

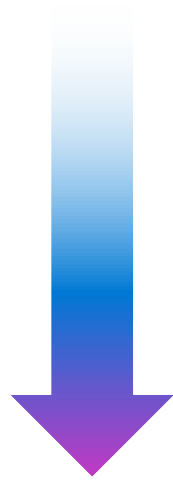
Copilot for Microsoft 365

Your AI assistant at work

IBS Event
27 September 2024

The AI Opportunity

Manage
cost



Increase
value

75%

knowledge workers using
AI at work

78%

knowledge workers bring
their own AI tools to work



Alexis Blackwell

Arce Vol.10

Brooklyn, NY



Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language
Models

+



Microsoft Graph
- Your Data -

+



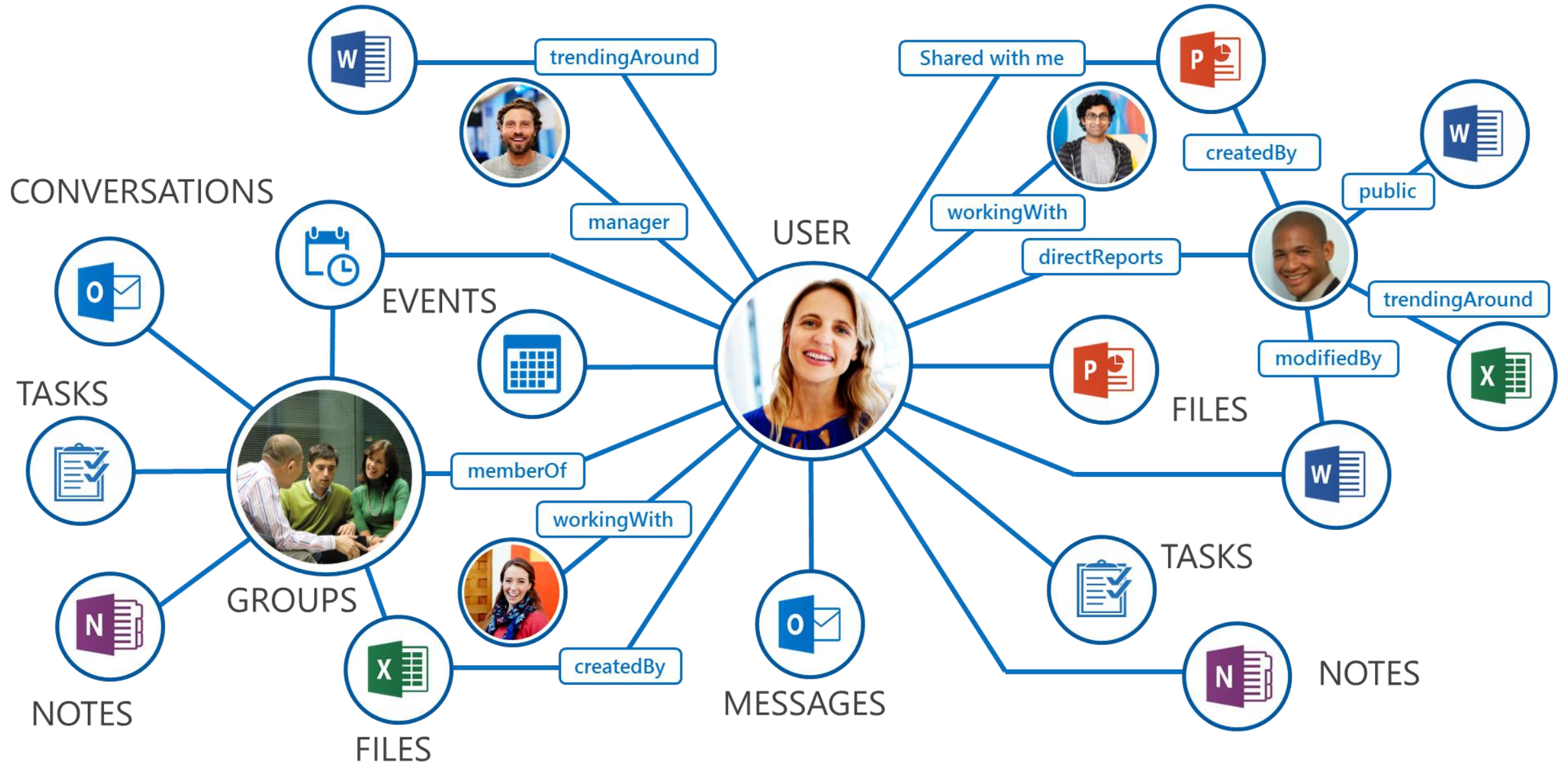
Microsoft 365
Apps

+



The
Web

Microsoft Graph





Copilot for Microsoft 365

Built on Microsoft's comprehensive approach



Security



Compliance



Privacy



Responsible AI

Top 10 to try first with Copilot for Microsoft 365



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

Demo



Expanding the AI Opportunity

Personal productivity

Individual efficiency

Time savings

Increase creativity

+

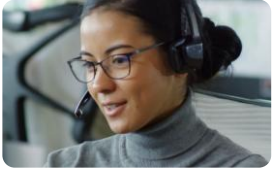
Business value

Revenue growth

Cost optimization

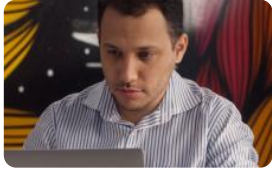
Employee wellbeing

Key processes



Customer Service

- Self-help
- Support assignment
- Issue diagnosis
- Problem resolution
- Continuous improvement



Sales

- Customer self-service
- Lead generation
- Customer engagement
- Negotiations & closing
- Post-sale follow-up & upsell
- Sales analysis & forecasting



Finance

- Quote to cash
- Record to report
- Tax & treasury
- Planning & analysis
- Risk management and compliance
- Procure-to-pay



Marketing

- Customer insights & strategy
- Demand generation
- Content creation
- Campaign execution
- Predictive analysis
- Personalization
- Sales enablement & recommendation



HR

- Employee engagement
- Recruiting
- HR admin & payroll
- Compensation & benefits
- Learning & development
- Talent management
- HR strategy & planning



Legal

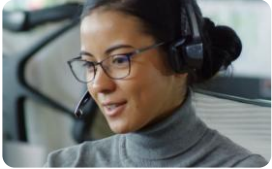
- Regulatory & compliance management
- Contracting
- Risk management
- Litigation
- Consultation
- Intellectual property
- Advisory services



IT

- Data management
- Software management & acquisition
- Device management
- IT operations
- Network operations
- Information security
- Change management & user adoption

KPIs by function



Customer Service

First Call Resolution (FCR) rate

Calls answered by agents

Issue resolution time

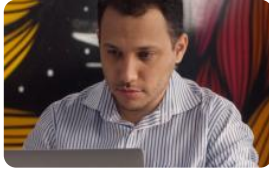
Customer retention

Case volume

Time to first response

Average call time

Customer experience (CSAT)



Sales

Opportunities pursued

Deal size

Win rate/Close rate

Customer retention

Average discount size

Upsell/Cross sell rate

Cost per lead

Sales cycles length



Finance

Finance outsourcing spend

Cost per analysis request

Deal review time

Time to close

Compliance rate

Forecast accuracy

Employee retention

Day sales outstanding



Marketing

Leads generated

Agency spend

Customer retention

Employee retention

Cost per lead

Brand value

Lead conversion rate

Revenue per lead generated



HR

Employee onboarding time

Calls answered by agents

Issue resolution time

Employee retention

Hiring costs per employee

Admin cost per employee

First call resolution rate

Workforce demographics



Legal

Outside counsel spend

Cost per internal review

Compliance rate

Contract error rate

Number of disputes

Dispute win rate



IT

IT operation costs

IT issue/ticket resolution time

IT outsourcing costs

Product adoption & usage

Application downtime

Network/infra reliability score

Reduce shadow IT risk

NSAT- User Satisfaction



A day in the life of Vanessa

9:00 AM

Vanessa wants to invite a customer to a workshop on Copilot for M365 so she asks Copilot to help her draft an invitation and prepare an agenda.



Microsoft 365 Chat

Draft an invitation to present Copilot for M365 to customer XYZ. Please prepare an agenda for a 90-min workshop. Audience is executives, both from business and IT.

9:30 AM

Vanessa is refining her Copilot presentation for XYZ customer (Manufacturing) and uses Copilot in PPT to customize it for the specific customer by adding a slide with specific use cases for the industry.



Copilot in PowerPoint

Add a slide with Copilot for M365 use cases in Manufacturing Industry.

10:00 AM

Vanessa exported from MSXI all the open opportunities for the FY and uses Copilot in Excel to get some insights and visualizations on size of opportunities and forecast recommendations.



Copilot in Excel

Show insights for the value of opportunities and insights recommendations.

6:00 PM

After a busy day Vanessa uses Copilot to help her summarize any urgent pending tasks and act on these so she can wrap up her day.

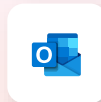


Microsoft 365 Chat

Summarize important emails and chats from today. Make it detailed, highlighting the sender and categorizing by topic. List emails from most important to least important based on the analysis of the content of the email. Split in emails and chats

4:00 PM

While Vanessa is on the go at external customers meetings, she is using Copilot in Outlook App for iOS to summarize an internal discussion to resolve an issue with a customer.



Summary by Copilot

And then using **Coaching by Copilot** to get some assistance on how to provide feedback on a sensitive matter.

12:00 PM

During the customer workshop Vanessa relies on Copilot to create meeting summary and list next steps. Vanessa asks Copilot to list the questions asked (both in chat and at meeting) she can be sure everything gets answered during the call. With Sales Copilot she gets additional insights on how customer is reacting with the sentiment analysis.



What questions were asked during the meeting that have not been answered?
Were any questions asked in the chat?



Vanessa is the Modern Workplace Specialist for Greece, Cyprus, Malta

Microsoft 365 Copilot

Copilot in Excel

EV Charger - Sales Analysis v05 | Confidential - Saved

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Table Design

Clipboard: Paste, Copy, Format Painter

Font: Arial Narrow, 12, Bold, Italic, Underline, Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: \$, %, #, 000, 000.00

Date	Product ID	Product Name	Category	Sales Channel	Units Sold	Total Revenue
			Fast Chargers	Direct	118	\$ 1,327,500.00
Aug-2024	FC-3001	Basic	Fast Chargers	Direct	112	\$ 1,050,000.00
Aug-2024	FC-3002	Plus	Commercial Chargers	Distributor	101	\$ 340,875.00
Aug-2024	CC-2001	Standard	Commercial Chargers	Direct	99	\$ 445,500.00
Aug-2024	CC-2002	Advanced	Commercial Chargers	Direct	97	\$ 327,375.00
Aug-2024	CC-2001	Standard	Commercial Chargers	Distributor	97	\$ 436,500.00
Aug-2024	CC-2002	Advanced	Commercial Chargers	Direct	92	\$ 621,000.00
Aug-2024	CC-2003	Pro	Commercial Chargers	Distributor	90	\$ 112,500.00
Aug-2024	HC-1002	Plus	Home Chargers	Retail	85	\$ 1,935,000.00
Aug-2024	FC-3003	Premium	Fast Chargers	Direct	81	\$ 546,750.00
Aug-2024	CC-2003	Pro	Commercial Chargers	Distributor	75	\$ 112,500.00
Aug-2024	HC-1001	Basic	Home Chargers	Retail	75	\$ 75,000.00
Aug-2024	HC-1002	Plus	Home Chargers	Direct	72	\$ 90,000.00
Aug-2024	PC-4001	Standard	Public Chargers	Direct	65	\$ 292,500.00
Aug-2024	HC-1003	Premium	Home Chargers	Direct	60	\$ 90,000.00
Aug-2024	HC-1001	Basic	Public Chargers	Direct	60	\$ 60,000.00
Aug-2024	FC-3001	Basic	Home Chargers	Direct	60	\$ 552,500.00
Aug-2024	FC-3002	Plus	Home Chargers	Direct	50	\$ 30,000.00
Aug-2024	FC-3003	Premium	Fast Chargers	Distributor	48	\$ 1,080,000.00
Aug-2024	FC-3001	Basic	Fast Chargers	Direct	46	\$ 450,000.00
Aug-2024	FC-3002	Plus	Public Chargers	Distributor	46	\$ 990,000.00
Aug-2024	FC-3003	Premium	Fast Chargers	Direct	44	\$ 990,000.00
Aug-2024	PC-4001	Standard	Fast Chargers	Direct	44	\$ 472,500.00
Aug-2024	PC-4002	Advanced	Fast Chargers	Distributor	42	\$ 365,625.00
Aug-2024	FC-3002	Plus	Fast Chargers	Direct	39	\$ 355,625.00
Aug-2024	FC-3003	Premium	Public Chargers	Direct	39	\$ 810,000.00
Aug-2024	FC-3003	Premium	Fast Chargers	Distributor	38	\$ 393,750.00
Aug-2024	FC-3002	Plus	Fast Chargers	Distributor	35	\$ 363,750.00
Aug-2024	FC-3002	Plus	Fast Chargers	Direct	35	\$ 49,500.00
Aug-2024	FC-3003	Premium	Fast Chargers	Distributor	33	\$ 20,000.00
Aug-2024	FC-3001	Basic	Fast Chargers	Direct	28	\$ 121,500.00
Aug-2024	FC-3001	Basic	Home Chargers	Direct	27	\$ 33,750.00
Jul-2024	HC-1003	Premium	Home Chargers	Distributor	27	\$ 37,500.00
Jul-2024	HC-1001	Basic	Public Chargers	Direct	25	\$ 31,250.00
Jul-2024	PC-4001	Standard	Home Chargers	Direct	25	\$ 31,250.00
Jul-2024	HC-1002	Plus	Home Chargers	Direct	25	\$ 31,250.00
Jul-2024	HC-1003	Premium	Home Chargers	Direct	25	\$ 31,250.00
Jul-2024	HC-1002	Plus	Home Chargers	Direct	25	\$ 31,250.00

Sales by Product | Reviews | Prices | Customers | +

78°F Sunny

Microsoft 365 Copilot

Copilot in Excel with Advanced Analysis

