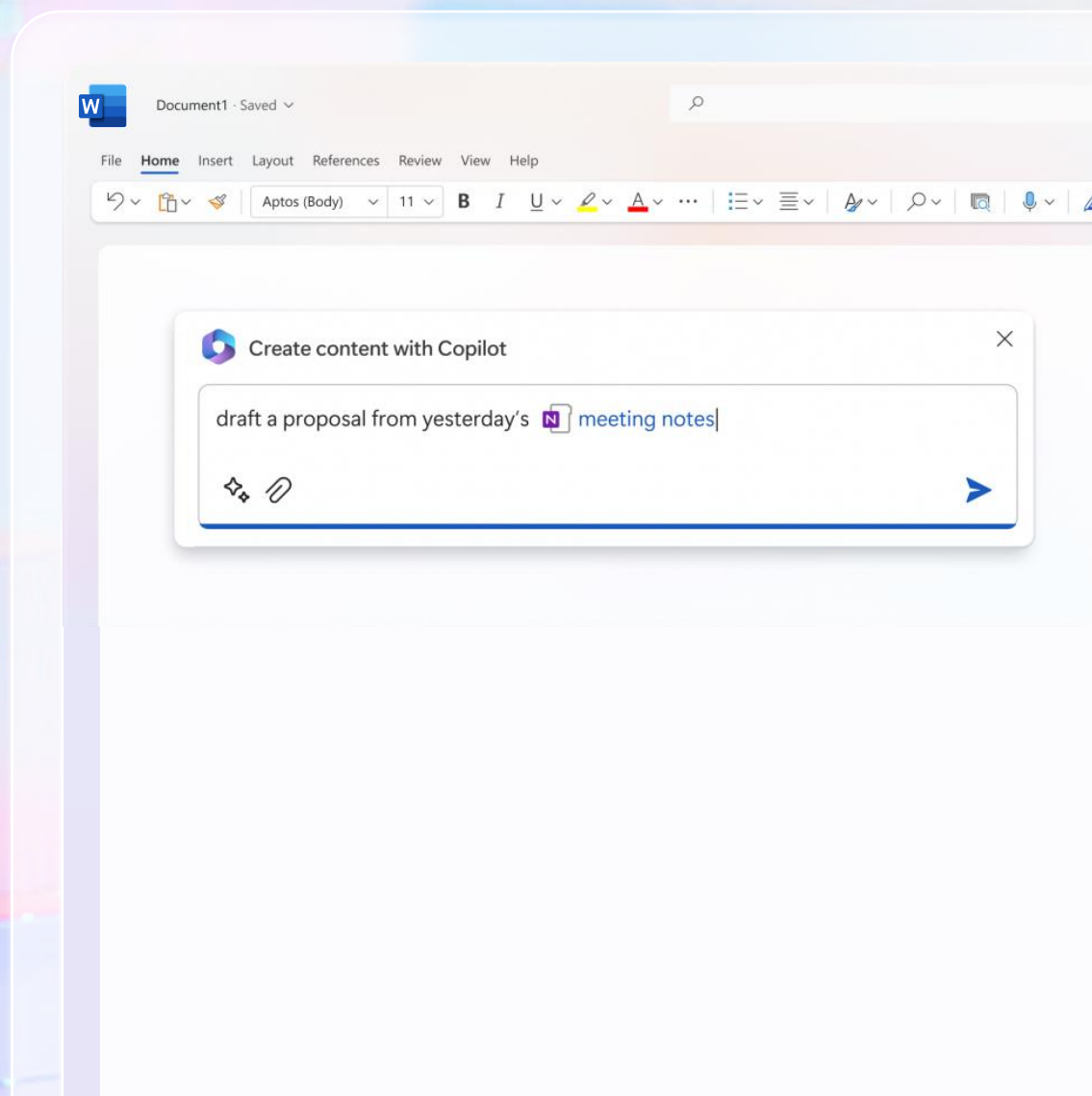




Microsoft 365 Copilot

The assistant you've been waiting for



Agenda

Introduction

- The state of work
- AI for everyone
- Microsoft 365 Copilot

Microsoft 365 Copilot

- AI for Human Resources (HR)
- AI for Sales
- AI for Marketing
- AI for Finance
- AI for Information Technology (IT)

Close

- Resources
- Thank you

Appendix



Getting the job done is taking a toll on innovation

64%

of people struggle with having the time and energy to do their job

62%

spend too much time searching for information during the workday

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

70% of people would delegate as much as possible to AI to lessen their workloads



82% of leaders say employees will need new skills to be prepared for the growth of AI

76% of people would be comfortable using AI for admin tasks

Leaders are 2X more interested in using AI to increase productivity than to cut headcount

Microsoft WorkLab Work Trend Index, May 2023

AI changes work for the better, but it's still your work

AI on Autopilot

AI changes work for the better, but it's still your work

AI as Copilot

**Save time and
energy**

**Get more
done**

**Generate
innovative ideas**

Microsoft 365 Copilot brings AI into the apps you use every day



Microsoft 365 Copilot





Welcome a new wave of productivity and value creation for your core teams

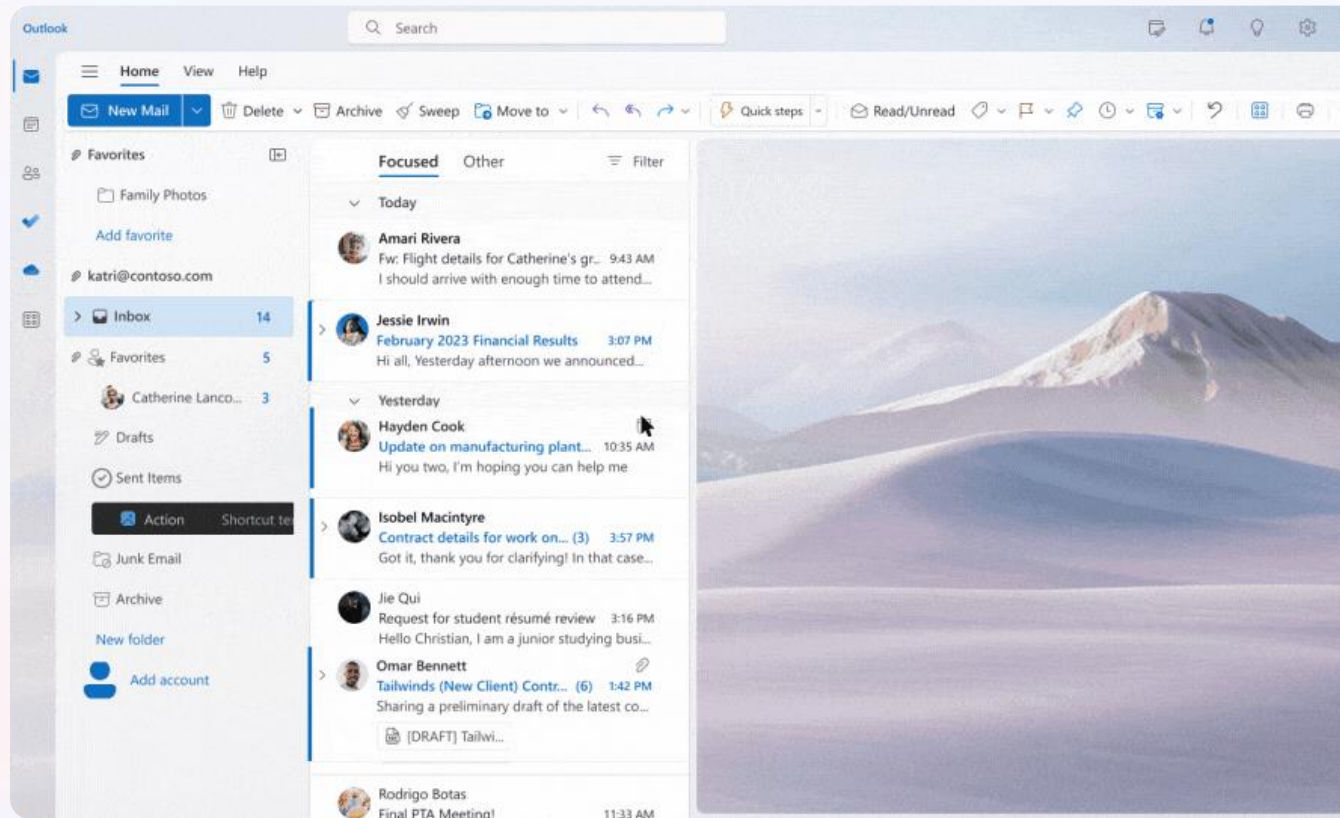
HR

Sales

Marketing

Finance

IT





Microsoft 365 Copilot AI for HR



Cultivating a thriving work culture is a lot of work for your HR team

HR experts are focused on:



Recruitment
and hiring

Compliance with laws
and regulations

HR technology
and analytics

Employee
engagement

Onboarding
and orientation

Policy development
and implementation

Diversity, equity,
inclusion, and belonging

Compensation
and benefits

Employee data
management

Change
management

Performance
management

Training and
development

Banish your busywork

3 in 4 people
would be comfortable using
AI for administrative tasks

Banish your busywork

Compose more impactful emails

Outlook

Get suggestions on how to effectively deliver sensitive information or coaching tips to improve email clarity and tone, you decide what to keep, modify, or discard



The screenshot shows the Outlook email composition interface. At the top, the 'To:' field lists recipients: Lydia Bauer, Henry Brill, Mona Kane, Tenzin Lasya, and +4 more. Below the recipients is a rich text editor toolbar with icons for font color, font family (Calibri), font size (12), bold, italic, underline, strikethrough, link, unlink, list, and indent. A 'Coaching by Copilot' panel is open, displaying a list of coaching suggestions on the left and a detailed suggestion on the right. The suggestions on the left are: Overall (sad face), Tone (neutral face), Clarity (happy face, selected), and Sentiment (sad face). The detailed suggestion on the right is: 'Clarity: Good' (happy face) followed by 'Suggestions: The email is clear and easy to read. Nicely done!' (lightbulb icon). At the bottom of the panel, there is a disclaimer: 'AI-generated content may be incorrect' and thumbs up/down icons. The email body text is visible below the panel, starting with 'Rebecca,' and 'I'm reaching out to update you on the Fabrikam project. Due to some illnesses on the team th... project is now about 2 weeks behind the original schedule. We'll need to meet with our conta... Rob, and go over the potential impacts of this delay. He's been touchy in the past when there... been unforeseen changes to projects, so we'll need to handle the conversation carefully. I'd like to ask that you take the lead with communication on this delay. You've dealt with Rob... the past and I think it's best if you take this on...

To: Lydia Bauer Henry Brill Mona Kane Tenzin Lasya +4 more

Calibri 12

Coaching by Copilot

- Overall
- Tone
- Clarity
- Sentiment

Clarity: Good

Suggestions:

The email is clear and easy to read. Nicely done!

AI-generated content may be incorrect

Rebecca,

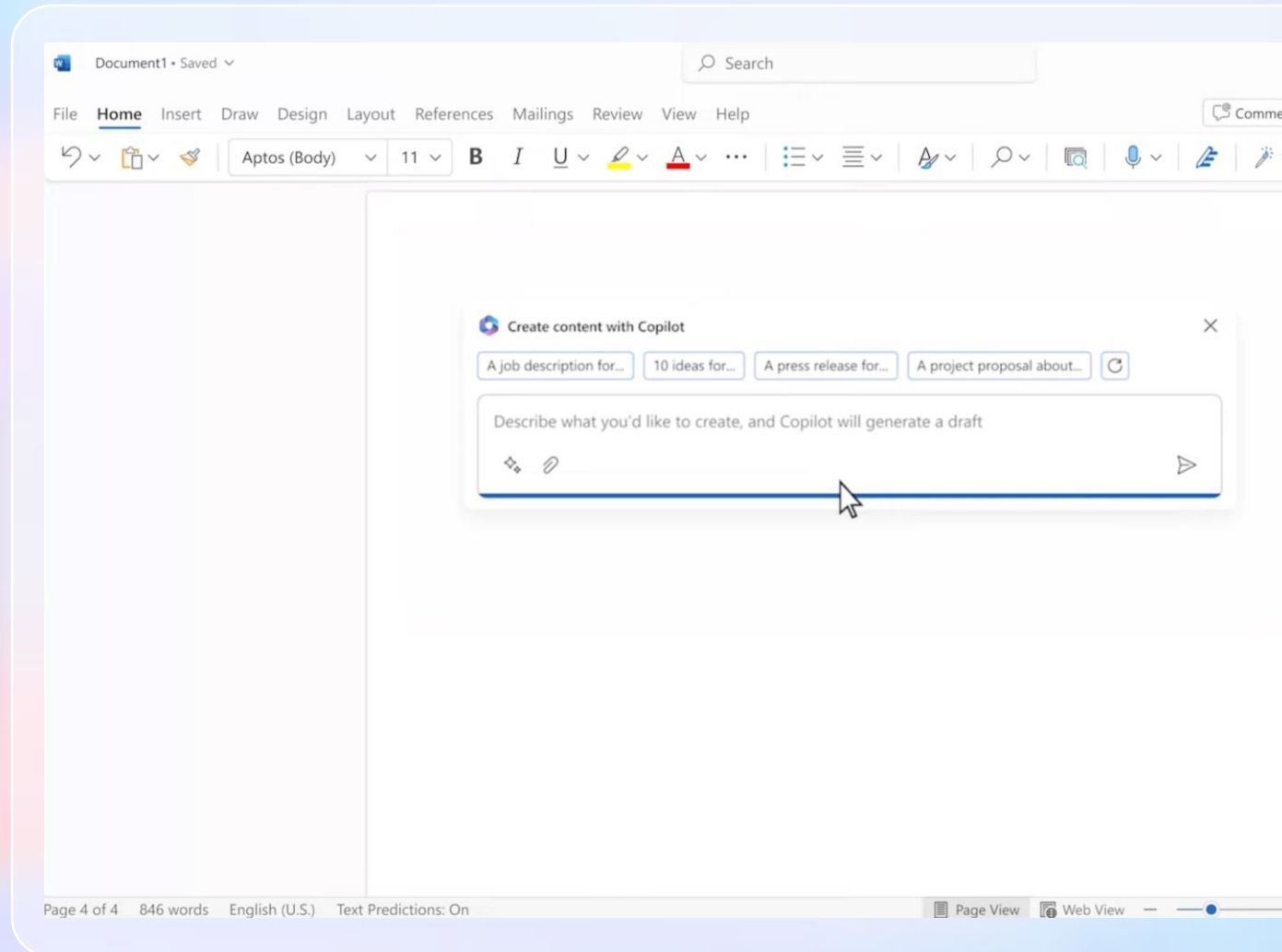
I'm reaching out to update you on the Fabrikam project. Due to some illnesses on the team th... project is now about 2 weeks behind the original schedule. We'll need to meet with our conta... Rob, and go over the potential impacts of this delay. He's been touchy in the past when there... been unforeseen changes to projects, so we'll need to handle the conversation carefully. I'd like to ask that you take the lead with communication on this delay. You've dealt with Rob... the past and I think it's best if you take this on...

Banish your busywork

Surface usable knowledge from lengthy documents

Word

Summarize benefit documents across Microsoft apps into a single list of concise bullet points

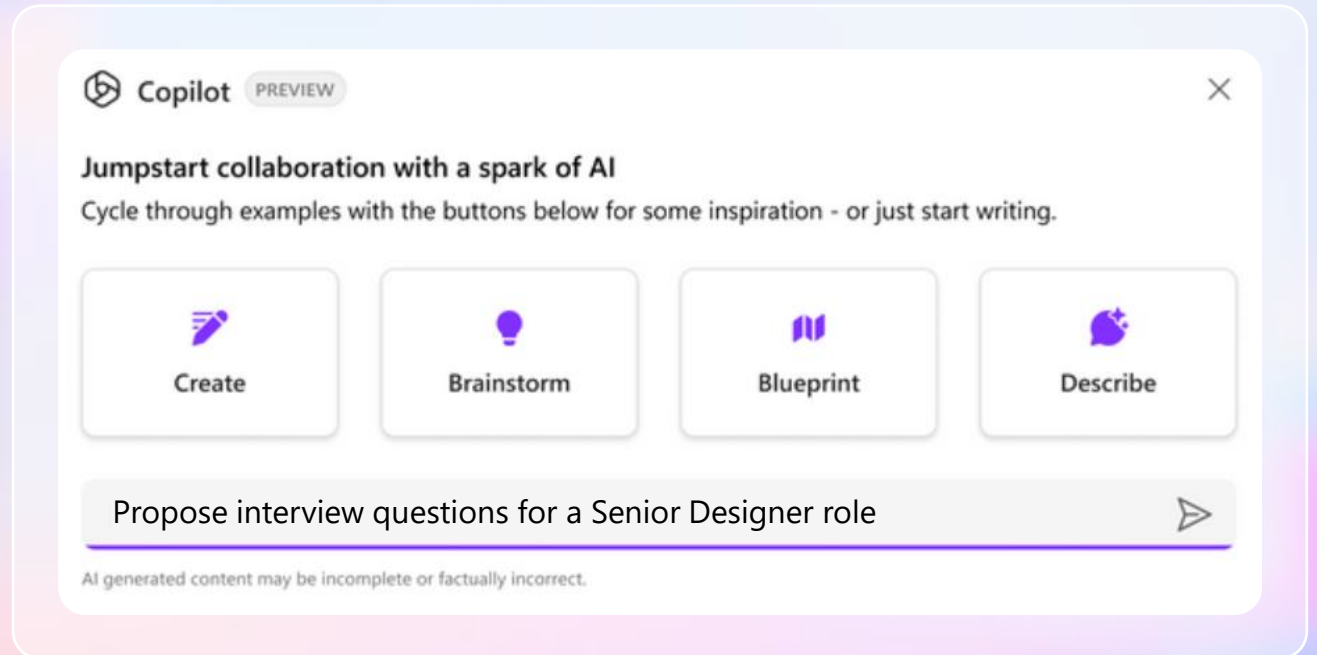


Banish your busywork

Complete routine tasks in a fraction of the time

Loop

Generate interview questions
based on unique job requirements



A day in the life of your recruiting manager

Recruiter Omar is responsible for sourcing new employees.



Craft the job description

Starting from a blank document, Omar (he/him) prompts **Copilot**:

Generate a job description for a senior animation designer role, based on design team core responsibility list.



Job description goes to the web and is posted!



Summarize interview notes

Lots of talented designers apply! Omar invites an experienced candidate, Maya (she/her), to a virtual phone screen via Teams. Maya accepts.

During the meeting, Omar turns on transcription. No need to take notes. When the meeting is over, Omar turns to **Copilot**:

Summarize notes from this interview.
How many years of experience did Maya mention she had?



Interview notes are ready pass to the hiring manager.



Draft the offer

After a follow-up call, the hiring manager agrees. Maya is the right designer for the role. Using **Copilot**, Omar spins up an offer letter:

Draft an offer letter to Maya with a start date of March 16th. Include details on our benefits package.



Copilot in Outlook with help him send the letter—fast.

Humm...the email tone isn't quite as welcoming as it should be. With a click, Omar has a friendly email, he reviews it, and sends!



Microsoft 365 Copilot AI for Sellers



A lot goes into closing the deal

Sellers have a lot to manage:



Prospecting and
lead generation

Sales presentations
and demos

Customer
relationships

Negotiating and
closing

Objection
handling

Competing in
market

Collaboration with
marketing

Continuous
learning

Collaboration with
other sellers

Software
utilization

Achieving sales
targets

Using time
effectively

Give your sales team an AI assistant

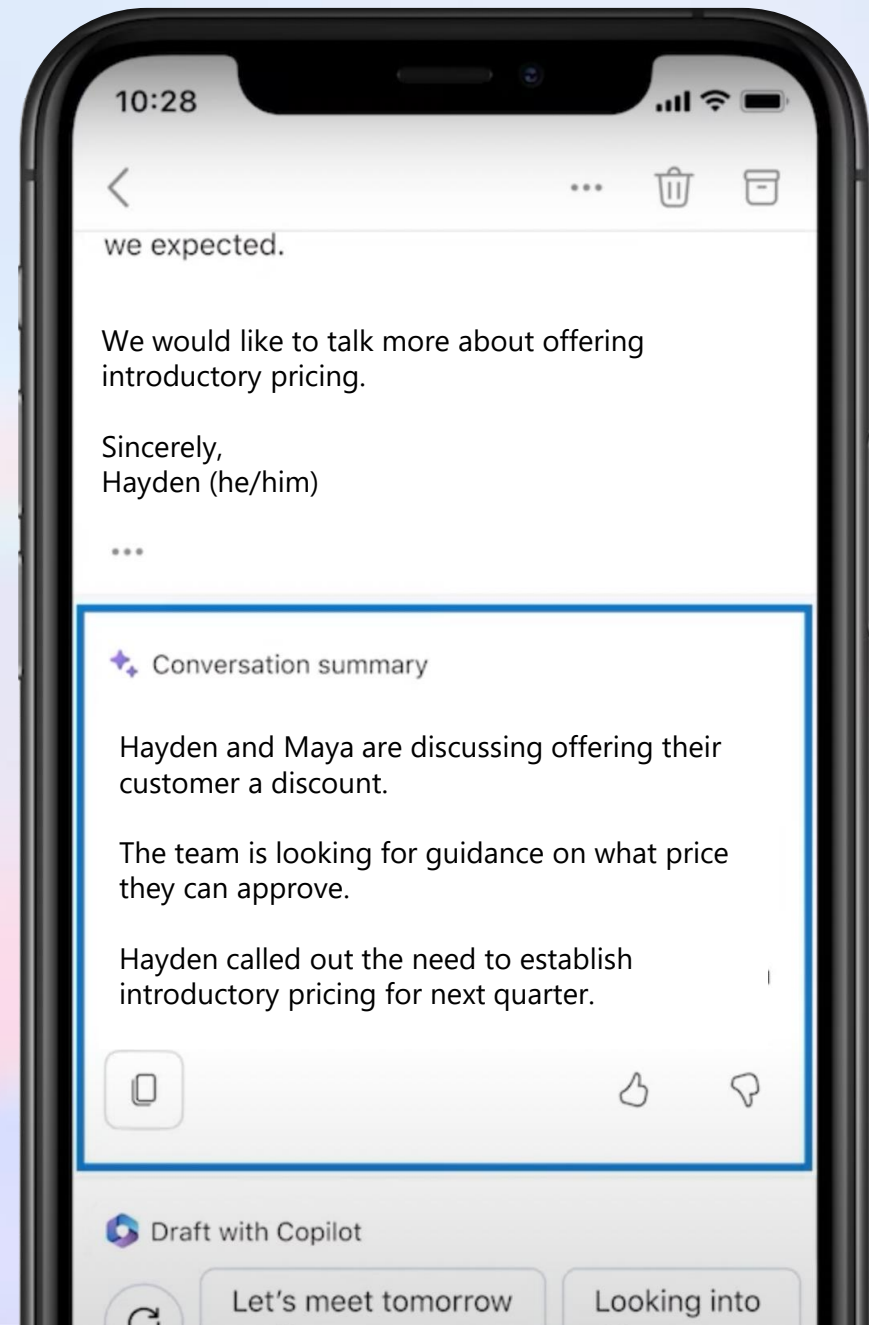
86% of people
are looking for AI to assist with
finding the right information

Give your sales team an AI assistant

Synthesize customer emails from a crowded inbox

Outlook

Before meeting with a high-value customer, request a summary of a long email thread

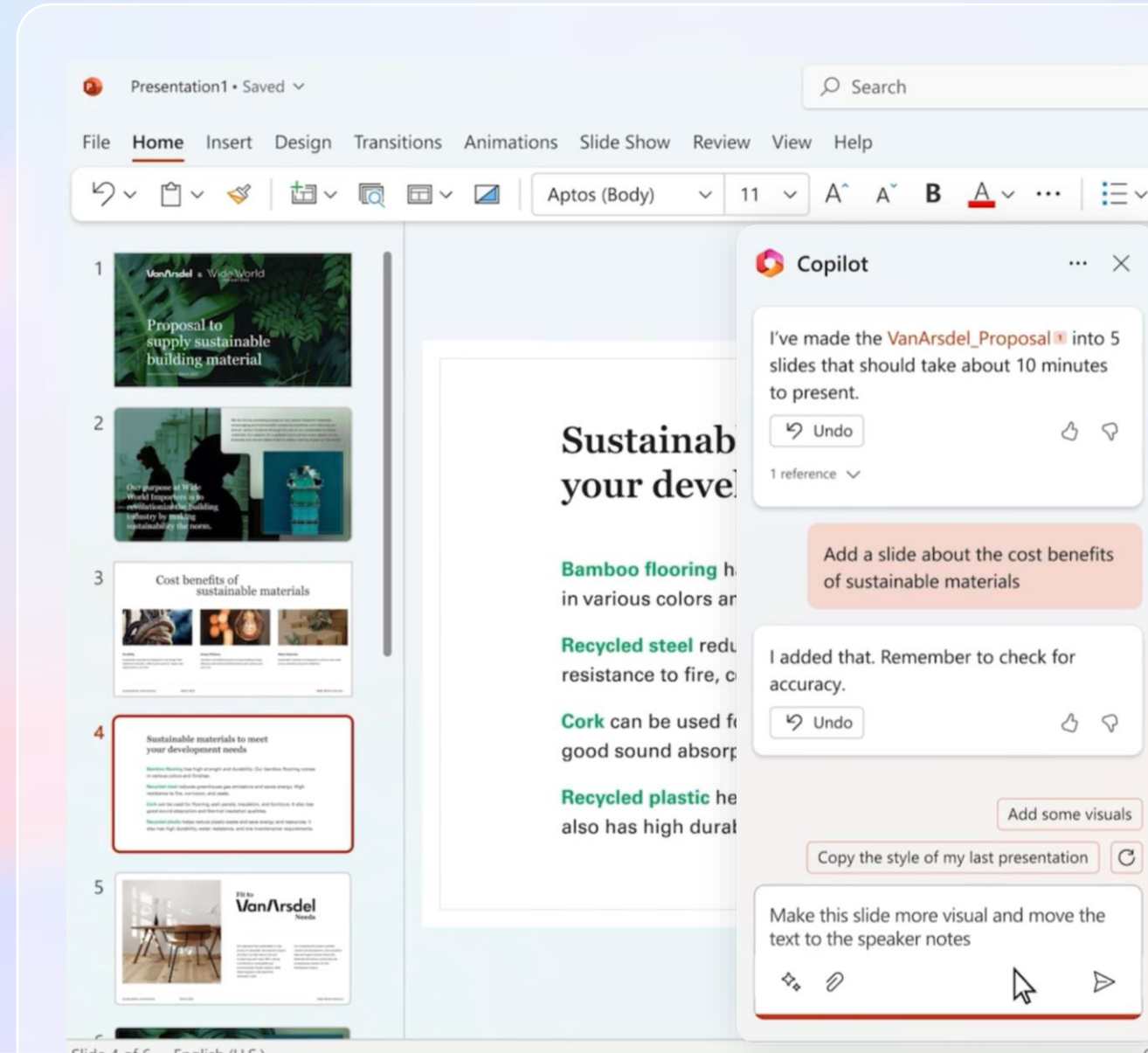


Give your sales team an AI assistant

Customize each sales pitch

PowerPoint

Quickly tailor a templated sales presentation using customer details from Outlook and visuals relevant to their industry

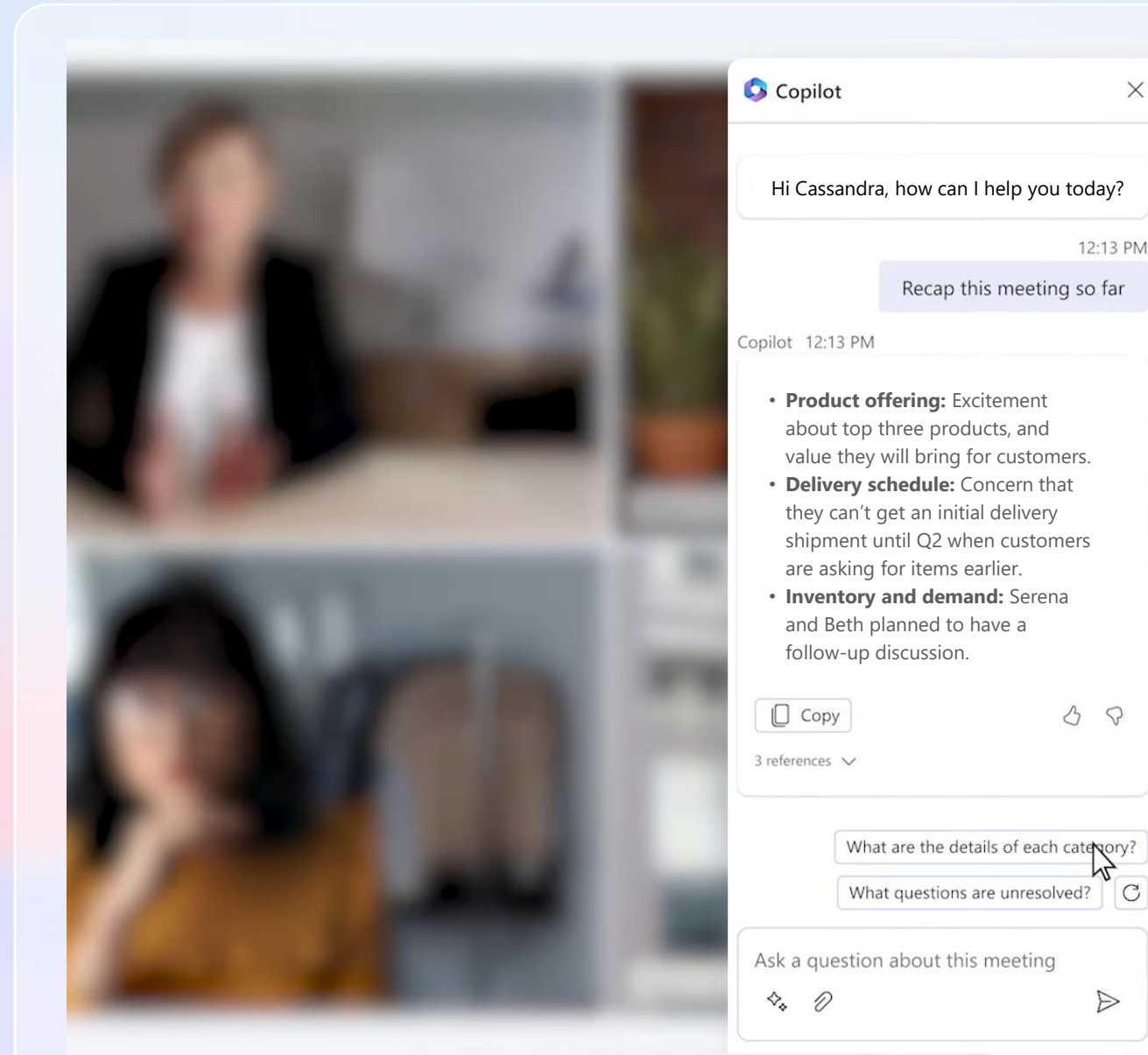


Give your sales team an AI assistant

Give the customer your full attention in meetings

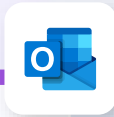
Teams

Summarize who said what, where people are aligned, and where they disagree and suggest action items, all in real time during a meeting



A day in the life of your sales lead

Sales rep Cassandra is responsible for reaching out to customer leads.



Surface new leads

Cassandra (she/her) checks her inbox first-thing—she received over 50 emails just yesterday and wants to get right to anything from a prospect. She asks **Copilot**:

Show me emails from new senders.

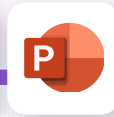


Copilot automatically filters results and displays an email from a new lead, Babek (he/him) from Fabrikam. **Copilot** allows Cassandra to respond to his email in seconds:

Invite **Babek** to a meeting to learn about our **core offerings**. Use persuasive language.



Babek accepts the meeting.



Prepare for each pitch

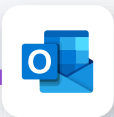
This could be a big account, and Cassandra knows she must come to the meeting prepared. She asks **Copilot** in Teams,

Recap **customer pitch tips** from the **spotlight meeting** last week.



Then, she turns to **Copilot** in PowerPoint to create her pitch:

Update **generic product pitch template** for **Fabrikam**. Add **pricing_for_enterprise_accounts.xls**. Update front image to include the **Fabrikam logo**.



Capture meeting notes

She's ready to meet with Babek!

Cassandra hosts the meeting in Teams. No need to take notes, she knows she can trust a Copilot-generated meeting summary when the call is done.

After they say goodbye, Cassandra jumps back to her inbox to thank Babek for his time.

Draft a thank you note from our **meeting notes**. Include next steps.





Microsoft 365 Copilot AI for Marketing



Your marketing team is doing a lot more than writing catchy taglines

Marketing teams are focused on:



Developing marketing strategies

Tracking and analyzing results

Proving return on investment (ROI)

Conducting market research

Creating campaigns

Staying up-to-date with trends

Collaborating with cross-functional teams

Budget constraints

Building and managing relationships

Managing digital channels

Generating quality leads

Protecting privacy and data

No one needs to start from scratch

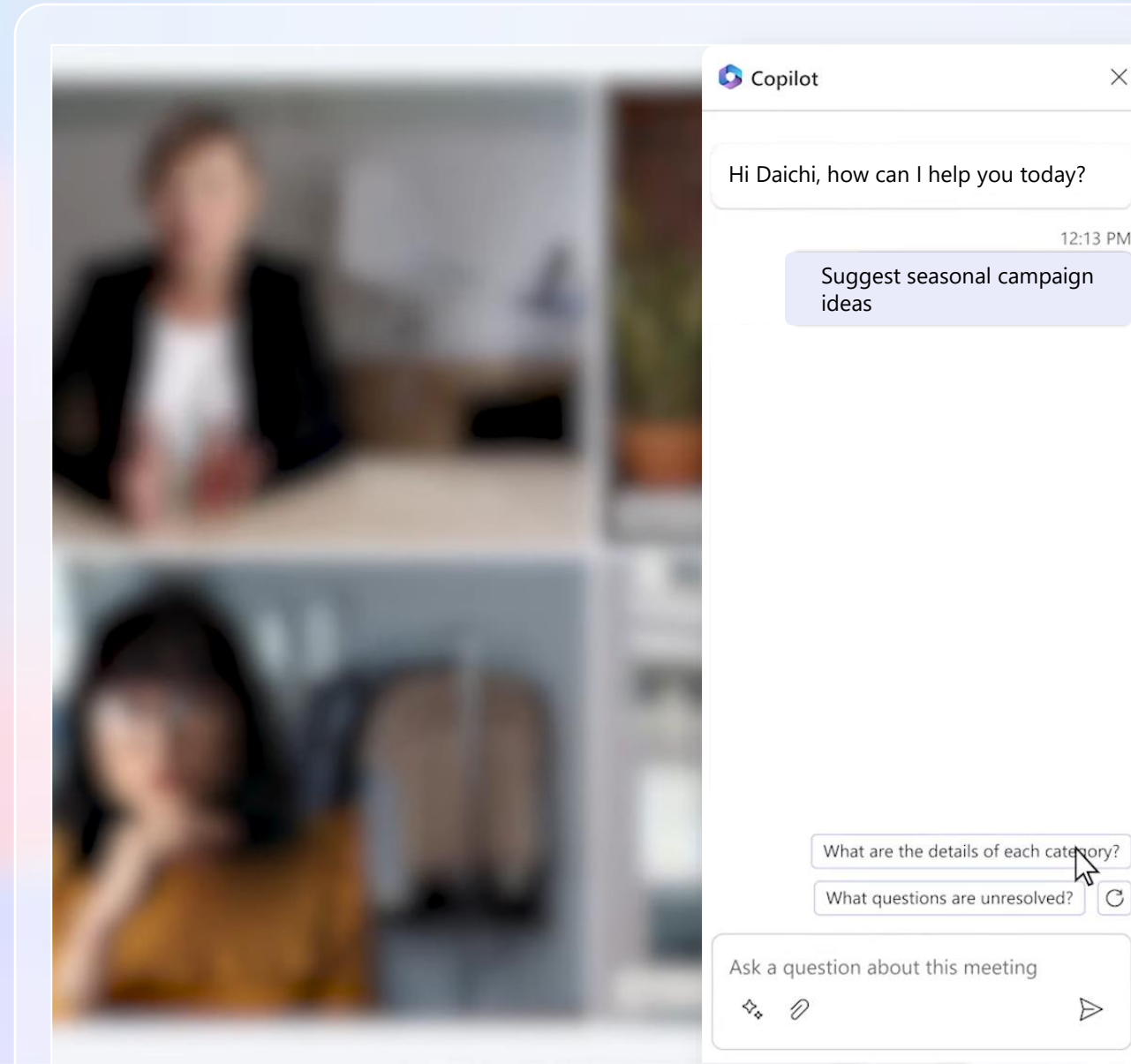
33% of people
want AI to help them produce
high-quality work in half the time

No one needs to start from scratch

Jumpstart the brainstorming process

Teams, Loop

Suggest seasonal campaign ideas to quick-start a live group brainstorm in a Teams meeting

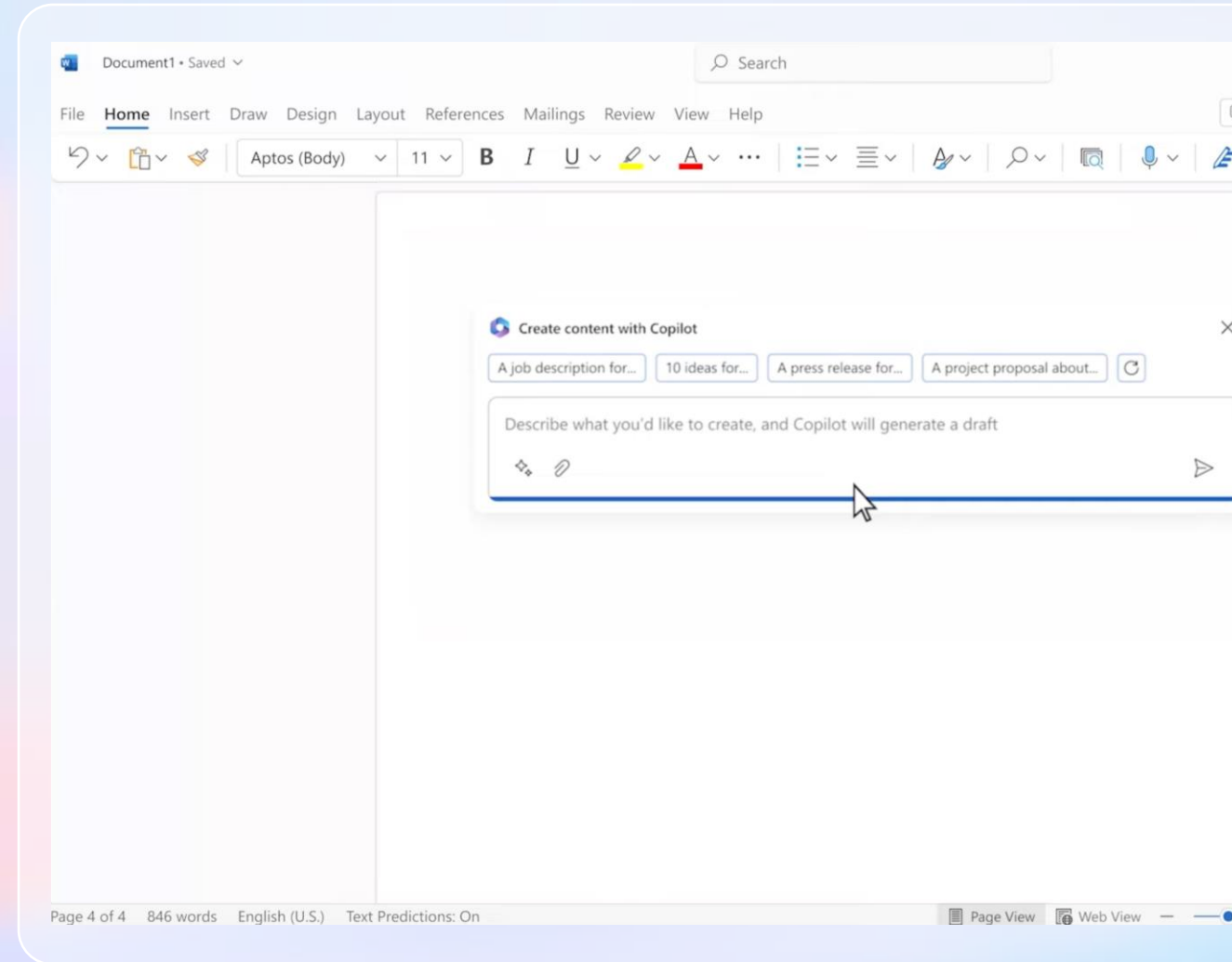


No one needs to start from scratch

Eliminate writer's block

Word

Generate event taglines and social media copy from a messaging framework

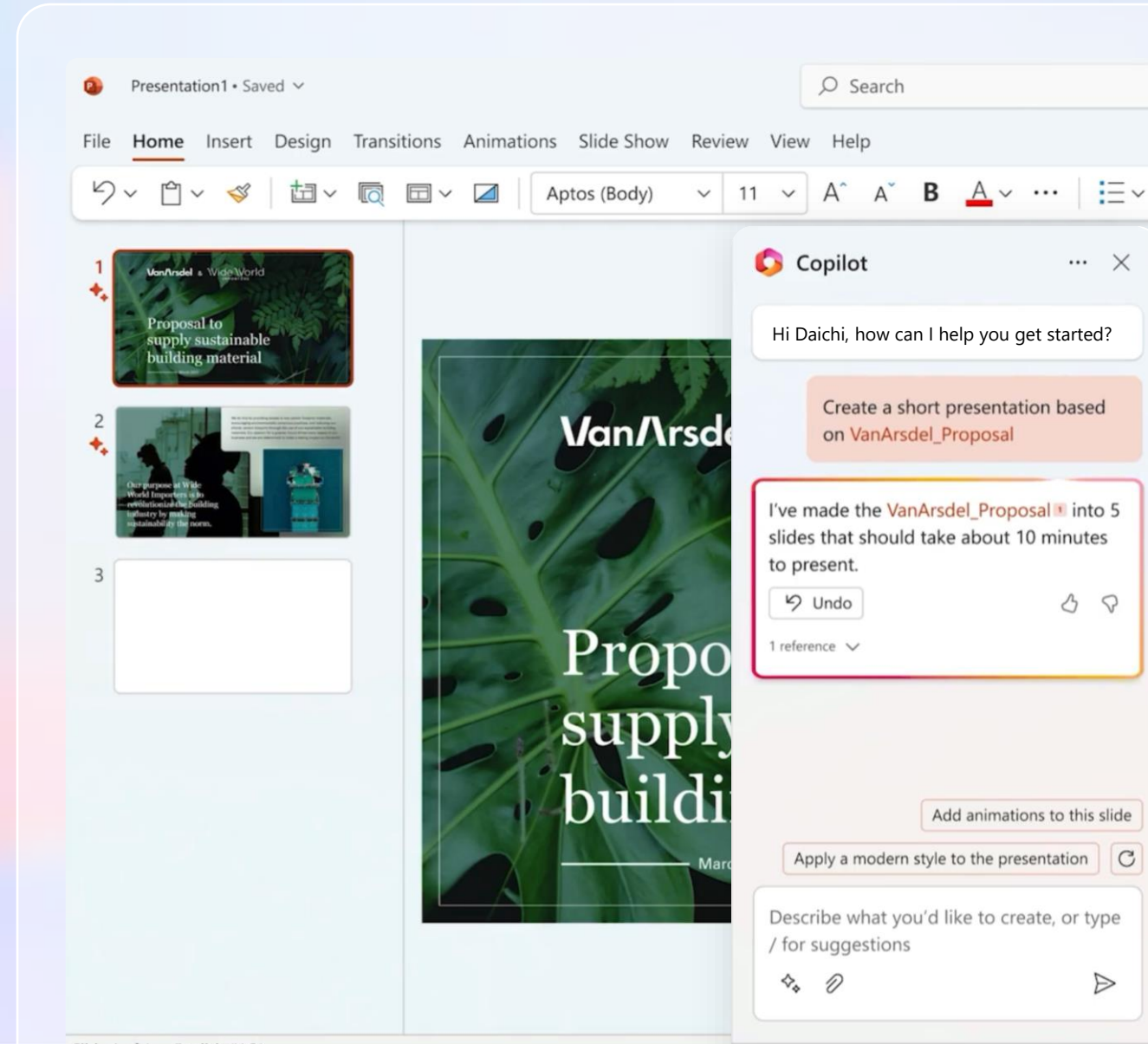


No one needs to start from scratch

Turn ideas into stunning presentations

PowerPoint

Transform Word documents into short presentations—complete with on-slide visuals



A day in the life of your marketing manager

Daichi manages a five-person marketing team.

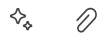


Host a better brainstorm

Daichi's (he/him) company wants to launch its flagship product in a new market. Daichi must plan and execute the targeted promotions.

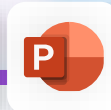
Daichi and his team meet in Teams to discuss market research and build customer profiles. Ideas are flowing, and everyone wants to capture them all. Mid-meeting, Daichi asks **Copilot**:

Summarize the key points we've discussed to build customer profiles.



After the meeting, Daichi starts a Word document, and asks **Copilot**:

Start a targeted promotion plan based on the meeting call notes.



Never start from scratch

Now it's time for promotional copy. He opens a second Word document and prompts **Copilot**:

Generate taglines for promotions.



Satisfied with the results, he adds them to the Loop workspace.

That afternoon, Daichi and the team meet about the taglines and debate them excitedly. He asks **Copilot** to list the taglines the team agreed on and highlight any questions.

Next up is an executive presentation. Daichi asks **Copilot** in PowerPoint:

Create slides from the customer profile, promotion plans, and taglines.



Send in seconds

The presentation draft is longer than Daichi expected and needs visual appeal. He tries again:

Rewrite into bullet points. Add illustrations.



The perfected presentation is ready for executive review. He turns opens a new email in Outlook:

Compose a short email with the campaign brief linked.



Daichi does a quick review, adjusts the length (busy executives don't have a lot of time to read emails) and sends! That was fast.



Microsoft 365 Copilot AI for Finance



Data analysis is just one part of your finance teams' job

The teams in your Finance Office are focused on:



Streamline business decisions based on finance data

79% of people
are comfortable using AI
for analytical work

Streamline business decisions based on finance data

Analyze trends and explore your data

Excel

Identify trends, create charts and graphs, and build everything into an easy-to-read dashboard



Product	Discount Band
Biodegradable Cleaning Products	Low
Biodegradable Cleaning Products	Low
Biodegradable Cleaning Products	None
Biodegradable Cleaning Products	Medium
Biodegradable Cleaning Products	Low
Recycled Can	Low
Natural Personal Care Products	Low
Biodegradable Cleaning Products	High
Compostable Food Packaging	Low
Natural Personal Care Products	Medium
Sustainable Snack Packaging	Medium
Natural Personal Care Products	Medium
Compostable Food Packaging	Medium
Compostable Food Packaging	Low
Sustainable Snack Packaging	Medium
Compostable Food Packaging	None
Biodegradable Cleaning Products	Low
Reusable Containers	Low



Copilot



results and summarize three key trends

Key trends:

- Sales are trending up for all customers, except Proseware which is down this quarter.
- Manufacturing costs are down this quarter after an increase in Q3.
- Low discount products made up nearly half of total sales last month.

Explain



Filter Discount Band to Low

Add a margin column



Ask a question or request, or type '/' for suggestions

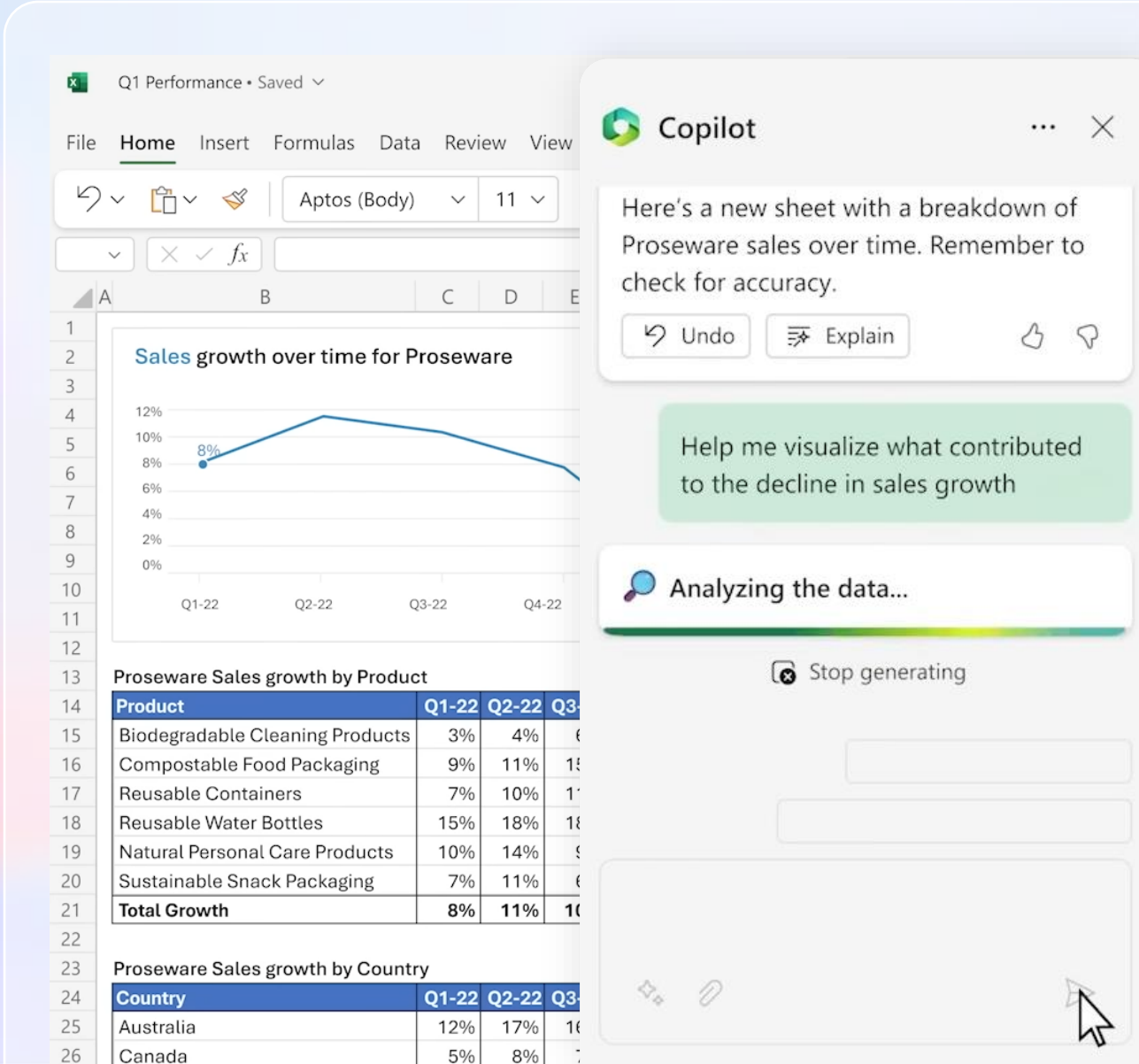


Streamline business decisions based on finance data

Make data-driven recommendations

Excel

Generate scenario models so you can explore data without modifying it, for example, suggesting ideas for improving your business

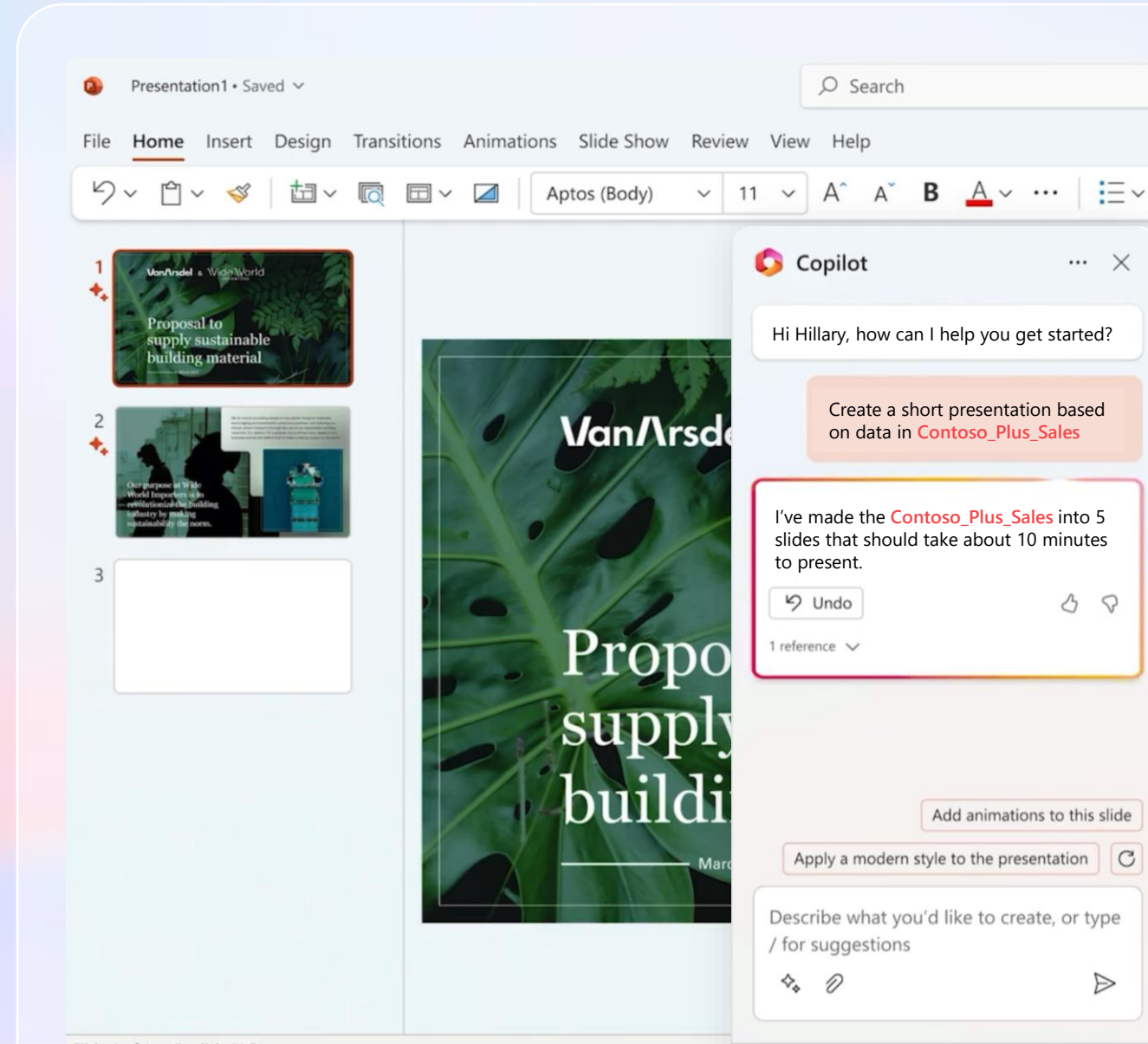


Streamline business decisions based on finance data

Invite others to collaborate

Loop, PowerPoint

Create a presentation based on the dataset in a Loop workspace, enabling others to contribute



A day in the life for your finance professionals

Financial Analyst Hillary is tasked with understanding a spike in sales.



Analyze business results

Ding! Hillary (she/her) is @mentioned in her department's Loop workspace. A manager has asked her to explain what contributed to an increase in demand for a premium product over the past two quarters.

Hillary starts with **Copilot** in Excel:

Review historical performance for product from the last three years.



She quickly validates that the product is a steady performer, but with thousands of data points, Hillary doesn't have time to comb through it all to see a reason for the jump.

Graph a breakdown of last quarter.
Visualize what contributed to the increase.



Summarize trends

Hillary discovers that sales jumped after a discount was offered. And she can explore the data without impacting the shared spreadsheet.

A Copilot-provided suggestion to apply color coding makes it easier for her to see sales trends. Next, she runs a "what-if" scenario:

Project the business impact of offering a 15% discount again.



A profitable result is not the outcome, so she tries something new:

Project the business impact of selling the product in our Redmond location.



Share a solution

Wow, looks good!

Hillary asks Copilot to draft a response to her manager in Loop:

Draft a response, link the Excel dataset and highlight demand results.



With the spreadsheet shared as a link in Loop, everyone can explore or validate her conclusions.



Microsoft 365 Copilot

AI for IT



Your technology experts look to tech for help, too

Your IT team focuses on:



Network
administration

Resource
management

Compliance
and regulations

System
administration

Security
management

IT procurement and
asset management

Backup and disaster
recovery

User support
and training

IT project
management

Cybersecurity

Help desk
support

IT policies and
documentation

Use AI as a personal help desk assistant

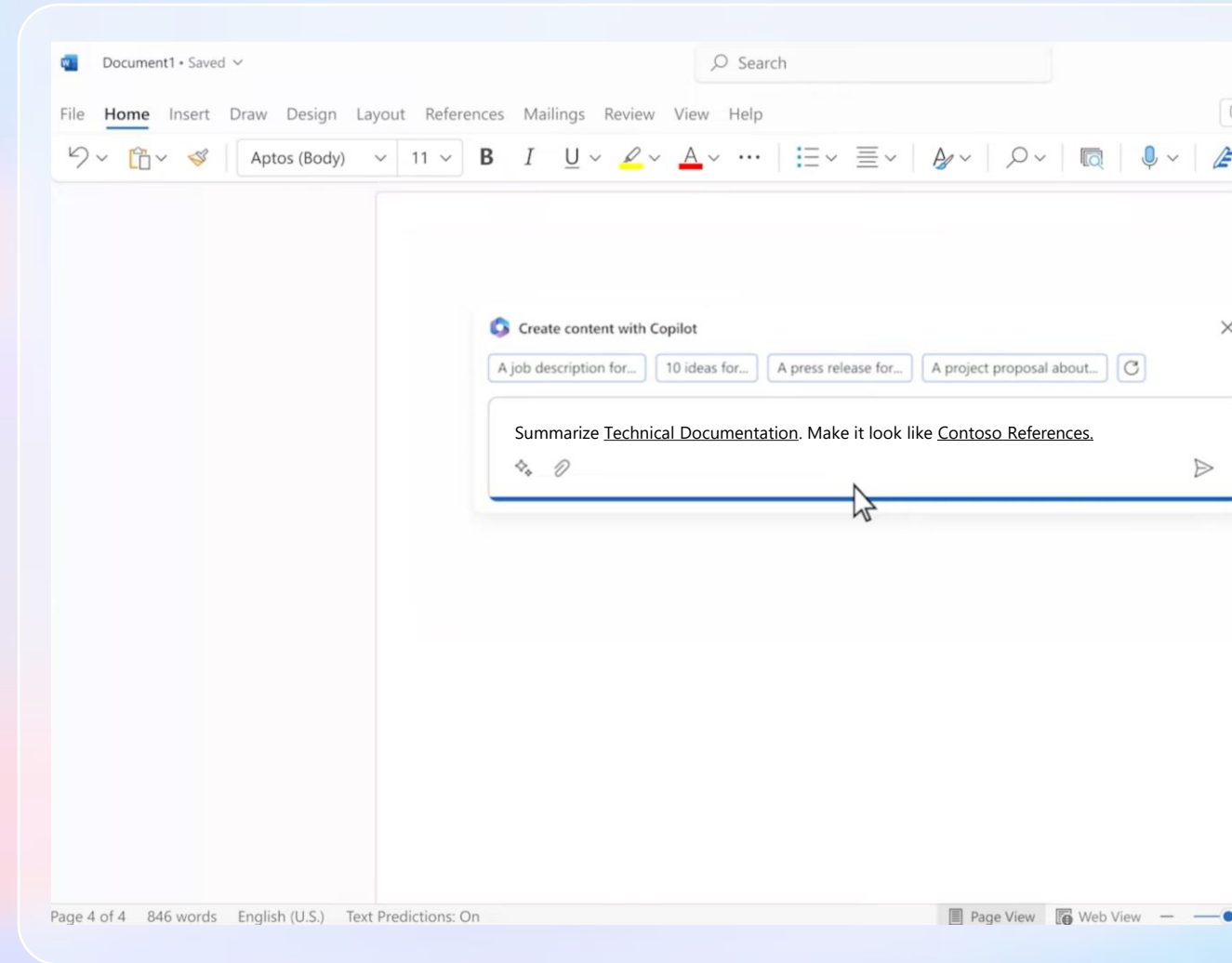
76% of people
would be comfortable using
AI for admin tasks

Use AI as a personal help desk assistant

Turn complicated documentation into usable knowledge

Word, Loop

Summarize multi-page Word documents into concise steps, and share them in a Loop workspace for the help desk to reference

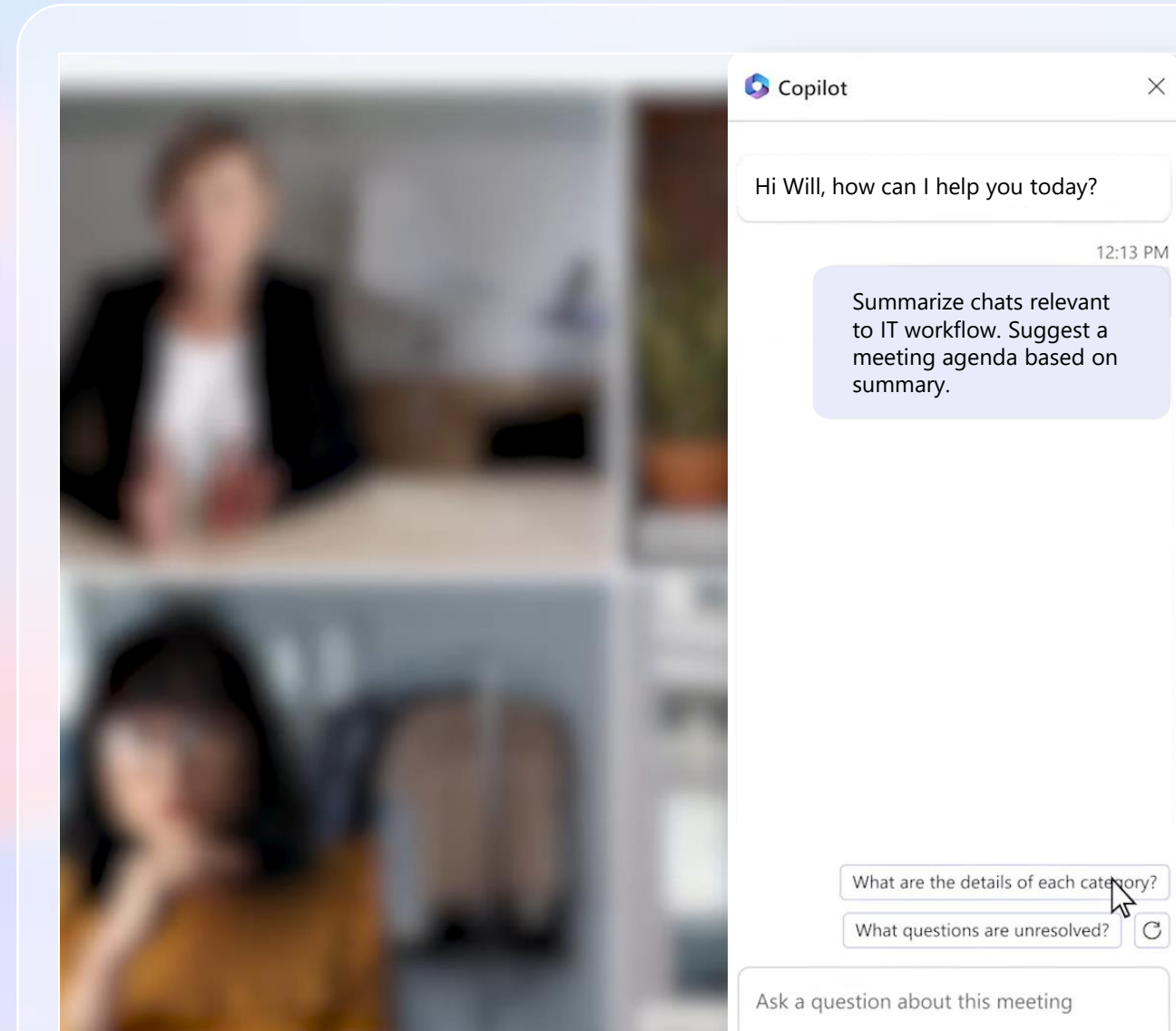


Use AI as a personal help desk assistant

Recap discussions

Teams

Before a cross-team meeting, request a summary of all Teams chats relevant to a specific workflow, and suggest a meeting agenda based on the summary

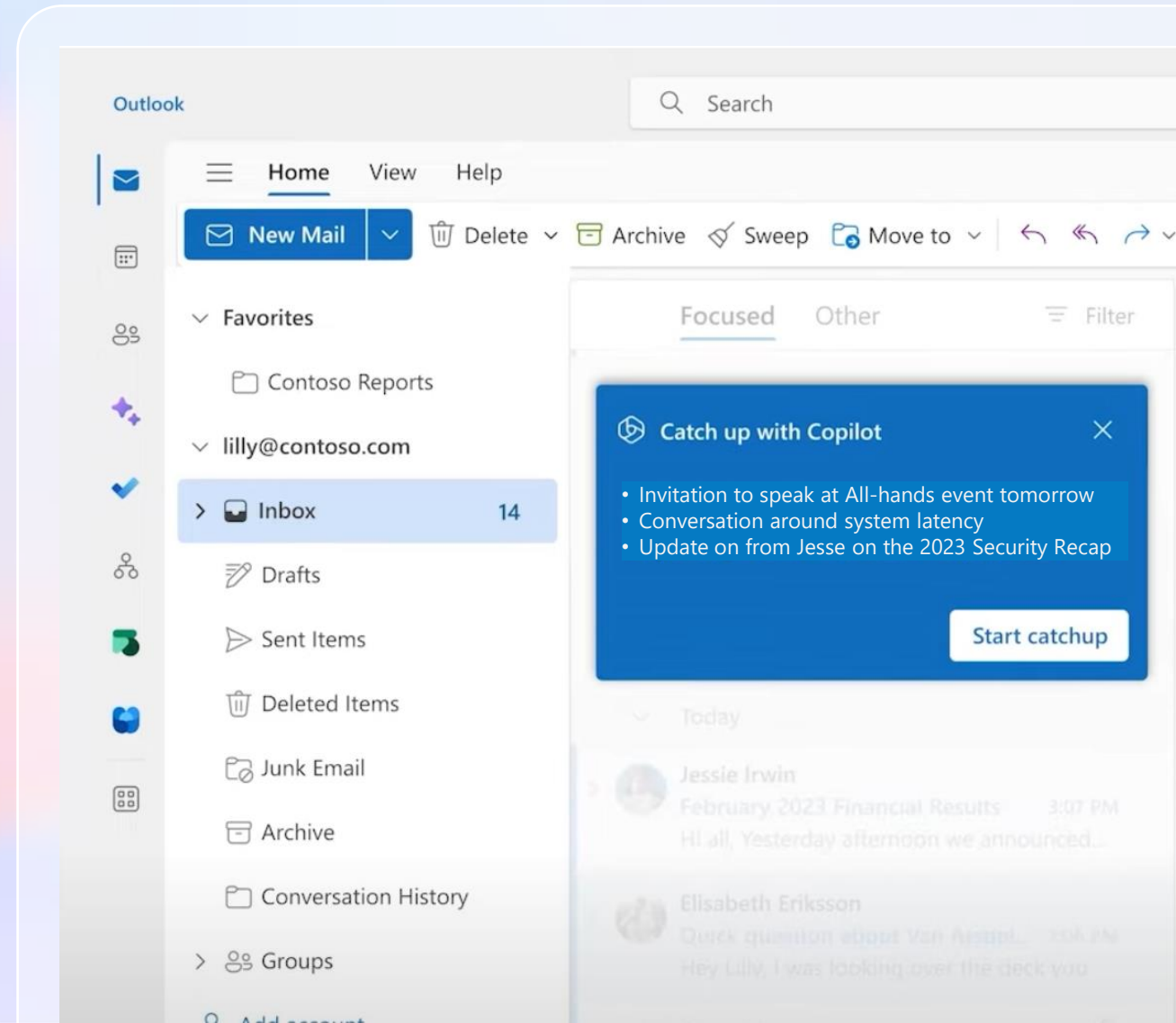


Use AI as a personal help desk assistant

Clear your inbox in minutes

Outlook

Organize a lengthy Outlook inbox, flagging important alerts to prioritize



A day in the life of your IT administrators

IT Administrator Will is tasked with summarizing system changes for the help desk.



Summarize changes

Yesterday, a critical system underwent an update that will impact customers. IT teams have been documenting the changes in separate files.

Will (they/them) is tasked with synthesizing everyone's notes into simple talking points for the help desk. Will turns to Loop and tags their team members to share what they have documented.

Next they schedule a meeting with all IT teams to get on the same page. To prep for the meeting, Will turns to **Copilot**:

Review system documentation and **surface all references** to customers. **Summarize** these references into bullet points.



Stay on topic during a meeting

During the meeting, IT managers discuss what the help desk needs to know, and a few points stand out. Will asks **Copilot** to summarize the impacts Marie (she/her) explained.

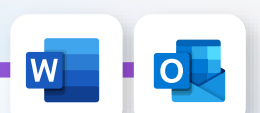
After the meeting, Copilot in Teams lists the important items for Will.

Recap all help desk tips that were considered. Turn our ideas into a table.



From there, Will is back to Word, creating a reference document for the help desk.

Turn this meeting checklist into a 1-page document. Provide more context for customer actions.



Share the impact

Time to share the 1-pager with the help desk! From a blank email, Will prompts **Copilot**:

Draft a detailed email from the linked 1-pager. Add three talking points from meeting notes. **Make the tone more friendly**, include formatting and emojis.



Sent! 😊

Unlock productivity, unleash creativity, create more value



HR



Sales



Marketing



Finance

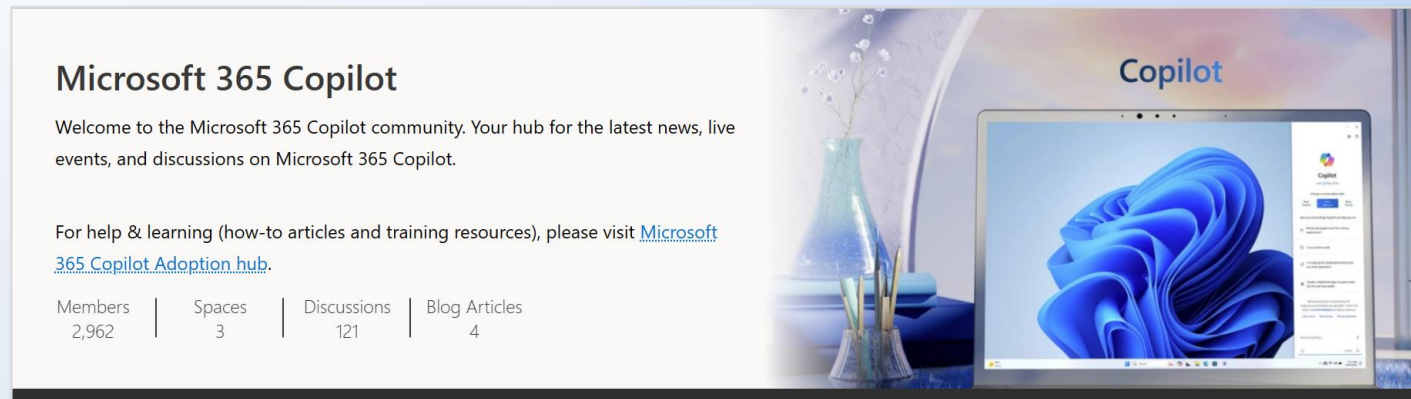
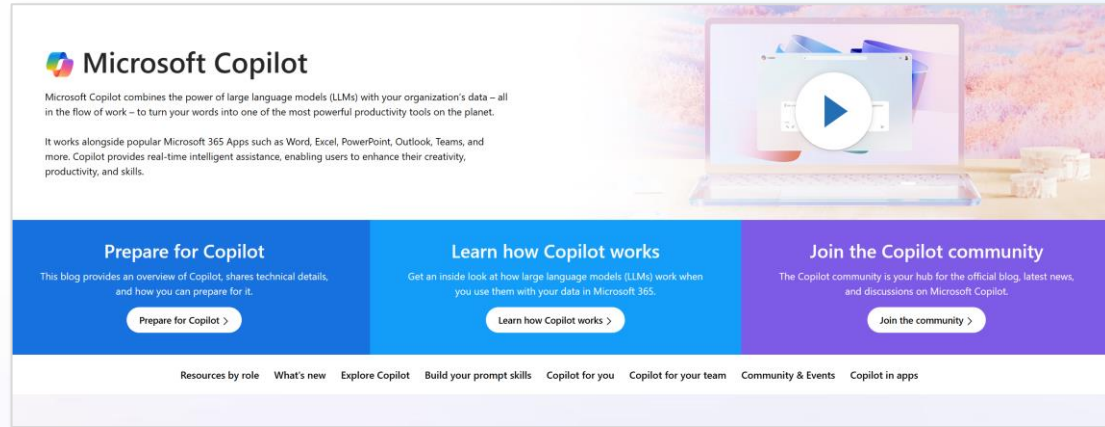


IT

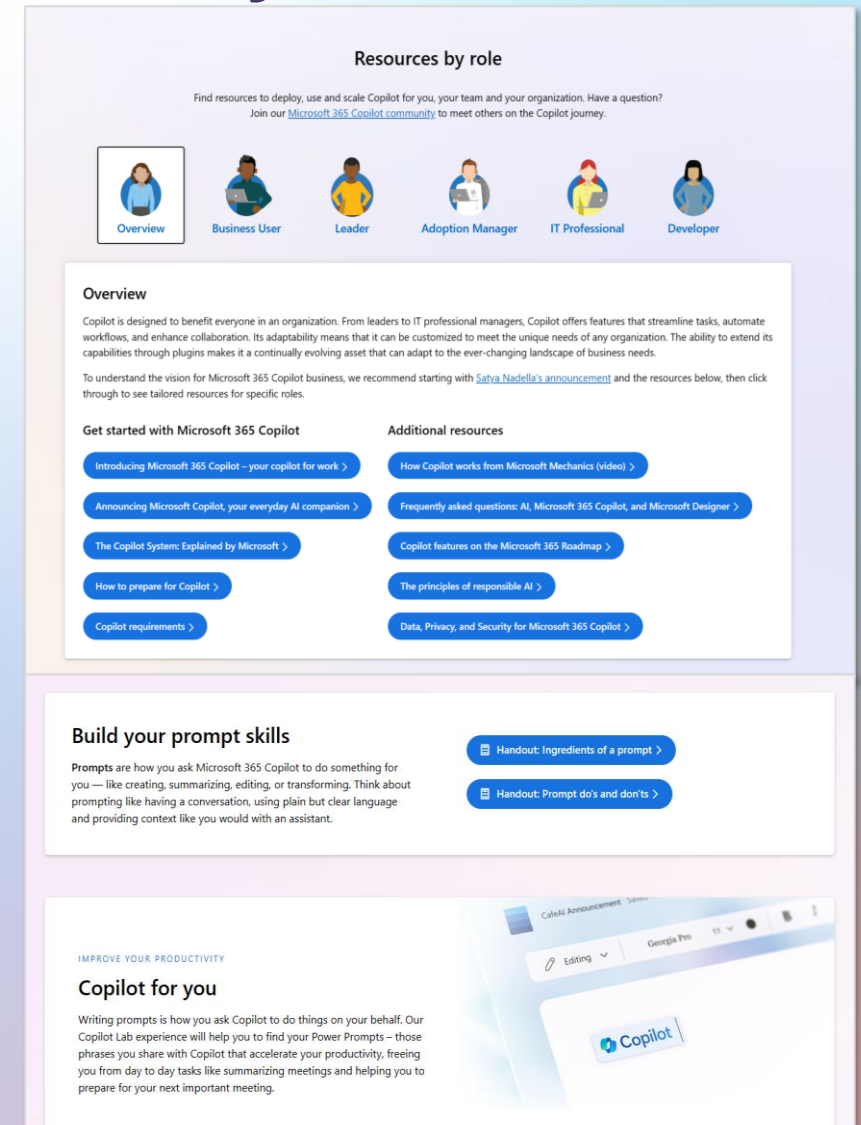
Visit the Copilot readiness hub & community

adoption.microsoft.com/copilot

Deployment, adoption, and usage guidance for Microsoft Copilot



Ask questions and get answers in our community aka.ms/M365CopilotCommunity



Learn more

[Copilot early access](#)

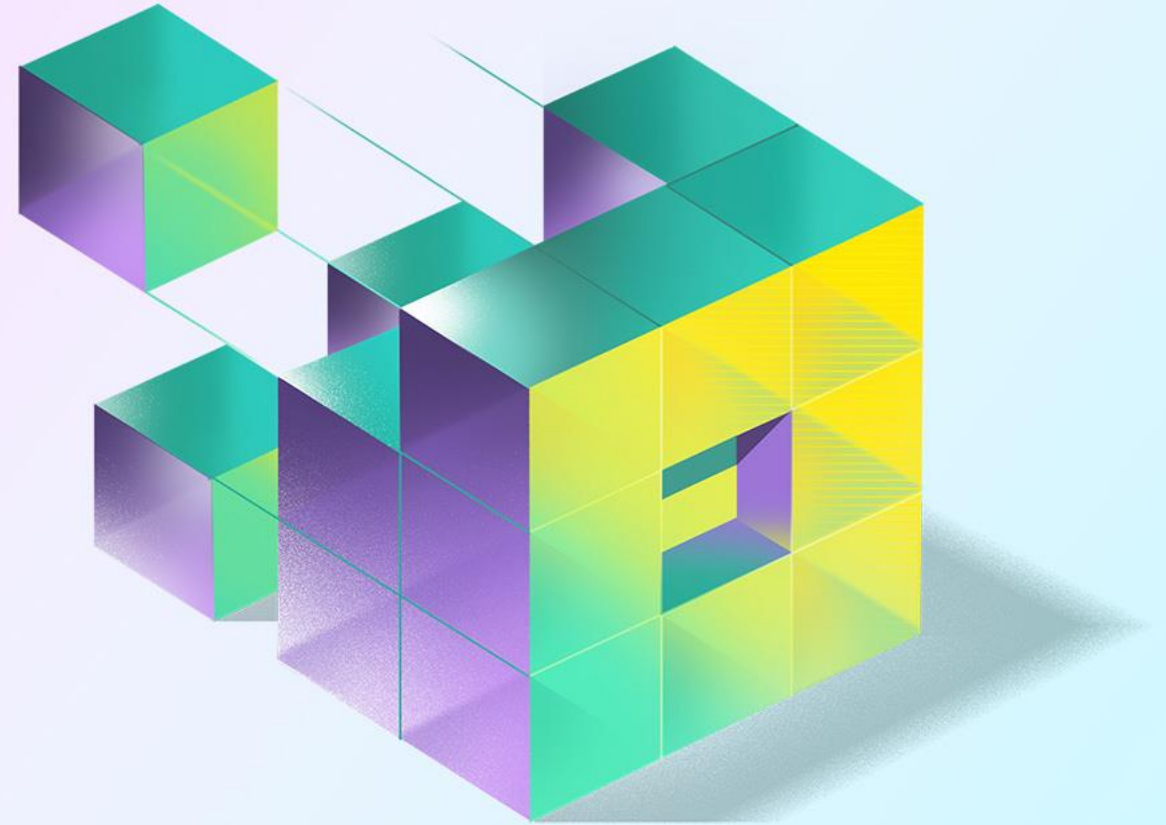
Announcing the Microsoft 365
Copilot Early Access Program

[Microsoft 365 Copilot](#)

Your copilot for work

[Microsoft WorkLab](#)

Research and data on the trends
reshaping the world of work





Thank You!

Appendix





The next
revolution in
computing