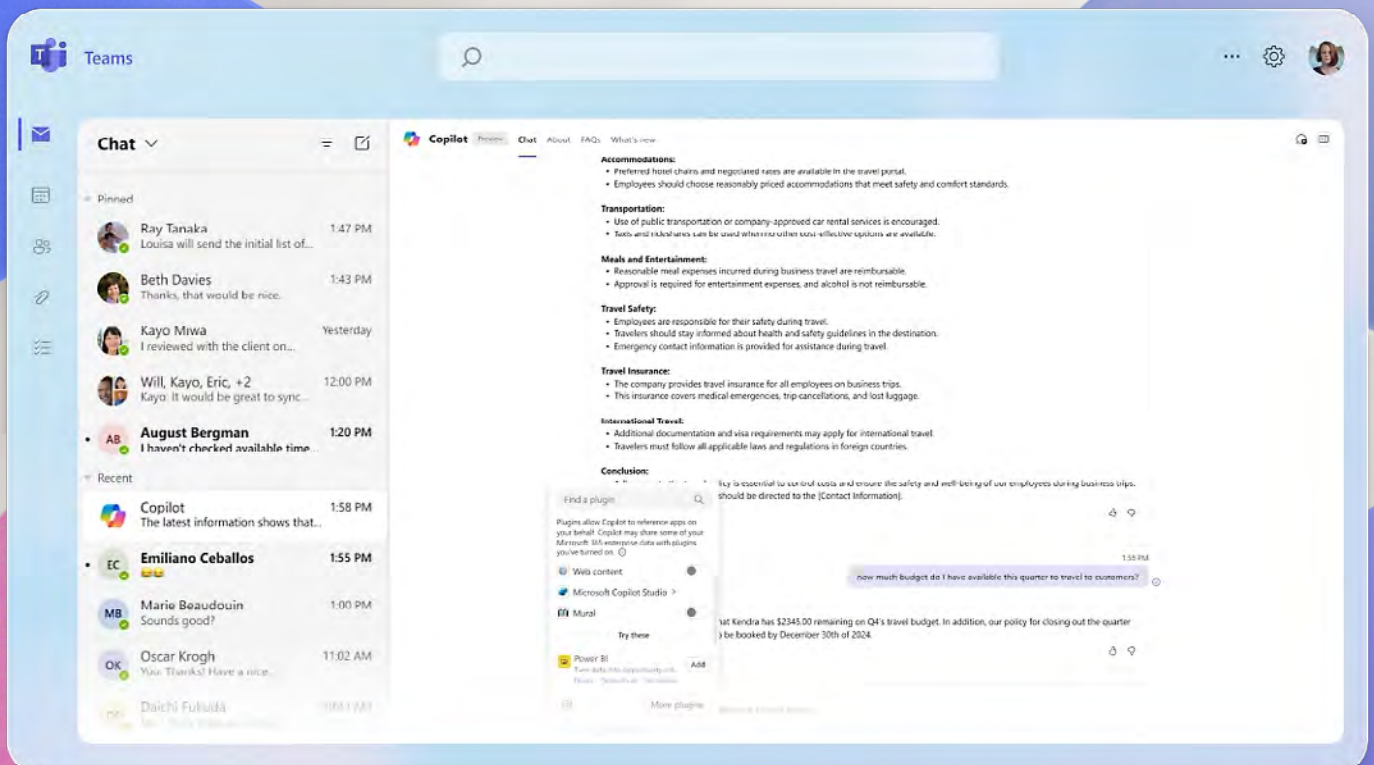
Build on the power of Microsoft Graph

As noted, Copilot for Microsoft 365 has all the foundational capabilities of Copilot, while inheriting your organization's security, privacy, identity, and compliance policies. But what really makes Copilot for Microsoft 365 stand out is Microsoft Graph.

Microsoft Graph connects Copilot to your entire universe of work data and integrates everything into Microsoft 365 apps. It's that combination of Microsoft Graph and

Microsoft 365 apps that makes Copilot for Microsoft 365 so powerful.

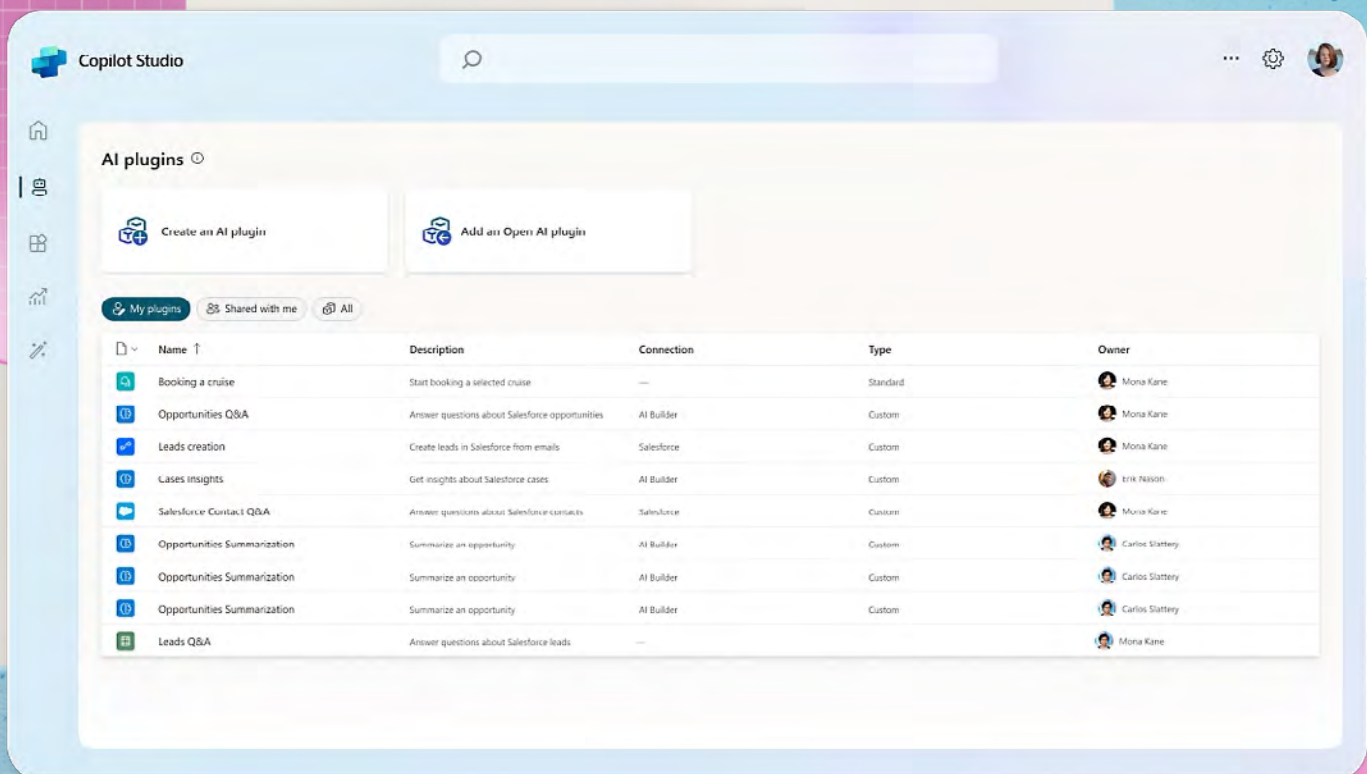
Plus, if you're already a Microsoft 365 customer, you've already built your Microsoft Graph. That means the time to value with Copilot can be measured in weeks, not months, let alone years. Microsoft Graph is extensible, so you can augment it with data from other systems, including your ERP, CRM, or other critical business data with custom plugins or connecting to the latest OpenAI GPTs.



Customize and extend with Copilot Studio

As your organization becomes more familiar with Copilot for Microsoft 365, use Copilot Studio to unlock data, information, and knowledge across your specific lines of business. This will capitalize on one of the biggest opportunities of generative AI: optimizing business processes.

Extend your capabilities with Copilot Studio by connecting data using prebuilt or custom plugins and GPTs. Or link Copilot with any of your company's systems of record, including custom line of business systems, to create and orchestrate sophisticated logic that is essential to creating workflows. And you manage it all, so everything is controlled by your IT.



The screenshot displays the Copilot Studio interface. At the top, there is a search bar and a user profile icon. Below the search bar, there are two buttons: "Create an AI plugin" and "Add an Open AI plugin". Underneath these buttons, there are three tabs: "My plugins", "Shared with me", and "All". The main content area shows a table of AI plugins with the following columns: Name, Description, Connection, Type, and Owner.

Name	Description	Connection	Type	Owner
Booking a cruise	Start booking a selected cruise	—	Standard	Mona Kane
Opportunities Q&A	Answer questions about Salesforce opportunities	AI Builder	Custom	Mona Kane
Leads creation	Create leads in Salesforce from emails	Salesforce	Custom	Mona Kane
Cases insights	Get insights about Salesforce cases	AI Builder	Custom	Erik Neilson
Salesforce Contact Q&A	Answer questions about Salesforce contacts	Salesforce	Custom	Mona Kane
Opportunities Summarization	Summarize an opportunity	AI Builder	Custom	Carlos Slattery
Opportunities Summarization	Summarize an opportunity	AI Builder	Custom	Carlos Slattery
Opportunities Summarization	Summarize an opportunity	AI Builder	Custom	Carlos Slattery
Leads Q&A	Answer questions about Salesforce leads	—	—	Mona Kane

Connect with Copilot Lab

Every Copilot for Microsoft 365 user has access to Copilot Lab, which is an online resource designed to help everyone build new habits and get the most out of working with Copilot directly within Microsoft 365 apps.

With Copilot Lab you can easily discover prompts right in the flow of work and learn to how to turn a good prompt into a great one.

We have also learned from early users that Copilot has the biggest impact when entire teams are able to connect and build community rather than having just one person using it on their own. Copilot Lab provides a space where you and your coworkers can save and share your favorite prompts and get inspired as you learn to work together in a new way.

See the value with Copilot Dashboard

Powered by Microsoft Viva, Copilot Dashboard helps you realize the full benefits of Copilot for Microsoft 365 with end-to-end support, from readiness to adoption to measuring and analyzing how your people are using Copilot.

If you're in the readiness phase, Dashboard will help you understand who is eligible for Copilot and which roles you may want to prioritize.

If you're trying to promote adoption, Dashboard helps you understand your progress, so you can see where momentum is strong and where it needs to be strengthened. You can even drill down to understand how people are using Copilot across various apps, from meeting summaries to content creation.

Lastly, Dashboard provides qualitative and quantitative measurement of the impact of Copilot over time across every part of your organization. Use it to survey employees and generate feedback, then compare your results against global benchmarks. Get visibility into changing work patterns and analyze behaviors across key workflows, such as meeting effectiveness, content creation, and email processing.

You can also see how work patterns differ by role—such as managers compared to individual contributors—and even between Copilot users and nonusers.

04

Driving productivity, creativity, and culture

Productivity drives value

At the heart of almost every technology value proposition is the metric of productivity. That is, increasing output for a fixed amount of time.


Productivity is certainly a key part of the benefits of using Copilot, and you've likely heard countless claims about how AI is going to make it easier to complete all



kinds of work-related tasks. But are the claims true?

The research Microsoft has conducted with Copilot so far shows that the time savings can be significant.

People work faster with Copilot:

	 With Copilot	Without Copilot
Search 27% faster	17m 54s	24m 18s
Summarizes meetings 4x faster	11m 13s	42m 34s
Write a first draft 43% faster	8m 12s	13m 48s
Multiple tasks 29% faster	29m 42s	42m 6s

Productivity drives wellbeing, too

Helping your people complete simple, high-volume, repetitive tasks can help reduce their overall cognitive load at work. This helps increase their ability to focus and improves wellbeing by reducing stress.

How Copilot makes work more engaging

As important as productivity is for business value, when you are considering an AI-powered solution, it is equally important to know what the user experience is like. Do people actually like working with AI? With what kind of tasks does it help them the most? How much does it help them? Is it just marginally useful or is it a tool they don't want to live without?

Let's look at two ways Copilot users report that it makes work more engaging: by improving creativity and increasing focus time.

More creativity, better quality

Microsoft surveyed Copilot users participating in the Early Access Program and 68% said it helped them jump-start the creative process. Over half (57%) said it made them more creative. Almost three-quarters (72%) reported that it helped them generate ideas while writing and over two-thirds (68%) said it improved the quality of their work.



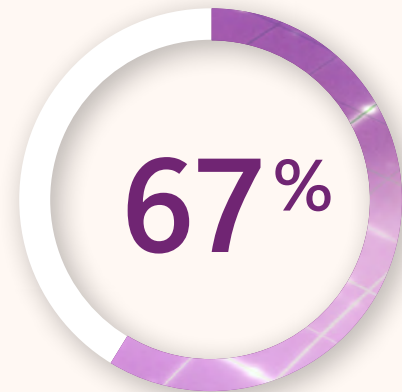
→ User-reported benefits of Copilot

- It jump-starts the creative process.
- It made them more creative.
- It helped generate ideas while writing.
- It improved the quality of their work.

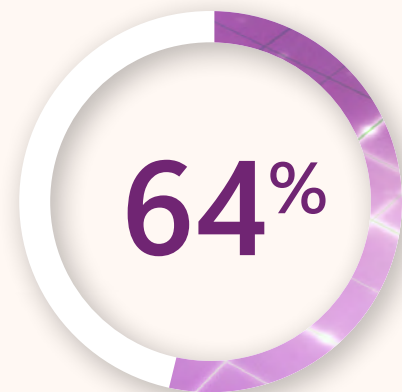
Improve focus

Microsoft research has shown that nearly 2 out of 3 people surveyed (64%) said they struggle with having enough time and energy to do their job, and as a result they are 3.5x more likely to struggle with innovation and strategic thinking. Their leaders are noticing, as 60% of them are concerned that there is a lack of innovation or breakthrough ideas from their teams.

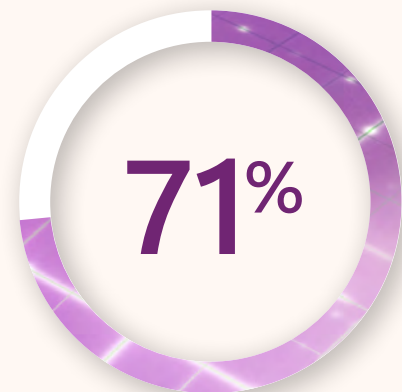
Research with Copilot users shows that it can have a direct impact on reducing cognitive load and its effects.



said it saved time so they could focus on more important work.



said it allows them to spend less time processing email.



said they saved time on mundane tasks.

Source: [What Can Copilot's Earliest Users Teach Us About Generative AI at Work?](#)

Copilot's impact on culture

As the impact of Copilot's capabilities spreads across your organization it should become more agile and decisive as it tests new ideas and learns from its interactions with AI, then adjusts to what it learns.

One of the surprising findings from the Copilot Early Access Program is that experienced managers have had an easier time adapting to working with Copilot compared to less experienced counterparts. Users also found the most value assigning Copilot complex, nuanced

tasks rather than just mundane repetitive tasks.

Because of the way generative AI works, clear communication skills are a critical part of getting the best results. Being conversational, providing emotional context, and treating Copilot as an intellectual partner not only helps generate quality results, but it can also help you better understand what you are trying to achieve yourself.

This means your organization needs to invest in helping every employee develop foundational leadership and management skills.



Transformation, amplification, optimization

Microsoft research indicates that there are four challenges that leaders cite most frequently as barriers to performance:

- Burned-out or disengaged employees.
- Inefficient work culture, specifically including endless meetings and unclear boundaries between work and personal time.
- Overburdened managers.
- Too many tedious tasks.

Copilot helps address these hurdles in three ways: transformation, amplification, and optimization.

Transformation. Copilot can enable transformative shifts by helping managers become more effective at empowering their teams, communicating effectively, and setting clear performance expectations.



Amplification. You can use Copilot to extend the benefits of best practices by inspiring more engaged leadership, supporting a culture of inclusion, and demonstrating a focus on employee wellbeing.

Optimization. Use Copilot to augment or automate tasks and make processes more efficient, empowering employees to use data in guiding actions and decisions.



05 Think before you deploy

If you expect AI to have a far-reaching impact on your organization, and you should, you will want to think through a number of factors well before you've made any buying decisions. That likely means investing more time in this phase than you have for other technology decisions.

However, because of the high percentage of your employees who will benefit from AI, and how different the nature of AI technology is, this additional preparation makes it well worth the effort.

Security

Copilot for Microsoft 365 inherits your existing Microsoft 365 security, privacy, identity, and compliance policies. Your data is logically isolated and protected within your Microsoft 365 tenant, so you are always in control. Perhaps most importantly, Copilot for Microsoft 365 only acts on behalf of individual users, so it can't access any data or information those users don't already have permission to use or see.

Copilot doesn't change any Microsoft commitments regarding data residency or handling. So, for example, anything Copilot does complies with Microsoft commitments to maintaining GDPR and EU data boundary standards. No Copilot data is used to train LLMs and Microsoft does not have access to any of that data.

Additional Copilot for Microsoft 365 security features include:

- Support for sensitivity labels.
- Understanding conditional access policies.
- Respect for information barrier business tools.
- Support for eDiscovery queries and retention policies that you define.
- Ability to generate audit logs.

For more information on security and data for Copilot, see our [technical documentation site](#).

Governance

The key to protecting your company and employees from the risks associated with AI is adopting proper governance measures based on rigorous data hygiene.

The following eight steps provide guidance for helping you get tenant data governance right while using Microsoft Copilot for Microsoft 365.



1. New workspaces

Empower employees to take full advantage of Copilot by allowing them to create new workspaces and making sure all your data is on your Microsoft 365 tenant.

2. Label containers

Labeling your containers ensures your data is not overexposed by default. To do this, set your container label defaults with the “private/no guests” setting.

3. Layered consistency

Derive your file labels from their parent container labels. This layered consistency boosts security at multiple levels.

4. Verify labels

Trust employees to apply sensitivity labels, but also verify them by checking against your Data Loss Prevention (DLP) standard and by using auto-labeling and quarantining when needed.

5. Employee training

Train employees how to handle and label sensitive data to increase your labeling accuracy.

6. Lifecycle management

Use strong lifecycle management protocols that require containers to be attested.

7. Limit oversharing

Limit oversharing at the source by enabling company shareable links. This is better than forcing people to add large groups for access. The standard is even higher for confidential items, which you should only “share with specific people” using a “need to know” standard.

8. Data extraction

Use Microsoft Graph Data Connect extraction to catch and report oversharing after the fact. When you find it, have employees fix it.



Your adoption roadmap

Informed by insights from the Copilot for Microsoft 365 Early Access Program, this roadmap outlines high-level actionable steps you can take to become an AI-powered organization quickly, accelerate usage and engagement, and track progress and the impact of deploying Copilot.



Phase 1:

Prepare your business for AI

Step 1: Review your security and data settings.

Step 2: Be intentional with seat assignments.

- See the Readiness tab of the Microsoft Copilot Dashboard to see which employees are technically eligible, as well as your total number of Microsoft 365 users.
- Focus on specific business goals and use cases where Copilot is likely to have the biggest impact.
- Deploy Copilot to entire teams rather than a few people across multiple teams.

Step 3: Create an AI council.

- This should include representation from IT and risk management, a change enablement team, and an executive sponsor.

Step 4: Help people build new work habits.

- Measure attitudes and interest. Expect a mix of enthusiasm and skepticism and respect both attitudes.
- Manage expectations. Help users understand when to rely on Copilot versus human expertise.



Phase 2:

Onboard and engage

Step 5: Create a Copilot user community.

- Create a Teams group chat for your AI council.
- Use Viva Engage so employees can share tips, ask questions, and upvote answers.
- Use Microsoft Forms to take in feedback.

Step 6: Identify champions to lead the way.

- Ask your AI council to identify power users.
- Recruit from engaged Copilot users who regularly share tips and feedback.
- Ask managers to nominate a team representative.
- Use Copilot Dashboard to measure usage.





Step 7: Make ongoing training the standard. How each user personalizes their Copilot usage will evolve dramatically over the first 6 to 12 months of use, so providing ongoing training is critical. Here are some top training resources to help your organization get started:

Prompt guidance: Understand the ingredients for a great prompt.

Copilot adoption: Get resources for deploying, using, and scaling Copilot at your organization.

Copilot capabilities: Discover learning materials for users, admins, and business leaders.

Copilot Lab: Find tips for better prompts, and explore prompts to try in different apps.

Copilot for Work: Discover work scenarios and how Copilot can become your AI assistant.

Viva Learning: Use the course catalog to learn new skills for the world of AI.

Phase 3:

Deliver impact

Step 8: Quantify impact with the Microsoft Copilot Dashboard.

Step 9: Meet with your AI council regularly.

Step 10: Publicly celebrate successes.

Phase 4:

Extend and optimize

Step 11: Tailor Copilot to your business with Copilot Studio.

- Connect Copilot to more data, such as internal systems of record.
- Connect Copilot to your data and apps so you can extend business processes, systems, and workflows.
- Enable IT to control and manage your customizations.

Step 12: With an additional Copilot Studio license, you can build your own custom copilots.

For instance, you can use it to create an AI assistant to serve customers on your website, mobile apps, or social channels.



Pro tip: Make the most of reclaimed time.

Encourage employees to be intentional with the time they save with Copilot. Remind them it's not about doing more—it's about doing more things that drive value, for individuals and the organization.

06

Best practices

Four tips for leaders

Empower employees to take full advantage of Copilot by allowing them to create new workspaces and making sure all your data is on your Microsoft 365 tenant.



1. Know that different roles have different pain points.

Workers are increasingly looking to AI to help them address the specific issues that will move their unit or company forward—as well as eliminate the mundane tasks that everyone struggles with.

Leaders need to understand and expect that part of what employees want, and one of the main benefits of AI, is its ability to provide precise, role-specific support to address role-specific pain points.

2. Understand what new work habits your people need to develop.

New work technologies require new work habits. When organizations launch a new big tech tool, there's often a huge spike in use, followed by a drop, as some workers get frustrated when it doesn't do exactly what they expected it to. Addressing the inevitable sticking points as they vary from role to role is key.

3. Focus on problem-solving.

Maybe the best work habit when it comes to AI, one that works regardless of your job or role, is to set aside time on your calendar to focus on using Copilot to solve day-to-day challenges. This not only builds your habit of using AI, it dedicates time to figuring out how it can help you at a strategic level, not just for one-off tasks.

4. Reflect and iterate.

After you roll out Copilot, spend the initial months looking at what is working and what isn't. Are your data sources as accurate as they need to be? Is there a certain skill that users seem to be really excited about? Is there a skill they need that they wish AI could help with? Paying attention to these early signals will help organizations use Copilot in a strategic way.



Pro tip: Encourage feedback.

Urge employees to give feedback when Copilot prompts them to. This will continue to improve and refine their experience.

Five tips for users

Think of working with Copilot as a conversation. While Copilot is extremely advanced technology, the ironic thing is that you need strong people skills to get the best results. The following guidance may help.



1. Start prompts with the end in mind.

Be specific about the output you want. Bullet points or an essay? An email or the start of a brainstorm? Generative AI excels at imitation, so give examples of what you'd like the output to look like in your prompts, such as: "Write this thank you email in a casual, approachable style." Or, "Write this as a very structured memo; it's fine for the paragraphs to be long and complex."

2. Provide context, define parameters.

Give Copilot details about what you're working toward. If you're preparing for a client meeting, or trying to write a rousing all-hands speech, let Copilot know which client or what your goal is. With traditional search, fewer words often does the trick. With Copilot, being more descriptive gets you better responses.

3. Tailor the delivery.

Explain how you want Copilot to deliver its response. What audience is it aimed at? What kind of tone? You may also want to explain who you are and what you're trying to achieve.

For instance, you might ask Copilot to explain something as if you were a novice-level coder, or a busy VP who only wants the very top-line takeaways.

4. Be polite and be curious.

Basic etiquette when you interact with generative AI makes a difference. Respectful, collaborative prompts set a tone for the Copilot response, because generative AI naturally mirrors the level of professionalism, clarity, and detail in the inputs you provide.

5. Iterate, iterate, iterate.

Your first prompt is just a starting point. Working with Copilot is not a one-way street where you give a command and get a response. It's a dynamic, interactive process where you and your Copilot are working together. Just remember that it's up to you to keep the conversation going.



07 Additional resources

Dive deeper into the following Copilot topics with these helpful resources.

Learn

Explore this hub of documentation for information about:

- Preparing for Copilot deployment
- Copilot rollout
- Security, privacy, and compliance
- Managing Copilot
- Training resources

[Visit documentation hub](#)

Adoption

Designed for leaders, adoption managers, and IT pros, these resources focus on getting ready, onboarding and engagement, delivering impact, and extending and optimizing Copilot capabilities within your organization.

[Copilot for Microsoft 365 Adoption](#)

Copilot Lab

Accessible, helpful content for general users.

[Visit Copilot Lab](#)

WorkLab

Thought leadership on the science of work and ingenuity, with a focus on AI.

[Visit WorkLab](#)

Start your AI journey

Top resources to drive impact with Copilot.

[Meet Copilot](#)

Plans and pricing

Find the right plan for your business.

[Review plans and pricing](#)