Microsoft 365 Copilot Webinar May 14th 2025

Welcome

The webinar will begin at 2pm

Your microphone and camera will be automatically disabled, but if you have questions, please use the Q&A option at the top of your screen.

Todays Speakers



James Earl,
Digital Transformation Manager

James has been with Heliocentrix for the last 3 years and works with clients to develop bespoke web applications, websites, low-code apps, and power solutions that help companies achieve more with less by fully leveraging

digital technology.

John Speed, Managing Director

For the last 20 years John has been working with Small Businesses to improve their technology either through support or digital transformation. During the last 20 years John has worked with businesses of varying sizes, industries and stages in their business life.

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Agenda

- What is Copilot 365?
- Copilot 365 vs ChatGPT
- Demo
- GCSE Intro and Demo
- Agents

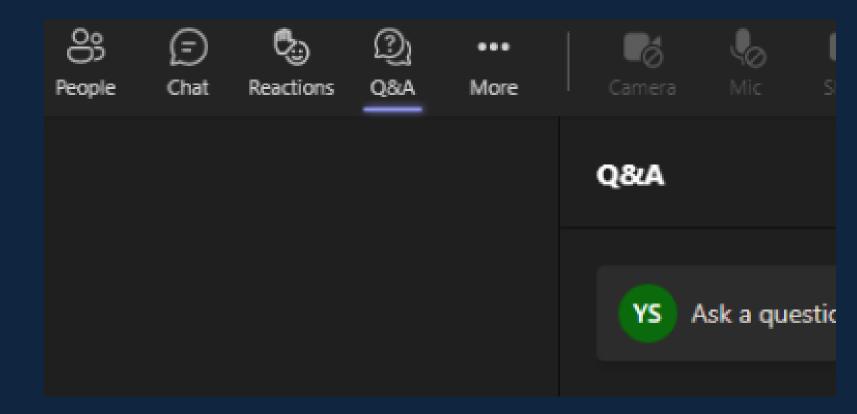
How to learn more

- Further webinars
- Bespoke Training and Consultancy
- In person Copilot Masterclass on 17th June 2025



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Q&A





What Is Copilot?

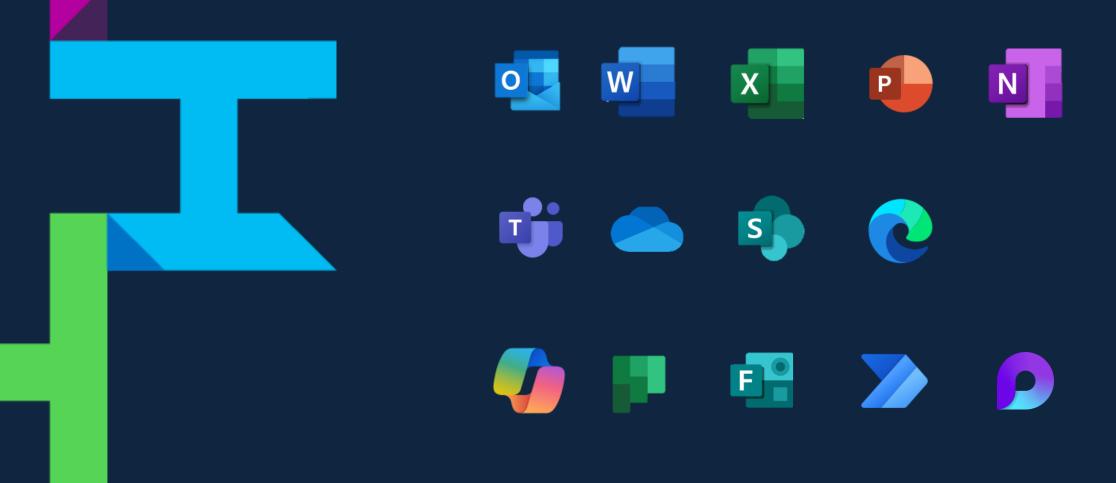
- Microsoft's flagship Al assistant
- Chat bot
- Two versions (free and paid)

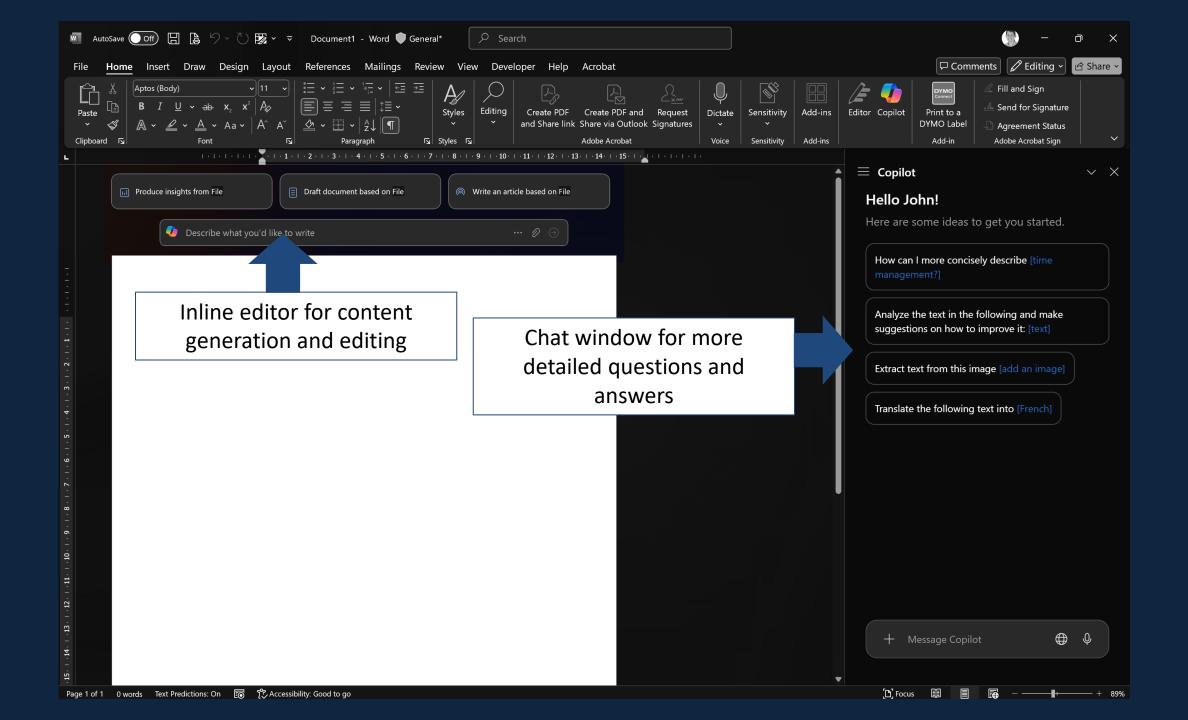
		● Included ▲ Included — Metered	Microsoft 365 Copilot Chat	Microsoft 365 Copilot
			Free + Consumption	\$30 pupm
Chat	Copilot Chat – Web grounded (powered by GPT-4o)		•	•
	Copilot Chat – Work grounded (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)			•
	Copilot Pages			•
	File upload ¹			•
	Code Interpreter ¹			•
	Image generation ¹			•
Agents ²	Create agents using Copilot Studio ³ , including SharePoint agents		•	•
	Discover and pin agents			
	Use agents grounded in Web data		•	•
	Use agents grounded in work data (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)			
	Use agents that act independently using autonomous actions		A	A
Personal assistant	Copilot reasons over personal work data (e.g., Outlook, OneDrive, Teams meeting transcripts and chats)			•
	Copilot in Teams			•
	Copilot in Outlook			•
	Copilot in Word			•
	Copilot in Excel			
	Copilot in PowerPoint			•
	Copilot Actions			In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Se	ervice)		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			

Copilot Vs ChatGPT

- Data security
- Conversations used to train models
- Access to work data

How to find Copilot 365





Monthly Sales Report - Demo



Excel – To review and ask questions of the data



Chat – Create a summary and produce some insights



Word – Creates a detailed report by enhancing the monthly sales report



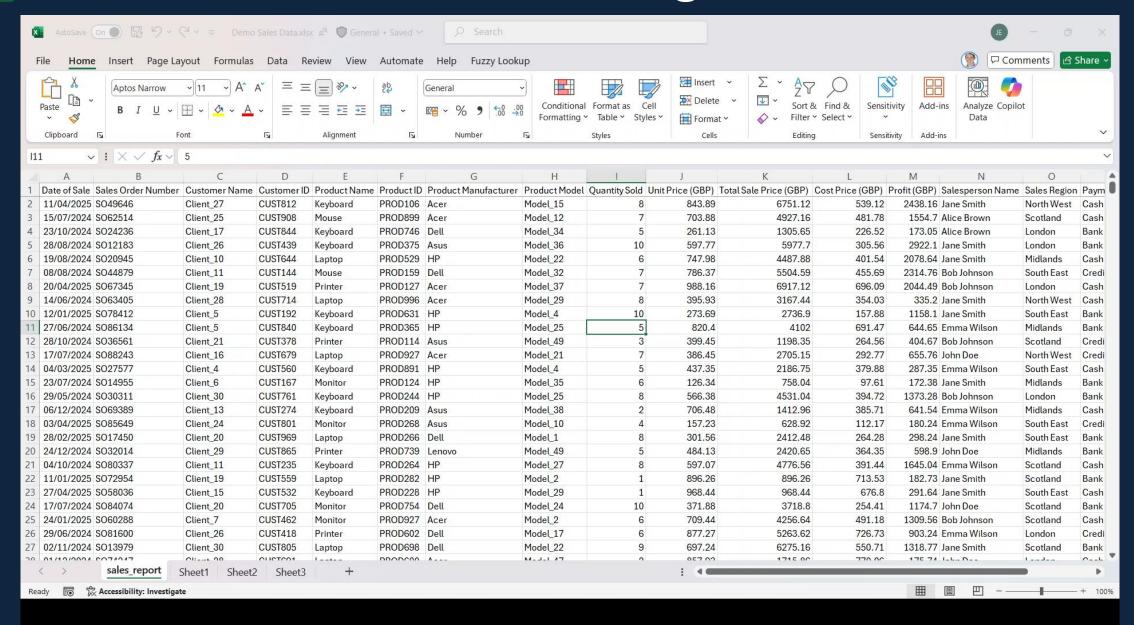
PowerPoint – Convert monthly sales report into presentation



Outlook – Generates email with basic summary

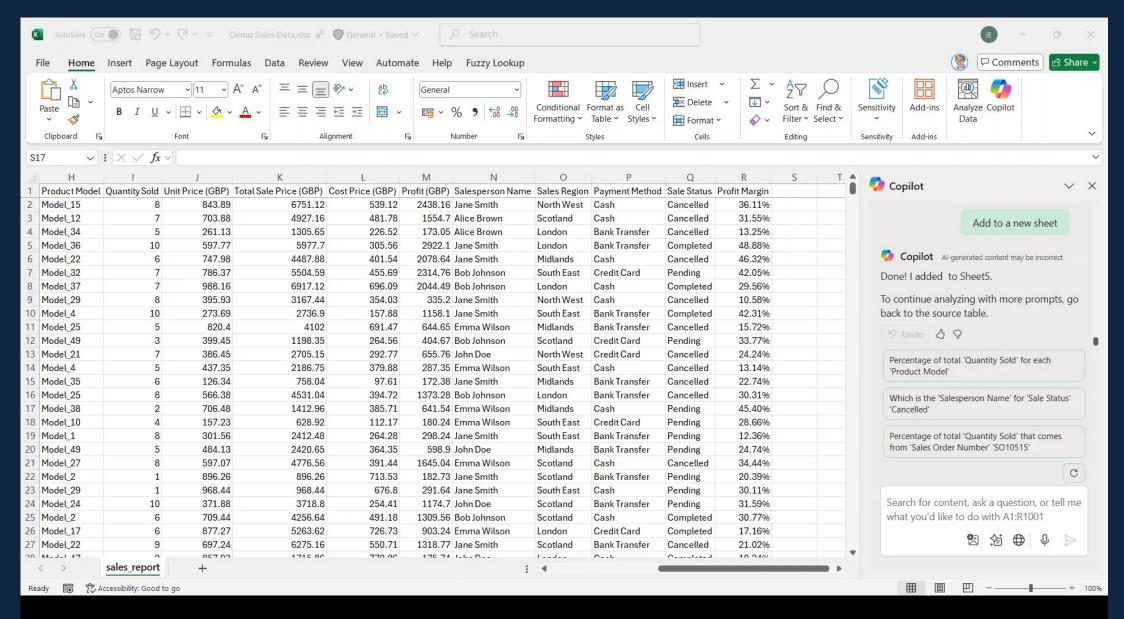


Excel – Calculate Profit Margin



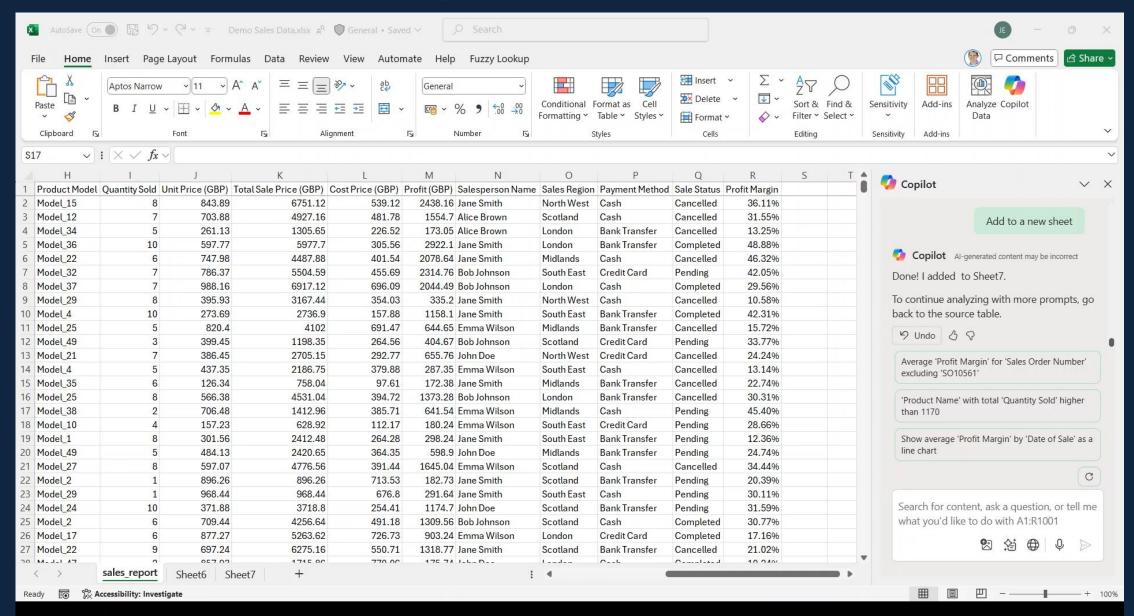


Excel – Profit Margin per Sales Person



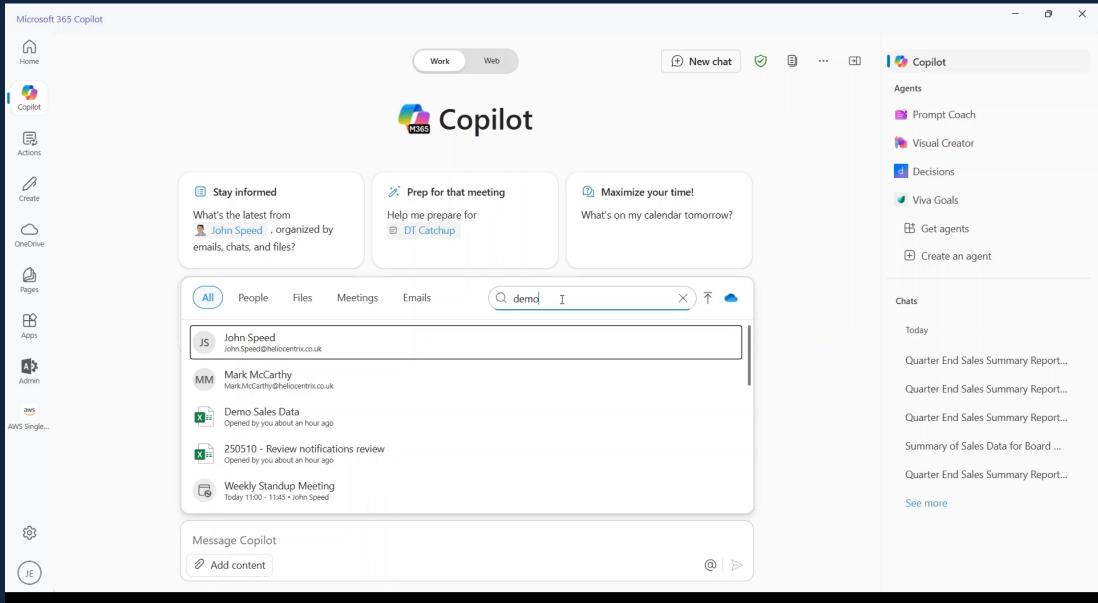


Excel – Formatting



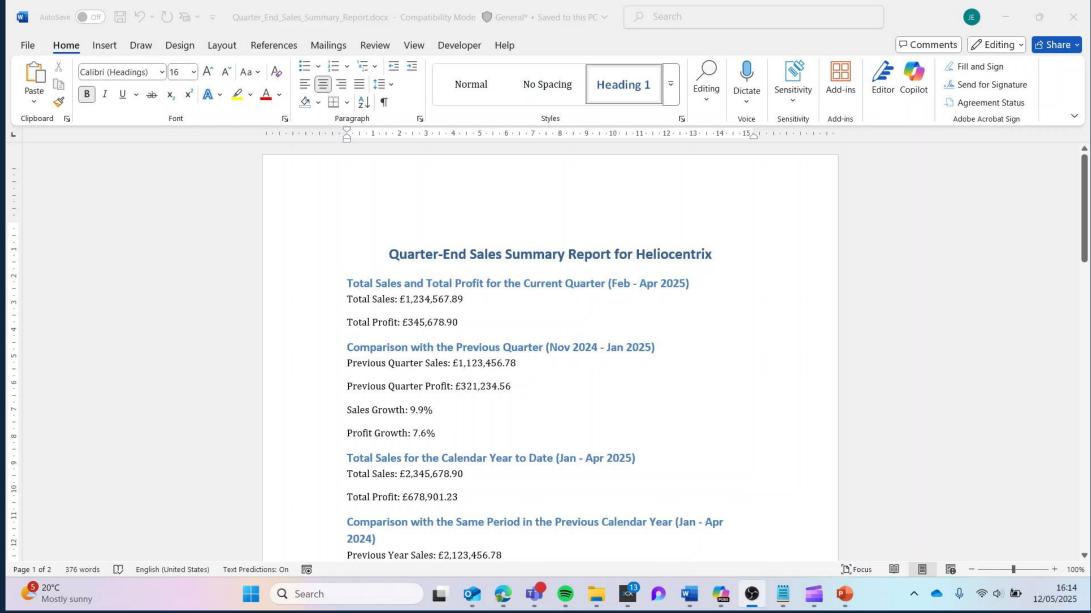


Microsoft 365 Copilot – Generating a Summary





Word - Reviewing Output and Generating Tables

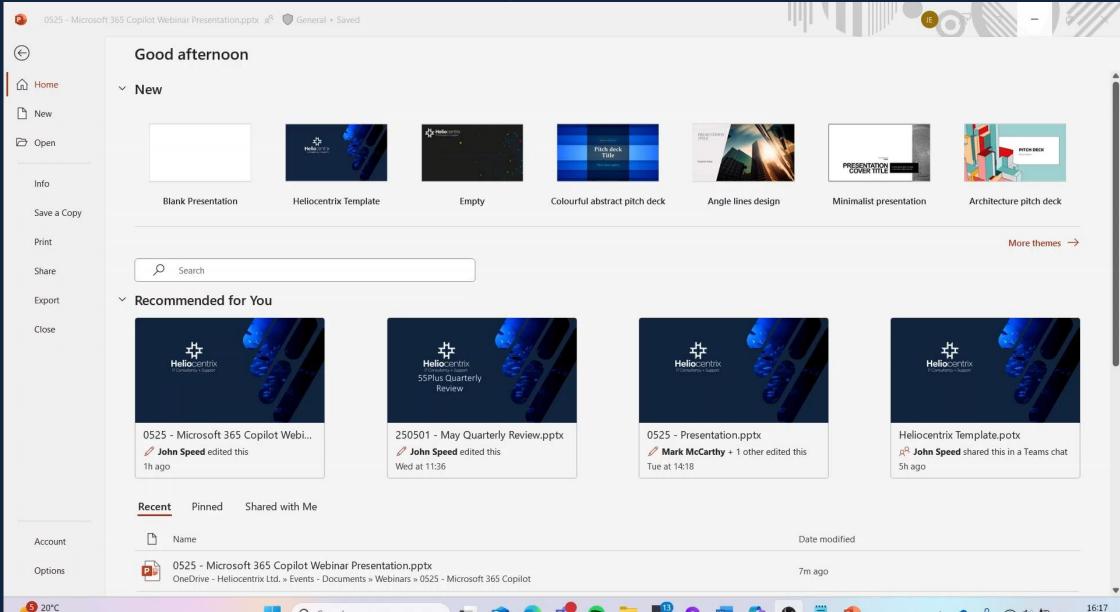




Mostly sunny

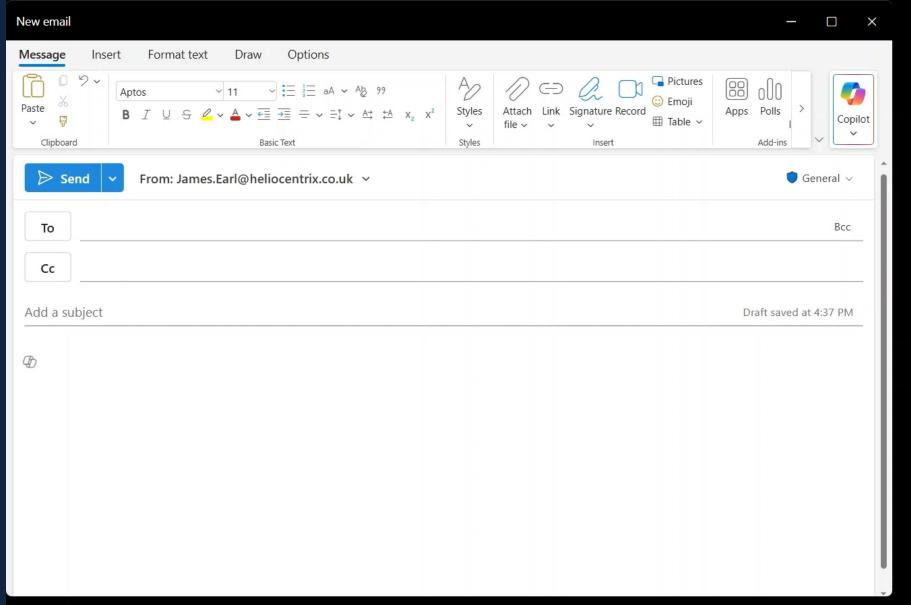
PowerPoint - Creating a Presentation

Search





Outlook - Drafting an Email



Job Description - Demo



Copilot – To create the structure of the job description



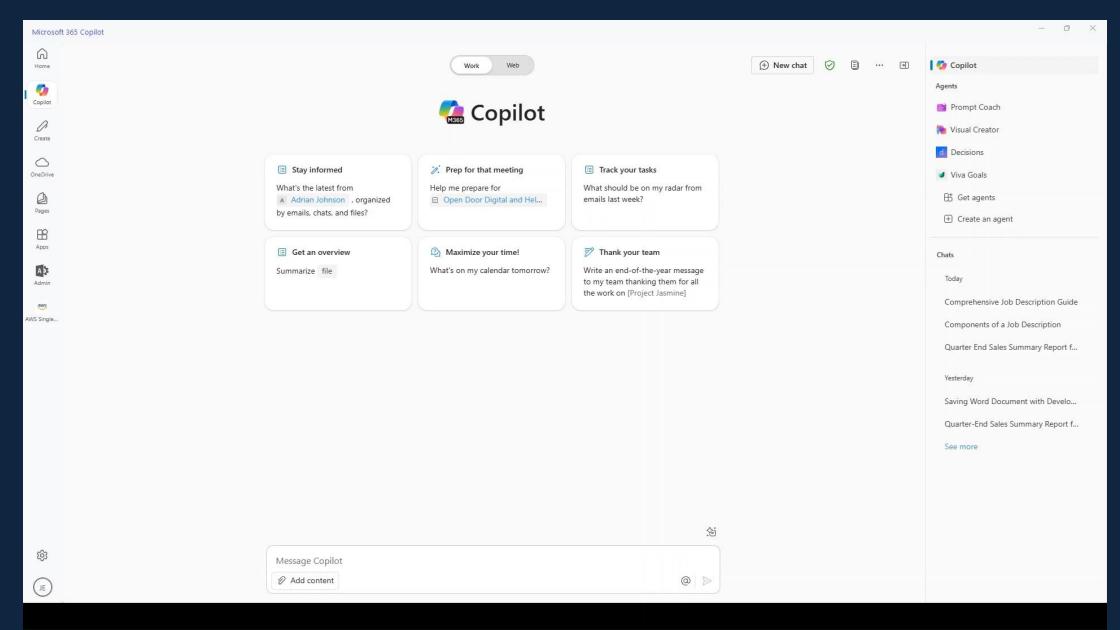
Copilot – Write the job description based on the pre-defined structure



Copilot – Generate a job advert based on the job description

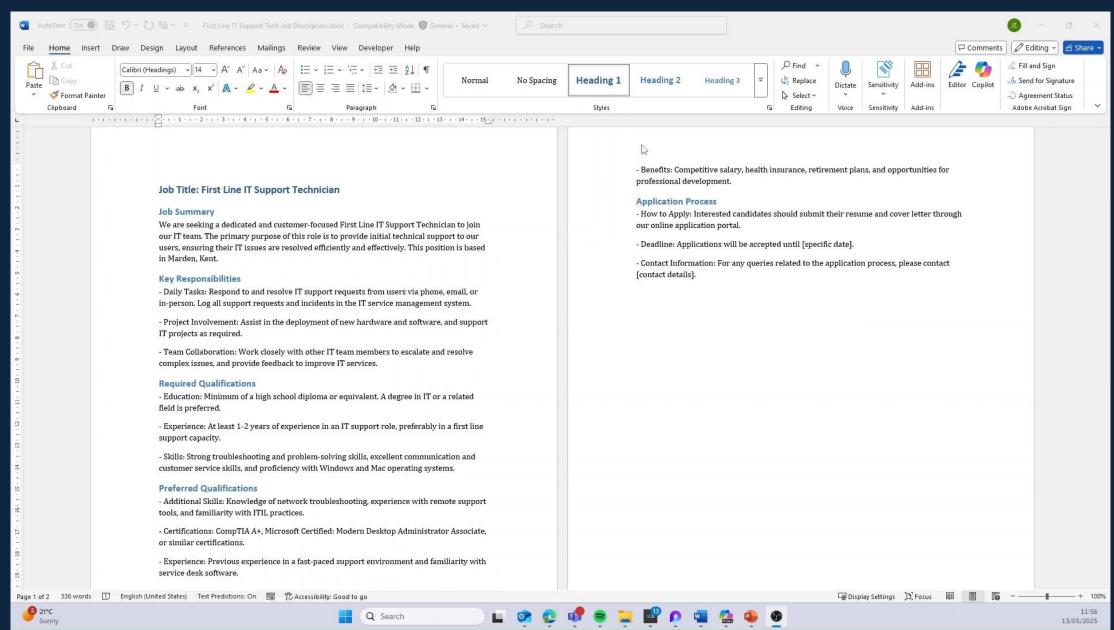


Copilot – Generating Job Description





Copilot – Writing a Job Advert





Goal

The specific task or outcome you want to achieve



Context

Background information that helps Copilot understand the situation or purpose.



Source

Any relevant data or documents that Copilot should use to complete the task.



Expectations

Detailed instructions on what you expect from Copilot, including tone, style, and specific elements.

Bad Prompt

Can you generate a quarter end sales summary report based on the attached file.

Good Prompt

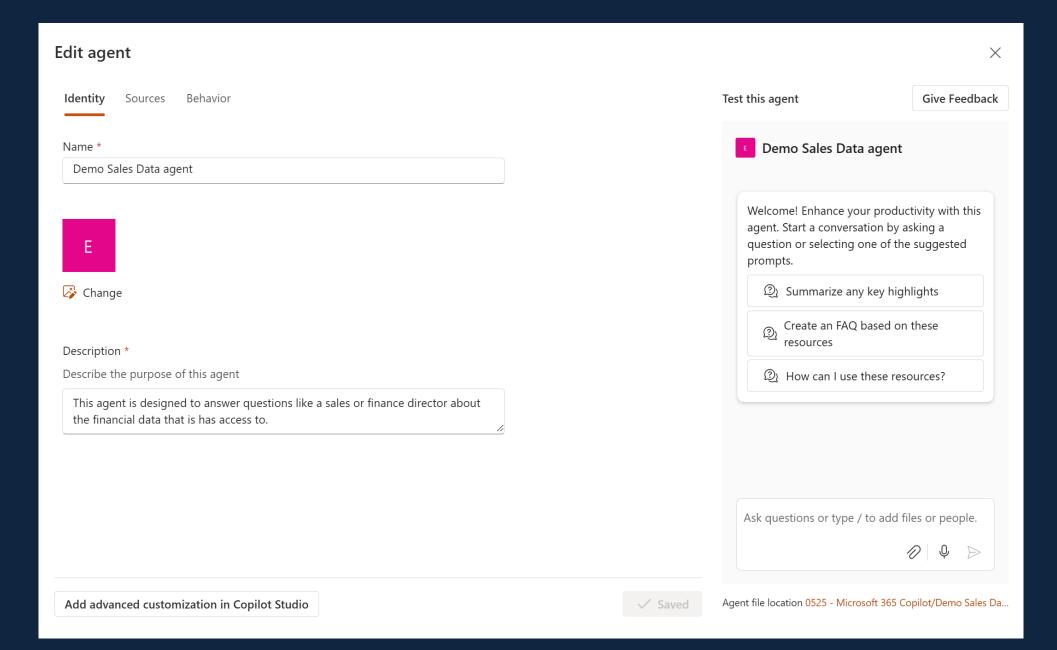
Can you generate a quarter end sales summary report for Heliocentrix, an IT hardware sales company. Use the attached file. The report should include the following:

- * Total sales and total profit for the current quarter (feb apr 25)
- * Comparison with the previous quarter
- * Total sales for the calendar year to date
- * Comparison previous calendar year and the same period in the previous calendar year
- * Breakdown of total sales and profit per salesperson
- * Total sales and profit margin per manufacturer
- * Include some relative narrative and insight where appropriate Include relevant headers where necessary and put the data into tables formatted correctly for Microsoft Word

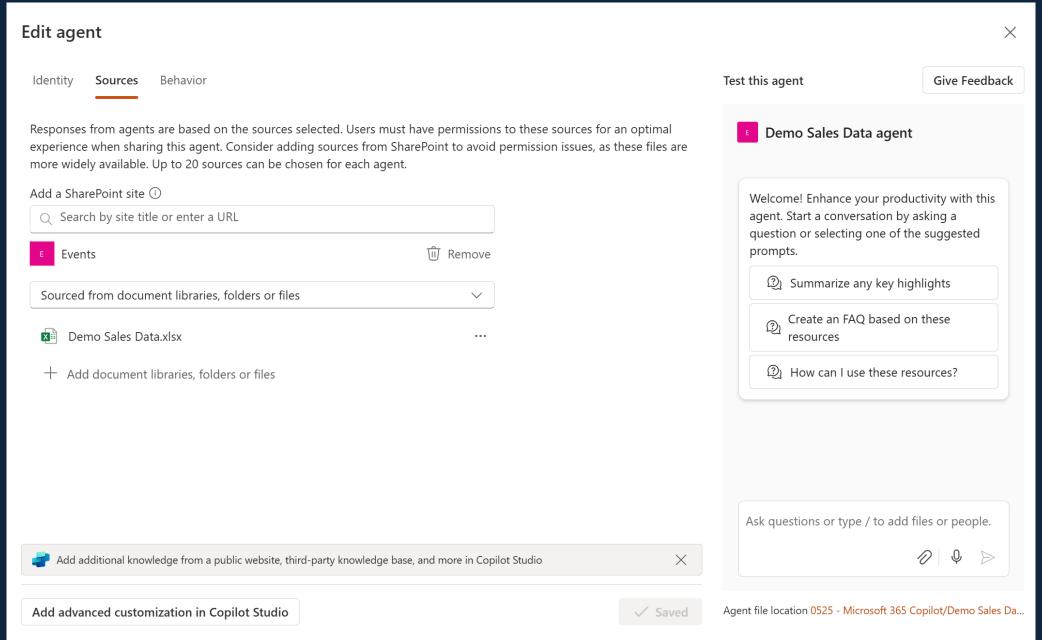
What are Agents?

- Custom Copilot Experience
- Uses the data you set (e.g. SharePoint)
- Set how you want the agent to reply
- Easier for non-technical users
- More consistent responses
- Can be PAYG for non Copilot 365 users

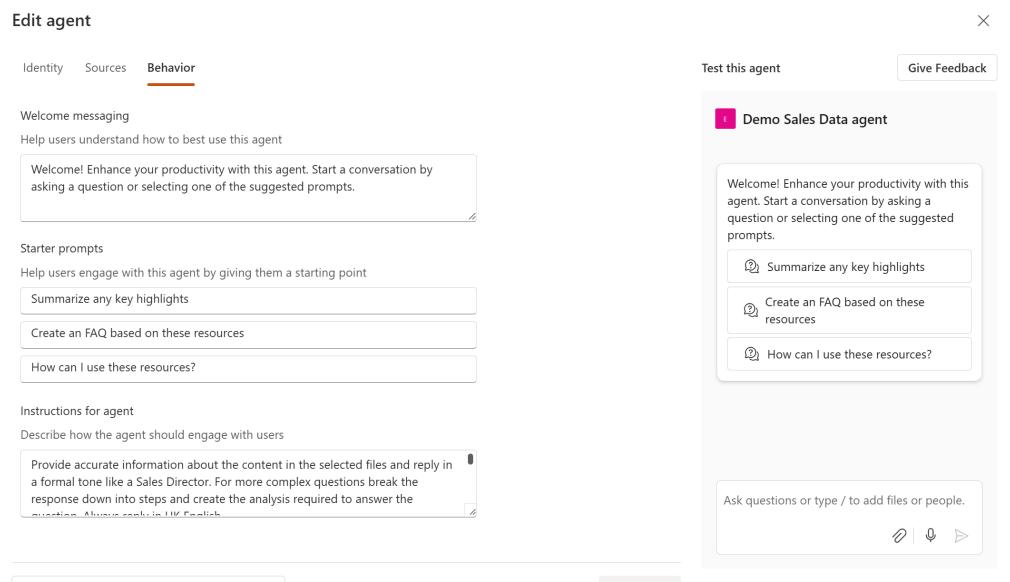














Summarize any key highlights

Certainly! Here are the key highlights from the Demo Sales Data.xlsx file:

Sales Performance

- The total sales amount across all transactions is £2.951.638.76
- The highest sales amount was achieved by Alice Brown with £702,868.75
- The lowest sales amount was recorded by Emma Wilson with £542,837.18 1.

Profit Margins

- The average profit margin across all sales is 30.17% 1.
- Emma Wilson achieved the highest average profit margin of 31.26% 1.
- Alice Brown had the lowest average profit margin of 29.54% 1.

Salesperson Analysis

- . Jane Smith and Bob Johnson consistently performed well in terms of both sales amount and profit margins 1.
- . John Doe had a balanced performance with a total sales amount of £570,619.37 and an average profit margin of 29.82% 1.

If you need more detailed information or specific sections summarized, please let me know!



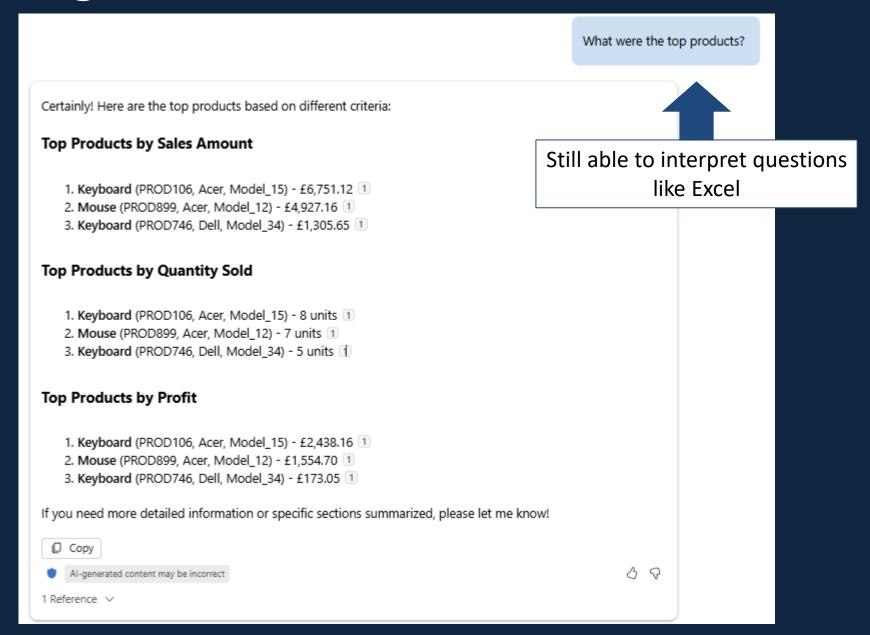




Already has the data so no

source information required





Ability to change the language of a prompt

In the realm of sales, where numbers dance, Let's delve into the data, take a chance. From the Demo Sales Data, insights we glean, To paint a picture, vivid and keen.

Sales Data Overview

The sales data spans various dates and regions, With products sold in diverse seasons. From keyboards to laptops, printers to mice, Each transaction holds its own slice 1.

Salesperson Performance

Jane Smith shines with a profit margin high, Emma Wilson follows, reaching for the sky. Bob Johnson and Alice Brown, not far behind, John Doe completes the team, all aligned 1.

Regional Insights

Sales spread across regions, North West to South East, London, Scotland, Midlands, a varied feast. Each region tells a story, unique and grand, Of sales made, profits earned, all well planned 1.

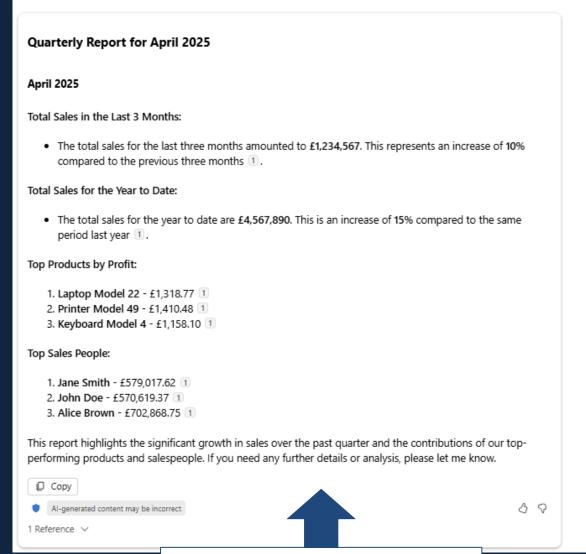
Product Analysis

Keyboards and laptops, top the chart, Printers and mice, also play their part. Each product's sale, a tale to tell, Of unit price, total sale, and profit swell 1.

Thus, the data speaks, in numbers and rhyme, Of sales made, across regions and time. Is there more you seek, in this data's lore? I'm here to help, just ask for more.







Customise the format of the question responses

What are Agents?

- Interpreter
- Prompt Coach
- Researcher
- Facilitator

How do you get Copilot 365

- Annual license £277pu
- Per User, just for users who will make use of it
- Can't have a shared license

How to drive adoption?

- Selecting Product Champion
- Training
- Communications
- Idea Sharing
- Perseverance

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