

Unleash Productivity with Microsoft 365 Copilot

Solutions for Success Education Series

Solutions for **Success**



POINT ALLIANCE



Alexis Blackwell

Arce Vol.10

Brooklyn, NY

Agenda

- About Point Alliance
- AI Transformation
- Microsoft 365 Copilot Chat
- Microsoft 365 Copilot
- Microsoft 365 Copilot Demo



Point Alliance

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Point Alliance

- Microsoft Solutions Partner
 - Modern Work
 - Security
 - Digital & App Innovation Azure
 - Data & AI Azure
- Microsoft Gold Partner with 11 Competencies (legacy)
- 100% Microsoft Certified Team
- pointalliance.com/companyprofile



AI Transformation

AI transformation is not just about the technology

AI empowers businesses
and their employees to:



Increase business value



Optimize costs



Help employees thrive



Focus on what matters most



Running your business



Growing your customers



Building your brand



Scaling securely

SMBs using Microsoft 365 Copilot are already seeing transformative results

353%

projected ROI over
a three-year period

132% low-end ROI

Copilot transforms your business to enhance personality productivity and streamline operations

New Technology: The Projected Total Economic Impact™: Of Microsoft 365 Copilot for SMB

6%

increase in
net revenue due
to **faster time
to market**

20%

reducton in
operating costs due to
process efficiencies and
increased productivity

61%

**increase in employee
satisfaction** due to relief
from mundane tasks and
faster access to information

Top security and governance concerns about generative AI

Data oversharing
and data leaks

80%

of leaders cited
leakage of sensitive
data as their main
concern¹

Identification of
risky AI use

41%

of security leaders cited that
the identification of risky users
based on queries into AI was
one of the top AI controls they
want to implement²

AI governance and
risk visibility

84%

Want to feel more confident
about managing and
discovering data input into AI
apps and tools²

1. First Annual Generative AI study: Business Rewards vs. Security Risks, Q3 2023, ISMG, N=400

2. [Microsoft data security index 2024 report](#)

Tools to secure and govern your Copilot use



Address oversharing concerns

- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot from processing sensitive files

Secure



Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and Copilot interactions
- Dynamically apply security policies based on risky actions



Govern AI use to meet regulations & policies

- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Govern

We secure your data at rest and in transit

You control your data

Your data is not used to train or enrich foundation models

You're protected against AI security and copyright risks



**Microsoft 365
Copilot is built
on trust**



Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language
Models

+



Microsoft Graph
- Your Data -

+



Microsoft 365
Apps

+



The
Internet



Copilot for Microsoft 365

Built on Microsoft's **comprehensive** approach



Security



Compliance

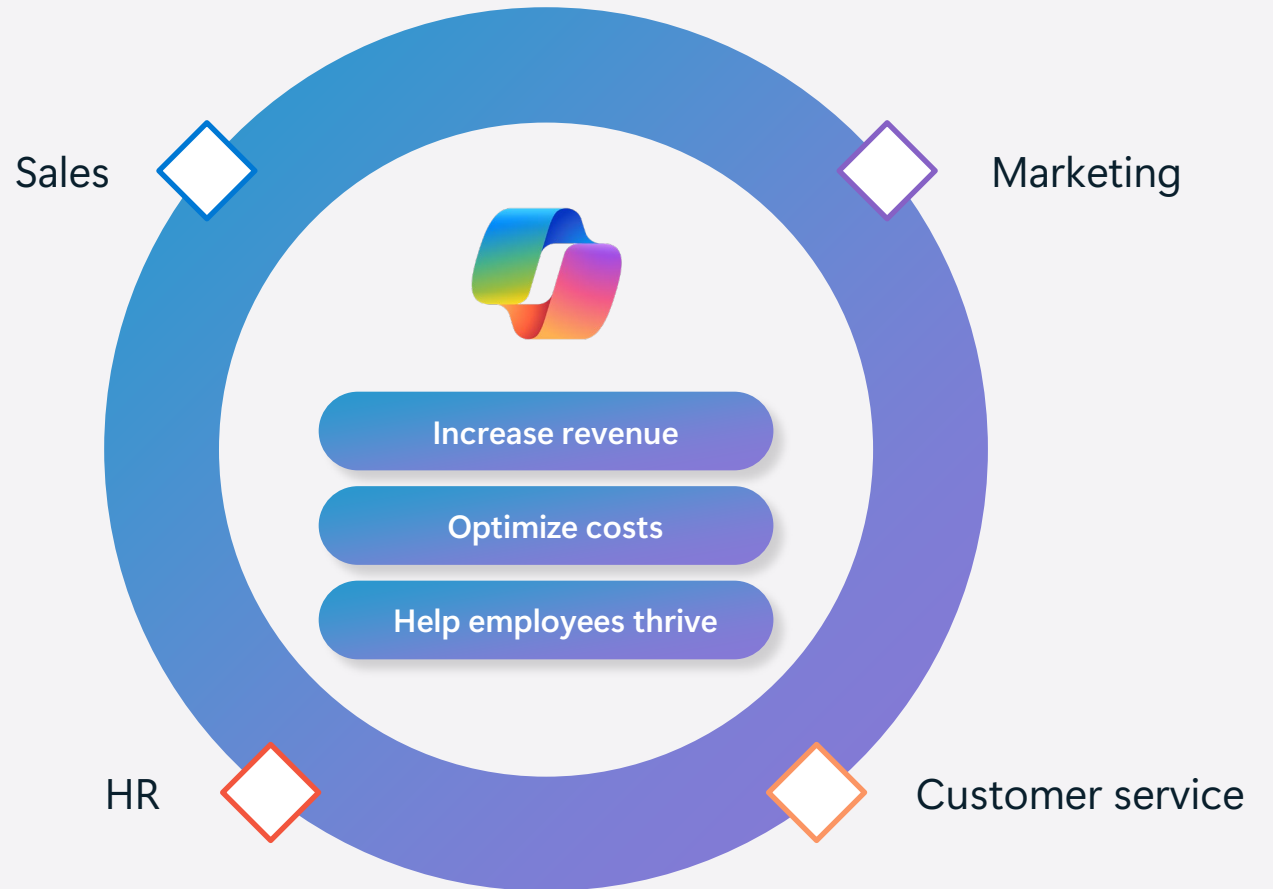


Privacy



Responsible AI

Where do I start?



Flexible purchase and deployment options

● = Included | ▲ = Included – Metered

Chat	Copilot Chat – Web grounded (powered by GPT 4o)		
	Copilot Chat – Work grounded (shared tenant Graph data, 3rd party data via graph connectors, personal data)		
	Copilot Pages		
	File upload ¹		
	Code Interpreter ¹		
	Image generation ¹		
Agents ²	Create agents powered by Copilot Studio ³ , including SharePoint agents		
	Discover and pin agents		
	Use agents grounded on web data		
	Use agents grounded in work data (work data in your tenant’s Microsoft Graph and 3 rd party data via graph connectors)		
	Use agents that act independently and autonomous actions		
Personal assistant	Copilot reasons over personal work data (i.e. Outlook, OneDrive, meeting transcripts)		
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)		
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		
	Copilot in PowerPoint (Narrative Builder, presentation translation, generate company branded slides or images)		
	Copilot Actions		In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview
Copilot Control System	Enterprise Data Protection (EDP)		
	IT management controls		
	Agent management		
	SharePoint Advanced Management		
	Copilot Analytics to measure usage and adoption ⁴		
	Pre-built reports and advanced analytics to measure ROI		

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio [here](#). 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.

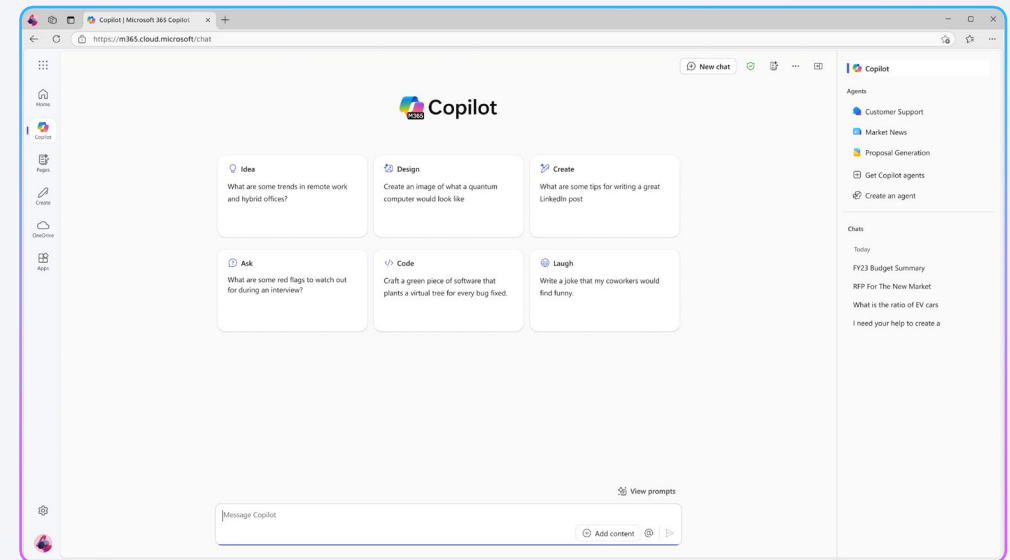
Microsoft 365 Copilot Chat

Your company's approved AI chat tool

Microsoft 365 Copilot Chat is an AI chat tool built **specifically for work**. It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc¹.
- Generate images¹ and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites².



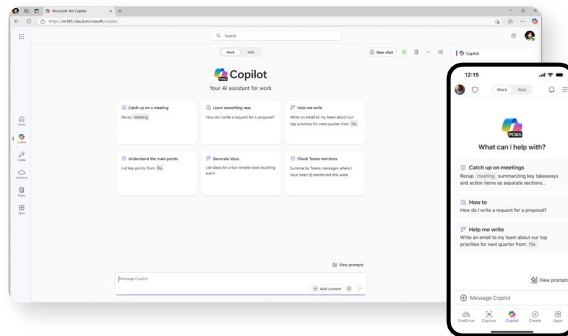
Get started by going to [M365Copilot.com](https://m365cloud.microsoft.com/chat)

¹Image generation and file upload limits apply.

²Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.



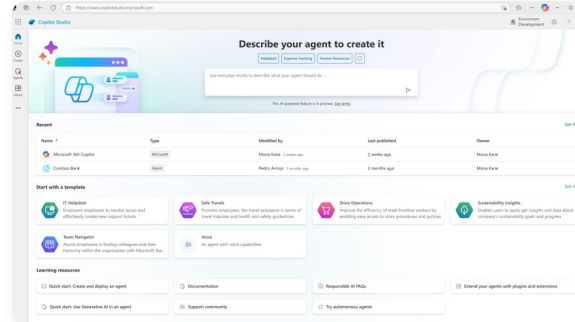
Microsoft 365 Copilot Chat components



Chat

Free, secure AI chat –
powered by GPT 4o and web grounded

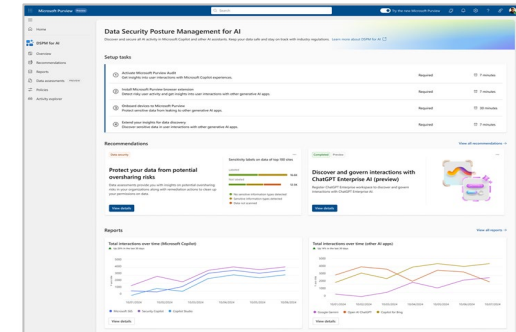
+



Agents

Integrated into the chat experience and
paid for on a consumption basis

+



IT Controls

Enterprise Data Protection
and agent management

Microsoft 365 Copilot Chat

Enterprise-ready web chat

The screenshot displays the Microsoft 365 Copilot Chat interface. At the top, the Copilot logo and a question "What is the ratio of EV cars to..." are visible. A sidebar on the left contains navigation icons for Home, Copilot, Pages, Create, OneDrive, and Apps. The main chat area shows a response to a query about the ratio of EV cars to EV chargers by region in the US for the past three years. The response includes a table with the following data:

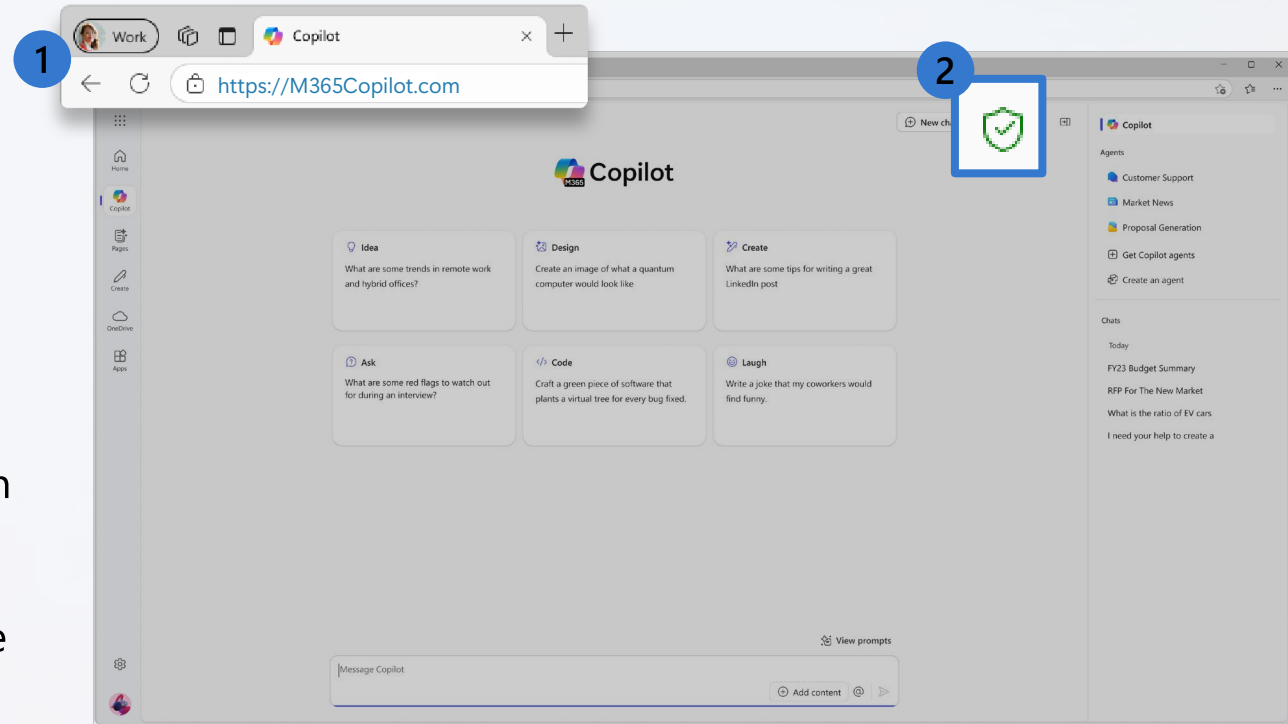
Region	Year	EVs per Charger
Northeast	2022	14:1
	2023	12:1
	2024	10:1
Midwest	2022	18:1
	2023	16:1
	2024	14:1
South	2022	20:1
	2023	18:1
	2024	15:1
West	2022	12:1
	2023	10:1
	2024	8:1

Below the table, a paragraph explains that these ratios reflect the increasing number of EV chargers being installed across the country, particularly in regions like the West and Northeast. A follow-up question asks if there is anything else to know about EVs or their infrastructure. The interface includes buttons for "Edit in Pages" and "Copy", and a footer with a "Ask me anything..." prompt and a character count (0 / 1000).

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 account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



If you are not signed in with your work account, Enterprise Data Protection does not apply.

Get to know Copilot Chat

Start at M365Copilot.com

Here is a visual tour of Copilot Chat:

The screenshot shows the Microsoft 365 Copilot Chat web application. The interface includes a sidebar on the left with navigation icons for Home, Copilot, Pages, Create, and Apps. The main area displays the Copilot logo and a grid of suggested prompts categorized by Idea, Design, Create, Ask, Code, and Laugh. At the bottom is a large text input box labeled 'Message Copilot' with an 'Add content' button and a 'Send' button. A right-hand sidebar lists 'Agents' (Customer Support, Market News, Proposal Generation, Get Copilot agents, Create an agent) and 'Recent chats' (FY23 Budget Summary, RFP For The New Market, What is the ratio of EV cars, I need your help to create a). A 'View prompts' link is also visible.

Suggested prompts
If you're not sure what to ask, try or modify a sample prompt!

Prompt box
Start your conversation here.

Start a new chat button
Clear your past chat and start a new conversation.

Agents
Use existing agents or create new ones.

Recent chats
Return to a previous chat to continue the conversation

Copilot Prompt Gallery
View additional prompt suggestions, including saved prompts.

Send your prompt!

Upload files
If you'd like Copilot to source responses from information in specific files, add them here.

Chat with an agent
Add an agent to your Copilot prompt to chat with it.

Differentiating between chat experiences

Work vs. Web

When signed in with your Entra ID, you'll see a toggle at the top left of your screen.

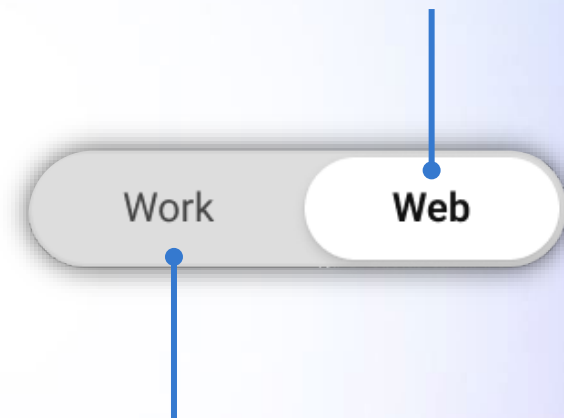
- 1 When the **web toggle** is selected, you'll get GPT-4o plus **web** grounding plus **Enterprise Data Protection** – meaning your user and business data are protected and will not leak outside the organization.

Copilot's web experience has no knowledge cut off and is ideal for finding answers to your questions, expanding your knowledge, creating images, and summarizing web pages in Edge.

- 2 When the **work toggle is selected**, you get **graph** grounding plus **Enterprise Data Protection** – which means that all your data stays inside the tenant boundary.

Copilot's work experience is truly your personal AI assistant at work. This experience is ideal when working with meetings, emails, Microsoft 365 suite applications, and confidential work data.

*Use Copilot to get answers from
current web data
(e.g., latest news, announcements)*



*Use Microsoft 365 Copilot to get answers from
your internal work data
(e.g., your emails, meetings, files)*

Start at copilot.microsoft.com

How to chat in 3 steps



1. Enter your prompt

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.

Message Copilot

+ Add content @ ▶



2. Check sources

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer. Vet these sources and validate your answers.

Learn more ▼ 1 microsoft.com 2 contoso.com

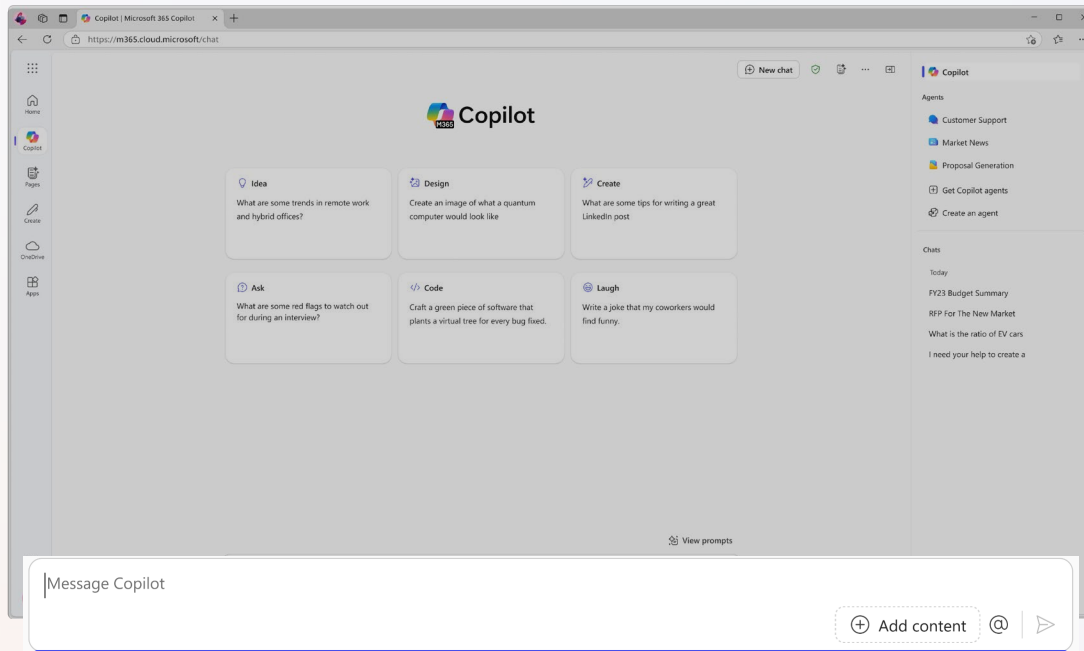


3. Continue the conversation

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." You can also select suggested prompts.

What is a “prompt?”



Get started by entering your prompt in the text box

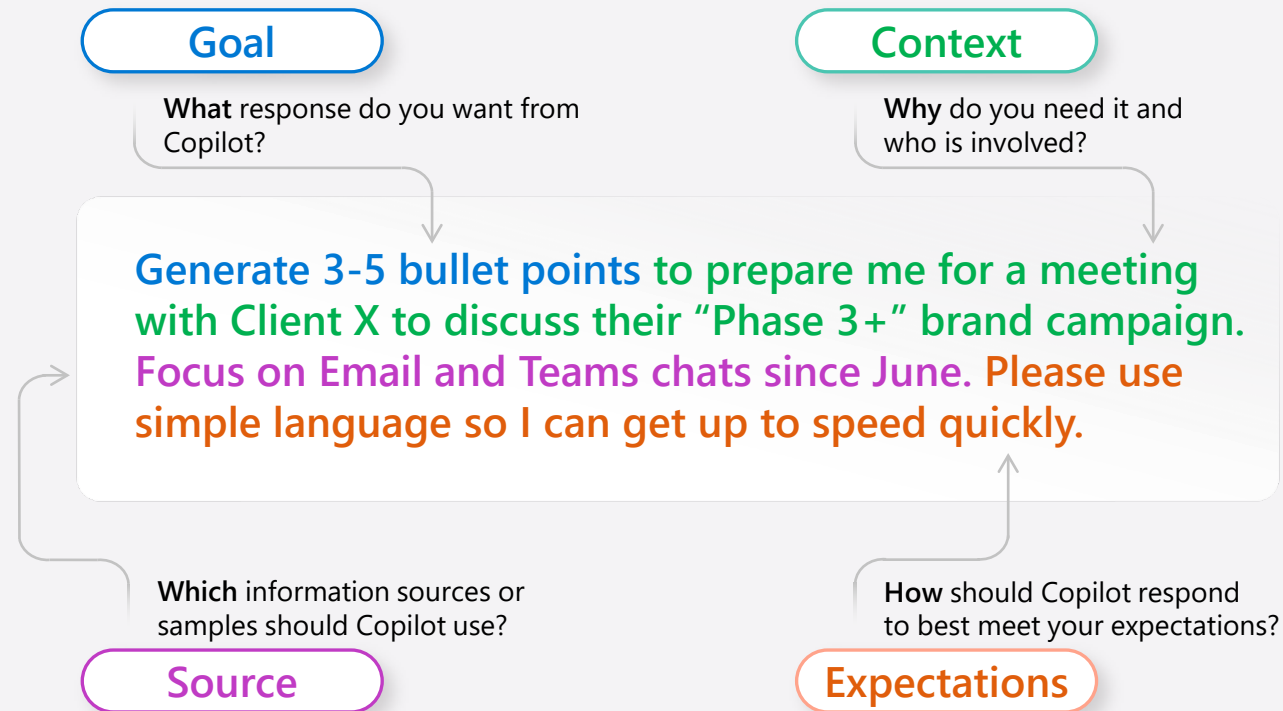
Prompts are how you have a conversation with Copilot

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.”*

Prompt Ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.



What makes an effective prompt?



Less Effective

- × Vague
- × Just a few words
- × No context on preferred output

Example: *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.



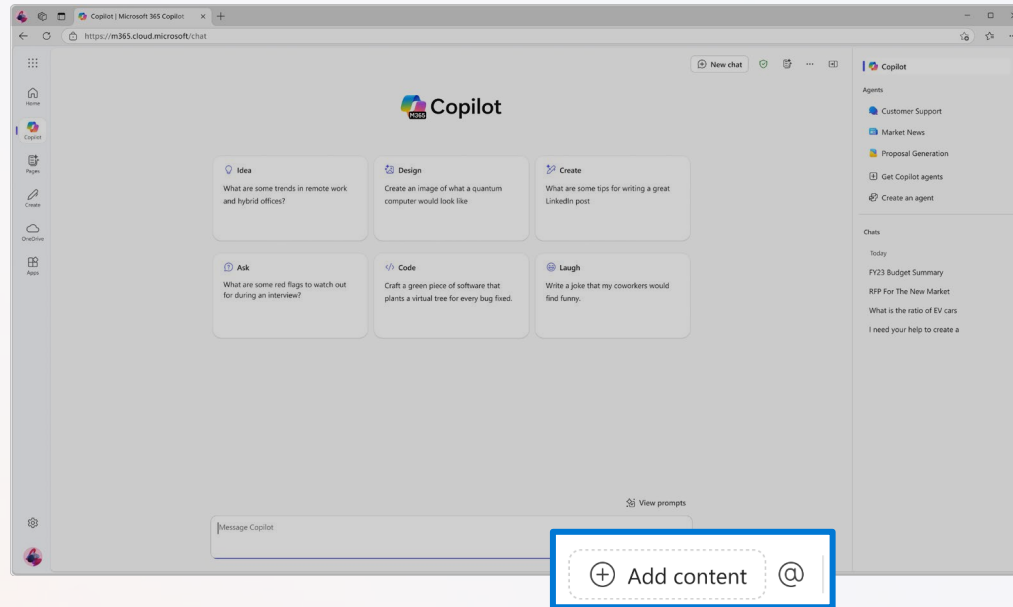
More Effective

- ✓ Specific and detailed
- ✓ In full sentences, with instructions
- ✓ States the tone, purpose, preferred format, etc.

Example: *I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.*

But there are no 'wrong' prompts because **natural, conversational language is welcome.**
Experiment away!

Upload a file to your prompt

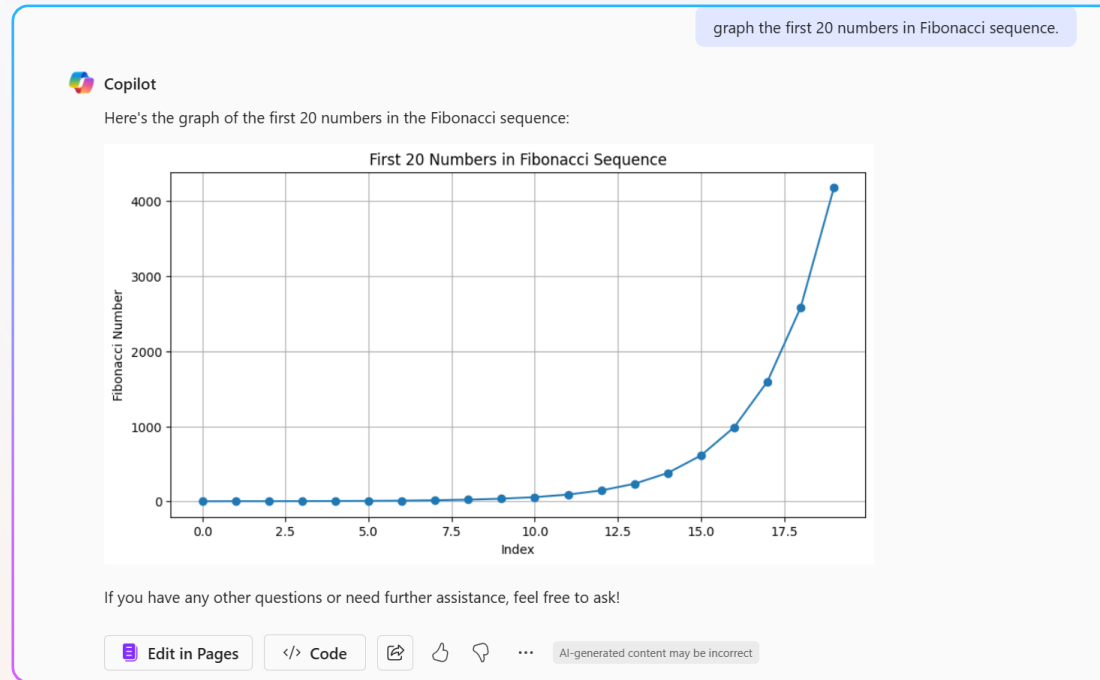


Want Copilot to respond using information from a Word document, PowerPoint deck, or other file? Select the “Add content” button in the Copilot Chat prompt box to upload a file.

Example prompt: Summarize this document in 5 bullet points. <attach file>

Note: Copilot Chat supports uploads of Word documents, PowerPoint decks, Excel spreadsheets, images, and PDFs.

Use Copilot Chat to visualize data



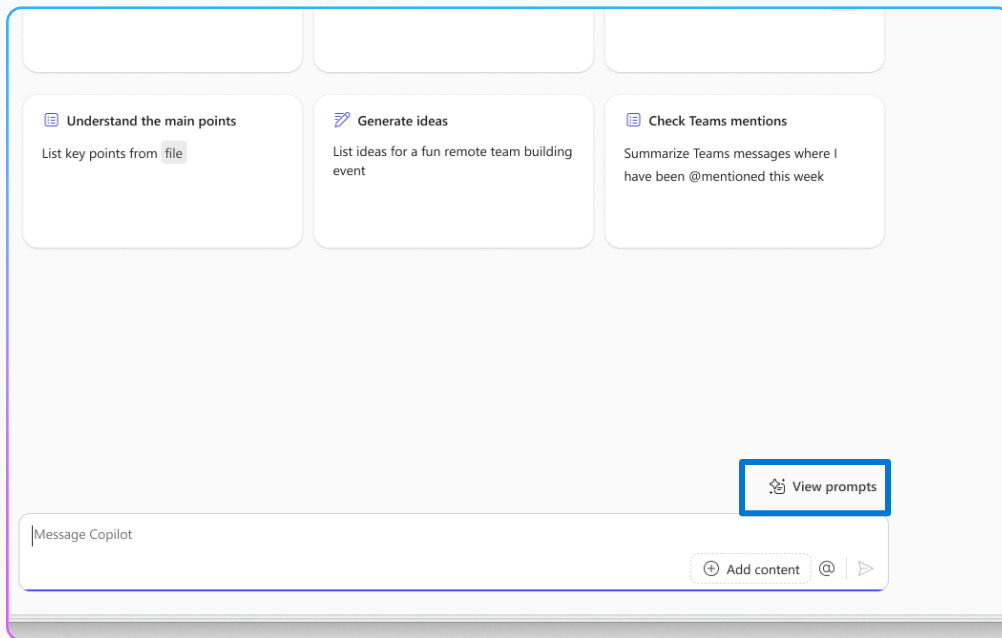
Copilot Chat has built-in capabilities to graph and visualize data as it's relevant to your prompt.

For example, use the prompt: *"Graph the first 20 numbers in Fibonacci sequence"*.

Navigating to the Copilot Prompt Gallery

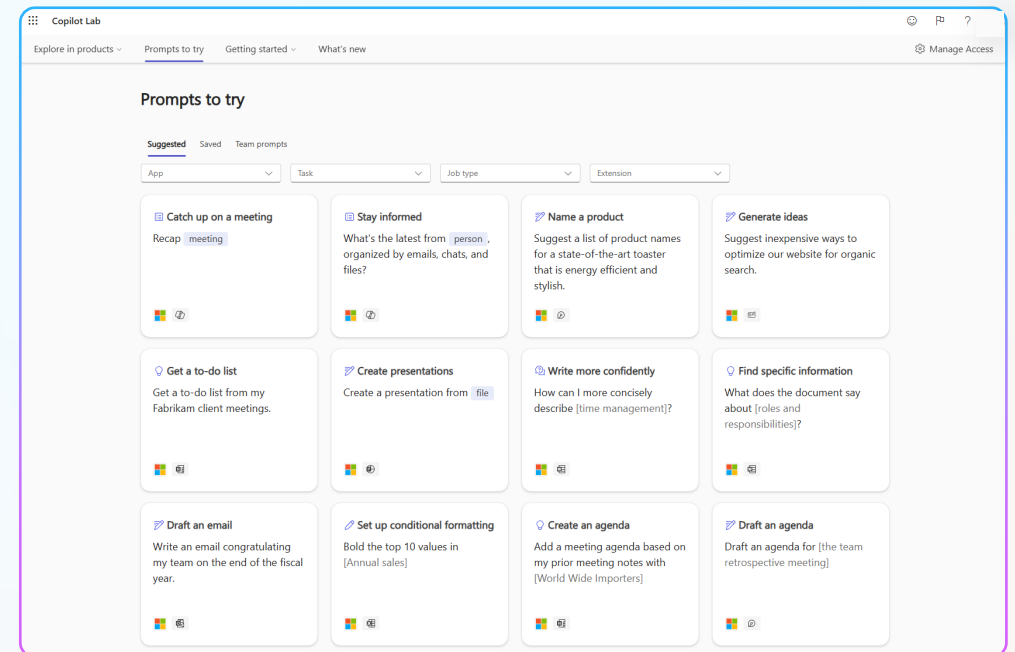
In-product experience

Select “View prompts” next to the Copilot prompt box. Here, you’ll see suggested Copilot prompts and your saved prompts.



Prompt Gallery website

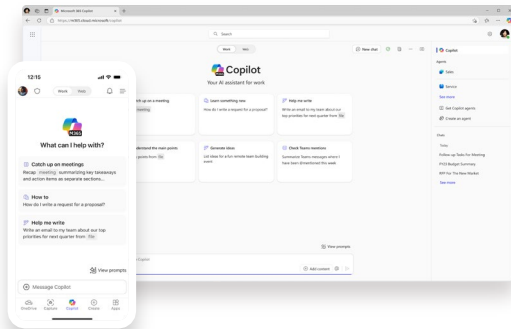
Go to aka.ms/Prompts to access the full Prompt Gallery experience. Here, you can find relevant Copilot prompt examples using the filters, view prompts that you and your team saved, and share useful prompts.



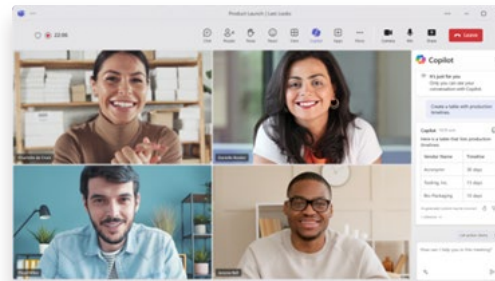
Microsoft 365 Copilot

Microsoft 365 Copilot

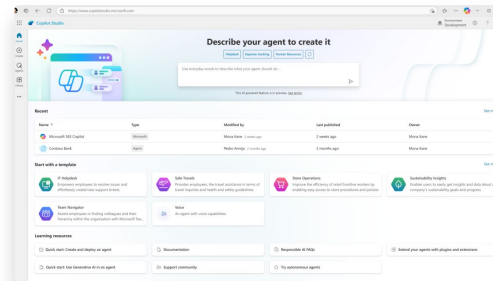
Your AI assistant for work



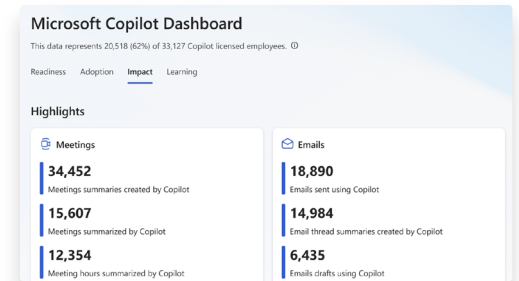
Copilot Chat
for web and work



Microsoft 365
apps



Copilot Studio +
agents



Adoption &
measurement

Copilot Control System



Copilot for Microsoft 365

Embedded across Microsoft 365 apps



Microsoft 365 Copilot

How it works



Microsoft 365 Copilot

- 1 Consistent UI for AI
- 2 Integrated in the tools millions use every day
- 3 Platform for agents and extensibility
- 4 Enterprise-grade security, privacy, and compliance
- 5 Flexible purchasing and deployment options
- 6 Measure AI impact and business value

Microsoft 365 Copilot is the AI assistant you can trust



Security

Honors your existing permissions

Persistent label inheritance and
DLP policies

Risk-based conditional access and
endpoint management



Governance & Compliance

Ramp your data preparedness for AI

Detect and investigate non-
compliant usage

Granular controls and transparency
for web queries



Privacy

You control your data

You control your data
location

Your data isn't used to train
foundation models

Your Microsoft 365 security, governance, compliance, and privacy policies

Secure and govern Copilot with Microsoft Security



Baseline

Essential security controls

- Multi-factor Authentication
- Audit logging
- Basic content and keyword search

Microsoft 365 Copilot +
Microsoft 365 Business Standard



Core

Comprehensive security controls

Everything in Microsoft 365 Business Standard, plus:

- Conditional Access
- Sensitivity labels
- Data loss prevention policies
- Unified endpoint management
- eDiscovery, litigation hold and retention policies

Microsoft 365 Copilot +
Microsoft 365 Business Premium

Top 10 to "Try First"

with Microsoft 365 Copilot

Foundational skills for new users



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from [meeting](#)



2

Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon



3

Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from [file](#)



5

Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about [topic](#) organized by emails, chats, and files?



6

Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on [file](#)



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did [person](#) say about [topic](#)



9

Revise this content

– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

→ Rewrite with Copilot



10

Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

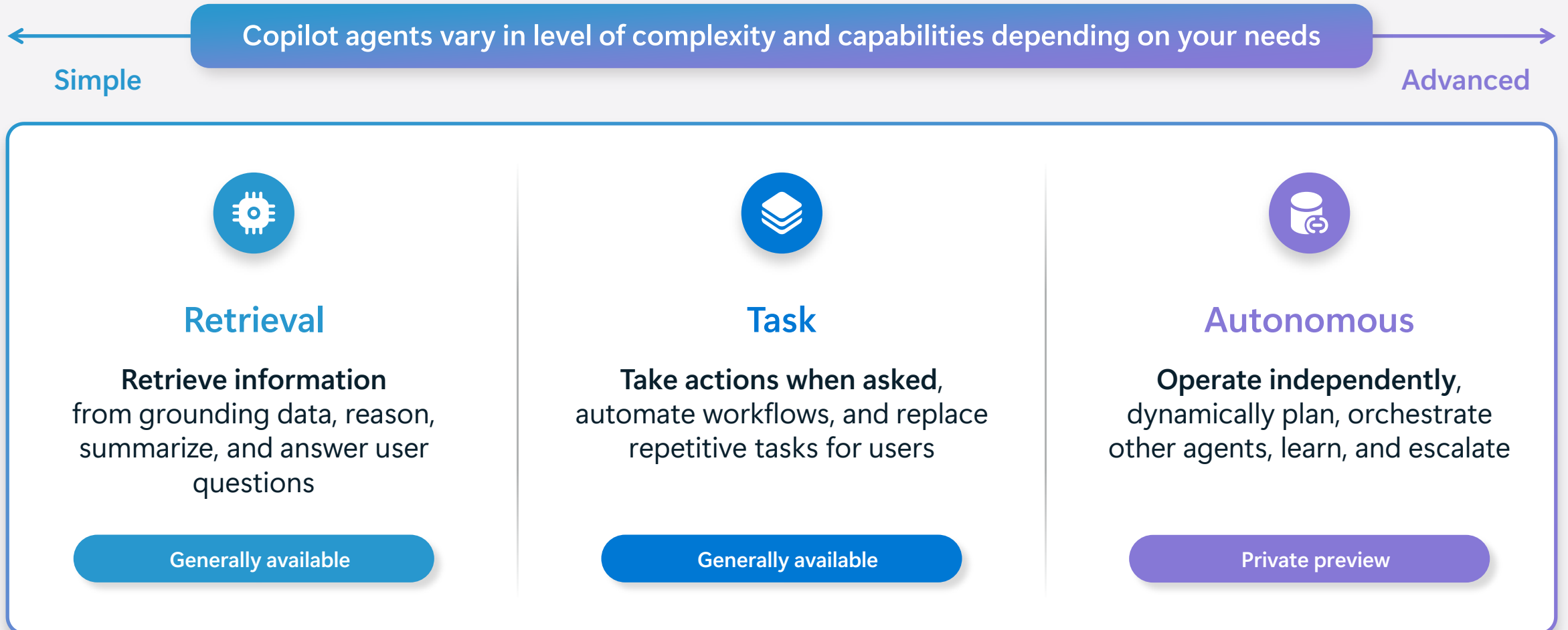
→ Translate the following text into French:

For more prompts, visit Copilot Lab at: aka.ms/CopilotLab

AI Agents + Copilot Studio

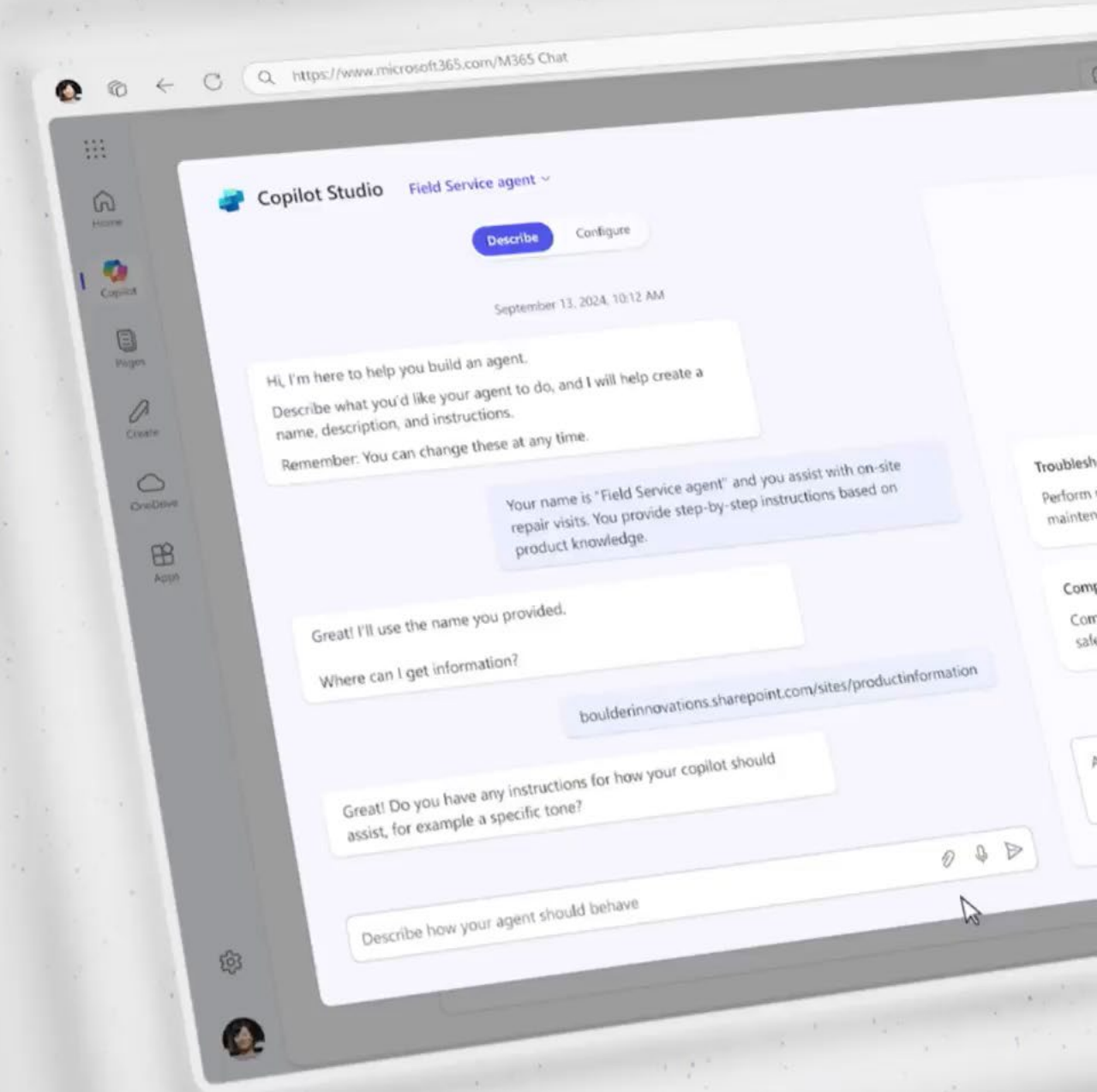
What are Copilot agents?

Agents expand Copilot's knowledge and skills or can operate autonomously to complete tasks or automate processes

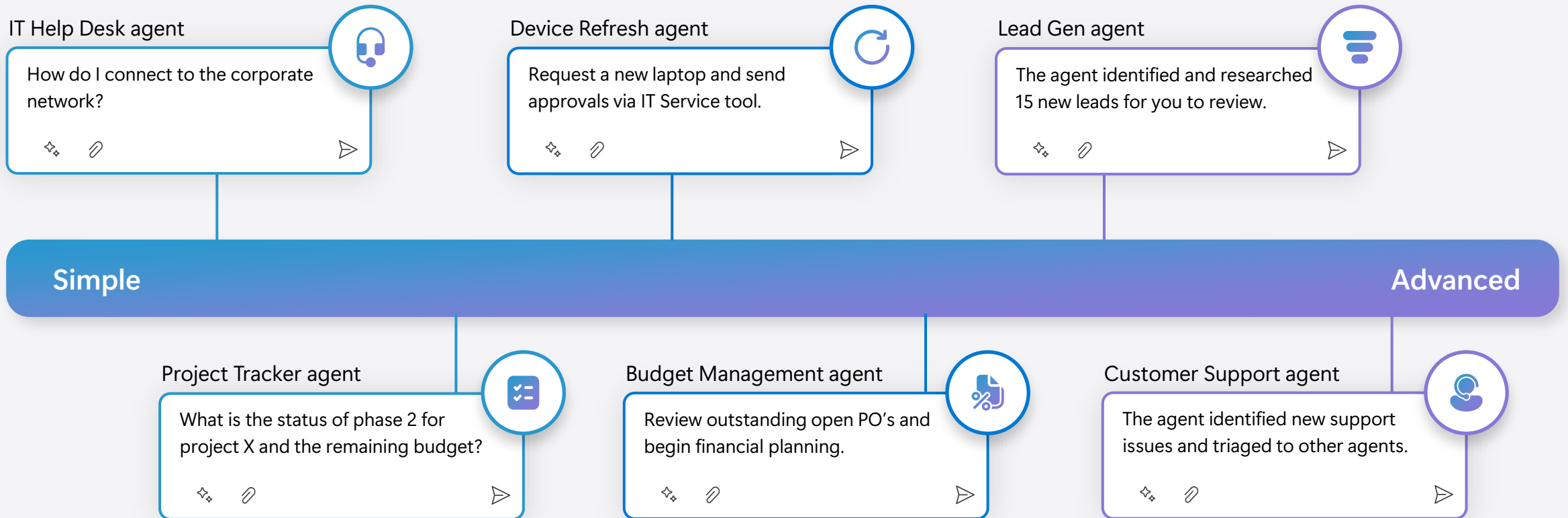


Microsoft 365 Copilot Chat

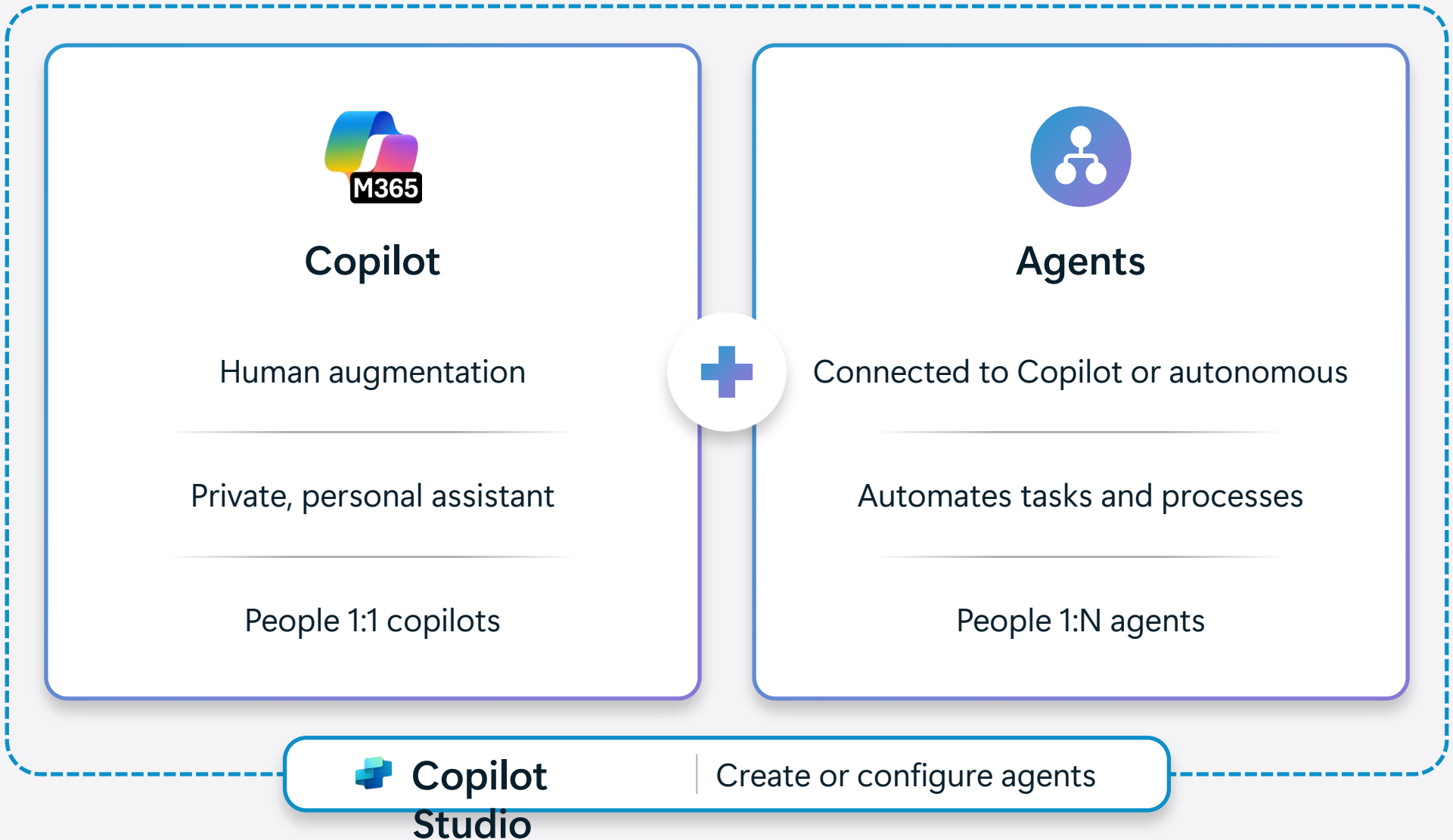
Agent builder in Copilot Chat



Explore a continuum of solutions



Transforming business with Copilot and agents



Introducing



Copilot Studio

Connect to data

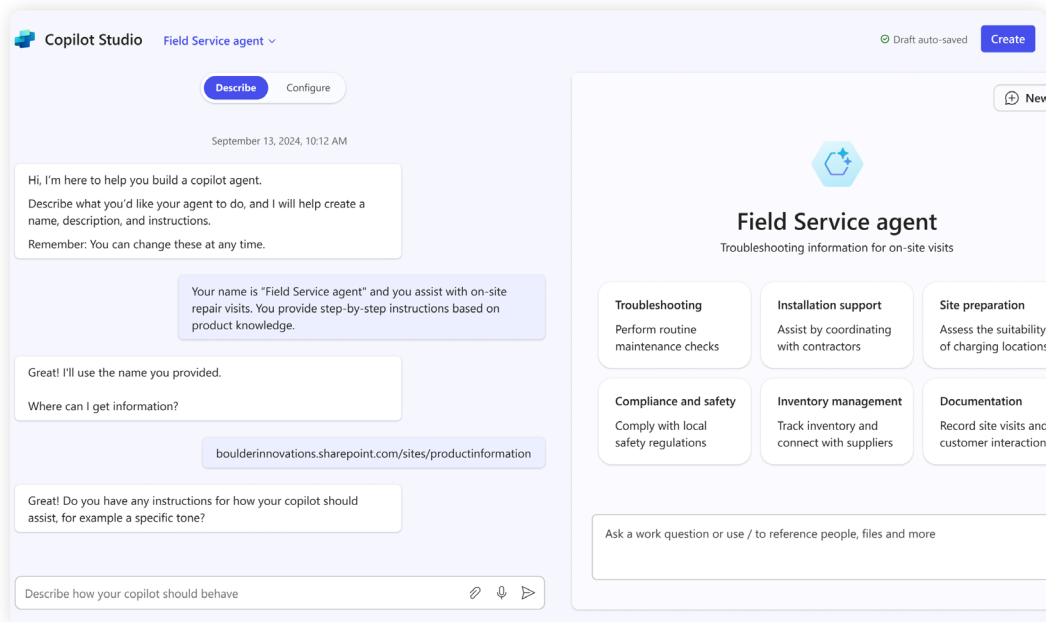
Create and orchestrate
sophisticated logic

IT manageability
& control

Copilot Studio

Copilot Studio is the platform to build Copilot agents that extend Microsoft 365 Copilot or operate standalone

For end users



The interface shows a chat window on the left with a conversation history. The main area displays a configuration card for a 'Field Service agent' with various functional categories like Troubleshooting, Installation support, Site preparation, Compliance and safety, Inventory management, and Documentation. A 'Describe' button is visible at the top.

Copilot Studio Field Service agent

Describe Configure

September 13, 2024, 10:12 AM

Hi, I'm here to help you build a copilot agent.
Describe what you'd like your agent to do, and I will help create a name, description, and instructions.
Remember: You can change these at any time.

Your name is "Field Service agent" and you assist with on-site repair visits. You provide step-by-step instructions based on product knowledge.

Great! I'll use the name you provided.
Where can I get information?

boulderinnovations.sharepoint.com/sites/productinformation

Great! Do you have any instructions for how your copilot should assist, for example a specific tone?

Describe how your copilot should behave

Field Service agent
Troubleshooting information for on-site visits

Troubleshooting
Perform routine maintenance checks

Installation support
Assist by coordinating with contractors

Site preparation
Assess the suitability of charging locations

Compliance and safety
Comply with local safety regulations

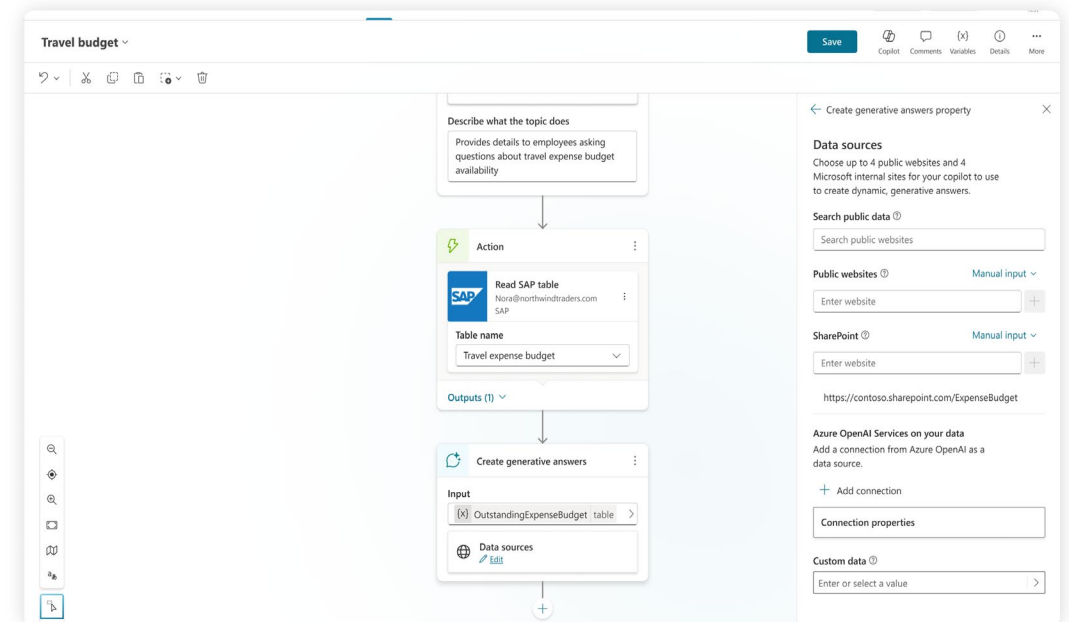
Inventory management
Track inventory and connect with suppliers

Documentation
Record site visits and customer interaction

Ask a work question or use / to reference people, files and more

Copilot Studio agent builder
in Microsoft 365 Copilot Chat and SharePoint

For IT and developers



The interface shows a visual workflow editor. A central canvas displays a sequence of actions: 'Describe what the topic does', 'Read SAP table', and 'Create generative answers'. The right sidebar contains configuration options for data sources, public websites, and SharePoint connections.

Travel budget

Save Copilot Comments Variables Details More

Describe what the topic does
Provides details to employees asking questions about travel expense budget availability

Action

Read SAP table
Nora@northwindtraders.com
SAP

Table name
Travel expense budget

Outputs (1)

Create generative answers

Input
OutstandingExpenseBudget table

Data sources

Create generative answers property

Data sources
Choose up to 4 public websites and 4 Microsoft internal sites for your copilot to use to create dynamic, generative answers.

Search public data

Search public websites

Public websites
Manual input
Enter website

SharePoint
Manual input
Enter website

https://contoso.sharepoint.com/ExpenseBudget

Azure OpenAI Services on your data
Add a connection from Azure OpenAI as a data source.

+ Add connection

Connection properties

Custom data
Enter or select a value

Copilot Studio

Full featured graphical authoring environment

Microsoft 365 Copilot Demo

Demos



MICROSOFT 365

Copilot in Teams Meetings

The screenshot displays the Microsoft Teams interface during a meeting. The top navigation bar includes a search bar and navigation icons. The left sidebar shows standard Teams navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main meeting window is titled "Core accounts business review" and includes tabs for Chat, Details, Files, and Recap. The meeting time is "Mar 16, 10:00 AM" with an "Open in Stream" button. Below the title bar, the "Shared content" section shows a file named "Proseware Proposal.pptx". A video player below this shows a screen recording of a presentation slide, with a play button and a duration of "48m 42s". To the right of the video player are buttons for "Speakers", "Topics", and a menu icon. Below these buttons, a list of topics is shown: "Proseware negotiation strategy" and "Core accounts round table". On the far right, the "Notes" section is visible, showing a note generated by "Core accounts.loop" titled "Quarterly results and forecasts for Core Account". The note includes a "Summary" section with a list of bullet points and a "Notes" section with a list of bullet points.

Core accounts business review Chat Details Files Recap +

Mar 16, 10:00 AM Open in Stream

Shared content

Proseware Proposal.pptx

48m 42s

Speakers Topics

Proseware negotiation strategy

Core accounts round table

Core accounts.loop

Quarterly results and forecasts for Core Account

Summary

Based on what attendees said in the meeting

- \$230K revenue shortfall in this quarter
- Inventory 15% surplus (renewable products and recycled n
- Account leads to propose discounting scenarios to lower i
- Proseware was discussed as a leading opportunity

Notes

- Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal.
- The team identified a new opportunity with Proseware th

Intelligent recap in Copilot

Intelligent recap

The screenshot shows a Microsoft Teams meeting titled "Product roadmap discussion". The interface includes a video player, a list of speakers (Mona Kane, Babak Shammass, Daniela Mandera, Amanda Brady, Bruno Zhao), and a "Recap" tab. The recap content is generated by AI and includes the following sections:

- Content:** Product Roadmap..., Marketing budget..., Marketing demo f...
- Notes:** AI notes, Mentions (3), Transcript
- Meeting notes:**
 - > **Serena** wants to look at the product roadmap before she and **Danielle** commit to more feature enhancements.
 - > **Danielle** explains that they are on track for new product release in December. But they will need to keep an eye on beta testing results. She will follow up on that.
 - > **Danielle** explains that they are managing the capacity well. There could be a problem if they get a surge of users. **Babak** will make sure that they have the necessary provisions to handle an influx of users if the need arises.
- Follow-up tasks:**
 - **Danielle** will follow up on feature enhancement prioritization
 - **Jon Shammass** will double check with **Amanda** regarding the ETA for the new product

Copilot in Teams

The screenshot shows the Copilot interface in Teams. It displays a table with pros and cons for a campaign option, generated by AI. The table is titled "Pros and cons of option 1: Drive campaign traffic to generic Sign up page:".

Pros	Cons
Wider range of potential leads	Less persuasive
Simpler, faster sign-up process	Difficult to segment audience
Streamlines multiple campaigns	Less engaging

Below the table, there are buttons for "Copy", "Elaborate on each pro and con.", and "List more options.". At the bottom, there is a prompt: "Ask a question about this meeting".

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only

On-demand

Based on unique prompts

Conversational interaction, with citations

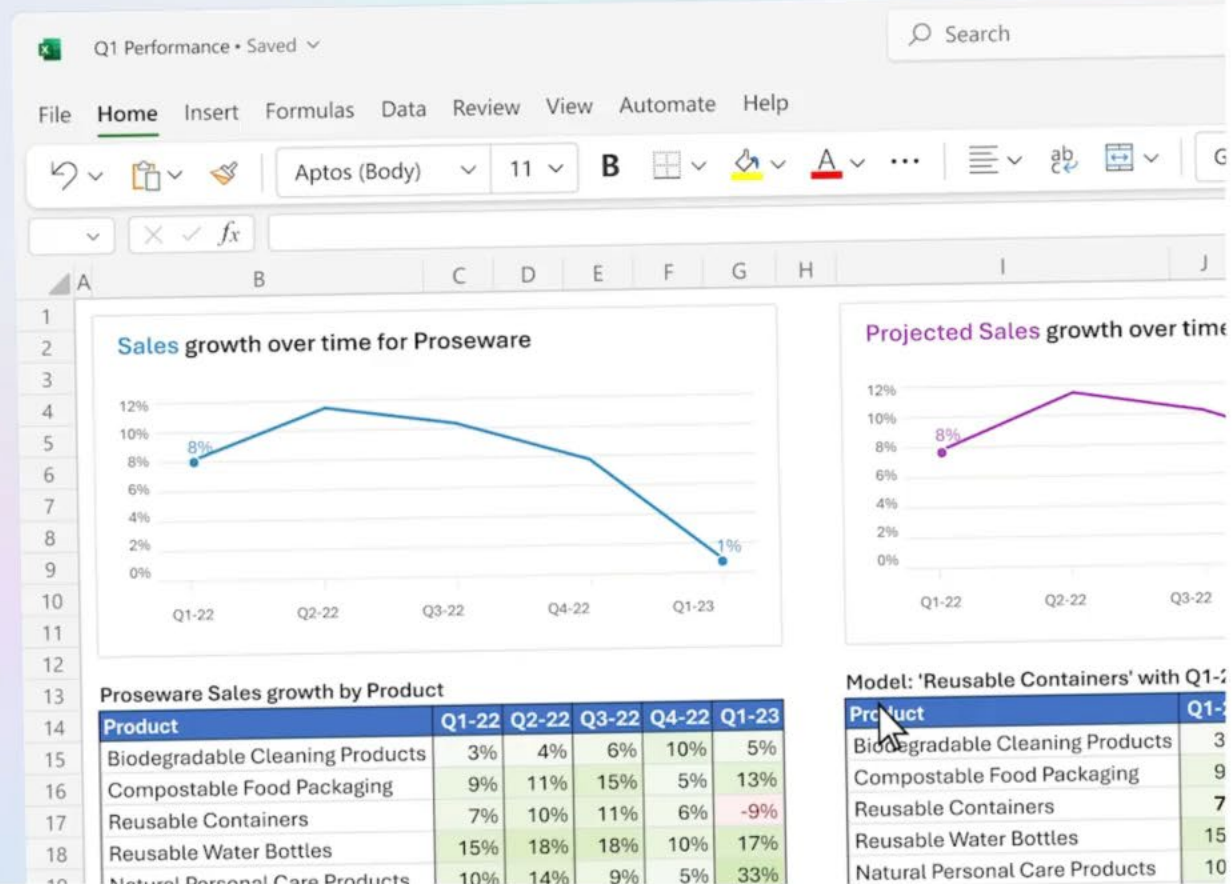
Available real-time (during & after meeting)

Use **built-in meeting summaries** and **ask any question** about the meeting

*Intelligent recap is also available in Teams Premium

MICROSOFT 365

Copilot in Excel



How can you get started?



Sign-up for [*Microsoft 365 Copilot Readiness Assessment*](#) by Point Alliance



Learn how AI is poised to create a whole [new way of working](#)



Leverage [Getting started](#) content as well as [Resources for Adoption](#)



Delve into [security, privacy and compliance](#)



Get better acquainted with the art of prompting with [Copilot Lab](#)

Thank You!



Upcoming Events

Upcoming S4S Webinars

- Third Tuesday of Each Month
- pointalliance.com/events

2025 27 MAY	SOLUTIONS FOR SUCCESS EDUCATION SERIES Unleash Productivity with Microsoft Copilot 🕒 11:30 AM - 30 MINUTES Register	2025 17 JUN	SOLUTIONS FOR SUCCESS EDUCATION SERIES Elevate Sales & Customer Service with Microsoft Dynamics 365 🕒 11:30 AM - 30 MINUTES Register
2025 15 JUL	SOLUTIONS FOR SUCCESS EDUCATION SERIES Building the Future: Migrating Your Infrastructure to Azure 🕒 11:30 AM - 30 MINUTES Register	2025 16 SEP	SOLUTIONS FOR SUCCESS EDUCATION SERIES Seamless Device Management with Microsoft Intune 🕒 11:30 AM - 30 MINUTES Register
2025 21 OCT	SOLUTIONS FOR SUCCESS EDUCATION SERIES Cybersecurity Essentials: Protect Your Business 🕒 11:30 AM - 30 MINUTES Register	2025 18 NOV	SOLUTIONS FOR SUCCESS EDUCATION SERIES Building Modern Apps with Azure, React, NextJS, and Angular 🕒 11:30 AM - 30 MINUTES Register
2025 16 DEC	SOLUTIONS FOR SUCCESS EDUCATION SERIES Transform Data into Insights with Power BI 🕒 11:30 AM - 30 MINUTES Register		

Leave us a review

