

IT PARTNERS  
IT PARTNERS 365 Copilot for  
Microsoft



# IT PARTNERS 365 Copilot for Microsoft Instruction Manual

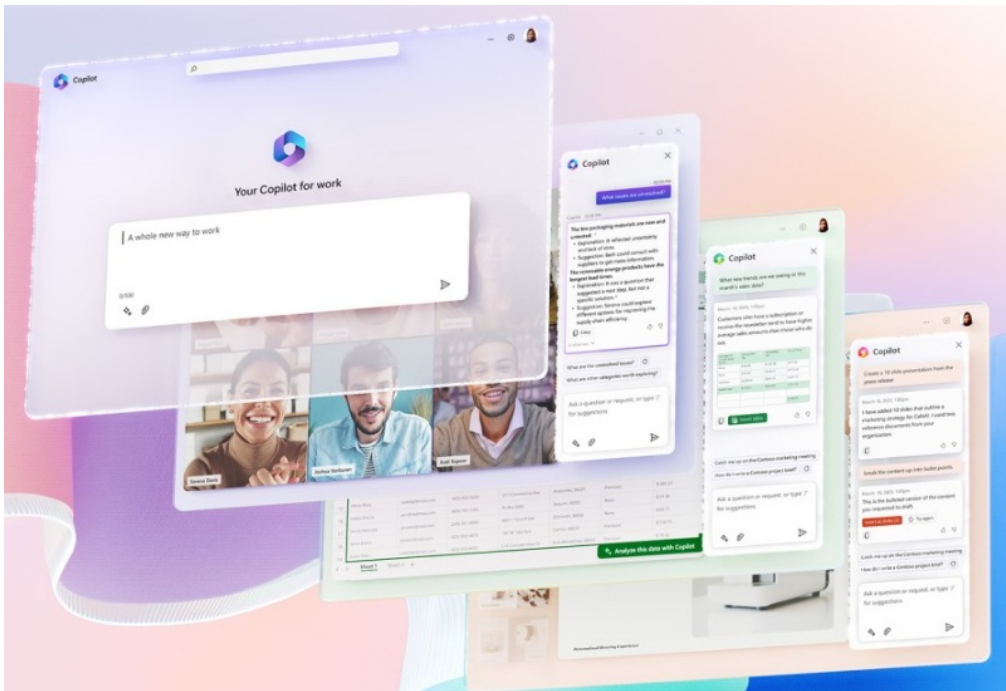
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IT PARTNERS

**IT PARTNERS 365 Copilot for Microsoft**



## Product Information

### Specifications

- Product Name: Copilot for Microsoft 365: A Strategic Adoption Guide
- Compatibility: Microsoft 365 ecosystem (Word, Excel, PowerPoint, Outlook)
- Functionality: Enhances productivity and collaboration through generative AI
- Pricing: \$582.00 (excl. GST) per year

## Product Usage Instructions

### Introduction

Copilot for Microsoft 365 is designed to revolutionize how teams collaborate, communicate, and accomplish tasks within the Microsoft ecosystem. By leveraging natural language processing and machine learning, Copilot assists users in enhancing productivity and focusing on creativity.

### Business Adoption

Businesses can integrate Copilot into their workflows to maximize efficiency and foster a culture of collaboration, innovation, and agility. It is essential for businesses to proactively engage with Copilot's features and functionalities to unlock new levels of productivity.

### User Adoption

Users can harness the potential of Copilot by embracing its capabilities for collaboration, content creation, and data analysis. While Copilot provides valuable suggestions in real-time, user input and guidance are crucial for effective utilization. Be prepared for a learning curve and understand that Copilot complements human expertise rather than replacing it.

## FAQ

- **What is Copilot for Microsoft 365?**
  - Copilot for Microsoft 365 is Microsoft's Generative AI tool aimed at enhancing productivity and collaboration within the Microsoft ecosystem. It seamlessly integrates with applications like Word, Excel,

PowerPoint, and Outlook to assist with various tasks such as summarizing emails, creating reports, and building presentations.

- **How does Copilot work?**

- Copilot utilizes natural language processing and machine learning to understand user intent within the Microsoft environment. By analyzing content and context, Copilot provides relevant suggestions in real-time to boost productivity.

- **What is the pricing for Copilot for Microsoft 365?**

- The subscription for Copilot for Microsoft 365 is available as an annual commitment paid upfront at \$582.00 (excl. GST) per year. Monthly subscription options are not currently available.

## **Introduction**

In today's fast-paced business landscape, we seek innovative solutions to streamline operations, enhance productivity, and drive growth. Copilot for Microsoft 365 is positioned to revolutionise how teams collaborate, communicate, and accomplish tasks.

After just three months of using Copilot, 70% of users said they were more productive and 68% felt it improved the quality of their work. And the best Copilot users? They saved more than 10 hours per month.

This comprehensive guide is designed to empower businesses to harness the potential of Copilot through strategic adoption and is divided into two sections

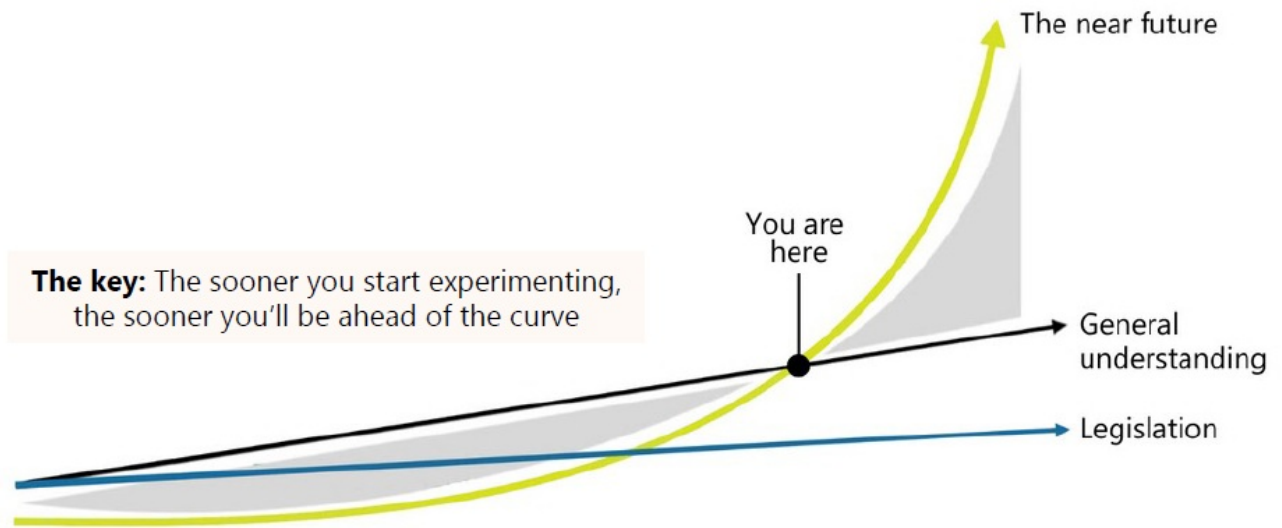
### **Business Adoption**

### **User Adoption**

- Providing you with a roadmap for integrating Copilot into your workflows, maximising efficiency and unlocking new levels of productivity.
- Through proactive engagement with Copilots features and functionalities, businesses can foster a culture of collaboration, innovation, and agility.
- We're excited to embark on this transformative journey together!

## **The journey is just beginning**

- It is important for us to acknowledge that the capability of artificial intelligence (AI) is rapidly evolving. We recognise, as do you, that we are in the early stages of this technology being used in business.
- While Copilot for Microsoft 365 in its current state presents notable value, the technology is evolving quickly. We need to set realistic expectations: Copilot isn't a replacement for human expertise or a magic solution to solve all productivity challenges.
- While it can greatly help with collaboration, content creation, and data analysis, it still needs user input and guidance to work effectively. Be prepared for a learning curve and remember that, like any technology, Copilot has limitations and might require fine-tuning to meet your specific needs.



## Welcome to the world of Copilot for Microsoft 365



### What is Copilot for Microsoft 365?

- Microsoft's Generative AI tool designed to enhance productivity and collaboration within the Microsoft ecosystem.
- Seamlessly integrating with applications such as Word, Excel, PowerPoint, and Outlook, assisting with summarising emails, creating reports, building presentations and more.
- The goal is to enable users to boost their productivity, allowing them to focus on creativity and higher-level thinking.

### How does Copilot for Microsoft 365 work?

- It uses natural language processing and machine learning to understand users' intent within the context of their businesses Microsoft environment.
- What does this mean? Simply put, Copilot analyses the content being created and the environment it is created in and provides relevant suggestions in real time.

## How much is the Copilot for Microsoft 365 subscription?

- The Copilot for Microsoft 365 subscription is currently available as an annual commitment, paid upfront. The annual subscription costs \$582.00 (excl. GST) per year.
- At this stage, we do not have any additional information about the timeline for the availability of monthly subscription options.

## Are there any other licensing requirements?

Copilot for Microsoft 365 is an add-on license that requires one of the following underlying licenses

- Microsoft 365 Business Standard
- Microsoft 365 Business Premium
- Office 365 E3
- Office 365 E5
- Microsoft 365 E3
- Microsoft 365 E5

## Business Adoption

### Your Copilot Adoption Roadmap

#### Phase 1

##### Preparation

Getting your business ready for the adoption of Generative Artificial Intelligence.

- **Step 1**

Review the location, security and access controls of your business data.

- **Step 2**

Seek expert guidance.

- **Step 3**

Experiment by providing Copilot for Microsoft 365 licenses to targeted users.



#### Phase 2

##### Onboard

Accelerating usage and engagement with Copilot for Microsoft 365.

- **Step 1**

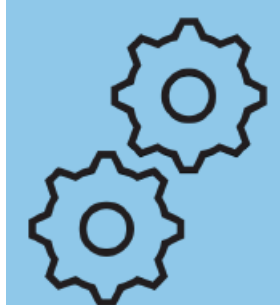
Establish mechanisms to support these users in their adoption journey.

- **Step 2**

Educate your power users.

- **Step 3**

Establish a Copilot for Microsoft 365 user group.



### **Phase 3**

#### **Rollout**

Informing the wider rollout of Copilot for Microsoft 365 across your business.

- **Step 1**

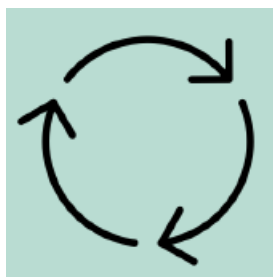
Quantify the impact.

- **Step 2**

Share the successes.

- **Step 3**

Establish strategy for wider rollout.



### **Phase 1**

#### **Preparation**

Getting your business ready for the adoption of Generative Artificial Intelligence

##### **Step 1**

- Review the location, security and access controls of your business data.
- Copilot for Microsoft 365 automatically inherits your existing Microsoft 365 data and security permissions. While

this makes set up relatively straightforward, it also highlights the importance of having established data governance practices in place before rollout begins.

**Action:** Work with your IT team or provider to review current data policies.

Below we explore some of the frequently asked questions we have received about the safety of leveraging Copilot for Microsoft 365 with your business data.

### **Copilot for Microsoft 365 Data Security and Privacy FAQ**

Copilot for Microsoft 365 has been built to safeguard your business data.

- **Is our business data at risk if we input it into Copilot for Microsoft 365?**

Unlike other free tools, Copilot for Microsoft 365 does not share your business data or use it to train other businesses artificial intelligence models. It operates within your existing Microsoft 365 environment, using your data to offer insights while upholding security measures.

- **How do we control access to data and prevent oversharing?**

Because Copilot inherits all your existing Microsoft 365 security and compliance requirements, only people with the right permissions can access the content it generates. Before deploying Copilot, audit your existing data access, retention controls, and sensitivity labels.

- **Where is Copilot for Microsoft 365 data stored and processed?**

Because Copilot is a core Microsoft 365 service, the data it uses resides in your geographical region. That means it complies with Microsoft processing commitments for that region. As businesses in New Zealand, our data is likely being stored in Australian data centers.

- **Are there copyright risks in using content generated by Copilot?**

Microsoft Copilots Copyright Commitment safeguards your intellectual property and that of others. If you employ Copilot to create business content and face copyright infringement claims from a third party, Microsoft will defend you and cover any adverse judgments or settlements.

Getting your business ready for the adoption of Generative Artificial Intelligence

## **Step 2**

### **Seek expert guidance.**

Prior to diving into deploying Copilot for Microsoft 365 to your team, it's crucial to engage experts to provide guidance on your initial thinking and use cases. This is likely to involve:

- Confirming that the appropriate data access policies are in place for your business
- Reviewing your data structures to ensure they are optimised for Copilot's processing
- Testing a series of different use cases in your businesses Microsoft 365 environment
- Supporting Pilot Program users to drive necessary changes in work habits for Copilot adoption

## **Step 3**

- Experiment by providing Copilot for Microsoft 365 licenses to targeted users.
- We recommend implementing a Copilot for Microsoft 365 Pilot Program across your business by providing licenses to targeted users. Monitoring their use cases, time savings, and overall usage. This structured

approach will allow you to gather valuable insights and inform a broader rollout strategy.

## **Assigning Licenses**

As part of this pilot, you will need to determine who to assign licenses to. Consider the following factors in your approach:

### **Microsoft 365 Application Usage**

- Your heaviest users of Microsoft 365 products will be well positioned to reap the benefits of a Copilot license.
- Define use cases for identified business functions
- Each team should have a clearly defined goal or specific use case for how they'll implement Copilot for Microsoft 365 –

we've shared some examples below

### **Human Resources Hiring**

- Create a job description by asking Copilot to suggest skills and responsibilities.
- Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.

### **Marketing**

#### **Content creation**

- Have Copilot write a compelling tagline for a product launch.
- Generate ideas for a creative campaign to increase brand visibility.
- Quickly generate suggested outlines for a blog or eBook.

### **Sales**

#### **Presentations**

- Create a bulleted list of notes using recent email threads before a customer meeting to understand the asks that need to be addressed.
- Draft a proposal, taking content from your emails, meeting notes, and earlier presentations.

### **Finance**

#### **Analysis**

- Extract relevant data from various sources, such as invoices, receipts, reports, and emails, and convert them into structured formats.
- Unsure of a specific formula in Excel? Have Copilot add formula columns for you.

## **Phase 2**



## Onboard

Accelerating usage and engagement with Copilot for Microsoft 365

### Step 1

- Establish mechanisms to support these users in their adoption journey.
- Effective change management is vital for implementing an AI tool like Copilot, as it ensures your business views it as not just new technology, but a new way of working.

#### Change Management

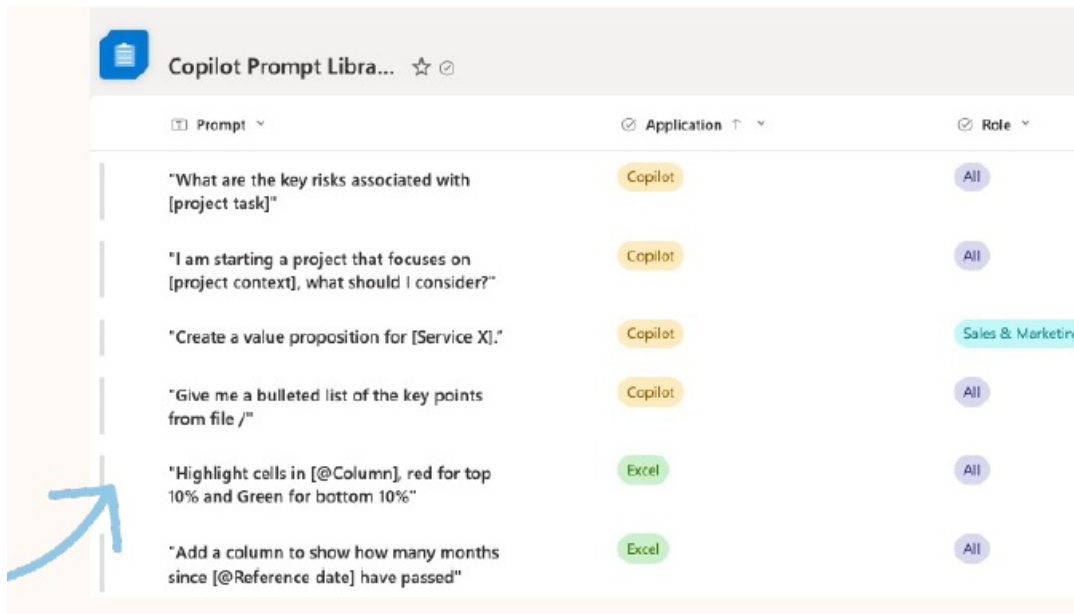
Diverse perspectives around AI exist, you'll likely see a combination of enthusiasm and skepticism. Different views require different levels of support.

#### Manage Expectations

Its important users understand what Copilot can and can't do. Knowing when to use AI capabilities and when to rely on human expertise.

### Step 2

- Educate your power users.
- Training users when assigning them a Copilot for Microsoft 365 license is vital for maximizing its benefits and ensuring utilization. By investing in training, this will help to foster a culture of continuous learning, enabling users to innovate and derive maximum value from the tool.
- We recommended the development of a prompt library, which we can help with!



Prompt	Application	Role
"What are the key risks associated with [project task]"	Copilot	All
"I am starting a project that focuses on [project context], what should I consider?"	Copilot	All
"Create a value proposition for [Service X]."	Copilot	Sales & Marketing
"Give me a bulleted list of the key points from file /"	Copilot	All
"Highlight cells in [@Column], red for top 10% and Green for bottom 10%"	Excel	All
"Add a column to show how many months since [@Reference date] have passed"	Excel	All

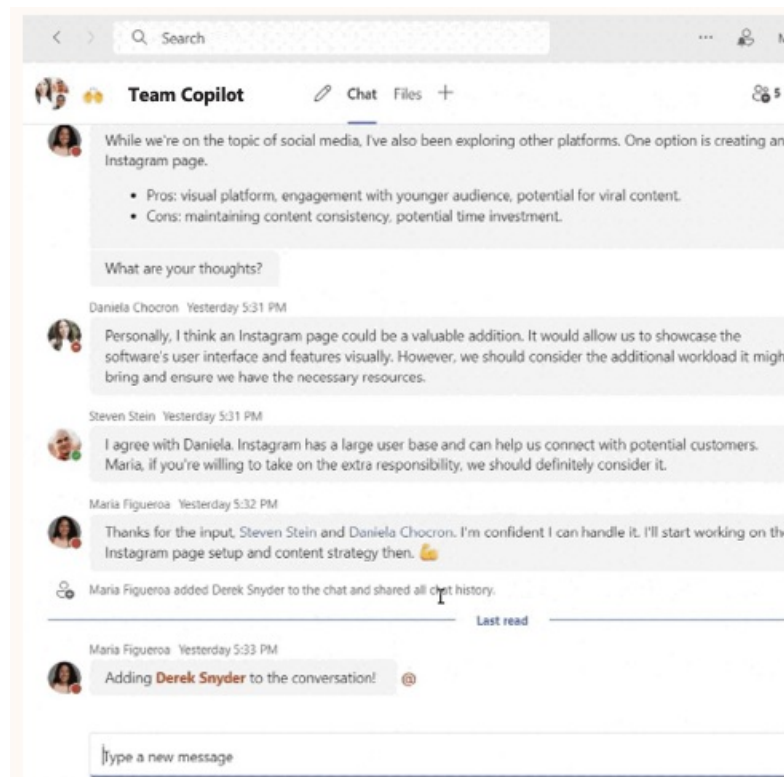
**Action:** Share the training resources collated on page 18 with those in your pilot group.

### Step 3

- Establish a Copilot for Microsoft 365 user group.
- Facilitating peer learning is an important catalyst for AI adoption, fostering a knowledge-sharing culture. It

generates excitement for innovative practices, offers insights from Copilot champions (your naturally emerging superusers), and delivers actionable guidance tailored to diverse roles.

- Establishing a virtual forum for exchanging experiences, such as over Microsoft Teams, will serve as an excellent foundation for igniting this momentum. Any avenue for sharing, no matter how small, empowers users to take ownership of their learning journey.



### Phase 3

#### Rollout

Informing the wider rollout of Copilot for Microsoft 365 across your business

##### Step 1

- Quantify the impact.
- Quantifying the impact of Copilot for Microsoft 365 involves measuring productivity gains before and after its implementation. One of the most effective ways to achieve this will be to ask your pilot group users questions such as, “What time savings or efficiencies has Copilot uncovered for you?”
- From there, convert these changes into measurable outcomes, such as cost savings. It doesn’t take much to have a noticeable impact. As an example, let’s consider an office administrator:



Continuously gather user feedback to refine implementation and ensure sustained benefits!

## **Step 2**

- Share the successes.
- Rolling out a new tool requires collaboration across various areas, so it's important to pause and recognise the milestones achieved in adopting Copilot for Microsoft 365. Give credit to the people involved in the successful rollout and highlight your power users. Their experiences will help to inspire others and demonstrate the tangible benefits of Copilot within your business.

## **Step 3**

- Establish strategy for wider rollout.
- Based on the learnings gathered through your Pilot Program, identify additional business areas and roles that will likely benefit from Copilot for Microsoft 365's functionality.

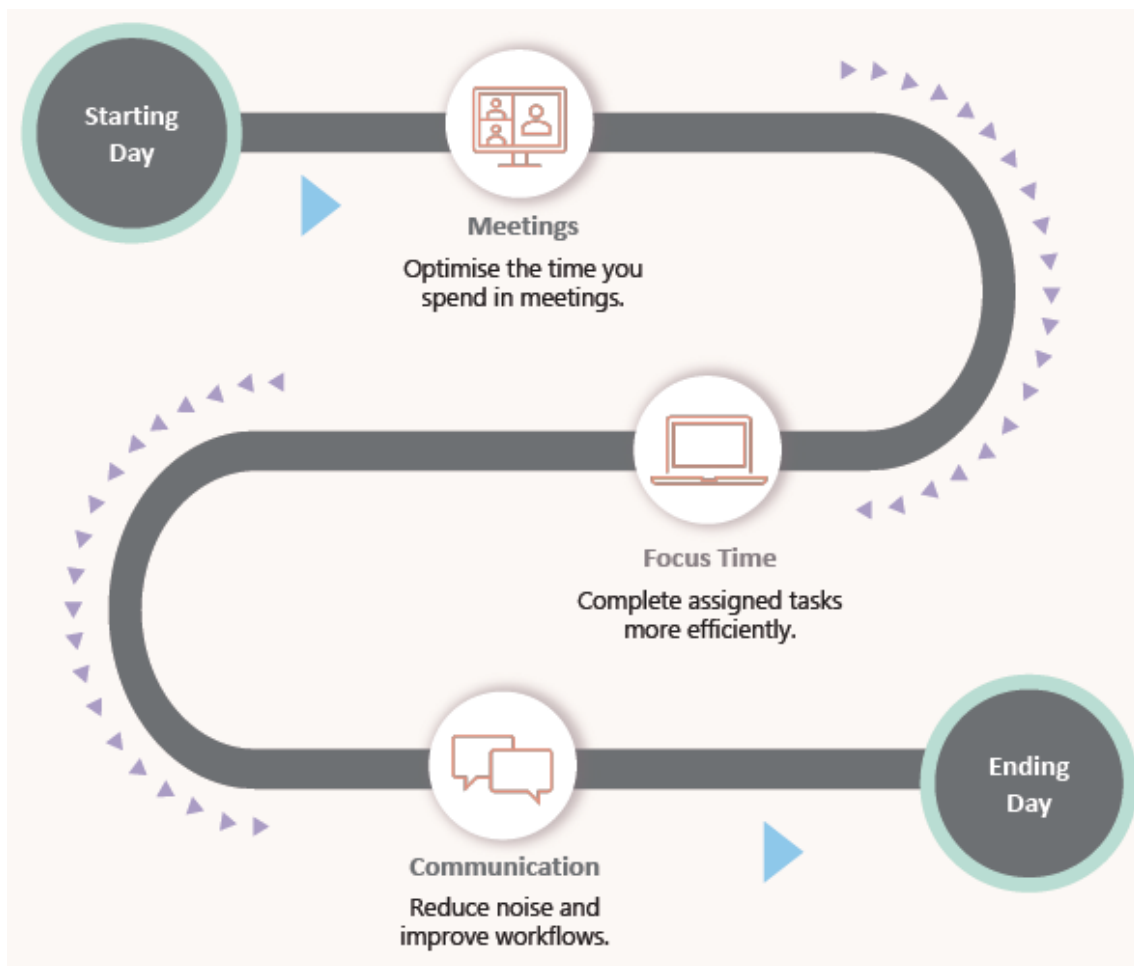
## **Taking into consideration**

- Functional use cases
- Logical groups for rollout
- Impact on business processes
- Users' willingness to change
- Ongoing training and support
- Gathering user feedback

## **User Adoption**

### **A Day with Copilot for M365**

- We all have those days when we dive headfirst into a whirlwind of back-to-back meetings, have countless emails to go through, and don't seem to have enough time for assigned tasks that add value to the business.
- Copilot for Microsoft 365 can help you overcome these challenges. Its integration across various applications ensures streamlined collaboration, swift communication and higher efficiency in your workday.
- Let's step into a day with Copilot, where we show you how you can boost your productivity in the Microsoft 365 world.

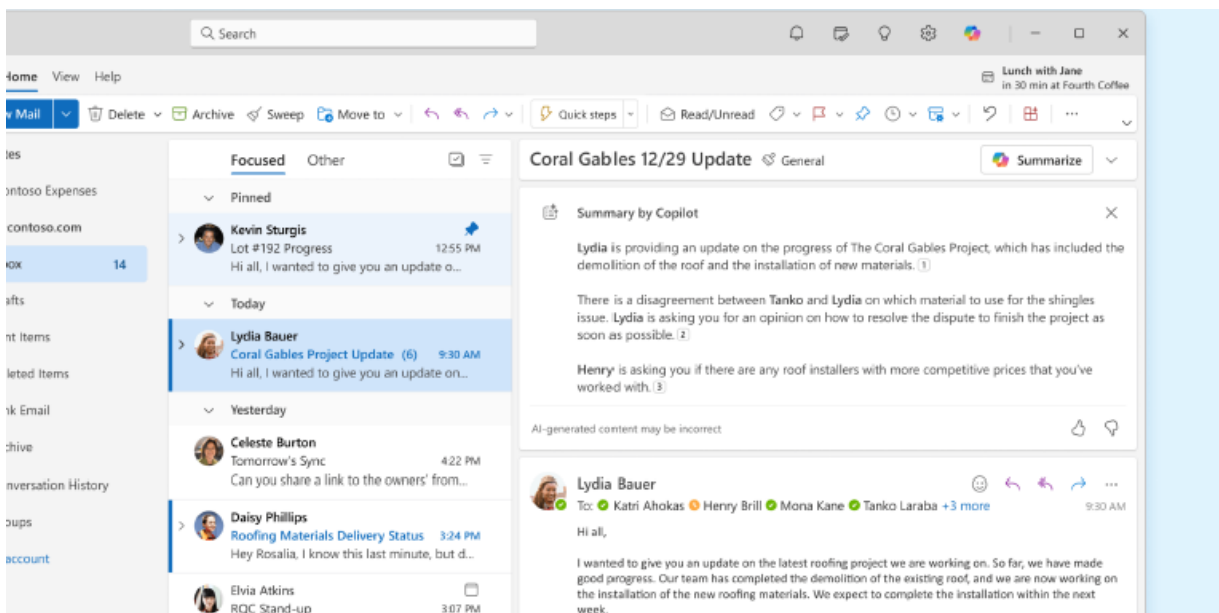


**Action:** We recommended sharing this section of this guide with your Pilot Group.

### Get ready for the day ahead

#### Morning momentum

For most people, a typical workday begins with a glance at their Outlook inbox, where countless emails await action. To swiftly clear the inbox and save valuable time, Copilot for Microsoft 365 can summarise long email threads and quickly draft replies.



1

"Summarise this email into two bulleted points"

3

"Create an overview of my meetings today, who organised them and what agenda items are in my name"

2

"Create a to-do list from my [meeting name] notes on this page"

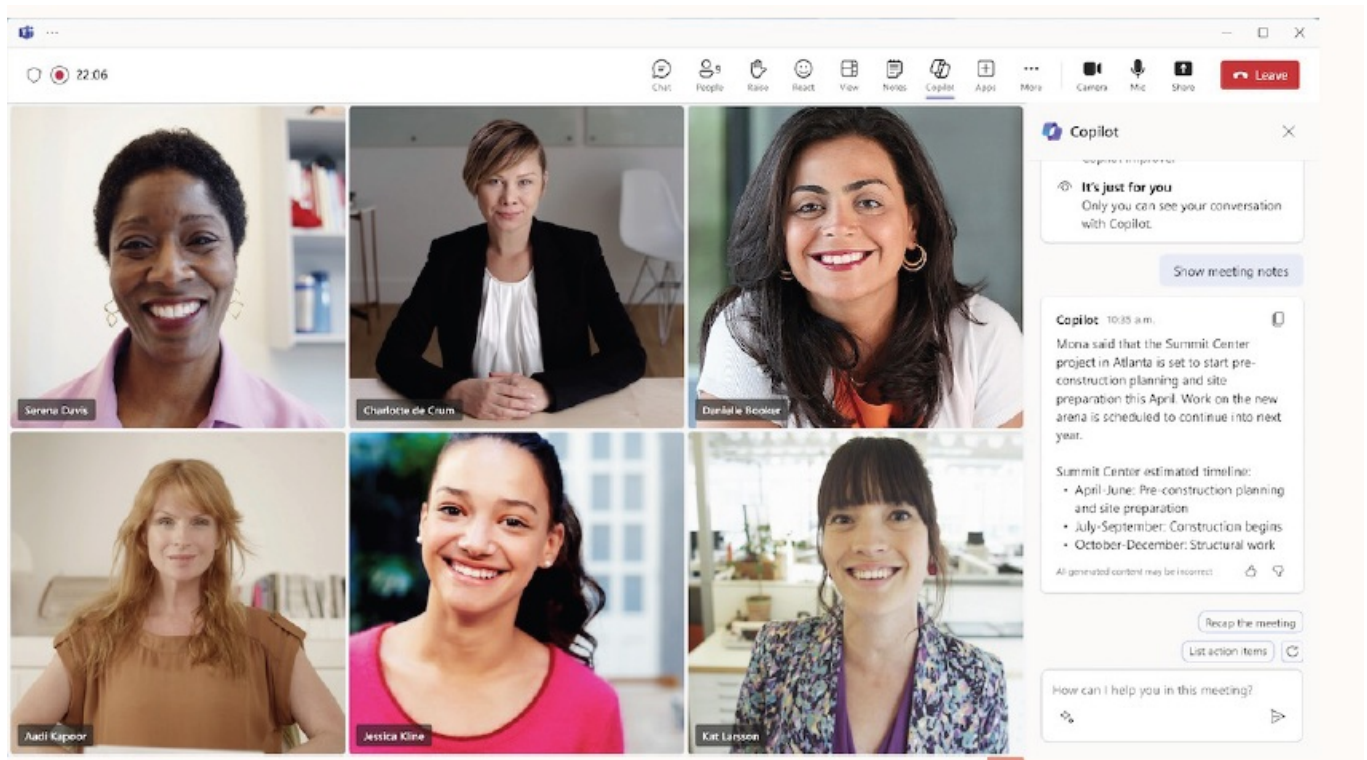
- Additionally, you can use Copilot for Microsoft 365 to create a daily to-do list from email threads or notes from previous days. It can also remind you of upcoming meetings and help you prepare for them.
- This will help you set up your day efficiently, ensuring you can stay focused and productive.

## Optimising your time together

### Meeting mastery

After clearing your inbox, it's time for the first meeting. To elevate your meeting efficiency, use Copilot for Microsoft 365 to generate meeting notes. Any additional notes you or your team take can be integrated into Copilot's notes, elevating the meetings outcomes.

**Tip:** If you want to ensure that a specific comment is recorded, you can instruct Copilot to make note of a particular statement made by another team member.



When you have back-to-back meetings or conflicting schedules, keeping up can be a challenge. In those instances, you can utilize Copilot for Microsoft 365 to get up to speed on ongoing discussions by asking it to summarise what has been talked about so far and check if there are any action items or open questions for you.

1. "Were there any unresolved decisions?"
2. "Were there any action items for me?"
3. "Summarize what was discussed in the meeting in short bullet points"

## Maximizing productivity

In the zone

Let's shift our attention to assigned tasks and focus time. Whether you are working in Word, Excel or PowerPoint – use Copilot for Microsoft 365 to summaries information, analyze data and spark creative ideas. Additionally, Copilot can help you find information buried in documents, emails, notes and calendar invites. Here are some prompt examples of how you can use Copilot to streamline your tasks, making your workflows more efficient and execution timelier

### Excel

Use Copilot for Microsoft 365 in Excel to generate suggested formula columns, present insights through charts and highlight interesting data segments.



#### • Prompt #1

"Create a bar graph showing the business growth between Q1 and Q2."

- **Prompt #2**

“Add a new column showing the difference between column B and column C.”

- **Prompt #3**

“Highlight the top 3 values in column A.”

- **Prompt #4**

“Add a column with a formula that calculates the total profit of each quarter.”

## **Word**

Use Copilot for Microsoft 365 in Word to summarize documents, create a first draft, rewrite text, or ask it to help you find additional information.



- **Prompt #1**

“Summaries this document in 5 key bullet points.”

- **Prompt #2**

“Summaries and list the pros and cons outlined in this document.”

- **Prompt #3**

“How can I more concisely describe [x]?”

- **Prompt #4**

“Visualised this [highlight paragraph] as a table in Word.”

## **PowerPoint**

Use Copilot for Microsoft 365 in PowerPoint to draft a presentation, add to or organize an existing one, or simply summaries a presentation shared with you.



- **Prompt #1**

“Convert [file] into a PowerPoint presentation.”

- **Prompt #2**

“Create a slide explaining the three key benefits of [topic].”

- **Prompt #3**

“Add an image of [x] to this slide.”

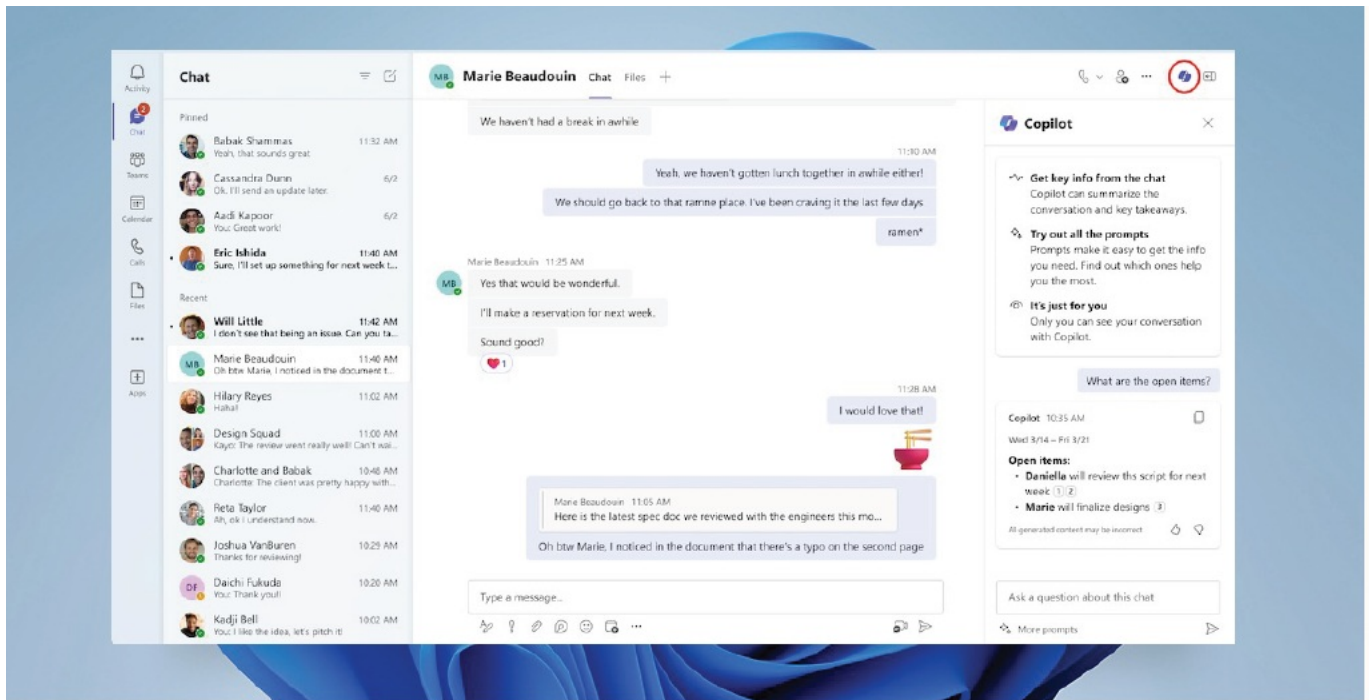
- **Prompt #4**

“Organize the presentation into three sections.”



## Collaborating effectively

- Teamwork dynamics
- Copilot for Microsoft 365 goes beyond simply managing your Outlook inbox efficiently – it can boost productivity and transform teamwork dynamics. Within the Microsoft Teams environment, Copilot allows you to effortlessly track chat exchanges and consolidate action points. This functionality enables you to quickly follow up with colleagues, streamlining collaboration on projects and tasks.



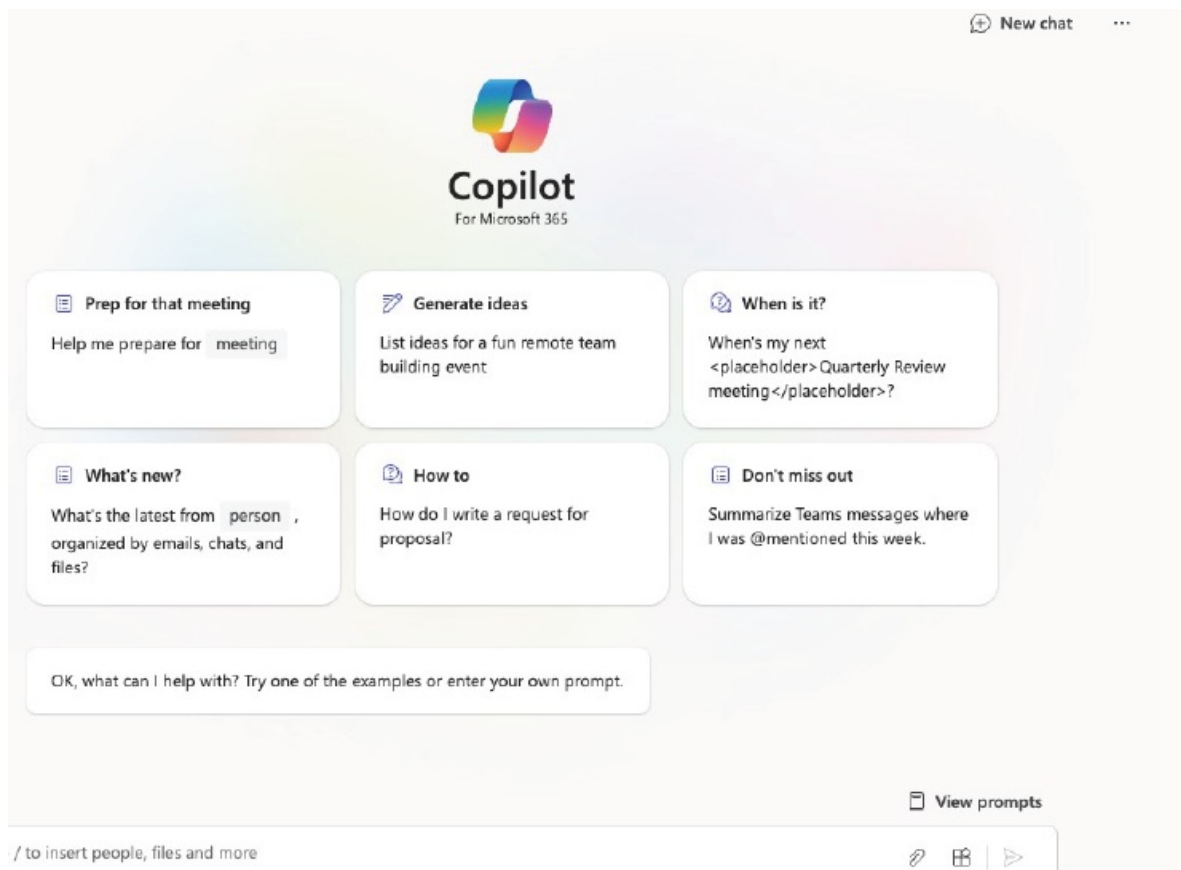
Copilot for Microsoft 365 can also draft messages for you, which expedites communication and enhances overall efficiency when collaborating with those you work with.

1. “Summaries my unread chats and list any action items for me.”
2. “Summaries the chats, emails, and documents about the [a customer] escalation.”
3. “Draft a message that [X] is due next week.”

## Efficiently wrapping up

- Day’s end reflection
- To finish your workday as efficiently as you started it and prepare for a successful next day, ask Copilot to review your tasks and meetings, list any open tasks and use it to clear your inbox.





1. "Create a summary of today's activities."
2. "Draft a reply to this email informing the team about [x]."
3. "Create a list of open tasks as well as a list of reminders for tomorrow's meetings."
4. "Create a to-do list from this [email]."

## Helpful Resources

### The art & science of prompting

Copilot for Microsoft 365

- Prompts are how you ask Copilot to do something for you. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.
- Being skilled in prompting Copilot will be advantageous for your future, but it's equally crucial to understand the limitations of AI and exercise critical thinking when interpreting and applying the generated results.

### Tell Copilot for Microsoft 365 what you need

There are many types of prompts you can use depending on what task you want done.

- **Learn about projects and concepts**

"What is [Project X] and who are the key stakeholders working on it?"

- **Edit text**

"Check this product launch rationale for inconsistencies."

- **Transform documents**

"Transform this FAQ doc into a 10-slide onboarding guide."

- **Summarise information**

“Write a session abstract of this [presentation].”

- **Create engaging content**

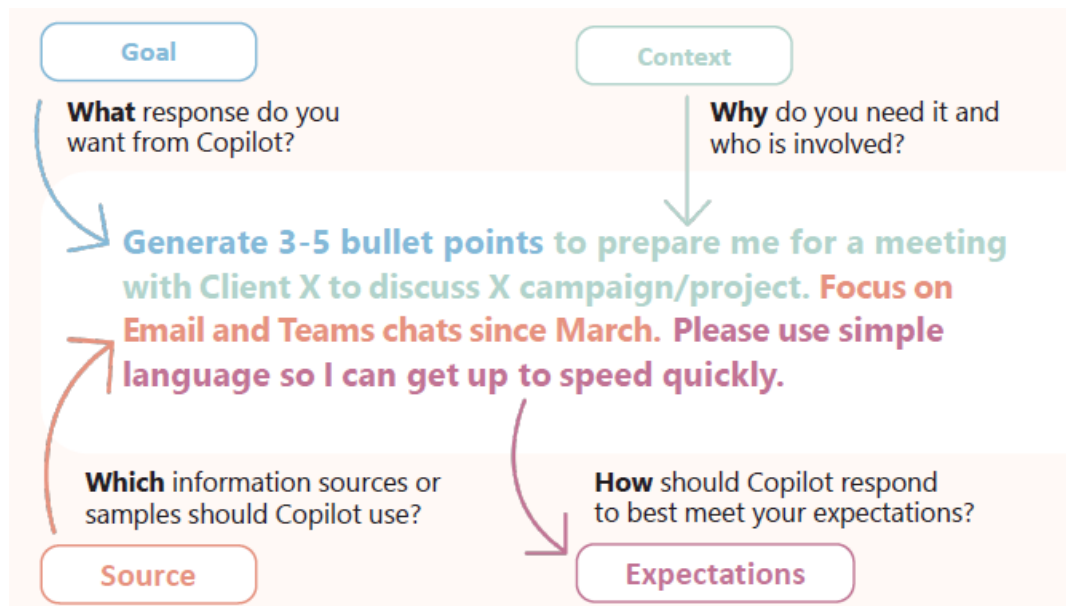
“Create a value proposition for [Product X].”

- **Catch-up on missed items**

“Provide a summary of the updates and action items on [Project X].”

### **Include the right prompt ingredients**

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



- **Prompt and then re-prompt**

Following up on your prompts will help you collaborate with Copilot to gain more useful, tailored responses.

- **Generating content ideas**

Lead with broader requests, then give specific details about the content.

- **Enabling insightful meetings**

Request a meeting recap, then ask for more information about what you should know.

- **Storytelling assistance**

Ask Copilot to write a story, then guide it by giving more specific, relevant details.

- **Gaining insights**

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.

- **Translating languages**

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.

### **Always think critically**

Any data created by an AI platform must be objectively analysed and reworked for

- Context – has the prompt been answered?
- Data accuracy and integrity
- Bias or discrimination
- Ethical or legal assumptions

- Copyright violation or plagiarism
- Regional or country-specific requirements and regulations
- Alignment to your business brand tone

**Tips to keep in mind...**

Know Copilot's limitations. Copilot is limited to your current conversation, so give lots of details.

**Use quotation marks.**

This helps Copilot know what to write, modify, or replace for you.

**Communicate clearly.**

Pay attention to punctuation, grammar, and capitalization.

**Start fresh.**

Avoid interrupting and type "new topic" when switching tasks.

**Be Professional.**

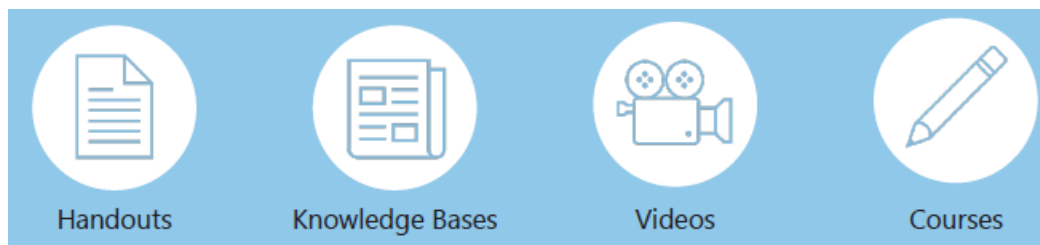
Using polite language improves Copilot's response.

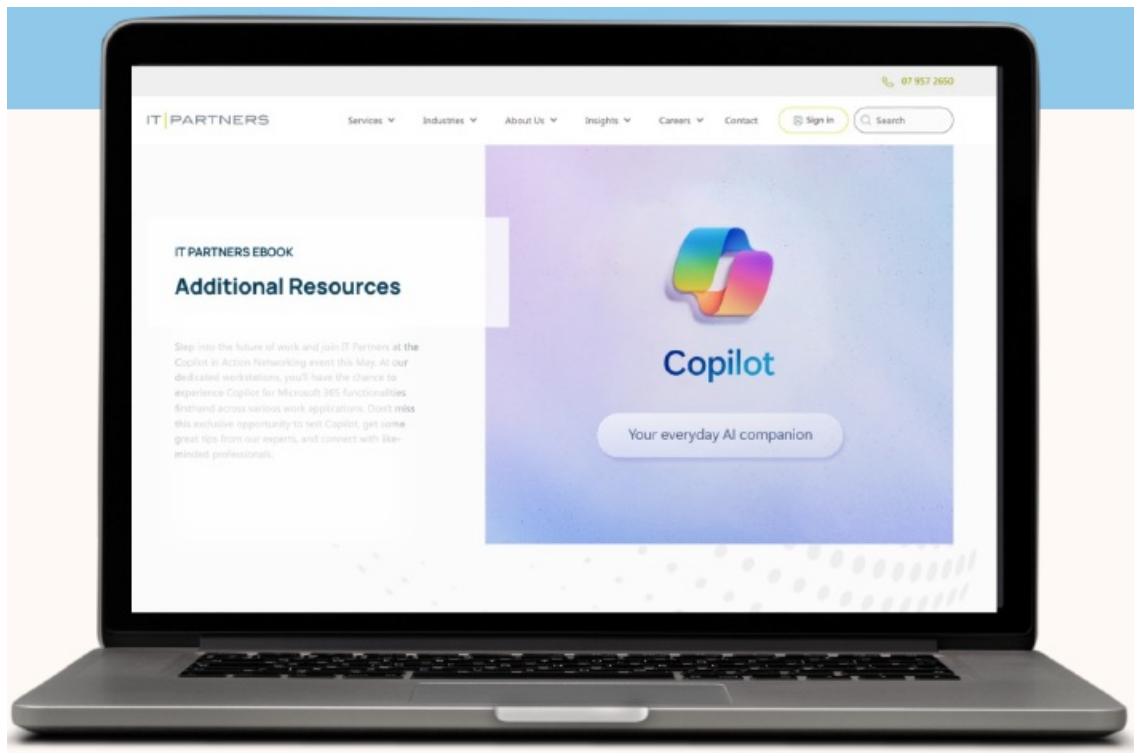
**Training resources**

Copilot for Microsoft 365

**Additional Resources**

For more training materials on Copilot for Microsoft 365, head over to our website (link and QR code below). You'll find additional materials, including:





[www.itpartners.co.nz/copilot-additional-resources](https://www.itpartners.co.nz/copilot-additional-resources)



## Navigating future developments

- Custom GPT
- As you learn to use Copilot within your workday, you will likely see opportunities for customization to further improve business processes and workflows. There are many examples of custom Generative AI tools emerging, one example being Microsoft Copilot Studio. As with all AI tools, it is rapidly evolving and an area we will keep you updated on.

### How does it work?

Copilot Studio is a conversational AI platform using low-code technology. It is a platform that allows developers to build custom Copilots tailored to specific tasks or business needs. It provides the tools to create AI-driven assistants that can integrate with various data sources and applications.

### How does Copilot Studio work with Copilot for Microsoft 365?

While Copilot for Microsoft 365 focuses on enhancing productivity within Microsoft's suite of applications, Copilot Studio allows for custom Copilots that can interact with broader systems. The two can work together by allowing a Copilot created in Copilot Studio to interact with Microsoft 365 applications.

### What are the benefits of Microsoft Copilot Studio?

Developers can use Copilot Studio to design and deploy custom Copilots, connecting them to internal systems,

databases, or third-party services. This flexibility enables businesses to create AI assistants that address unique business processes or workflows.

### Licensing Availability

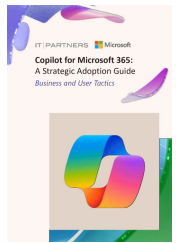
As Copilot Studio is licensed at the tenant level, it is more complex than individual user licenses. Please reach out to [orders@itpartners.co.nz](mailto:orders@itpartners.co.nz) if you would like more information.

### Next Steps

- Embracing the shift to a world with Generative AI is more than just a technological upgrade – it’s a driver for profound transformation in business operations. By using Copilot for Microsoft 365, businesses can not only increase productivity but also transform processes and workflows.
- To efficiently navigate this transition and maximise its benefits within your business environment, you can follow the structured adoption steps outlined in this guide. One key factor of a successful implementation is cultivating a positive culture surrounding AI use in the workplace. Prioritising investment in training will create an environment of ongoing learning, empowering individuals to innovate and extract optimal benefits from Copilot.
- If you’re curious about the potential benefits of Copilot for Microsoft 365 for your business, contact us [hello@itpartners.co.nz](mailto:hello@itpartners.co.nz)

Making Each Day Better Through Technology

### Documents / Resources

	<p><a href="#">IT PARTNERS 365 Copilot for Microsoft</a> [pdf] Instruction Manual 365 Copilot for Microsoft, 365, Copilot for Microsoft, Microsoft</p>
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### References

- [User Manual](#)

[Manuals+](#), [Privacy Policy](#)

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