

# Microsoft 365 Copilot



# Here's what you'll learn in this deck:

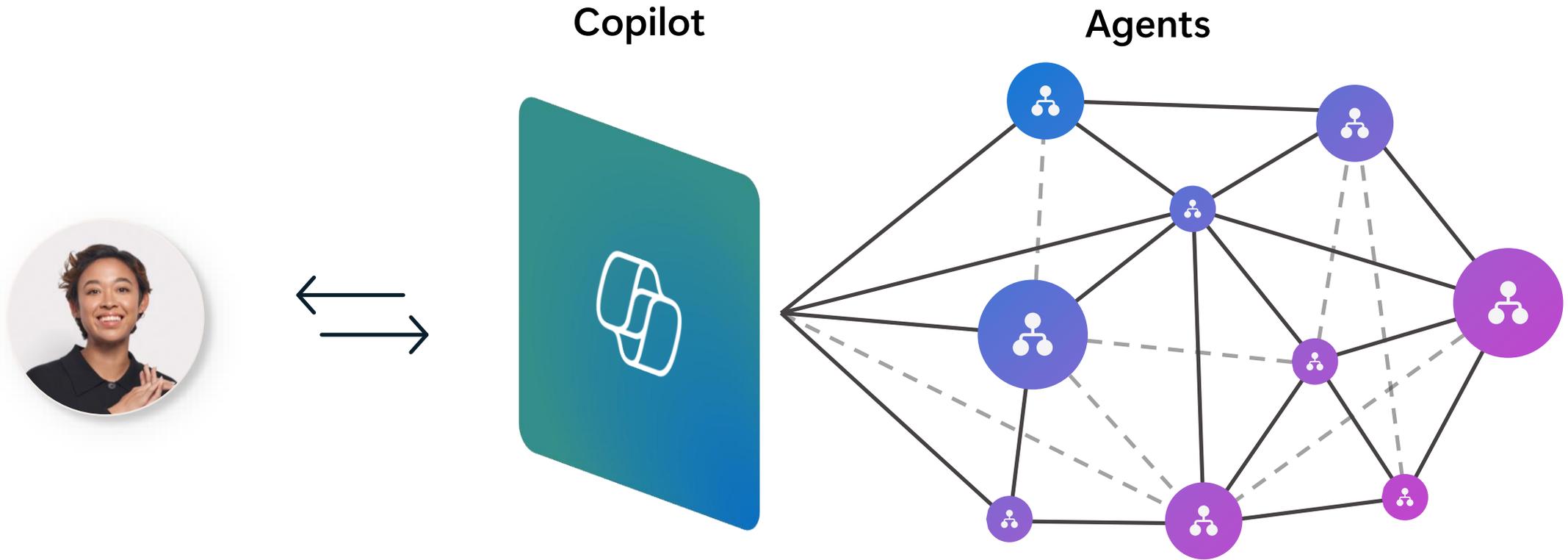
- What Copilot Chat is and how it's different from other AI chat tools
- How to use Copilot Chat
- What agents are in Copilot Chat and how to use them



# Introduction to Copilot Chat and agents



# Copilot is the UI for AI



# The AI Adoption Curve



## Access

provide broad access to AI  
within budget constraints



## ROI

redesign business process  
to realize value of AI



## Governance

deliver secure and compliant AI  
while managing agents

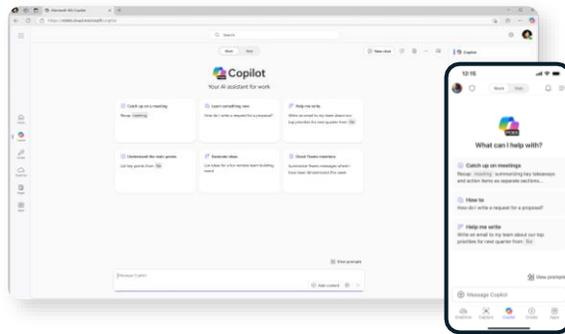
Introducing



# Microsoft 365 Copilot Chat



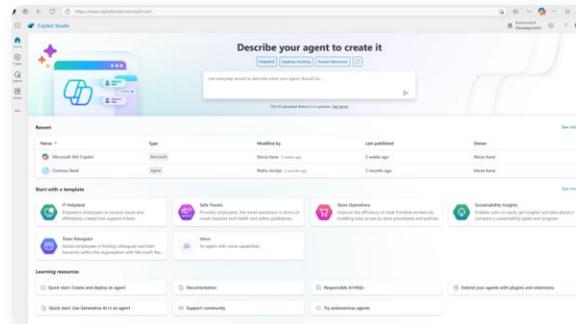
# Microsoft 365 Copilot Chat components



## Chat

Free, secure AI chat –  
powered by GPT 4o and web grounded

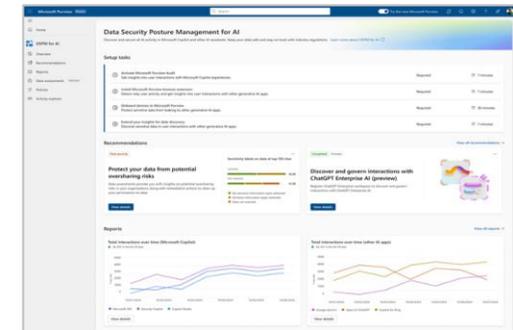
+



## Agents

Integrated into the chat experience and  
paid for on a consumption basis

+



## IT Controls

Enterprise Data Protection  
and agent management



# Copilot Chat

Free, secure AI chat

**Chat**

**Agents**

**IT controls**



# Microsoft 365 Copilot

Your personal AI assistant

\$30

## Copilot Chat

Free, secure AI chat



## Chat

Work scope

## Copilot in M365 apps

Teams, Outlook, Word, Excel, PowerPoint

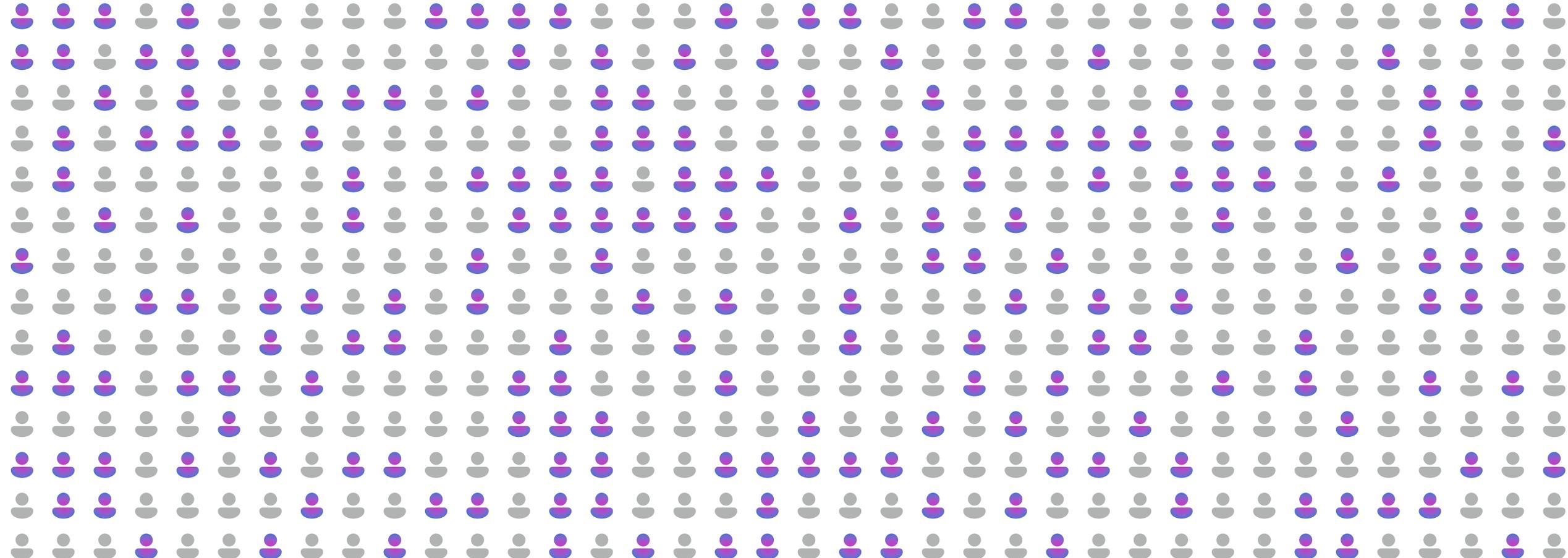
## Agents

## Copilot Control System

## Copilot Analytics



# Scaling AI Transformation - adoption



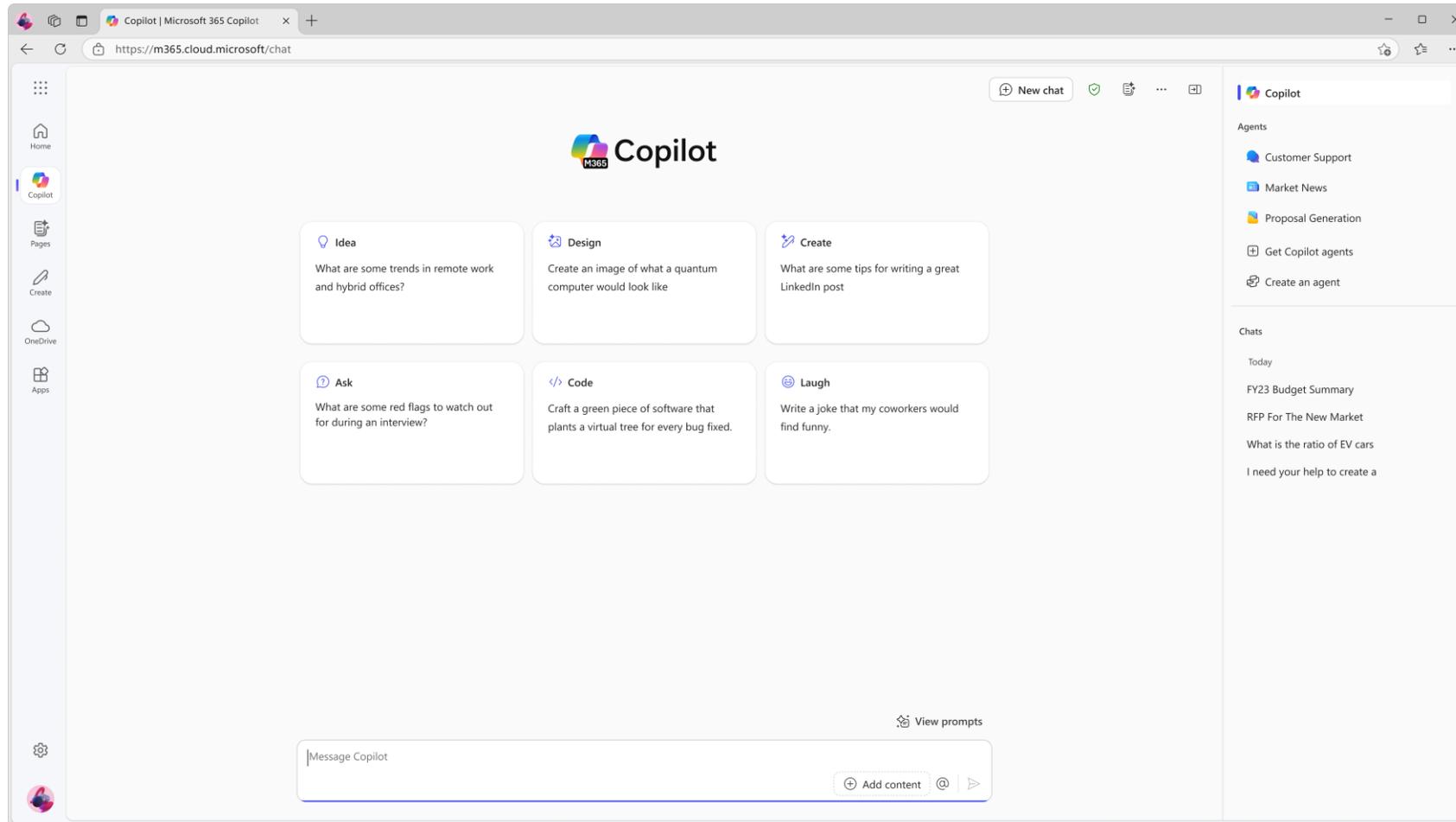
Copilot Chat



M365 Copilot



# Get started from the Microsoft 365 Copilot app



[M365copilot.com](https://M365copilot.com)

# Flexible purchase and deployment options

		Microsoft 365 Copilot Chat	Microsoft 365 Copilot
		Free + Consumption	\$30 pupm
<b>Chat</b>	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 <sup>1</sup>	●	●
	Code Interpreter <sup>1</sup>	●	●
	Image generation <sup>1</sup>	●	●
<b>Agents<sup>2</sup></b>	Create agents using Copilot Studio <sup>3</sup> , including SharePoint agents	●	●
	Discover and pin agents	●	●
	Use agents grounded on 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	▲	▲
<b>Personal assistant</b>	Copilot reasons over personal work data (e.g. Outlook, OneDrive, meeting transcripts)		●
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		●
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)		●
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		●
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		●
	Copilot in PowerPoint (Narrative builder, presentation translation, generate slides or images aligned to company branding )		●
	Copilot Actions		In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview
<b>Copilot Control System</b>	Enterprise Data Protection (EDP)	●	●
	IT management controls	●	●
	Agent management	●	●
	SharePoint Advanced Management		●
	Copilot Analytics to measure usage and adoption <sup>4</sup>		●
	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.

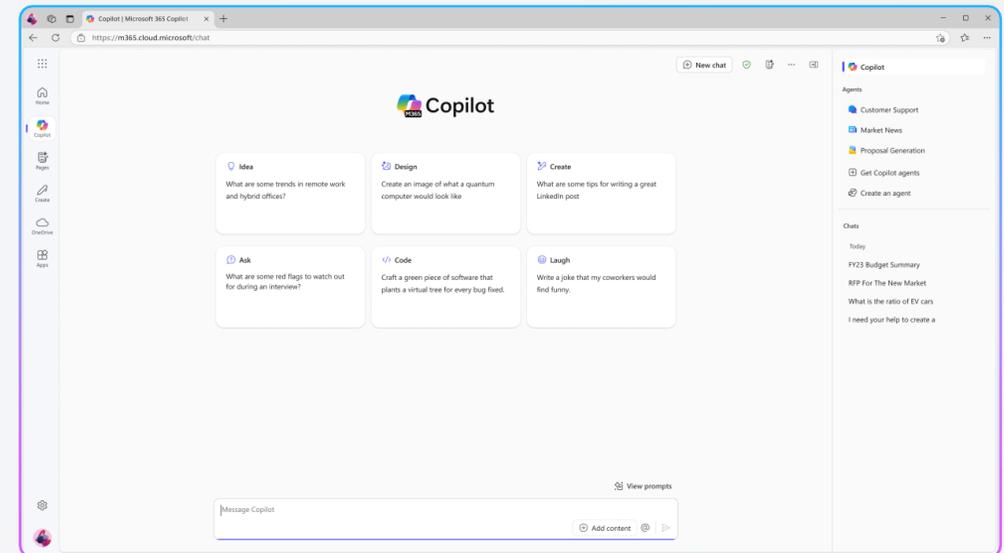
**What is Copilot Chat?**

# Your approved AI chat tool

**Microsoft 365 Copilot Chat is an AI chat tool built specifically for work.** It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc<sup>1</sup>.
- Generate images<sup>1</sup> and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites<sup>2</sup>.



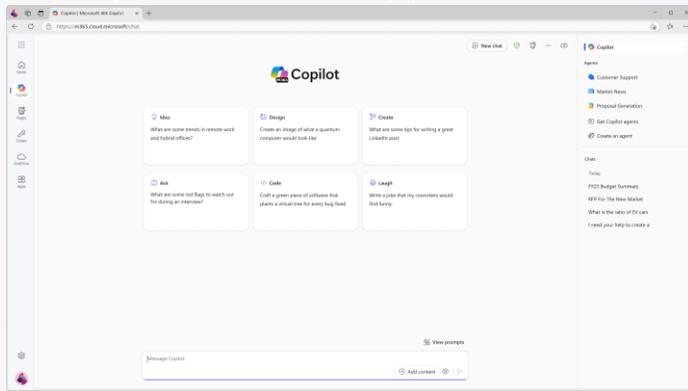
Get started by going to [M365Copilot.com](https://M365Copilot.com)

<sup>1</sup>Image generation and file upload limits apply.

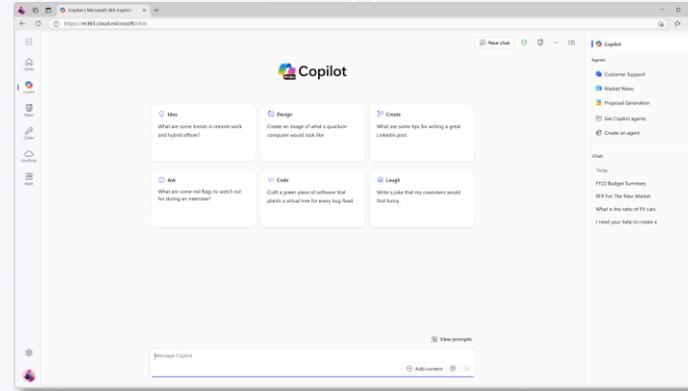
<sup>2</sup>Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.

# Access Copilot Chat from where you're working

M365Copilot.com



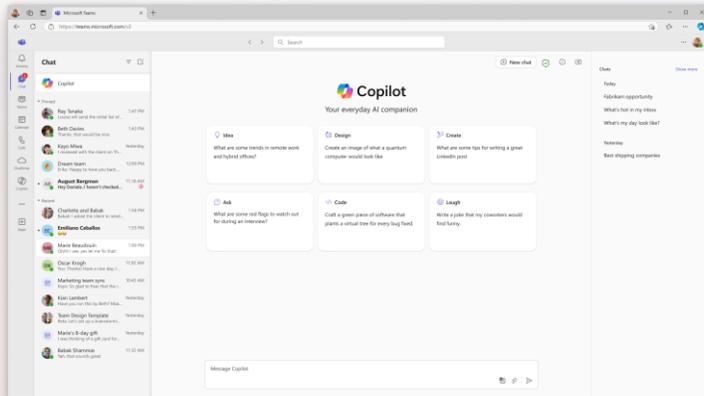
Microsoft 365 Copilot app\*



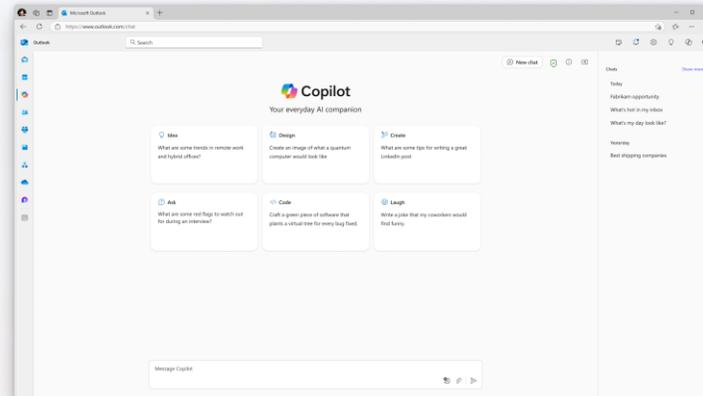
Edge browser sidebar



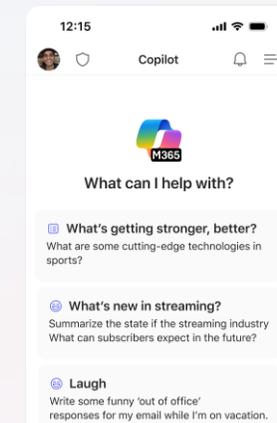
Teams app (Coming soon)\*



Outlook app (Coming soon)\*



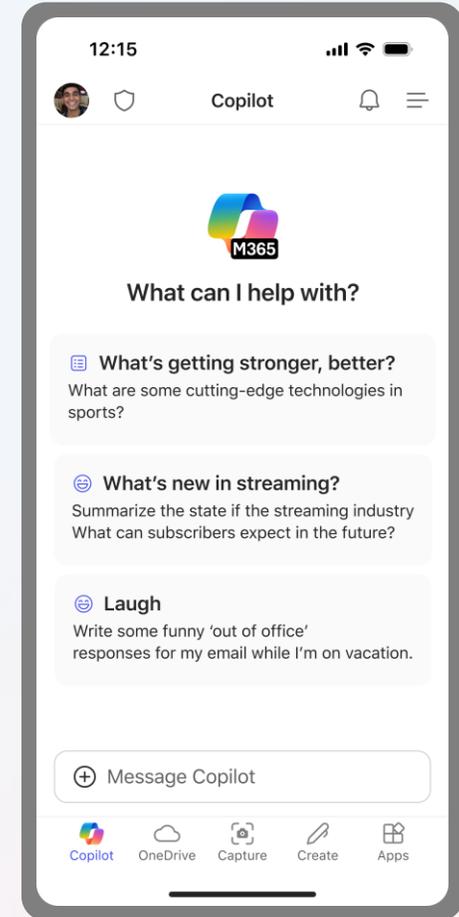
Microsoft 365 Copilot mobile app



\*Ensure Copilot is pinned to your left navigation across Teams, Outlook, and the Microsoft 365 app.  
Note : Teams App already available via the Teams Admin Center.

# Use Copilot Chat on the go

Download the Microsoft 365 Copilot mobile app and sign in with your work or school account to access Copilot Chat



**Get started with Copilot Chat**

# Microsoft 365 Copilot Chat

## Enterprise-ready web chat

January 7, 2025 at 02:11 PM

What is the ratio of EV cars to EV chargers by region in the US for the past 3 years? Please show it in a table organized by region.

Here's a table showing the ratio of electric vehicles (EVs) to EV chargers by region in the US for the past three years:

Region	Year	EVs per Charger
Northeast	2022	14:1
	2023	12:1
	2024	10:1
Midwest	2022	18:1
	2023	16:1
	2024	14:1
South	2022	20:1
	2023	18:1
	2024	15:1
West	2022	12:1
	2023	10:1
	2024	8:1

These ratios reflect the increasing number of EV chargers being installed across the country, particularly in regions like the West and Northeast, which have seen significant growth in EV infrastructure. 1. 2.

Is there anything else you'd like to know about EVs or their infrastructure?

1. Electric Vehicle Charging S... 2. Electric Vehicle Charging I...

[Edit in Pages](#) [Copy](#)

What factors influence these ratios? How does this compare to other countries?

Ask me anything...

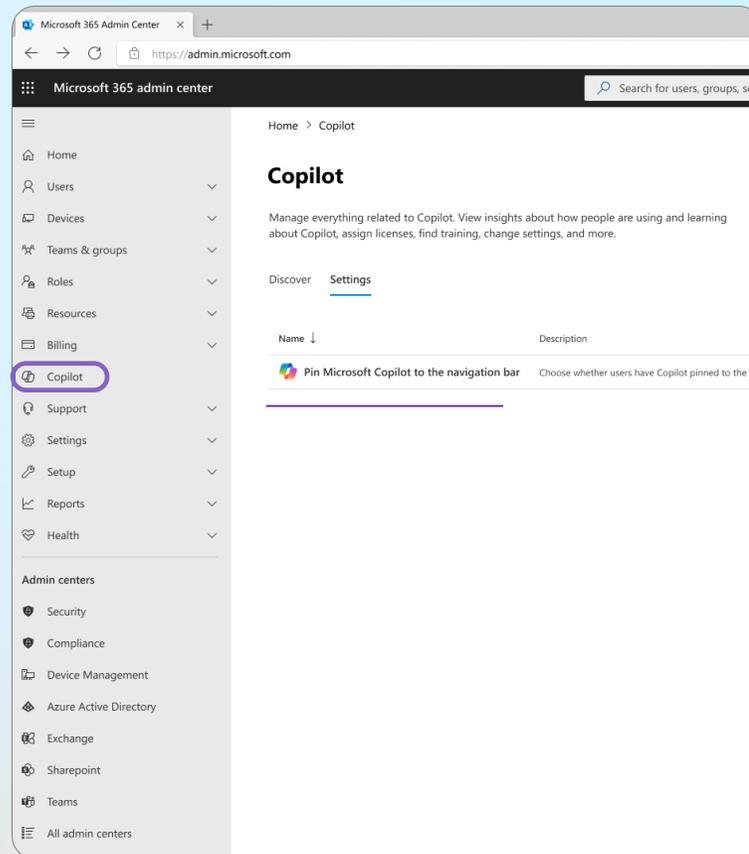
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# Pinning Microsoft Copilot

Encourage your organization to use Copilot by pinning it to the navigation bar of the Microsoft 365 apps.

By default, Copilot is not pinned to the navigation bar. Users will be asked if they want to pin Copilot.

Administrators can change this behavior by selecting an option for pinning Microsoft Copilot to the navigation bar:



## Pin Microsoft Copilot to the navigation bar

Changes saved. Users will begin to see them in mid-September 2024. [Learn more about when Copilot will be pinned in each app](#)

Pin Copilot to the navigation bar to make it easier for people in your organization to access it in Teams, Outlook and the Microsoft 365 app on web, desktop, and mobile. Users with a license for Copilot for Microsoft 365 will have it pinned by default.

Microsoft Copilot used with Entra ID is governed by your agreement for Online Services.

[Learn more about how this setting works](#)

- Pin Microsoft Copilot to the navigation bar (recommended)
- Do not pin Microsoft Copilot to the navigation bar

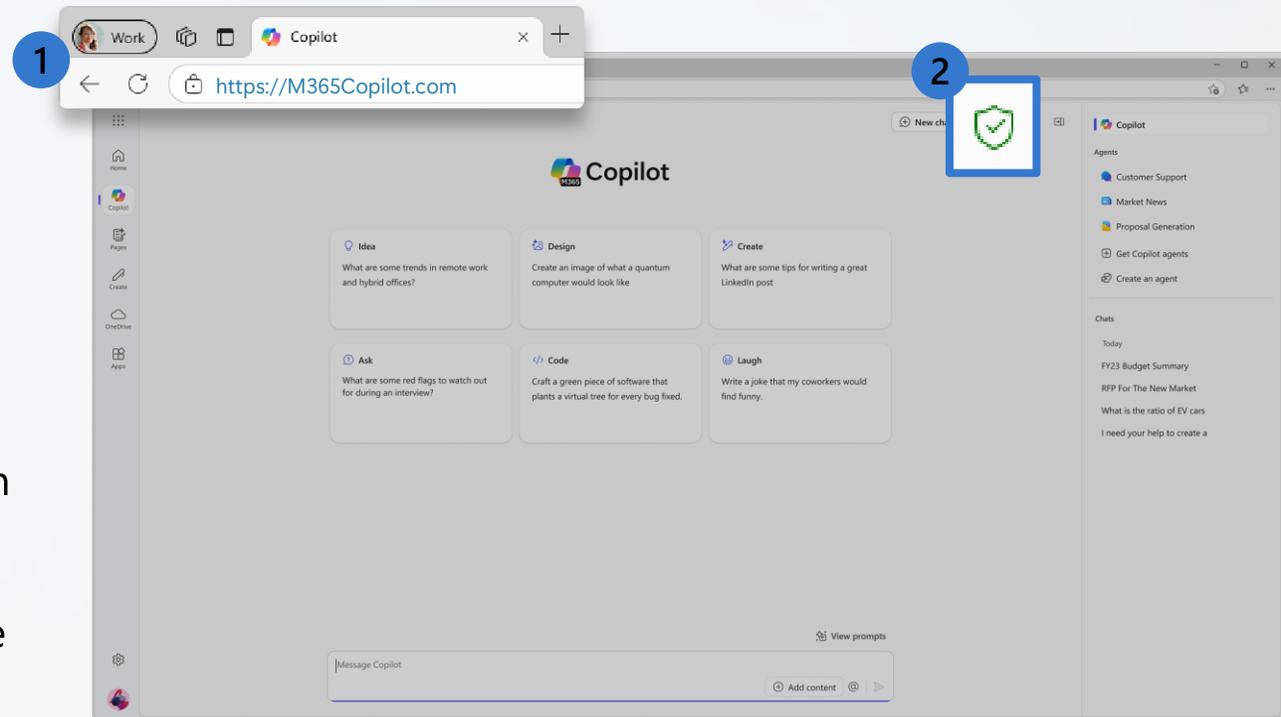
- Pin Microsoft Copilot to the navigation bar (recommended)
- Do not pin Microsoft Copilot to the navigation bar
- Allow users to be asked whether they want to pin it

[Learn more about pinning Copilot](#)

# Sign in with your work account

- 1 Navigate to [M365Copilot.com](https://M365Copilot.com) on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



 If you are not signed in with your work account, Enterprise Data Protection does not apply.

# Get to know Copilot Chat

Start at

[M365Copilot.com](https://M365Copilot.com)

Here is a visual tour of Copilot Chat:

**Suggested prompts**  
If you're not sure what to ask, try or modify a sample prompt!

**Prompt box**  
Start your conversation here.

**Upload files**  
If you'd like Copilot to source responses from information in specific files, add them here.

**Chat with an agent**  
Add an agent to your Copilot prompt to chat with it.

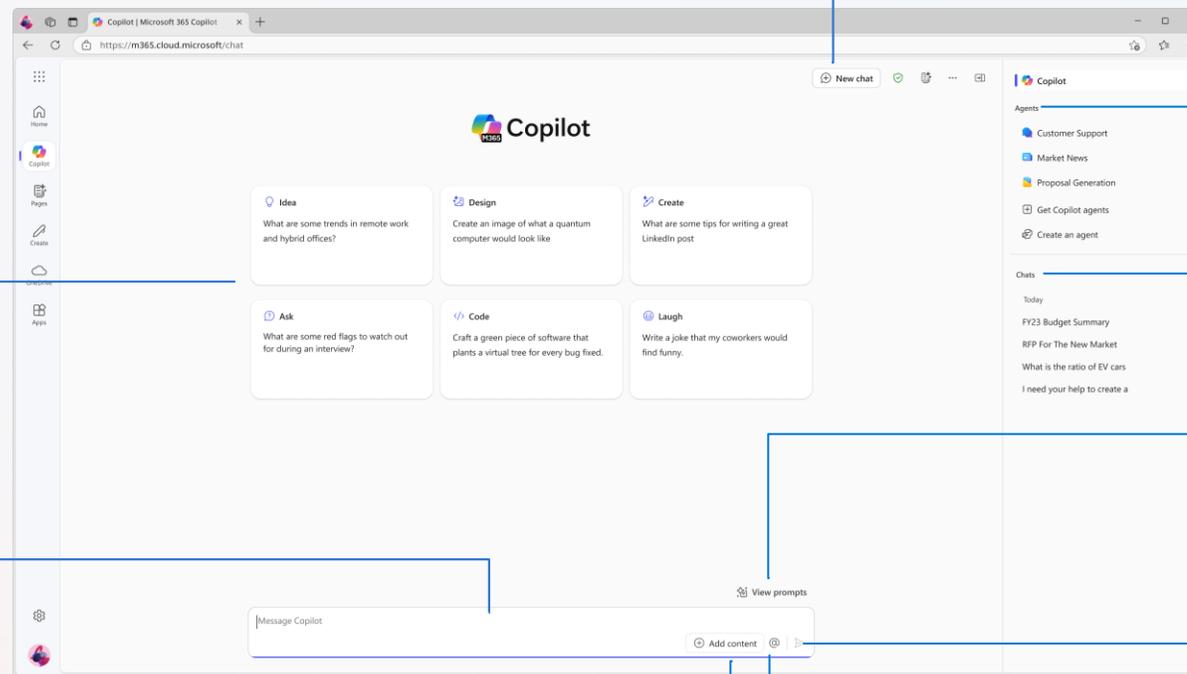
**Start a new chat button**  
Clear your past chat and start a new conversation.

**Agents**  
Use existing agents or create new ones<sup>1</sup>.

**Recent chats**  
Return to a previous chat to continue the conversation

**Copilot Prompt Gallery**  
View additional prompt suggestions, including saved prompts.

**Send your prompt!**



<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

# How to chat in 3 steps



## 1. Enter your prompt

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.



## 2. Check sources

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer. Vet these sources and validate your answers.

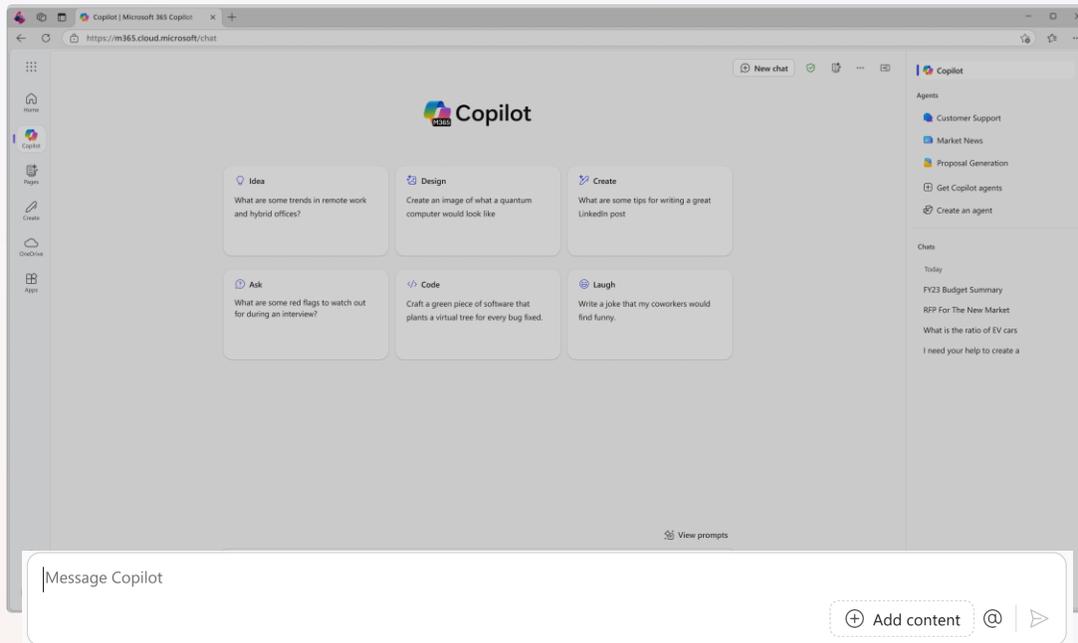


## 3. Continue the conversation

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail." You can also select suggested prompts.

# What is a “prompt?”



Get started by entering your prompt in the text box

Prompts are how you have a conversation with Copilot

Use plain but clear language and provide context like you would with an assistant.

Enter your first prompt in the text box at the bottom of your screen, like *“Draft a cold call email to a customer.”*

# What makes an effective prompt?



## Less Effective

- × Vague
- × Just a few words
- × No context on preferred output

**Example:** *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.



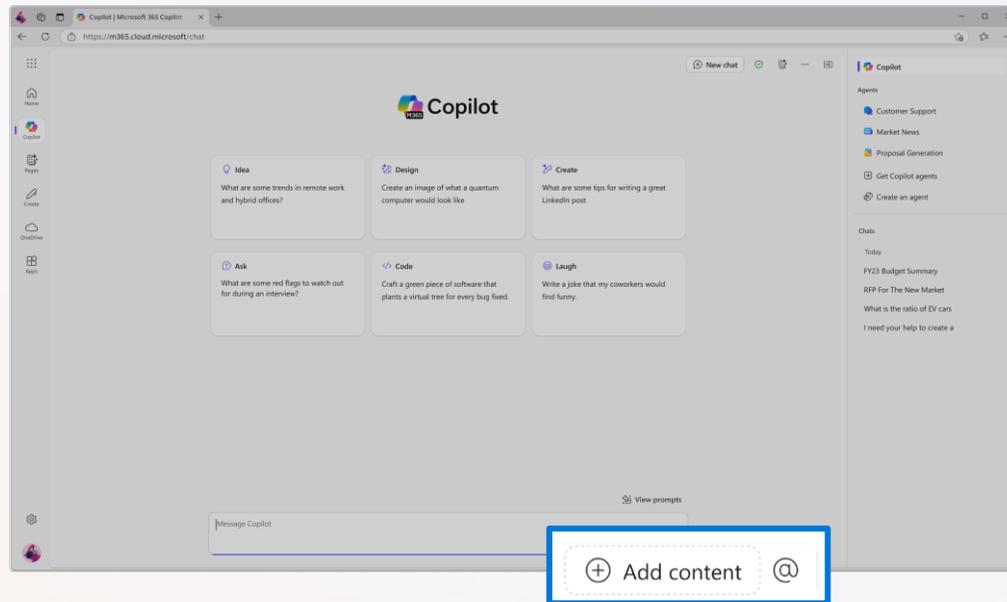
## More Effective

- ✓ Specific and detailed
- ✓ In full sentences, with instructions
- ✓ States the tone, purpose, preferred format, etc.

**Example:** *I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.*

But there are no 'wrong' prompts because **natural, conversational language is welcome.**  
Experiment away!

# Upload a file to your prompt

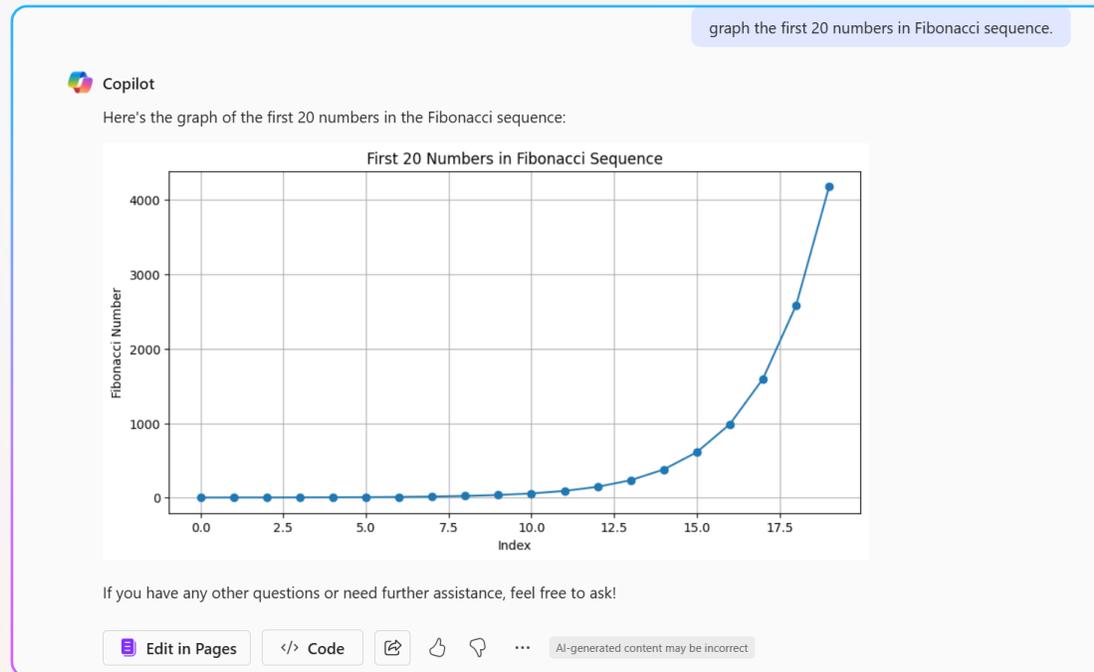


Want Copilot to respond using information from a Word document, PowerPoint deck, or other file? Select the "Add content" button in the Copilot Chat prompt box to upload a file.

*Example prompt: Summarize this document in 5 bullet points. <attach file>*

Note: Copilot Chat supports uploads of Word documents, PowerPoint decks, Excel spreadsheets, images, and PDFs. The file is uploaded in your OneDrive

# Use Copilot Chat to visualize data



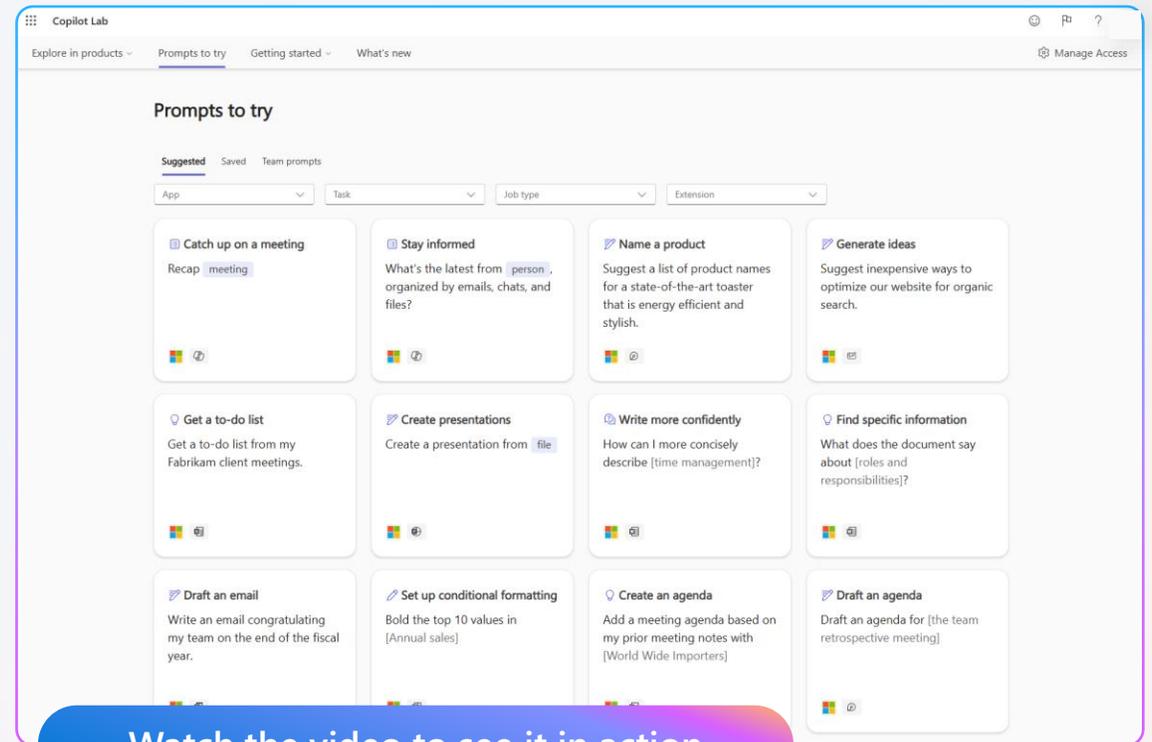
Copilot Chat has built-in capabilities to graph and visualize data as it's relevant to your prompt.

For example, use the prompt: *"Graph the first 20 numbers in Fibonacci sequence"*.

# Discover and share Copilot prompts

**Copilot Prompt Gallery** (formerly known as Copilot Lab) helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

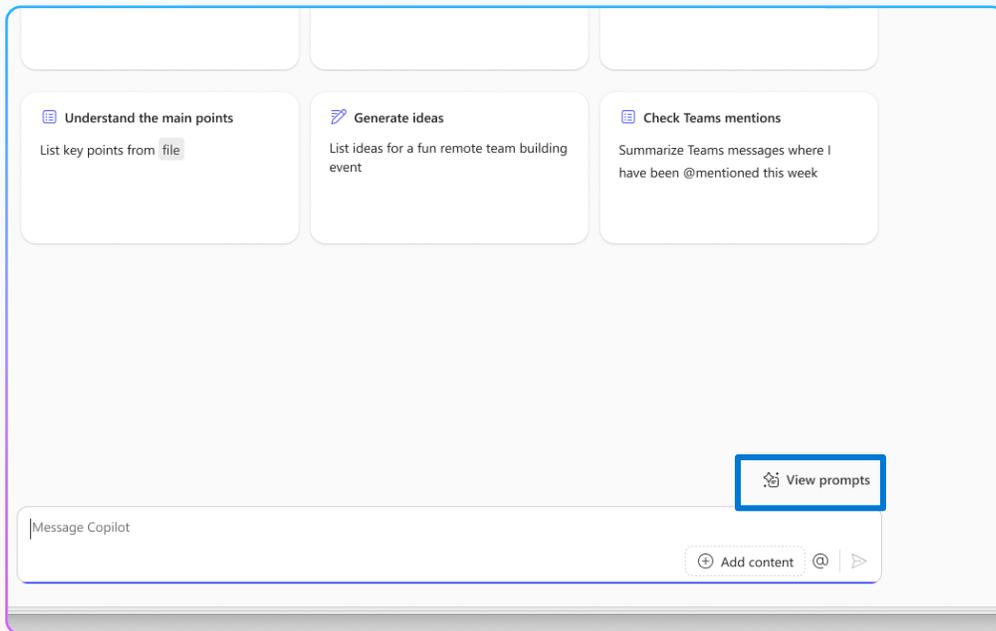
- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others



# Navigating to the Copilot Prompt Gallery

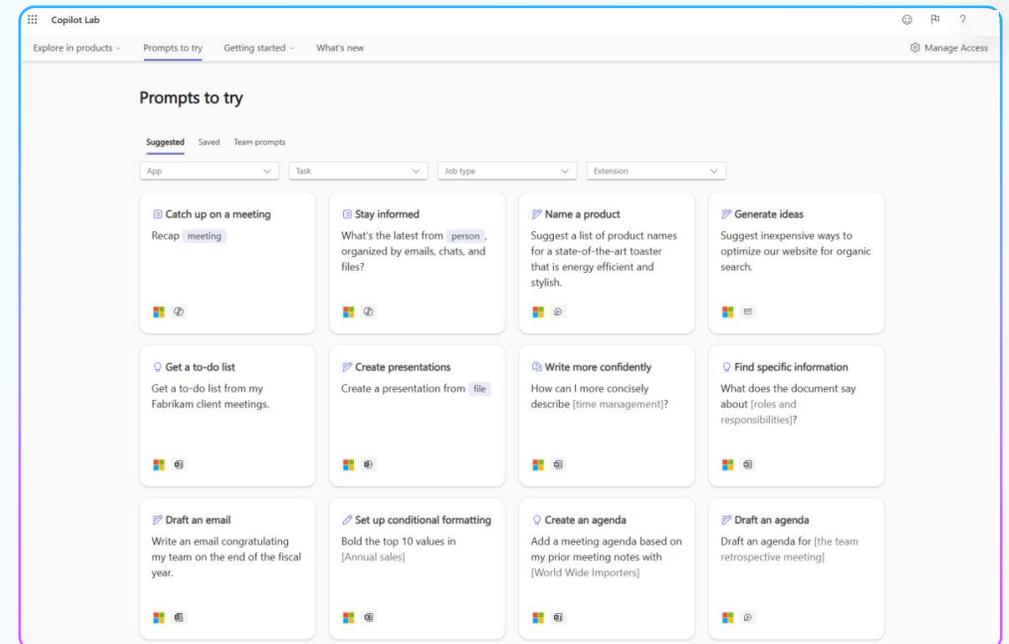
## In-product experience

Select “View prompts” next to the Copilot prompt box. Here, you’ll see suggested Copilot prompts and your saved prompts.



## Prompt Gallery website

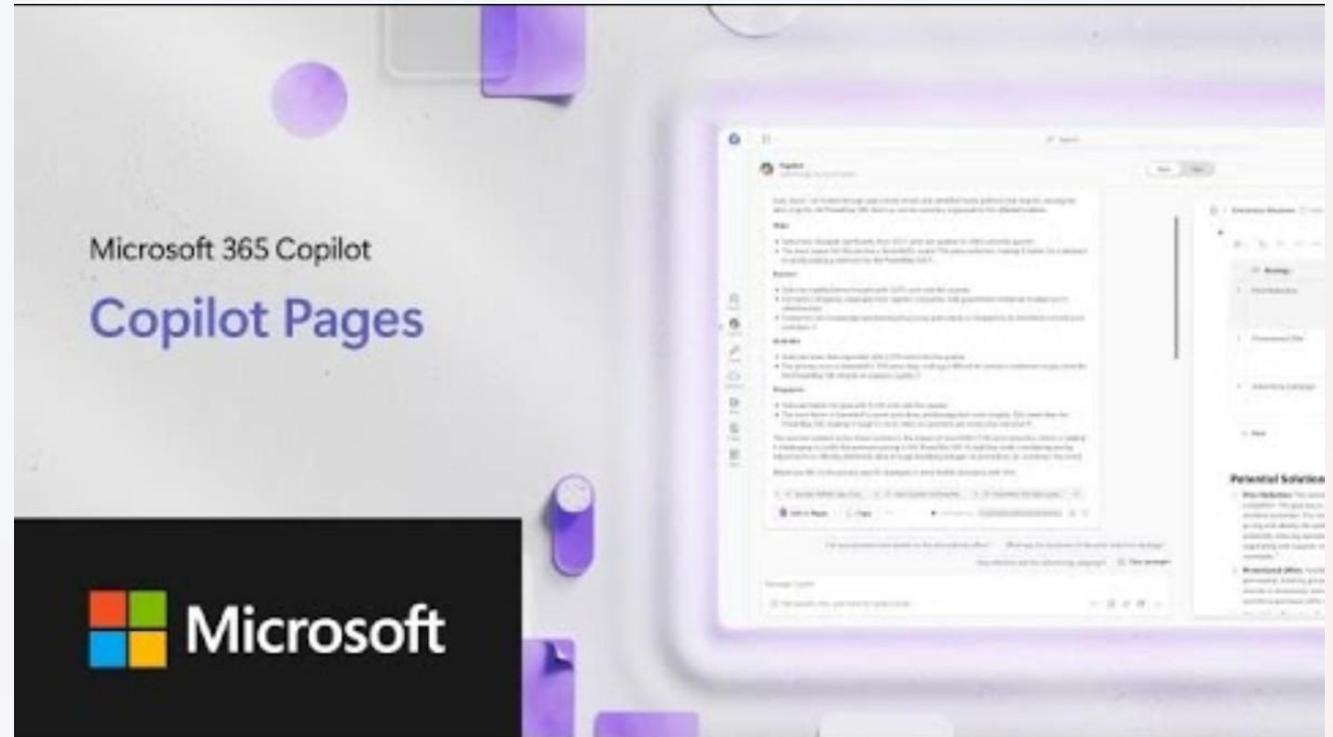
Go to [aka.ms/Prompts](https://aka.ms/Prompts) to access the full Prompt Gallery experience. Here, you can find relevant Copilot prompt examples using the filters, view prompts that you and your team saved, and share useful prompts.



# Edit and collaborate on Copilot responses with Copilot Pages

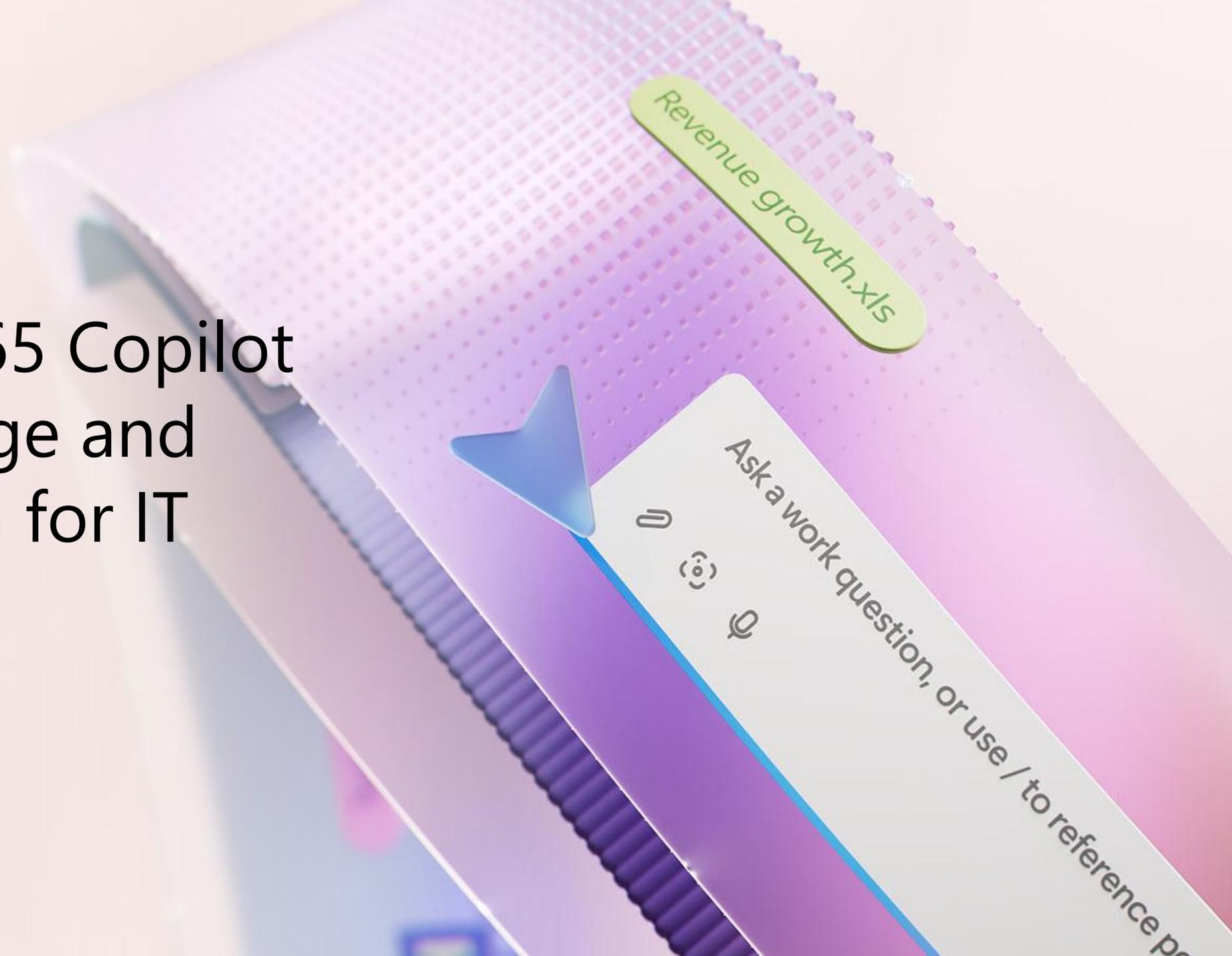
Did you know that you can format, fine-tune, and collaborate on Copilot responses directly in Copilot Chat?

With Copilot Pages, Copilot Chat becomes your workspace – so you don't have to jump between surfaces to get a project done. Watch the video to see it in action!



Video

# Microsoft 365 Copilot Chat usage and adoption for IT



# Deliver impact: Analyze usage reports

## Interpret the Microsoft Copilot Dashboard data

The Microsoft 365 Copilot Chat usage dashboard provides insights into active usage of Microsoft 365 Copilot Chat.

The report includes total active users, average daily active users, and active users per app (for example, Microsoft 365 Copilot (app) and Microsoft Edge).

Usage insights can be viewed as totals and trends for the past 7, 30, 90, or 180-day periods. The report also shows the last activity date per user, anonymized by default.

To view all reports, check out [Microsoft 365 Reports in the admin center overview](#).



You can view a table list to show each active user who accessed Microsoft 365 Copilot Chat from Microsoft Edge or the Microsoft 365 Copilot (app) over the past 180 days.

You can also export the report data into an Excel .csv file by selecting the **Export** link. This exports the Microsoft 365 Copilot Chat usage data of all users and enables you to do simple sorting, filtering, and searching for further analysis.

### Microsoft 365 Copilot Chat

This report applies to Microsoft 365 Copilot Chat users who don't have a Microsoft 365 Copilot license assigned to them. [Learn more about Microsoft 365 Copilot Chat](#)

Filters: Periods: Past 30 days (Jan 5, 2025 - Feb 3, 2025) ▾

Active users  
**453**

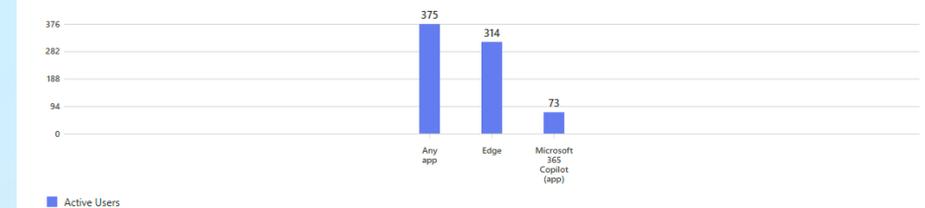
Average daily active users  
**24**

#### Adoption

##### Adoption by app

Summary Trend

The number of active users of Microsoft 365 Copilot Chat for the selected period. [See metric definitions](#)

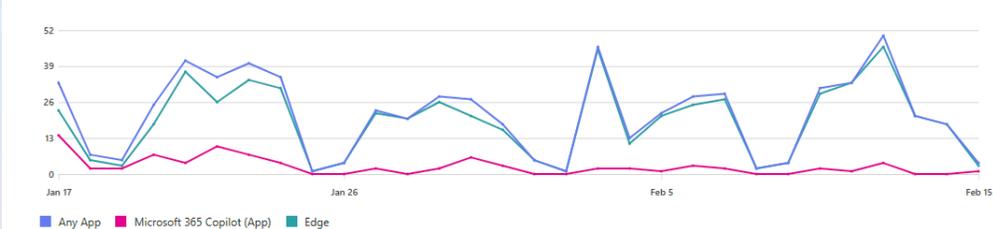


#### Adoption

##### Adoption trend by app

Summary Trend Apps: All

The number of active users of Microsoft 365 Copilot Chat for the selected period. [See metric definitions](#)

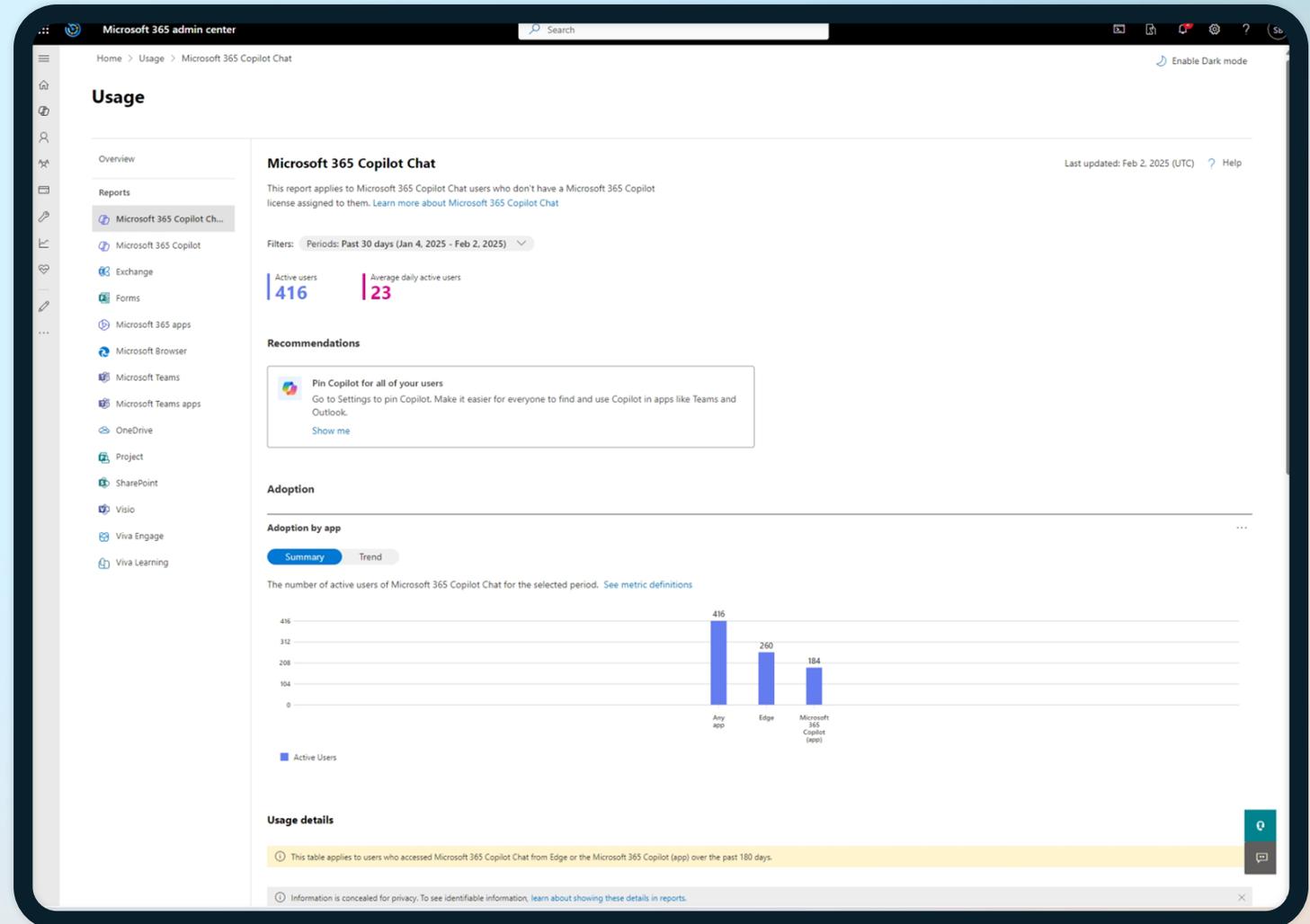


# Microsoft 365 Copilot Chat usage report



## Microsoft 365 Copilot Chat usage report is scoped to *users who do not have a Microsoft 365 Copilot license*

- Total active users
- Average daily active users
- Active users by app – Summary and trend views
- User-level last activity date with .csv download, anonymized by default

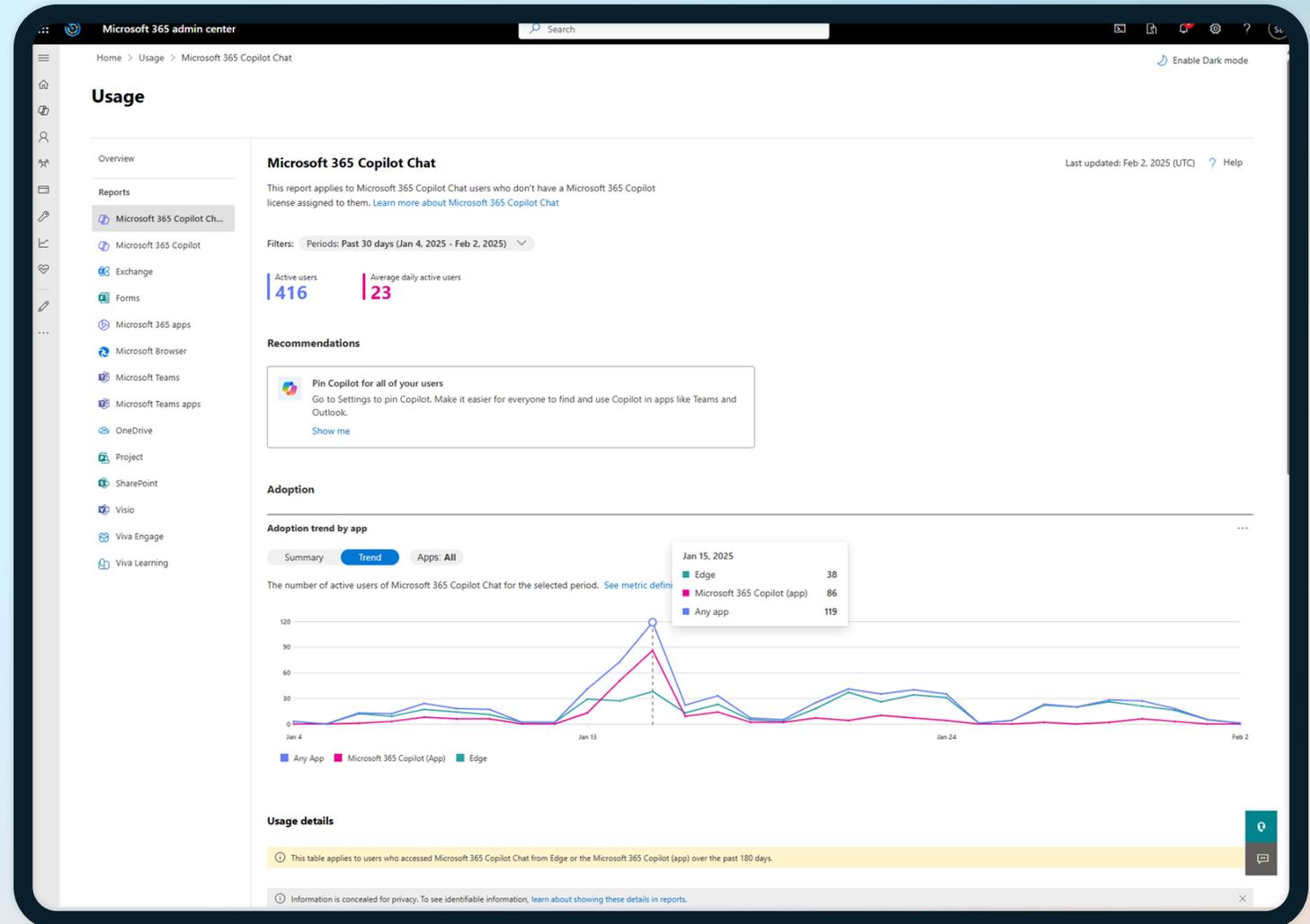


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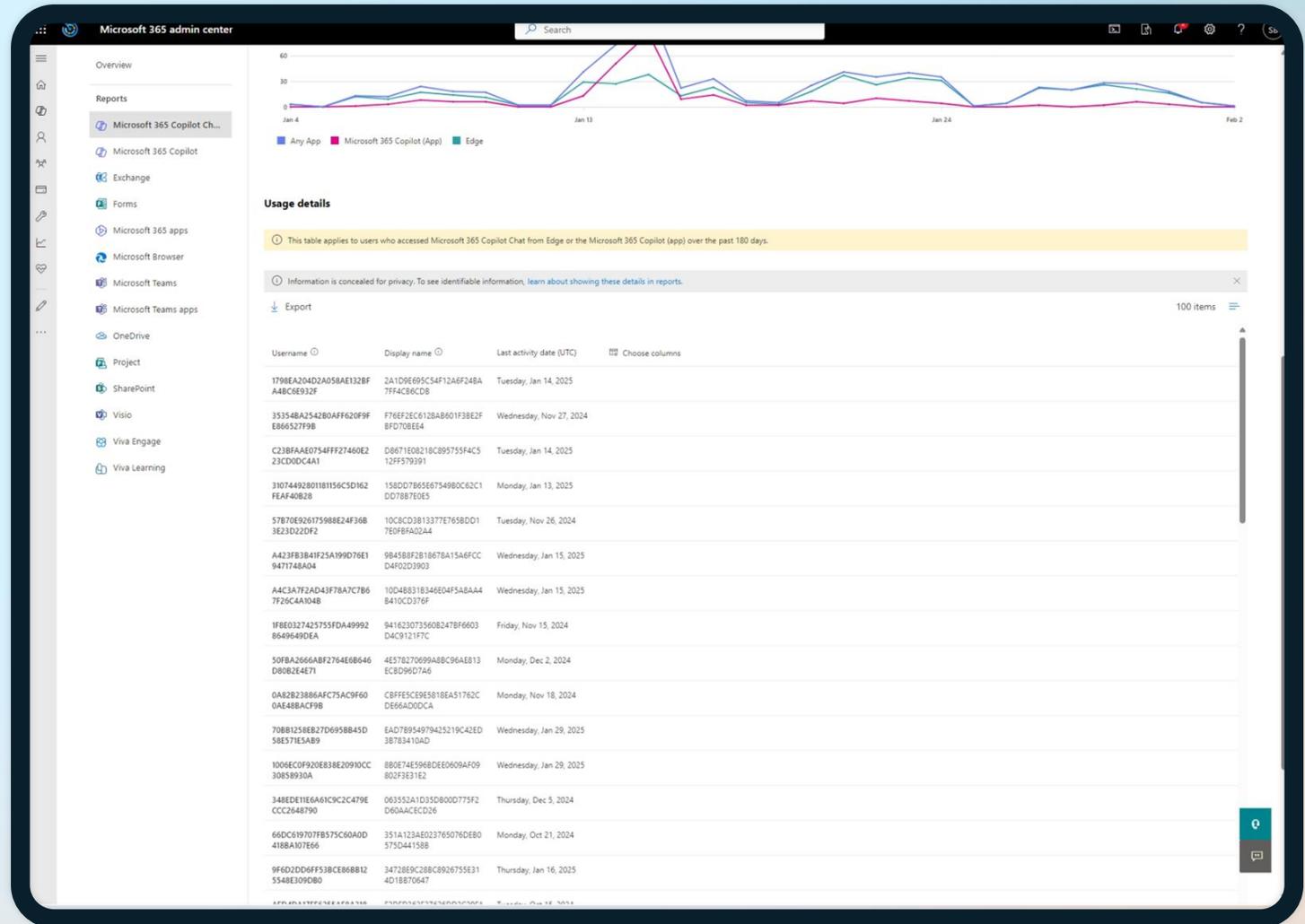


# Microsoft 365 Copilot Chat usage report

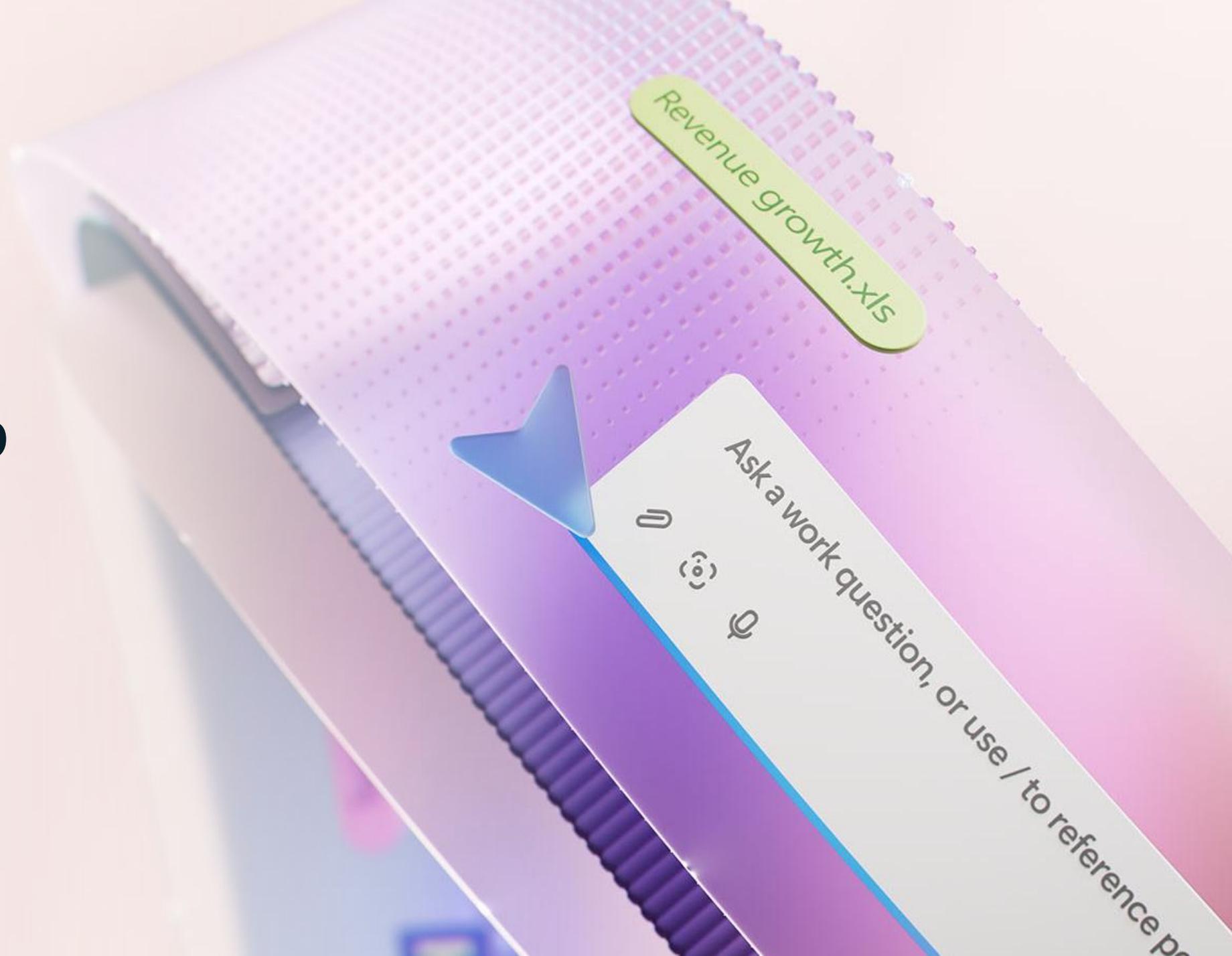


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- Total active users
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# Control Web Grounding



# Improving web search query controls

## Recent enhancements

### Web Search Control

Enhanced granularity of web search control.

- Will override the optional connected experiences setting. Will also enable admins to manage web search discreetly within the Work and Web modes in Microsoft 365 Copilot and in Microsoft 365 Copilot Chat.

**Available now**

### User Transparency

Copilot web search query citations for users displays to users:

- The exact keywords being emitted
- Available now**
- Pairs with the sites that are being searched with clear citations/annotations (already available)

### Admin Transparency

Copilot web search query logging:

- Enable admins to see and audit emitted queries
- Associate with the prompt / interaction that generated the query, available in the Purview Audit tool and eDiscovery tool used to search prompts/ responses

**Available now**

# Copilot web search query citations for users

Includes the exact web search queries derived from the user's prompt in the linked citation section of the Copilot response.

Helps users understand what search queries, along with the sites searched (available today), were used to enhance the response.

(Applies to Microsoft 365 Copilot Chat, Microsoft 365 Copilot)

The screenshot shows a Microsoft Copilot chat window. At the top, there are tabs for 'Work' and 'Web', and a 'New chat' button. The user's prompt is: "Summarize all of Marty Cagan's books for me including the latest ones please. Go through social media reviews and synthesize how the PM community has responded. Were there any contrarian viewpoints shared?".

The Copilot response is as follows:

**Copilot** AI-generated content may be incorrect.

Sure! Here's a summary of Marty Cagan's key books and how the product management (PM) community has responded to them:

- 1. Inspired: How to Create Tech Products Customers Love**  
**Summary:** This book is a foundational text for product managers, focusing on how the best tech companies create products. It covers techniques for product discovery, team alignment, and delivering value to customers [1]. The second edition includes updated insights and examples.  
**Community Response:** Widely praised for its practical advice and real-world examples, "Inspired" is considered a must-read in the PM community. Many reviews highlight its usefulness for both new and experienced product managers [2]. Some contrarian viewpoints suggest that while the book is insightful, it may be overly idealistic and not always applicable to smaller companies or non-tech industries [3].
- 2. Empowered: Ordinary People, Extraordinary Products**  
**Summary:** This book focuses on empowering product teams and leaders to create an environment where innovation can thrive. It emphasizes the importance of leadership in enabling teams to solve hard problems and create extraordinary products [1].  
**Community Response:** "Empowered" has been well-received for its focus on leadership and team dynamics. Reviewers appreciate its actionable advice and case studies from top tech companies [1]. However, some critics argue that the book's concepts are challenging to implement in traditional, hierarchical organizations [3].
- 3. Transformed: Moving to the Product Operating Model**  
**Summary:** Cagan's latest book addresses the transformation needed for companies to adopt a product operating model. It provides a deep understanding of this model, case studies of successful transformations, and inspiration for what companies can achieve once they adopt this approach [4].  
**Community Response:** Early reviews are positive, with readers appreciating the detailed case studies and practical advice for transforming their organizations [4]. Some contrarian viewpoints suggest that the book may be too focused on large tech companies and less applicable to smaller firms or those outside the tech industry [3].

**Social Media Reviews and Contrarian Viewpoints**

On social media, Cagan's books are frequently discussed and recommended within the PM community. Common themes in positive reviews include the practical, actionable advice and the real-world examples that resonate with readers. However, some contrarian viewpoints highlight challenges in applying Cagan's industries or smaller companies. Critics also mention that while the books are sometimes feel idealistic and difficult to implement in less agile or more traditional [3] [2] [4].

books are highly regarded in the product management community, with a few ie applicability of his advice to different types of organizations. If you have any specific books or need more details, feel free to ask!

**References used to generate the response.** Copilot protects data by encrypting and respecting access controls for enterprise searches, while securely anonymizing web search queries separately. Web search queries are removed from responses after 24 hours. [Learn more](#)

1 Inspired: How to Create Te... 2 How applicable are Marty ... 3 Book Review: Inspired by ... 4 Inspired Summary of Key L... Marty Cagan books summ... Marty Cagan books social ... Show less

Buttons: Edit in Pages, Copy, Share

Follow-up prompts:  
Tell me more about the case studies in 'Transformed'.  
What are some practical takeaways from 'Inspired'?  
Are there any other influential PM authors I should explore?

View prompts

Ask me anything...

# Copilot web search query logging

Enables admins to perform audit, search, and eDiscovery on the exact web search queries Copilot derived from the user's prompt when enhancing responses with the latest data from the web.

Admins can use the same tools they use today for audit, search, and eDiscovery of prompts and responses in Microsoft 365 Copilot.

(Applies to both Microsoft 365 Copilot Chat, Microsoft 365 Copilot)

For more information, see [Audit log activities](#), [Copilot interaction events overview](#), and [Search for and delete Copilot data in eDiscovery \(preview\)](#).

The screenshot displays the 'Audit' interface for Microsoft 365 Copilot. It features a top navigation bar with 'New Search' and 'Audit retention policies'. Below this, there are statistics for 'Searches completed' (7), 'Active searches' (0), and 'Active unfiltered searches' (0). The interface includes several filter sections: 'Date and time range (UTC)' with start and end date/time pickers; 'Keyword Search' with a text input; 'Admin Units' with a dropdown; 'Activities - friendly names' with a dropdown; 'Activities - operation names' with a text input; 'Record types' with a dropdown; 'Search name' with a text input; 'Users' with a dropdown; 'File, folder, or site' with a text input; and 'Workloads' with a text input. A 'Search' button and a 'Clear all' button are located below the filters. Below the filters is a table of search results with columns for Search name, Job status, Progress (%), Search time, Total results, Creation time (UTC-07:00), and Search performed by. The table contains seven rows of search results, all with a 'Completed' status and 100% progress.

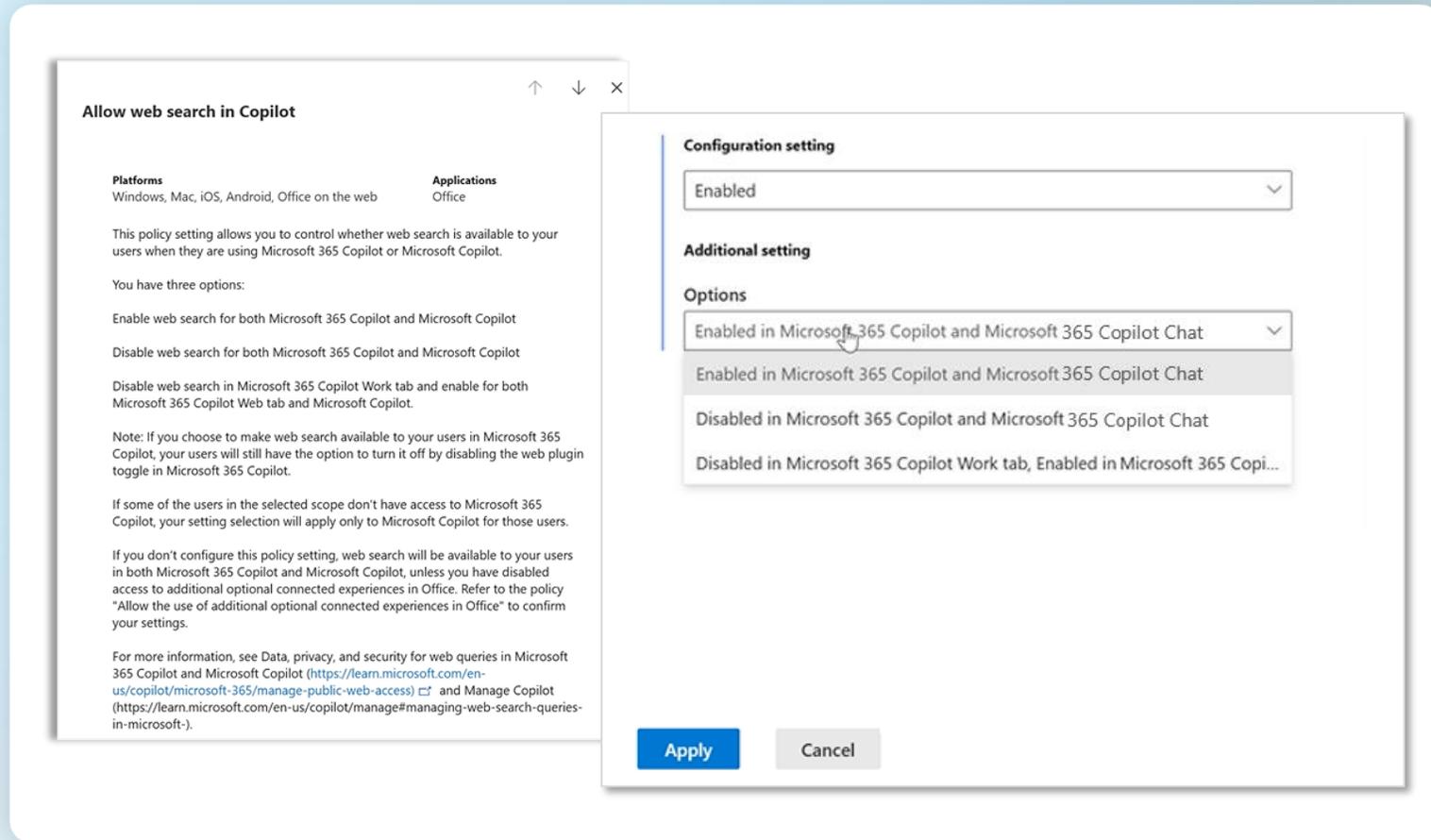
Search name	Job status	Progress (%)	Search time	Total results	Creation time (UTC-07:00)	Search performed by
<input type="checkbox"/> May 8 - May 9 CopilotInteraction weather	Completed	100%	9m, 20s	0	May 9, 2024 10:44 AM	corat@m365cp40766653.onmicrosoft.com
<input type="checkbox"/> May 8 - May 9 CopilotInteraction weather	Completed	100%	2m, 7s	0	May 9, 2024 9:47 AM	corat@m365cp40766653.onmicrosoft.com
<input type="checkbox"/> May 8 - May 9 CopilotInteraction sports	Completed	100%	2m, 28s	0	May 9, 2024 9:47 AM	corat@m365cp40766653.onmicrosoft.com
<input type="checkbox"/> May 8 - May 9 BillieV CopilotInteraction	Completed	100%	8m, 36s	0	May 9, 2024 9:33 AM	corat@m365cp40766653.onmicrosoft.com
<input type="checkbox"/> May 8 - May 9 CopilotInteraction weather	Completed	100%	2m, 29s	0	May 9, 2024 9:27 AM	corat@m365cp40766653.onmicrosoft.com
<input type="checkbox"/> May 8 - May 9 CopilotInteraction Copilot sports	Completed	100%	2m, 27s	0	May 9, 2024 9:11 AM	corat@m365cp40766653.onmicrosoft.com
<input type="checkbox"/> May 8 - May 9 BillieV CopilotInteraction Copilot weather	Completed	100%	3m, 5s	0	May 9, 2024 9:11 AM	corat@m365cp40766653.onmicrosoft.com

## 'Allow web search in Copilot' policy

Enables admins to manage web search separately from other optional connected experiences for Microsoft 365 Copilot.

This policy also supports turning off web search in the work tab while keeping web search on in the web tab.

Both the Allow web search in Copilot policy feature and the optional connected experiences policy can be managed at the user and group levels from the Microsoft 365 Apps admin center.



# Copilot Chat prompt examples

# Get the answers you need to move forward

*Get hiring tips*

How can I evaluate an interview candidate's soft skills?

*Summarize a file*

Summarize this document in 5 bullet points. <attach file>

*Start your research*

How have world literacy rates changed in the past 30 years?

*Calculate the answer quickly*

At \$X per unit, how many units to break even if costs are \$Y

*Reach a broader audience*

How do you say [thank you for your time] in Japanese?

*Discover synonyms*

What are some other words for [exciting]?

*Understand trends*

Share some trends in remote work and hybrid offices

*Retrieve buried info*

What are the deadlines mentioned in this file? <attach file>?

*Boost your knowledge*

Help me learn about [topic]. Provide 2 analogies & files to dig in.

*Highlight the differences*

Compare these two paragraphs grouped by differences in formatting, structure, and content: [paste content]

*Monitor your PR*

Give me a concise summary of recent news about [company]

*Stay on top of tech advances*

Summarize the main points of the latest research on AI

*Make informed decisions*

Create a table that compares top-selling office printers

*Make your code better*

Optimize and fix this code: [insert code]

# Brainstorm and draft content quickly

*Co-create with Copilot*

Ask me 3 questions to help me draft an email about [OKRs]

*Going on holiday?*

Write some funny Out of Office email responses.

*Make it stand out*

Suggest a few email subjects for the following email: [body]

*Generate ideas*

List ideas for a fun remote team building event

*Put info in a table*

Organize the world's most valuable companies into a table

*Visualize the data*

Create an image of a bar chart demonstrating growth

*Track changes over time*

Create a line chart showing the relationship between...

*Start a conversation*

Suggest ways to break the ice with my new colleague.

*Jump-start a draft*

Create an FAQ based on this file <attach file>

*Draft an introduction*

Write a compelling intro paragraph for this speech <attach file>

*Make it better*

Improve my writing in: <attach file>

*Disagree gracefully*

Provide a convincing counterargument to the following: [paste content]

*Rally the team*

Draft an exciting email ... using <attach files>

*Get started on a plan*

Draft a business plan based on [idea]