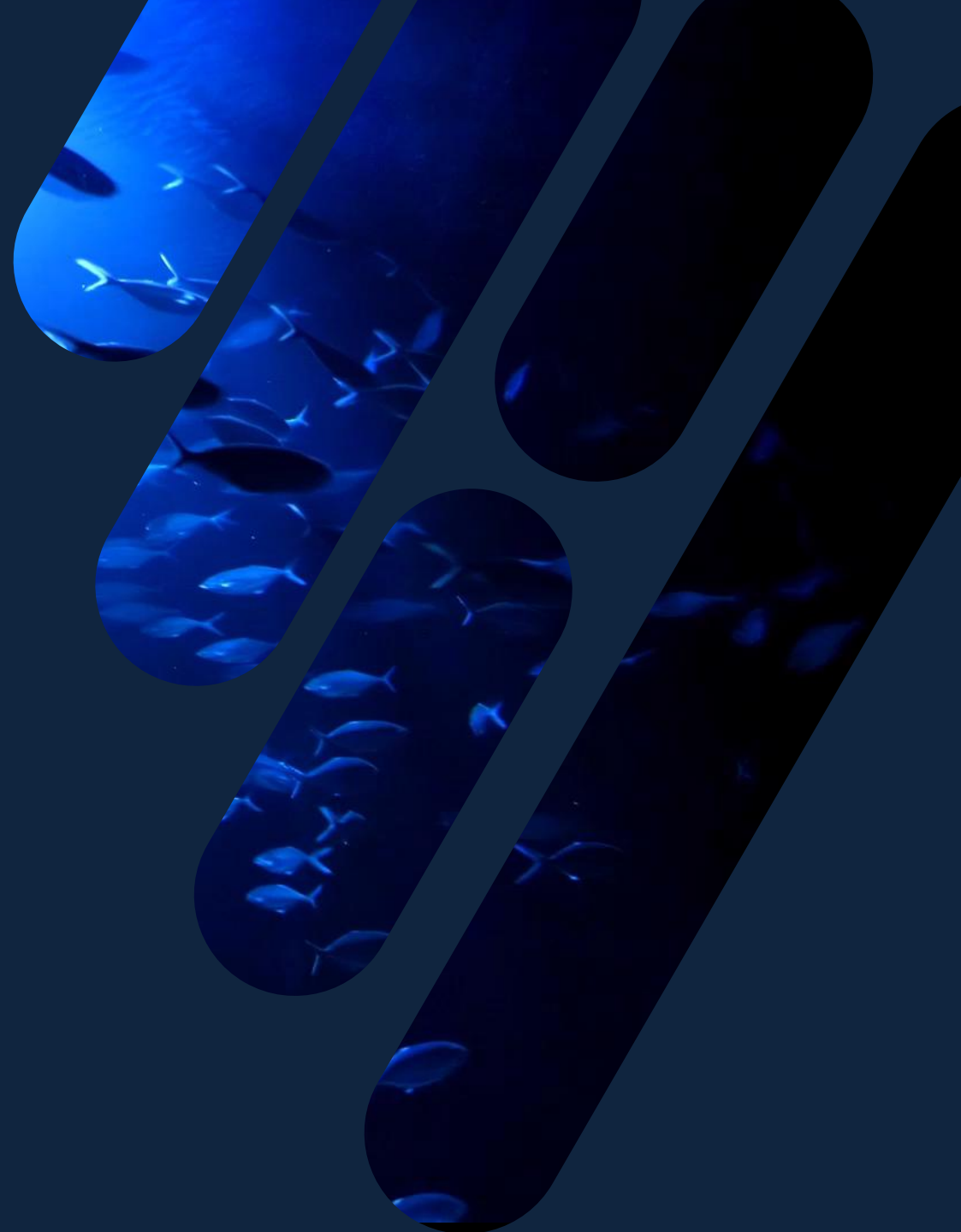




Heliocentrix
IT Consultancy + Support





Microsoft Copilot Chat Webinar

The webinar will start at 2pm

All participants will automatically have cameras and microphones turned off.

We will have a section for Q&A at the end so please post any questions using the Q&A option on the top menu



General House Keeping

This is a webinar hosted with Microsoft Teams and your Microphone and Camera will be off for the duration of the meeting

We will have some time at the end for Q&A and if you have any questions about this or other AI or Microsoft 365 systems then please ask them using the Q&A option

The Webinar will be recorded. You will be sent notes at the end.



Today's Speakers:

James Earl, Digital Transformation Manager
Heliocentrix

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 .





Microsoft Copilot Chat

Presented by James Earl, Heliocentrix
May 2025



Agenda

- What is Copilot Chat?
- What can you use Copilot Chat for?
- How do you access Copilot Chat?
- How to craft effective prompts
- What are agents?
- Q&A



What Is Copilot?

- Microsoft's flagship AI 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	▲	▲
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-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: aka.ms/CopilotStudioCapabilities 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.

Research

Display the results in the format you thinks best



CRM Platform	Website	Features	Estimated Cost
Insightly	https://www.insightly.com/industry/crm-for-consulting/	Email tracking, marketing automation, pipeline management, customer service portal	Starts at £23/user/month
HubSpot CRM	https://www.hubspot.com/products/crm	Email tracking, marketing automation, contact management, sales pipeline	Free for basic features paid plans start at £38/user/month
Zoho CRM	https://www.zoho.com/crm/	Email tracking, marketing automation, workflow automation, analytics	Starts at £12/user/month
Pipedrive	https://www.pipedrive.com/en	Email tracking, sales pipeline management, automation, reporting	Starts at £12.50/user/month
Salesforce Essentials	https://www.salesforce.com/uk/products/sales-cloud/essentials/	Email tracking, contact management, marketing automation, analytics	Starts at £20/user/month

Ask follow up questions
Includes sources for more information



These platforms offer a range of features that can help you manage your client relationships, track emails, and market your services effectively. They also integrate well with Microsoft 365, ensuring seamless communication and workflow.

Do you have any specific requirements or preferences for your CRM system?

1 CRM For Consulting Firms...

2 7 Best Small Business CR...

8 Best CRMs For Consulta... [Show more](#)

Edit in Pages


Copy

AI-generated content may be incorrect

Summarising

Give the AI a web page or a document and
it can summarise into small points.




 Copilot

What are the cancellation policies?

Heliocentrix Limited's cancellation policies are outlined in their Terms and Conditions document. Here are the key points:

- 1. Client's Right to Cancel:**
 - Clients can cancel their agreement by providing written notice at least 30 days in advance ^[1].
 - If the client cancels the contract, they must settle any outstanding payments for services rendered up to the cancellation date ^[1].
- 2. Company's Right to Cancel:**
 - Heliocentrix reserves the right to terminate the contract if the client fails to comply with the terms and conditions or if there are issues with payment ^[1].
 - The company will provide written notice of termination ^[1].
- 3. Refunds:**
 - Refunds for services already provided are generally not available unless there is a breach of contract by Heliocentrix ^[1].

 Copilot

Here's a summary of the key terms from Heliocentrix Limited's Terms and Conditions document:

Heliocentrix Limited - Terms and Conditions Summary

- 1. Introduction:** These terms outline who Heliocentrix Limited is, how they provide products and services, how contracts can be changed or ended, and what to do if there are problems ^[1].
- 2. Services Provided:** Heliocentrix offers IT support and services, including maintenance, strategy development, cybersecurity, cloud services, network management, and consultancy ^[2].
- 3. Contract Formation:** A contract is formed when Heliocentrix accepts an order from a client. The terms and conditions apply to all services provided ^[1].
- 4. Payment Terms:**
 - Invoices are issued monthly and must be paid within 30 days.
 - Late payments may incur interest charges ^[1].
- 5. Client Responsibilities:** Clients must provide accurate information and cooperate with Heliocentrix to ensure effective service delivery ^[1].
- 6. Liability:** Heliocentrix limits its liability for any loss or damage arising from the services provided, except in



Ask follow up questions

Content Generation

Reviewed our tone of voice



Provided the post content



Included relevant hashtags



Suggested when to post



Here's a LinkedIn post that aligns with your company's tone of voice:


Unlock Enterprise-Level Security with Microsoft Copilot Chat!

At Heliocentrix, we understand the importance of secure and reliable technology solutions for your business. That's why we're excited to announce that Microsoft Copilot Chat now comes with enterprise-level security, included with all Microsoft 365 licences.

Whether you're looking to enhance productivity or streamline communication, Microsoft Copilot Chat ensures your data is protected while you focus on what matters most – growing your business.

Ready to take your business to the next level? Discover how Microsoft Copilot Chat can transform your operations today.

 **Secure**

 **Included with Microsoft 365**

 **Boost Productivity**

#Microsoft365 #EnterpriseSecurity #Heliocentrix #TechSolutions #BusinessGrowth

Recommended Time and Day to Share:

For maximum views, share this post on **Tuesday at 10:00 AM**. This timing typically sees high engagement on LinkedIn.



Where to find Copilot Chat

- Microsoft Edge
- [M365copilot.com](https://m365copilot.com)
- M365 Copilot Desktop App
- Teams
- Modern Outlook
- iOS and Android Apps



[Automate](#) [Dataverse Tables](#) [Graph Explorer](#) [Office Portal](#) [Topics - Hugo | Micr...](#)

ts Play Money Weather Watch Shopping Health Travel

- Feed layout

(Personalise

all of Gaza and hold it indefinitely, officials say



 Top stories

Breaking  Sky News · 3h

Israel approves plan to seize all of Gaza and hold it indefinitely, officials say

 The Guardian · now

VE Day: royals join veterans as 80th anniversary commemorations begin –...

✦ Evening Standard · 2h

Iranian terror attack 'hours from being launched' before being foiled by police

[See more](#)

Markets

FTSE 100
UKX

+1.17%
8,596.35

FTSE 250
MCX



+0.52%
20,240.51

FTSE 350
NMX

+1.09%
4,702.90

FTSE Intl-AIM All Share In...
AXX

+1.11%
707.75

FTSE AllShare
ASX



+1.09%
4,652.38

[See market](#)





Where to find Copilot Chat

- Microsoft Edge
- [M365copilot.com](https://m365copilot.com)
- M365 Copilot Desktop App
- Teams
- Modern Outlook
- iOS and Android Apps


Best match



Copilot

App

Apps


 Microsoft 365 Copilot >

 Microsoft 365 Copilot Installer.exe >

Documents - This PC


 CoPilot Updates Jan25.docx >


 Copilot PowerPoint Starter Template Nov 2024.pptx - in >

 Copilot PowerPoint Starter Template Nov 2024.pptx - in >

Folders

 0525 - Copilot Chat >


 CopilotChatTrainerKit.zip >


 CopilotChatUserOnboardingTemplates.zip >




Copilot

App


 Open


 Run as administrator


 Pin to Start

 Pin to taskbar

 App settings

 Rate and review

 Share

 Uninstall




Where to find Copilot Chat

- Microsoft Edge
- [M365copilot.com](https://m365copilot.com)
- M365 Copilot Desktop App
- Teams
- Modern Outlook
- iOS and Android Apps

→

55Plus Web Application Specifici...

 Get more apps

- Catch up fast



@





Where to find Copilot Chat

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- Teams
- Modern Outlook
- iOS and Android Apps



Google Play

Games

Apps

Books

Children



Microsoft 365 Copilot

Microsoft Corporation

Contains ads · In-app purchases

4.6★

7.53M reviews

1B+

Downloads



Editors' choice

3

PEGI 3



App Store Preview

This app is available only on the App Store for iPhone and iPad.



Microsoft 365 Copilot 4+

Copilot, Word, Excel, and more

[Microsoft Corporation](#)

#33 in Productivity

★★★★★ 4.7 • 1.1M Ratings

Free · Offers In-App Purchases



How to craft effective prompts

- A new skill we have to learn
- Takes practice and thought
- Trial and error

G C S E



Goal

The specific task or outcome
you want to achieve



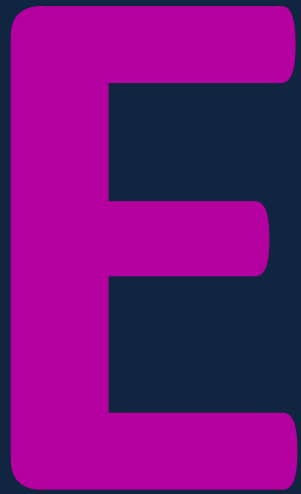
Context

Background information that helps Copilot understand the situation or purpose.



Source

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

A large, bold, magenta-colored letter 'E' is positioned on the left side of the slide, serving as a visual anchor for the section.

Expectations

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

G C S E



Bad Prompt

List 5 CRM Packages that I could use for my business

Good Prompt

Generate a list of 5 CRM platforms that would be suitable for my Business.

- We are an HR Consultancy based in the UK
- With 5 employees and 100 clients.
- We use Microsoft 365 for emails so 365 integration is important
- We need the system to track emails and advice and allow us to market to our clients

Use blogs and relevant trusted sites in the UK.

Provide me with a table giving me the name of the product, url for their website, a comparison of features and the estimated cost of the product for my team.

Even Better Prompt

Generate a list of 5 CRM platforms that would be suitable for my Business.

- We are an HR Consultancy based in the UK
- With 5 employees and 100 clients.
- We use Microsoft 365 for emails so 365 integration is important
- We need the system to track emails and advice and allow us to market to our clients

Use blogs and relevant trusted sites in the UK.

Provide me with a table giving me the name of the product, url for their website, a comparison of features and the estimated cost of the product for my team.

Ask me any relevant questions to make the results more appropriate.



What are Agents?

- Pre-prompted versions of Copilot
- Designed for specific tasks

How to learn more

- Further webinars – Microsoft 365 Copilot soon
- Bespoke Training and Consultancy
- Prompt-a-thon on 17th June 2025



Heliocentrix.co.uk/events



Question:

- What are pages?



Question:

- Can I have a mix of Copilot Chat and the full copilot in my company?



Question:

- Can I write letters and emails with Copilot Chat?