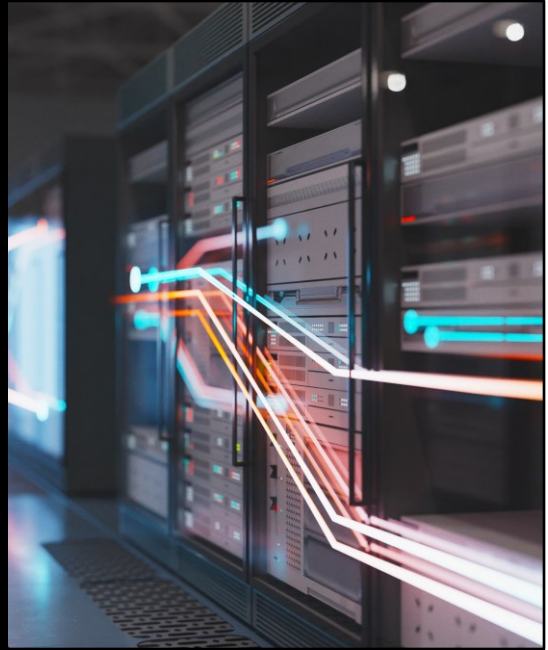
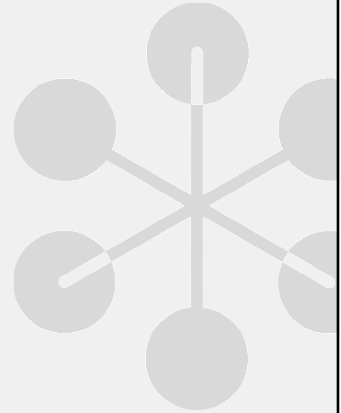


**Microsoft 365
Copilot Chat:
transform
productivity across
Microsoft 365**



Session topics

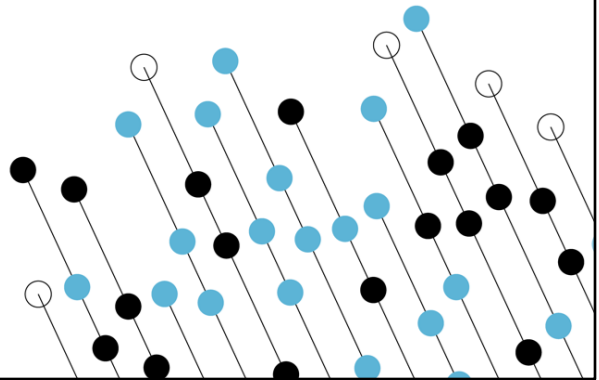
- Introducing Microsoft 365 Copilot Chat
- Why use Copilot Chat (and how to access it)
- Prompt engineering and effective prompting
- Live demonstration: Copilot Chat in action
- Role-specific use cases and data privacy
- Planning for adoption and next steps



QA

Microsoft 365 Copilot Chat

What's it all about?



Before we talk about how to use it well, let us be clear about what it actually is – because there is a lot of confusion between the free and licensed experiences.

What is Microsoft 365 Copilot Chat?

An **AI-powered assistant** for productivity and creativity

Offers **context-aware suggestions**, summarises information, answers questions

Assists with complex or mundane tasks

Enterprise-grade security, privacy, and compliance

Integrates with Word, PowerPoint, Outlook, Excel, Teams, and more*

* Requires a separate Microsoft 365 Copilot licence

QA

What is Copilot Chat?

Copilot Chat is an AI assistant built into Microsoft 365 that works in natural language – you ask, it helps.

It integrates with Word, PowerPoint, Outlook, Excel, Teams and more, so it can work with content you already have rather than starting from a blank page.

Key licensing point: the deeper integration with your own files, emails and meetings requires a separate Microsoft 365 Copilot licence assigned to your account. Without it, you still get a capable chat experience, but grounded in web data rather than your work content.

Note: Microsoft are continually adding capability and features to Copilot Chat. It now offers more direct integration with M365 apps such as Outlook without a full Premium license.

So, where do I find it?

Well, you **already have access** to it if you use Microsoft 365 (formerly Office 365)

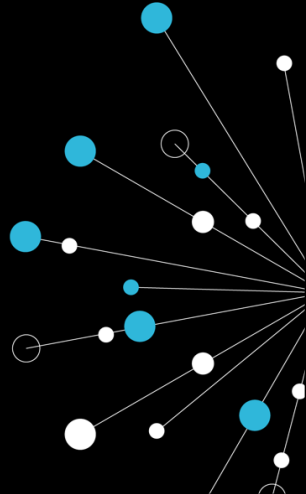
<https://m365.cloud.microsoft/chat>

Sign-in with your Microsoft account
to unlock more features

Don't have one? You can still use it,
but some features may be limited

Copilot Chat can also be accessed from your **Outlook** or **Teams** left sidebar

QA



Where do I find it?

Reassure the room: if you use Microsoft 365, you already have access to some form of Copilot Chat.

Access points to call out:

- The left sidebar in Teams and in Outlook on the Ribbon or toolbar if you prefer.
- Directly in the browser

Unlicensed: <https://copilot.microsoft.com/chat>

Licensed: <https://m365.cloud.microsoft/chat>

Supported languages

Albanian	English (UK)	Hungarian	Norwegian (Bokmål)	Spanish
Arabic	English (US)	Icelandic	Polish	Spanish (Mexico)
Bulgarian	Estonian	Indonesian	Portuguese (Brazil)	Swedish
Catalan	Filipino	Italian	Portuguese (Portugal)	Thai
Chinese (Simplified)	Finnish	Japanese	Romanian	Turkish
Chinese (Traditional)	French (Canada)	Korean	Russian	Ukrainian
Croatian	French (France)	Latvian	Serbian (Cyrillic)	Vietnamese
Czech	German	Lithuanian	Serbian (Latin script)	Welsh
Danish	Greek	Malay	Slovak	
Dutch	Hebrew	Maltese	Slovenian	

QA

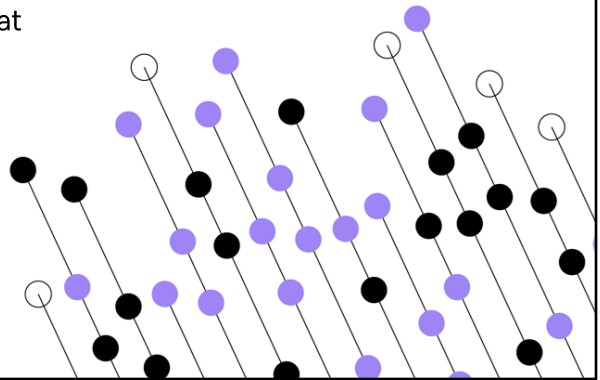
Supported languages for international or multilingual teams.

Key message: Copilot works across a wide range of languages, so you can prompt in one language and ask for output in another.

Practical tip: asking Copilot to draft in a colleague's first language is a quick win for cross-border teams.

Prompt engineering

The secret to getting Copilot to do what you want

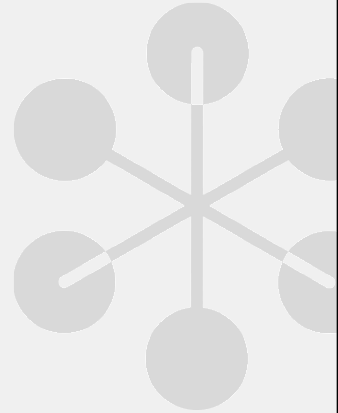


Prompt engineering

Useful line: “The single biggest difference between people who find Copilot useful and people who find it disappointing is the quality of their prompts.”

Getting started with prompting

- Your **prompt** tells Copilot how you want it to help you
- Try to tell Copilot everything it needs to know – don't be too **vague**
- Remember to explain what the task is **about**
- Don't **overload** the prompt and give it too much in one go – complex tasks might be best performed across a series of prompts



QA

Getting started with prompting

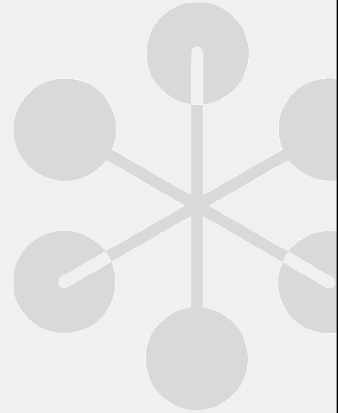
Core message: your prompt is a brief, not a search query. The more context you give, the better the output.

Look through the four points with a short example of a vague prompt versus a specific one – for example “write an email” against “draft a short, friendly email to my project team confirming Thursday's workshop and asking them to bring their draft budgets.”

Guard against overloading a single prompt: complex tasks work better as a series of smaller prompts where you refine as you go.

Prompting best practice and responsible use

- **Iterate:** refine your prompt rather than settling for the first answer
- **Review** everything Copilot produces before you use or share it
- **Check** facts, figures and names against a trusted source
- **Keep** confidential and personal information out of prompts unless your policy allows it



QA

Prompting best practice and responsible use.

Iterate: the first answer is a draft, not a final product. Ask Copilot to shorten it, change the tone, or focus on a specific point.

Review: the person who sends the output owns the output. Copilot can be confidently wrong.

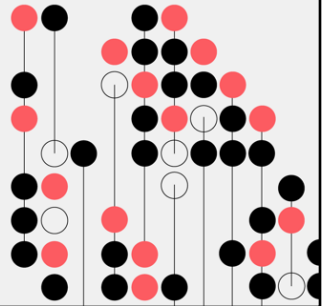
Check: verify facts, figures, names and dates against a trusted source before anything goes external.

Confidential information: remind attendees to follow the organisation's own policy on what may be entered into a prompt.

A line to think of: "Treat Copilot like a capable new starter – fast and helpful, but everything gets checked before it goes out."

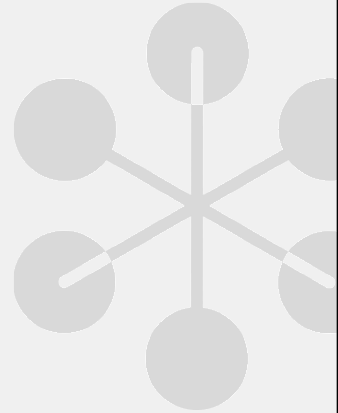
**Let's see it in
action!**

QA



What we'll demonstrate (time permitting 😊)

- **Summarising emails:** pulling the key points and actions out of a long thread
- **Preparing for meetings:** briefing yourself and capturing the follow-ups
- **Analysing data:** spotting trends and outliers in a spreadsheet
- **Drafting documents:** building a first draft from content you already have



QA

Here are the four example scenarios: summarising a long email thread, preparing for a meeting, analysing data in a spreadsheet, and drafting a document from existing content.

The next five slides hold paste-ready prompts for each of these four scenarios, plus the Quick Win openers.

Facilitator prompts: summarising emails

- **Paste-ready – improve a badly written email (no file needed)**

Rewrite the following email to make it clearer, more concise, and more professional. Keep the meaning the same, but improve structure, tone, and readability. Email: [paste the sample email from the prompt library]

- **Then...**

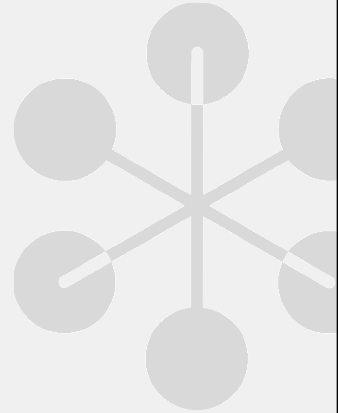
Make the tone slightly more reassuring and client-friendly, and add a clear next step so the recipient knows what will happen next.

- **Then...**

Shorten this to no more than five sentences while keeping the key message.

- **Alternative – draft from scratch**

Draft a concise, professional email to a client explaining a short delay in delivery. Apologise clearly, explain the reason without oversharing, and confirm the revised timeline along with next steps.



QA

Prompts for the 'summarising emails' scenario.

Facilitator prompts: preparing for meetings

- **Paste-ready – talking points (no file needed)**

Create a short set of talking points for a meeting with a senior stakeholder about a project that is behind schedule. Include likely questions they may ask and suggested responses.

- **With a file – Transcript - Finance Committee Meeting.docx**

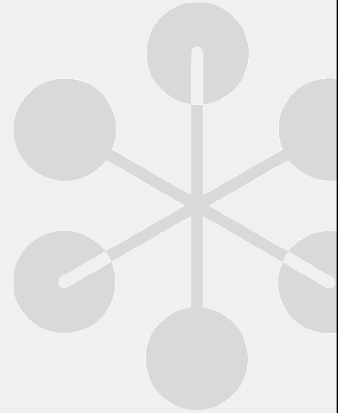
Summarise this meeting transcript into clear action items. Group them by owner where possible, include suggested deadlines, and highlight any risks or unresolved questions.

- **Then...**

Turn these action items into a short follow-up email I can send to the team. Keep it concise and professional.

- **Then...**

Which of these actions should be treated as high priority, and why?



QA

Prompts for the 'preparing for meetings' scenario.

The talking points prompt needs no file, so it is the safest choice if your demo environment is unpredictable.

If you have the finance meeting transcript to hand or similar try it as it shows Copilot working with real content.

Facilitator prompts: analysing data

- **With a file – Holidays Data.xlsx**

Analyse the patterns of employee sales over the past year. Look for any trends that align with holiday periods, identify when sales peak, and suggest recommendations to support planning or resource allocation.

- **Then...**

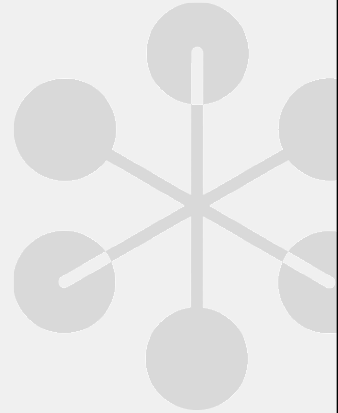
Using this sales data, compare the performance of different regions. Highlight which region performed best overall and provide insights into the factors that may have contributed to its success.

- **Then...**

Show how this data could be structured as a pivot table that breaks down the number of bookings by holiday resort and sales team. Include suggested rows, columns, and values, and recommend useful filters such as booking method and review rating.

- **Then...**

Which fields are most useful to include as filters, and why?



QA

Prompts for the 'analysing data' scenario.

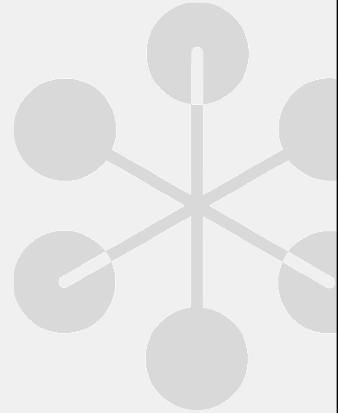
Needs a sample spreadsheet open or attached in a Chat.

Try looking for trends with a prompt. Ask for summary statistics or give Copilot a specific question to answer that is relevant to you and your data.

You could also ask Copilot to produce visuals or a dashboard suitable for an audience (works best directly in Excel).

Facilitator prompts: Quick Win openers

- **Add one of these openers to the front of any prompt**
- **Ask me any questions before you begin.**
Copilot interviews you first – safe to run live because you can invent the answers (budget, launch date, audience, channels).
- **Confirm your understanding before you begin.**
Copilot plays the brief back to you, so the room sees whether the prompt was clear.
- **Explain your approach before you start.**
Copilot shows its plan before drafting – good for demonstrating transparency.
- **What have I missed?**
Run after a summary to surface gaps, risks and unanswered questions.



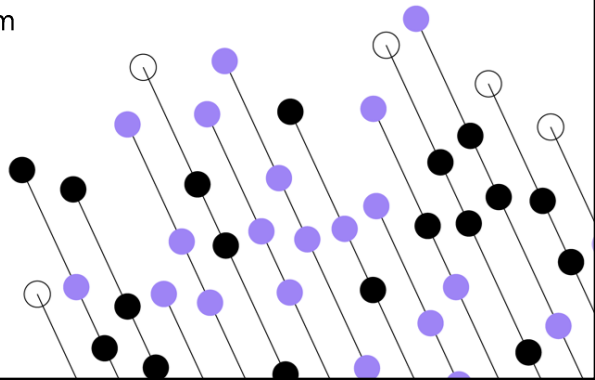
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Quick Win openers.

Each opener is a short phrase added to the front of any prompt on the previous slides. They all help with checking the output produced by Copilot!

Use cases, privacy and adoption

Making Copilot Chat work for your team



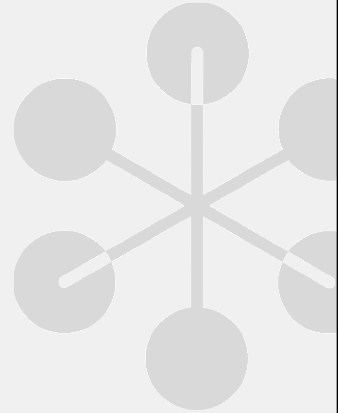
Use cases, privacy and adoption.

Transition from “what it can do” to “what this means for you and your team.”

Useful line: “Practicing with Copilot prompts show what is possible. This next part is about making it stick in real work.”

Role-specific use cases

- **Managers:** summarise team updates and prepare for one-to-ones
- **Finance:** analyse spreadsheets and explain variances in plain language
- **HR:** draft policies, job descriptions and onboarding material
- **Sales and marketing:** research accounts and draft tailored outreach



QA

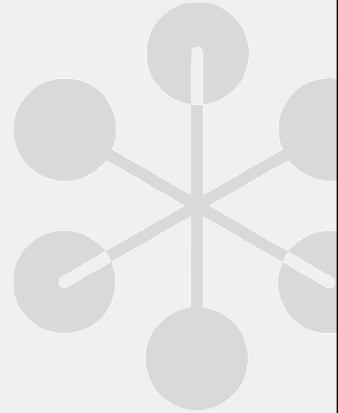
Role-specific use cases.

Purpose of this slide is recognition – do you see yourself in at least one line or can you think of another role.

Roles may drive useful use cases for adoption of Copilot. Some actions in Copilot will be generic e.g. working in an Inbox but others may be relevant to you and your team.

Data privacy considerations

- Your prompts and responses are not used to train the underlying models
- Copilot only surfaces content you already have permission to access
- Signing in with your work account keeps data inside your organisation's boundary
- Follow your organisation's policy on confidential and personal information



QA

Data privacy considerations.

Key reassurances:

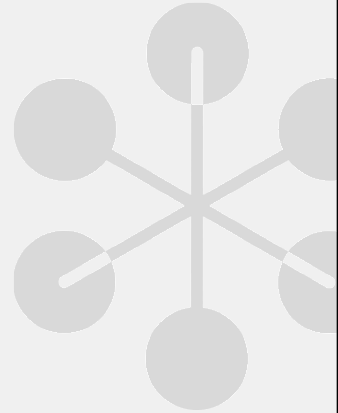
- Prompts and responses are not used to train the underlying models
- Copilot only surfaces content the user already has permission to access – it does not widen access
- Signing in with a work account keeps data within the organisational boundary

Be clear about the boundary of your own knowledge: for questions on specific data residency, retention or compliance obligations, talk to your IT, security or compliance team rather than improvising an answer.

Remember that organisational policy always takes precedence over anything demonstrated here.

Planning for adoption

- Identify the everyday tasks that cost your team the most time
- Prove a small number of high-value use cases before going wider
- Build internal champions to share prompts and wins across the team
- Measure the time saved and revisit your use cases regularly



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Planning for adoption.

Think about current tasks and activities.

Start with time drains: the best first use cases are frequent, low-risk and tedious.

Prove a small number of use cases before going wider – broad, unfocused rollouts tend to stall.

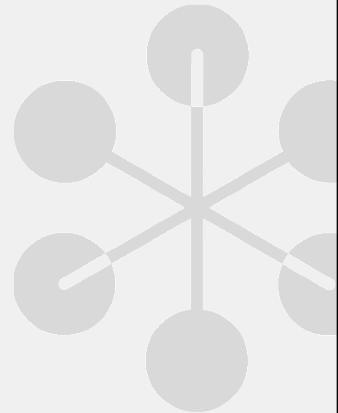
Champions are the most reliable lever: people who share prompts and wins in team channels do more for adoption than formal training.

Measurement keeps momentum – even informal before-and-after time estimates help make the case.

Can you think of one team task you could pilot this month.

Key takeaways and next steps

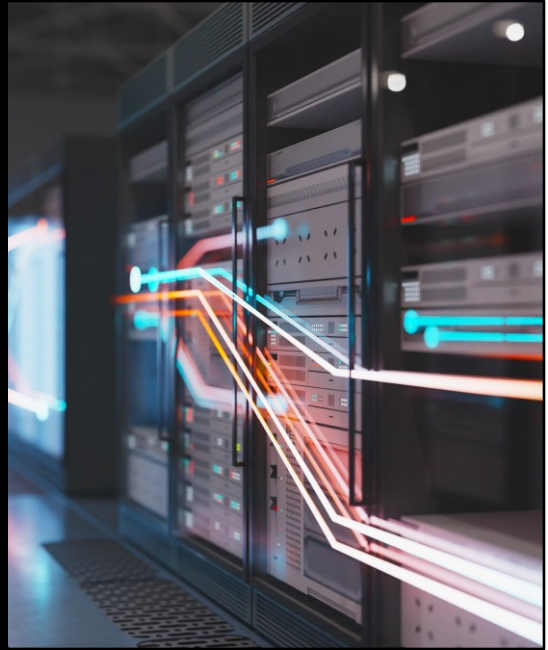
- Copilot Chat works across Outlook, Teams, Word, Excel and PowerPoint
- Goal, Context, Source and Expectations gives you a better answer, faster
- Always review the output and keep sensitive information in mind
- Pick one use case this week and practise it until it becomes a habit



QA

Key takeaways and next steps.

Thanks for joining us!



Thank attendees for their time and energy.

Choose one use case and try it this week.

Consider further learning: Microsoft Copilot Courses | Copilot Training Partner | [QA.com](https://qa.com)