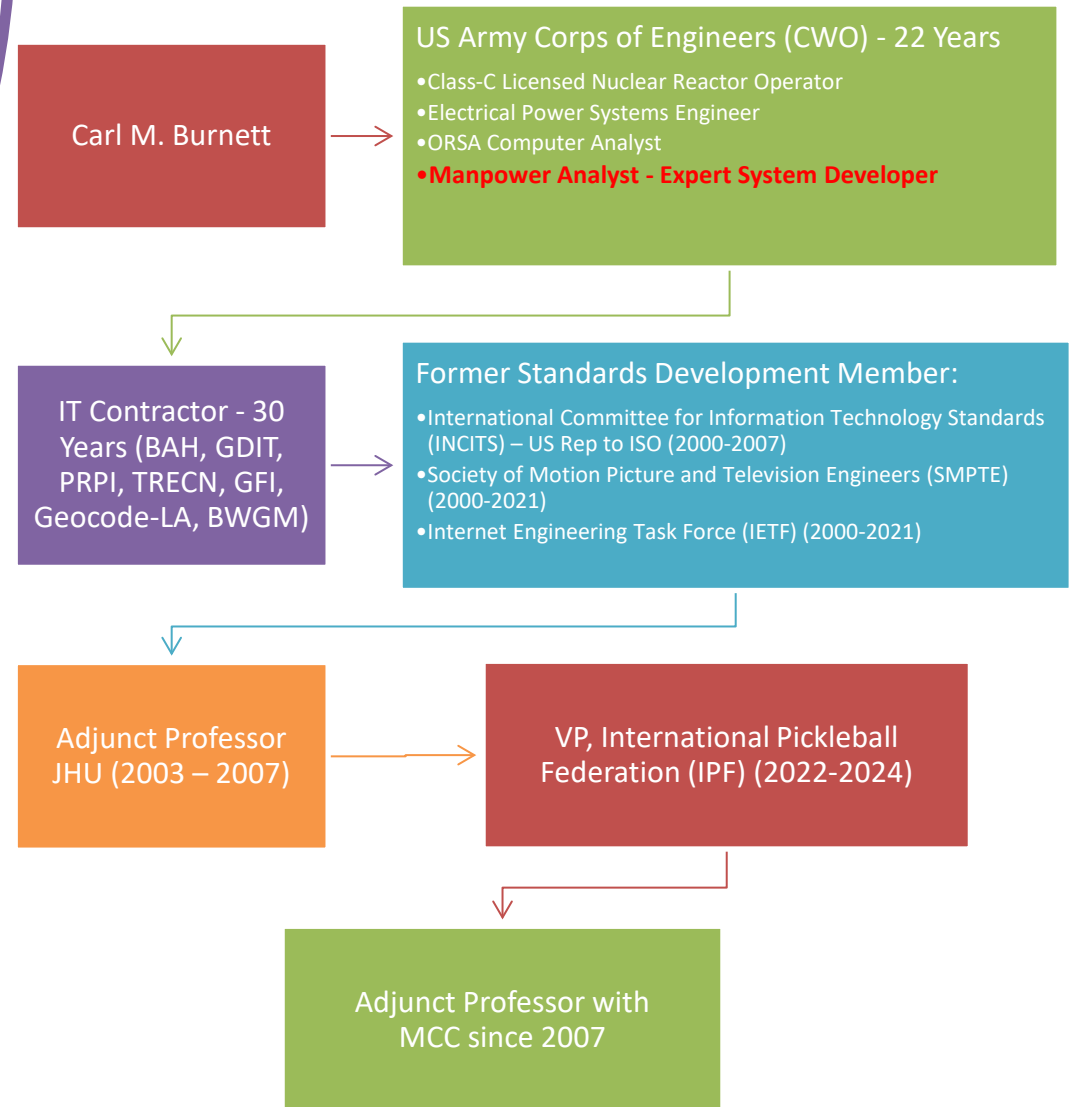


Unlocking Productivity with Microsoft 365 Copilot



rosoft

Instructor Info



Profburnett Website
<https://profburnett.com>



Professor Burnett Office Hours Bookings
<https://outlook.office365.com/owa/calendar/ProfessorBurnett@montgomerycollege0.onmicrosoft.com/bookings/>



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Introduce Yourself

Name

Job

**What do you to
expect from course?**

Unlocking Productivity with Microsoft 365 Copilot

- Explore AI integrations enhancing Word, Excel, and Outlook workflows
- Discover personal organization tools using Copilot's task management
- Learn AI-driven calendar and meeting scheduling efficiencies
- Automate routine tasks like email drafting and summarizing
- Adopt best practices for AI integration and security awareness

Microsoft Copilot & AI in Microsoft 365

- Key features and integrations
- Real-world benefits for productivity and organization

Outlook

- **Key Features:**
 - **Email Summarization:** Summarize long threads.
 - **Reply Drafting:** Suggest responses based on context.
 - **Tone Adjustment:** Make emails more formal, friendly, etc.
 - **Schedule Suggestions:** Propose meeting times and follow-ups.
- **Integration Highlights:**
 - Integrates with calendar, Teams, and To Do.
 - Can pull data from Word/Excel attachments for context.

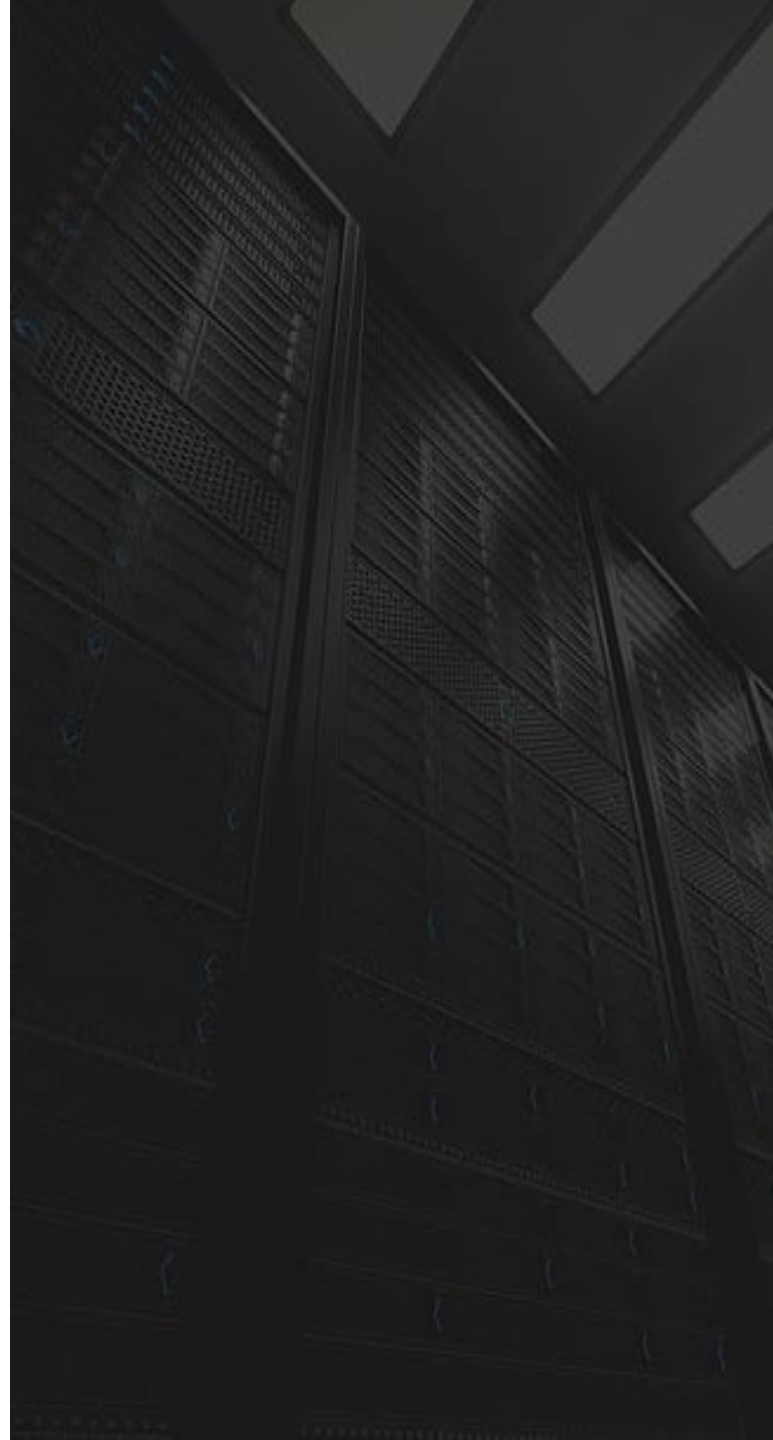
Word

- **Key Features:**

- **Content Drafting:** Generate text based on prompts or outlines.
- **Summarization:** Condense long documents into key points.
- **Rewrite Suggestions:** Improve tone, clarity, or style.
- **Formatting Help:** Apply consistent styles and layouts.

- **Integration Highlights:**

- Appears as a sidebar or inline assistant.
- Can pull data from other documents or emails for context.



Excel

- **Key Features:**

- **Data Analysis:** Generate insights, trends, and summaries.
- **Formula Generation:** Create complex formulas from natural language.
- **Chart Creation:** Automatically generate charts and visuals.
- **What-If Analysis:** Simulate scenarios and outcomes.

- **Integration Highlights:**

- Works with PivotTables, Power Query, and dynamic arrays.
- Can reference data from other Microsoft 365 sources.



PowerPoint

- **Key Features:**

- **Presentation Generation:** Create slides from prompts or documents.
- **Slide Summarization:** Condense decks into key takeaways.
- **Design Suggestions:** Improve layout and visual appeal.
- **Speaker Notes:** Auto-generate talking points.

- **Integration Highlights:**

- Pulls content from Word, Excel, and Teams.
- Can generate visuals and icons using AI.





Teams

- **Key Features:**

- **Meeting Summaries:** Auto-generate notes, action items, and highlights.
- **Real-Time Transcription:** Live captions and transcripts.
- **Chat Assistance:** Summarize threads, suggest replies.
- **Task Tracking:** Extract tasks and assign them.

- **Integration Highlights:**

- Syncs with Planner, To Do, and Outlook.
- Works across channels, meetings, and chats.

REAL-WORLD BENEFITS OF COPILOT FOR PRODUCTIVITY AND ORGANIZATION



Copilot

Create an image

Write an email

Organize my plans

Give me a summary

Task and Time Management

- **Smart Scheduling:** Plan your day, week, or month based on priorities and deadlines.
- **Reminders & Follow-ups:** Automate reminders for meetings, emails, and tasks.
- **Time Blocking:** Allocate focused time slots for deep work and breaks.



Document and Note Organization

- **Summarization:** Quickly summarize long documents and meeting notes.
- **Searchable Notes:** Structure and tag notes for easy retrieval.
- **Auto-formatting:** Maintain consistency in reports, emails, and presentations.



Data Analysis and Reporting

- **Spreadsheet Automation:** Analyze data, create pivot tables, and charts.
- **Report Generation:** Generate reports from raw data or transcripts.
- **Trend Identification:** Spot patterns and anomalies to support decisions.



Communication Efficiency



EMAIL DRAFTING: WRITE
PROFESSIONAL EMAILS FROM
BULLET POINTS OR CONTEXT.



MEETING SUMMARIES:
TRANSCRIBE AND SUMMARIZE
MEETINGS WITH ACTION ITEMS.



LANGUAGE TRANSLATION:
COMMUNICATE ACROSS
LANGUAGES ACCURATELY.



Project and Workflow Support



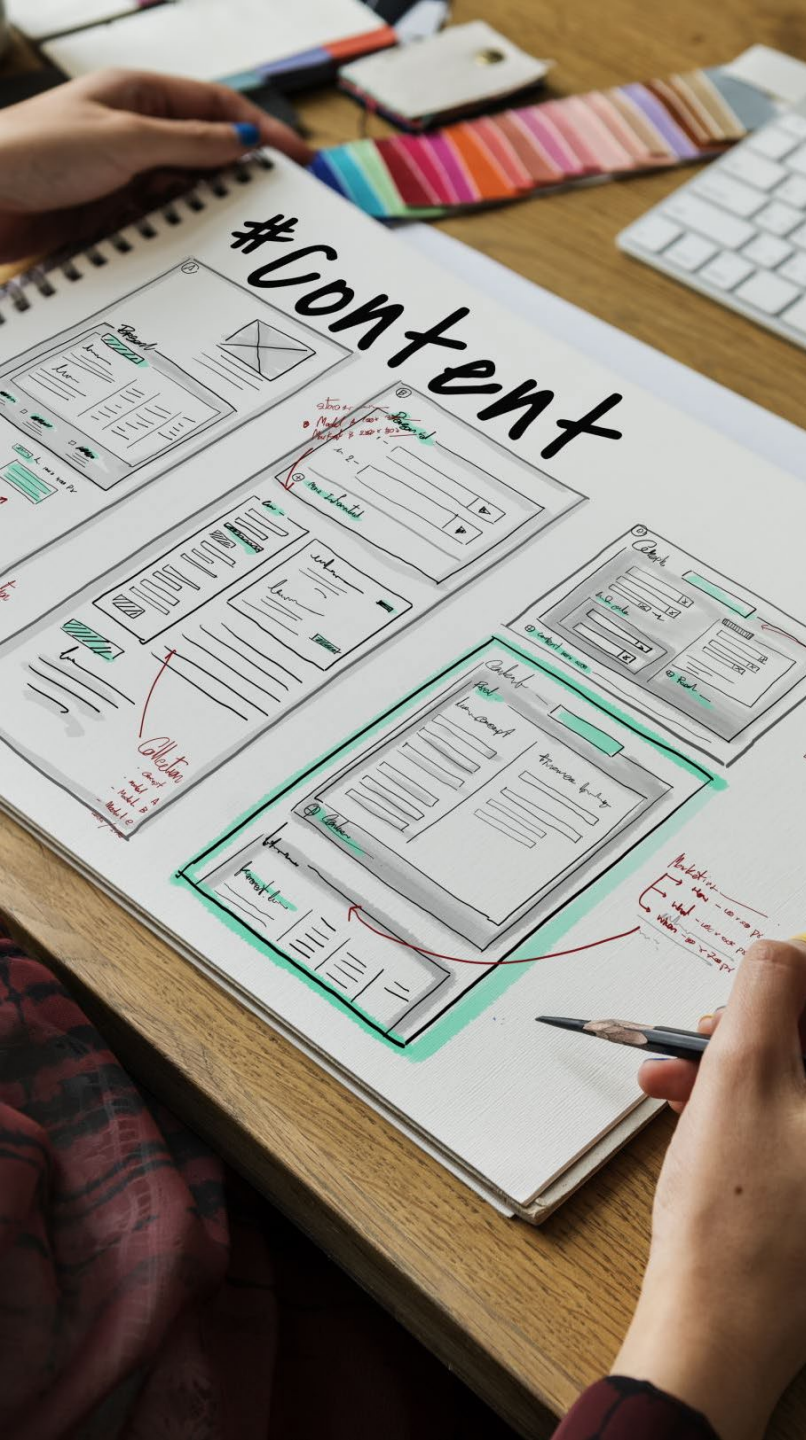
Project Planning:
Break down goals
into actionable
steps.



Progress Tracking:
Monitor milestones
and deliverables.



Collaboration:
Integrate with tools
like Teams, Slack, or
Trello.



Personal Productivity

- **Habit Tracking:** Build and track habits like reading or journaling.
- **Learning Assistant:** Explain complex topics and assist with research.
- **Creative Brainstorming:** Generate ideas for writing, design, or problem-solving.

MS 365 Copilot UIs

Feature / Aspect	Copilot in Microsoft 365 Apps	Copilot Chat (Standalone Interface)
Integration	Embedded in Word, Excel, PowerPoint, Outlook, Teams	Separate chat-based interface
Primary Use Case	Contextual assistance within documents, emails, meetings	General productivity, research, and multi-agent tasks
Interface Style	Sidebar, inline suggestions, ribbon buttons	Full-screen chat with side panel and prompt suggestions
Data Access	Works with content in the current app (e.g., open document)	Can access broader organizational data and files
Visual Indicators	App-specific icons and UI elements	Green shield icon for enterprise protection
File & Image Support	Limited to app capabilities	Supports file uploads and image generation
Copilot Pages	Not available	Available (requires SharePoint license)
Suggested Prompts	Contextual to the app (e.g., "Summarize this email")	General and customizable prompts shown in the center panel
Agent Support	No	Yes – supports custom agents for specialized tasks

MS 365 Copilot Chat (Online)

The screenshot displays the Microsoft 365 Copilot Chat interface within an Outlook web browser. The browser's address bar shows the URL: `outlook.office.com/host/d870f6cd-4aa5-4d42-9626-ab690c041429/entity1-d870f6cd-4aa5-4d42-9626-ab690c041429`. The Outlook navigation bar at the top includes a search bar and various app icons. The left sidebar contains several icons, with the Copilot icon (a colorful square) highlighted by a blue arrow and the text "Copilot Chat Icon".

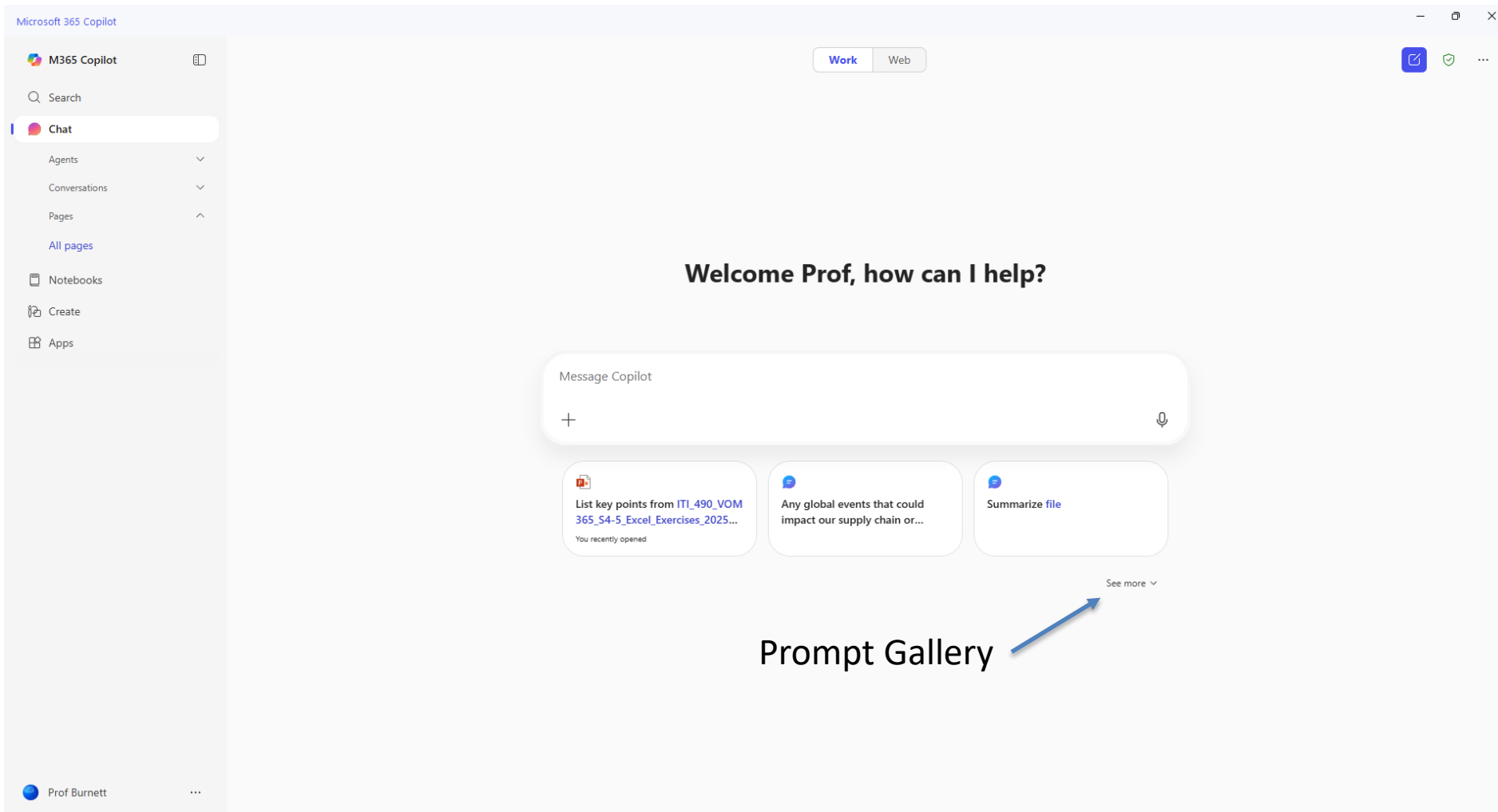
The main chat area shows a conversation with Copilot. The header of the chat says "Today" and "draft a reply to email". The Copilot message reads: "Sure, I can help with that! Could you please share the email you received and let me know the tone you'd like to use in your reply (e.g., formal, friendly, professional, apologetic)? Also, let me know if there are any specific points you'd like to include." Below the message are icons for copy, paste, and other actions.

At the bottom of the chat area is a text input field labeled "Message Copilot" with a plus sign and a send button. A blue arrow points to the send button with the text "View Prompts".

On the right side, there is a "Previous Chats" panel. It lists several chat topics, including "draft a reply to email", "Populate the \"to do\" list from events...", "Generate a prioritized daily task list ba...", and "how do I get copilot in ms apps". A blue arrow points to this panel with the text "Previous Chats".

At the very bottom of the interface, a small disclaimer reads: "AI-generated content may be incorrect".

MS 365 Copilot



MS 365 Copilot in Outlook

The screenshot displays the Microsoft Outlook application window. The top ribbon includes tabs for File, Home, Send / Receive, Folder, View, Help, Bitdefender Antispam, and Acrobat. The Home tab is active, showing various action buttons like New Email, New Items, Schedule a Meeting, Start Instant Meeting, Delete, Archive, Report, Reply, Reply All, Forward, Share to Teams, Quick Steps, Move, Tags, New Group, Browse Groups, Search People, Address Book, Filter Email, Read Aloud, Translate, All Apps, Reply with Scheduling Poll, Find Time, Viva Insights, and Copilot. The Copilot icon is highlighted with a blue arrow and labeled "Copilot Icon".

The left sidebar shows the "Drag Your Favorite Folders Here" section with a list of folders: profburnett@profburnett..., Inbox, Outbox, Drafts, Sent Items, Appointments, > Archive, > Conversation History, Junk Email, Deleted Items, RSS Subscriptions, > Search Folders, > Groups, and You have not joined any grou... Below this, the Groups section shows carl.burnett@montgome... with sub-items: Inbox, Drafts, Sent Items, Deleted Items, > Archive, > Conversation History, and Junk Email.

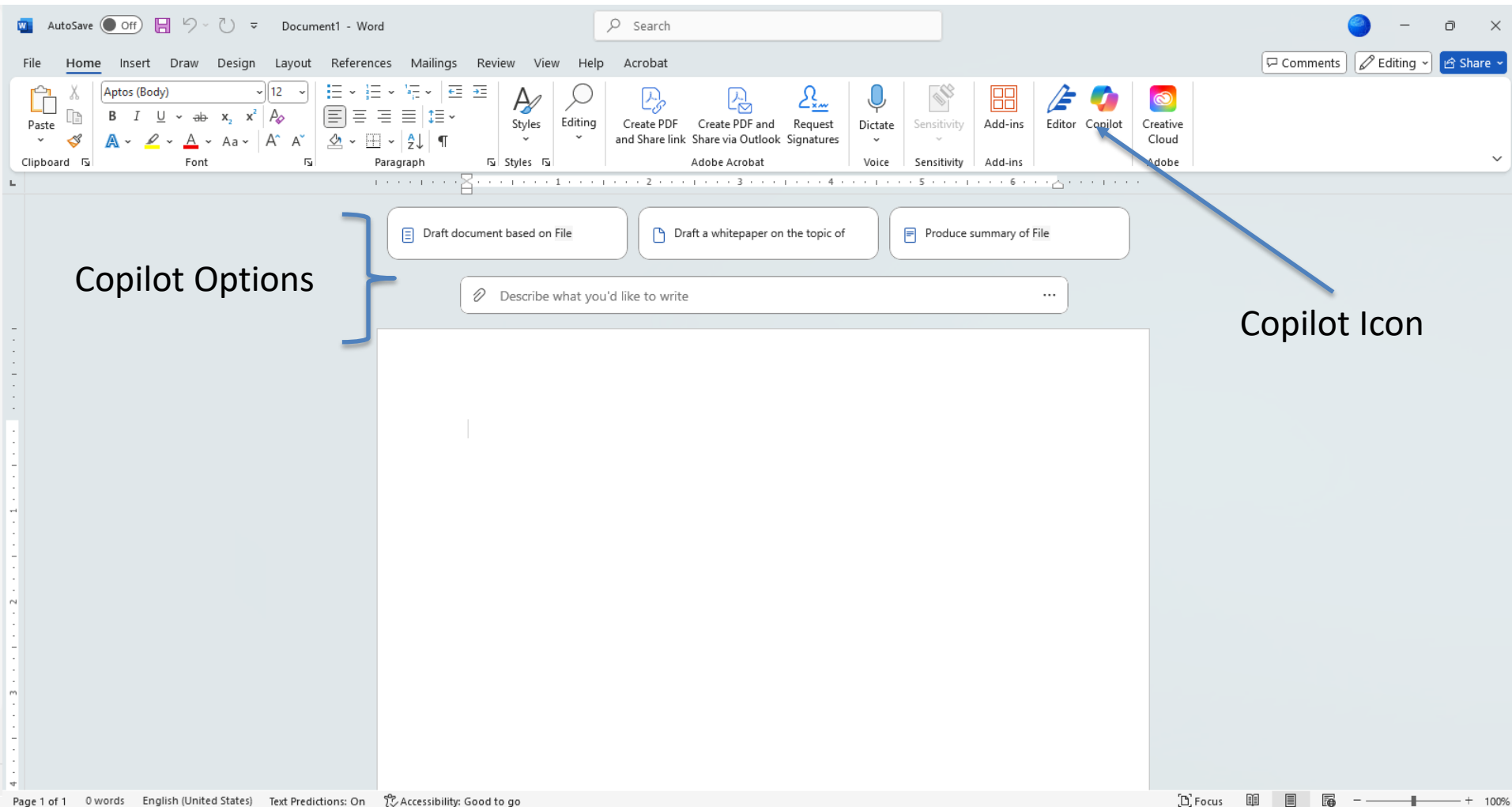
The main content area displays a list of emails. The top email is from Microsoft 365, titled "Welcome to Microsoft 365 Copilot", with a subject line "Here's what you need to get your organization up and running." and a date/time of "Thu 7/24/2025 6:01 AM". The email body contains the text "Welcome to Microsoft 365 Copilot" and a link to download pictures. The Copilot Chat icon is highlighted with a blue arrow and labeled "Copilot Chat Icon".

Below the email list, the "Welcome to Microsoft 365 Copilot" message is shown. It includes a profile picture of Microsoft 365 and a link to download pictures. The Copilot icon is highlighted with a blue arrow and labeled "Copilot Icon".

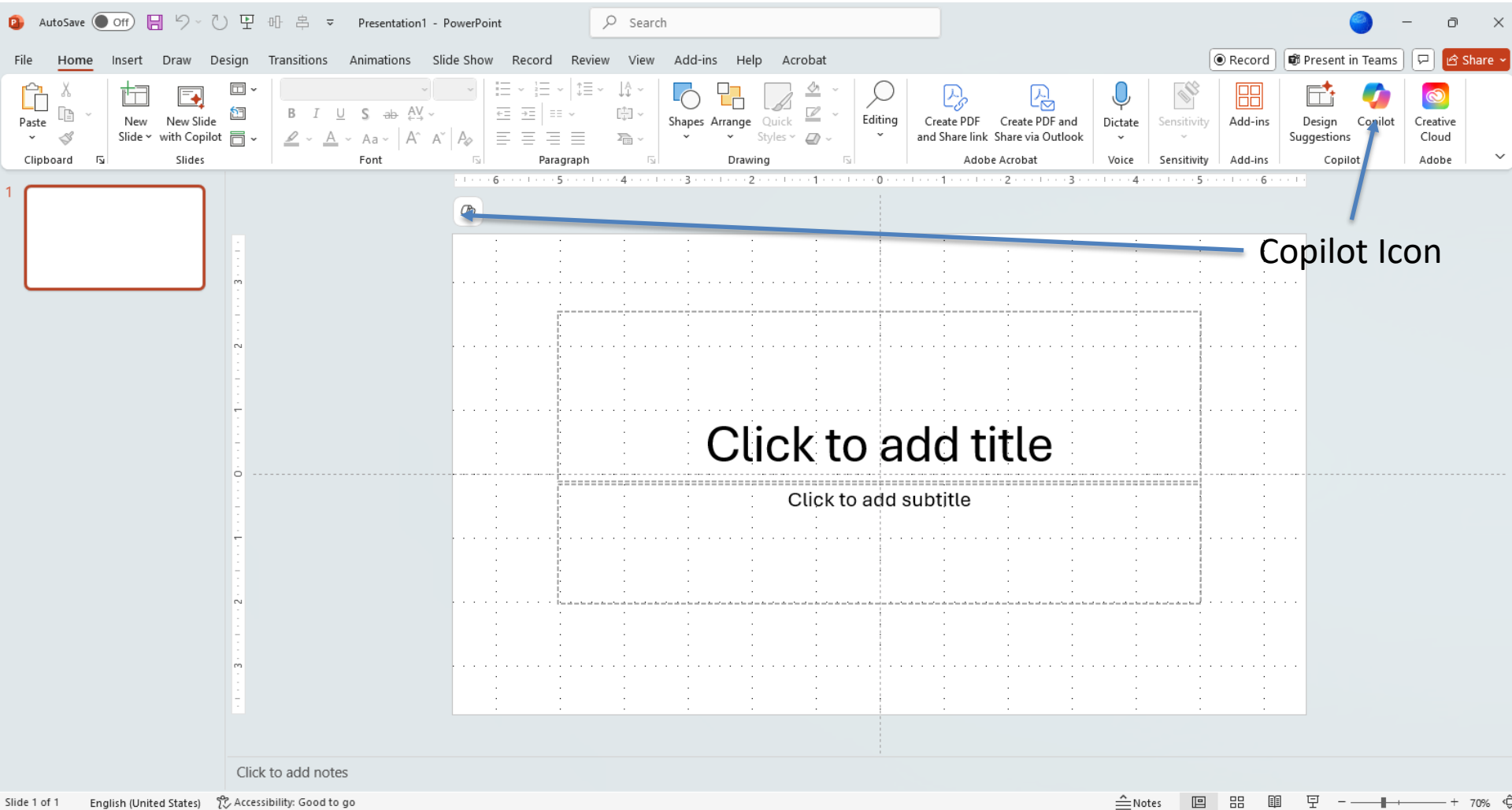
At the bottom of the message, there is a section titled "Get started with Microsoft 365 Copilot".

Items: 3,945 All folders are up to date. Connected to: Microsoft Exchange 100%

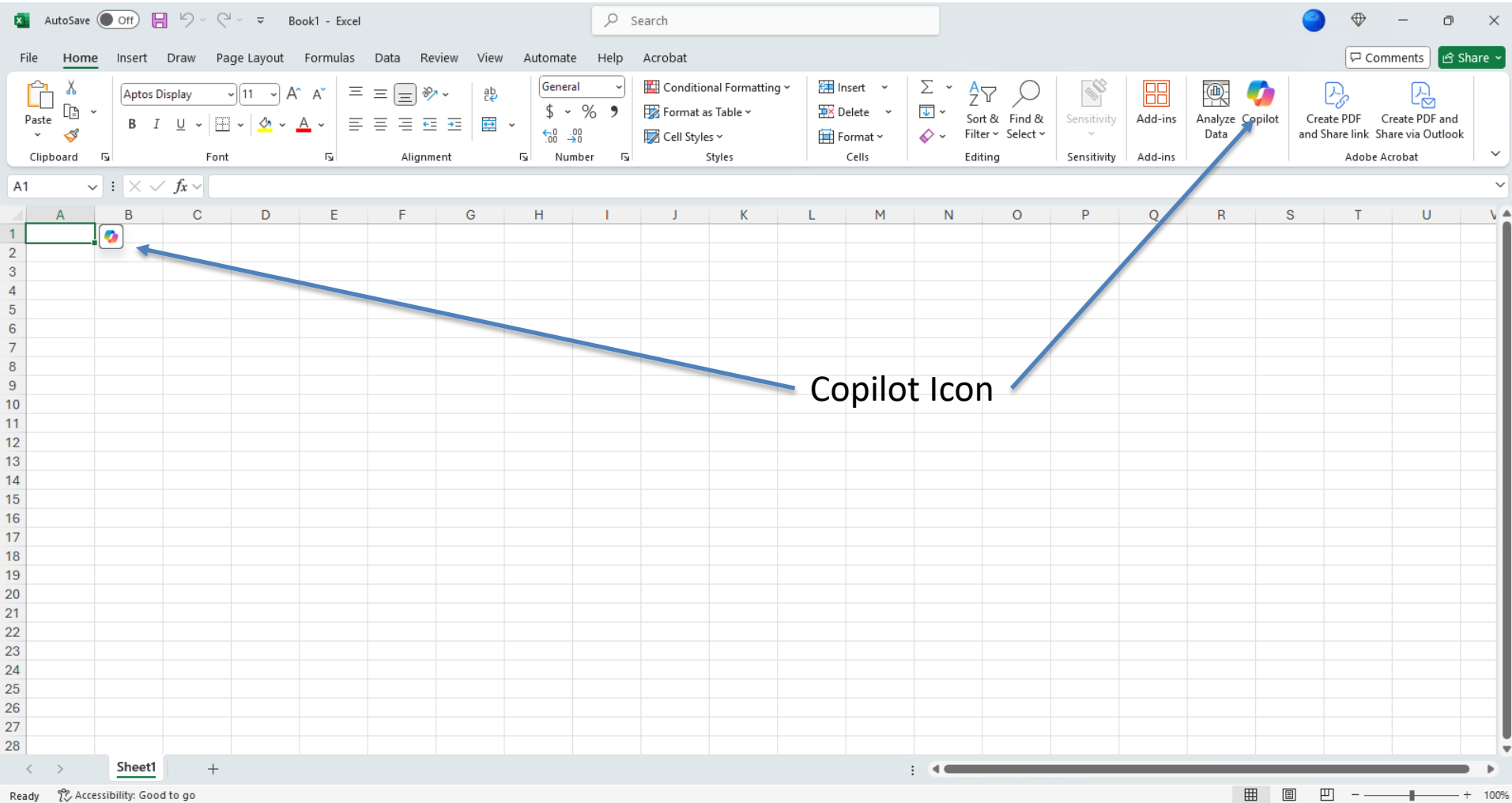
MS 365 Copilot in Word



MS 365 Copilot in PowerPoint



MS 365 Copilot in Excel



MS 365 Copilot in Teams

The screenshot displays the Microsoft Teams web application interface. The left sidebar contains navigation icons for Activity, Chat, Calendar, Calls, OneDrive, Admin, and Copilot. The Copilot icon, which is a blue square with a white 'C' and a robot head, is highlighted by a blue arrow and labeled "Copilot Chat Icon". The main chat area is titled "Tacton demo for CODiE Award - Best Emerging Technology". The top of the chat header shows a "Join" button, a list of participants (3), and a search icon. A blue arrow points to the Copilot icon in the top right corner of the chat header, labeled "Copilot Icon". The chat history shows several messages from "Prof Burnett" and "Madhur (Guest) (Unverified)" stating they have temporarily joined the chat. A message from "Alex Boike (Unverified)" dated 3/16/2022 3:29 PM contains a long URL. The bottom of the chat area shows a "Type a message" input field and a row of icons for actions like reply, emojis, attachments, and more options.

https://teams.microsoft.com/v2/

Search (Ctrl+Alt+E)

Download the new Teams desktop app for improved speed and performance

Account manager for Prof Burnett

Chat

Unread Channels Chats Meeting chats

Copilot

Mentions

Favorites

Prof Burnett (You)

Chats

Prof Burnett

Prof Burnett

cb_profbrunett.com

Tacton demo for CODiE Award - Best Emer...

Teams and channels

See all your teams

Tacton demo for CODiE Award - Best Emerging Technology Chat Shared Recap +3

Join

3

Copilot Icon

Some people in this chat are outside your org. It's possible they have message-related policies that will apply to the chat. [Learn more](#)

Prof Burnett has temporarily joined the chat.

Madhur (Guest) (Unverified) has temporarily joined the chat.

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Madhur (Guest) (Unverified) has temporarily joined the chat.

Alex Boike (Unverified) 3/16/2022 3:29 PM

<https://visualizer.tactoncpq.com/1-42-0/joinSession.html?sessionId=kze8iqqjheckd8s85y9pudkzbfww99xo&sessionServer=wss%3A%2F%2Fprod.vss.eu.tactoncpq.com>

3/16/2022 4:20 PM Meeting ended: 1h 14m 30s

Madhur (Guest) (Unverified) no longer has access to the chat.

Unknown User left the chat.

Tuesday, September 20, 2022

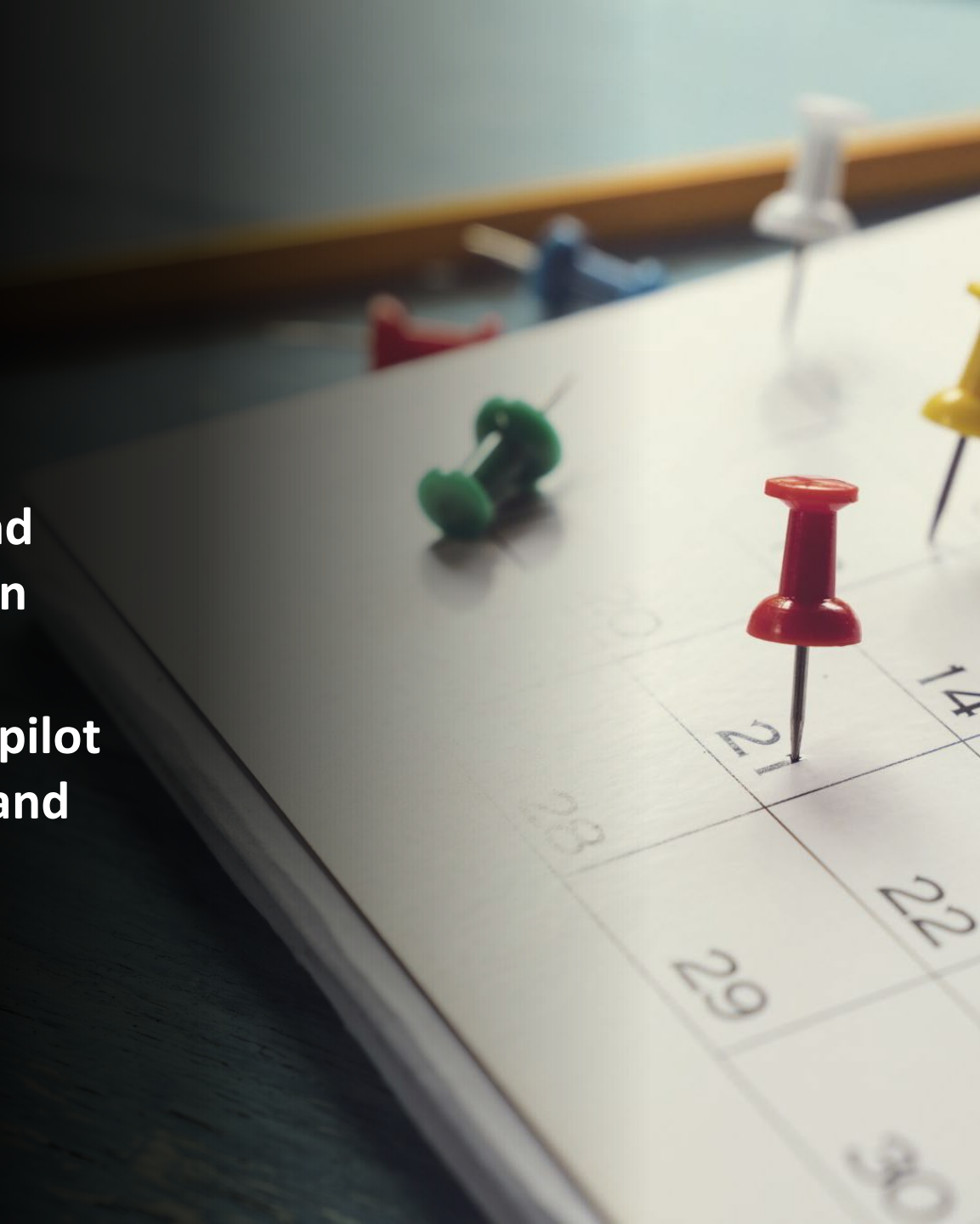
Type a message

Organizing Yourself with AI

- Using Copilot for personal task management
- Creating and managing to-do lists
- AI-powered prioritization and reminders
- **Demonstration:**
Generate a prioritized daily task list with Copilot

Mastering Your Calendar with AI

- AI-driven scheduling and meeting management in Outlook and Calendar
- **Demonstration:** Use Copilot to schedule a meeting and create an agenda

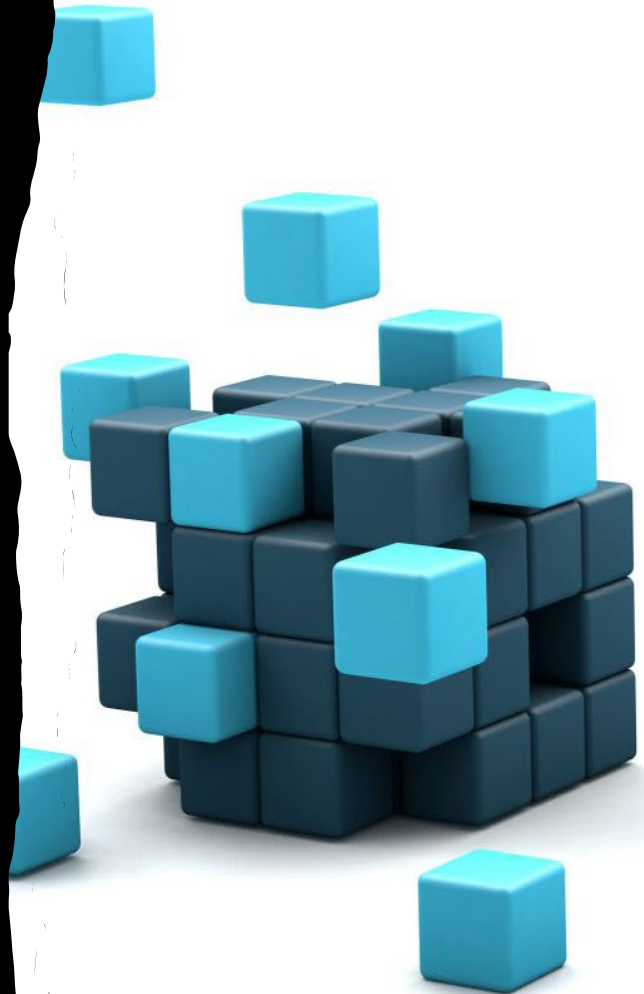


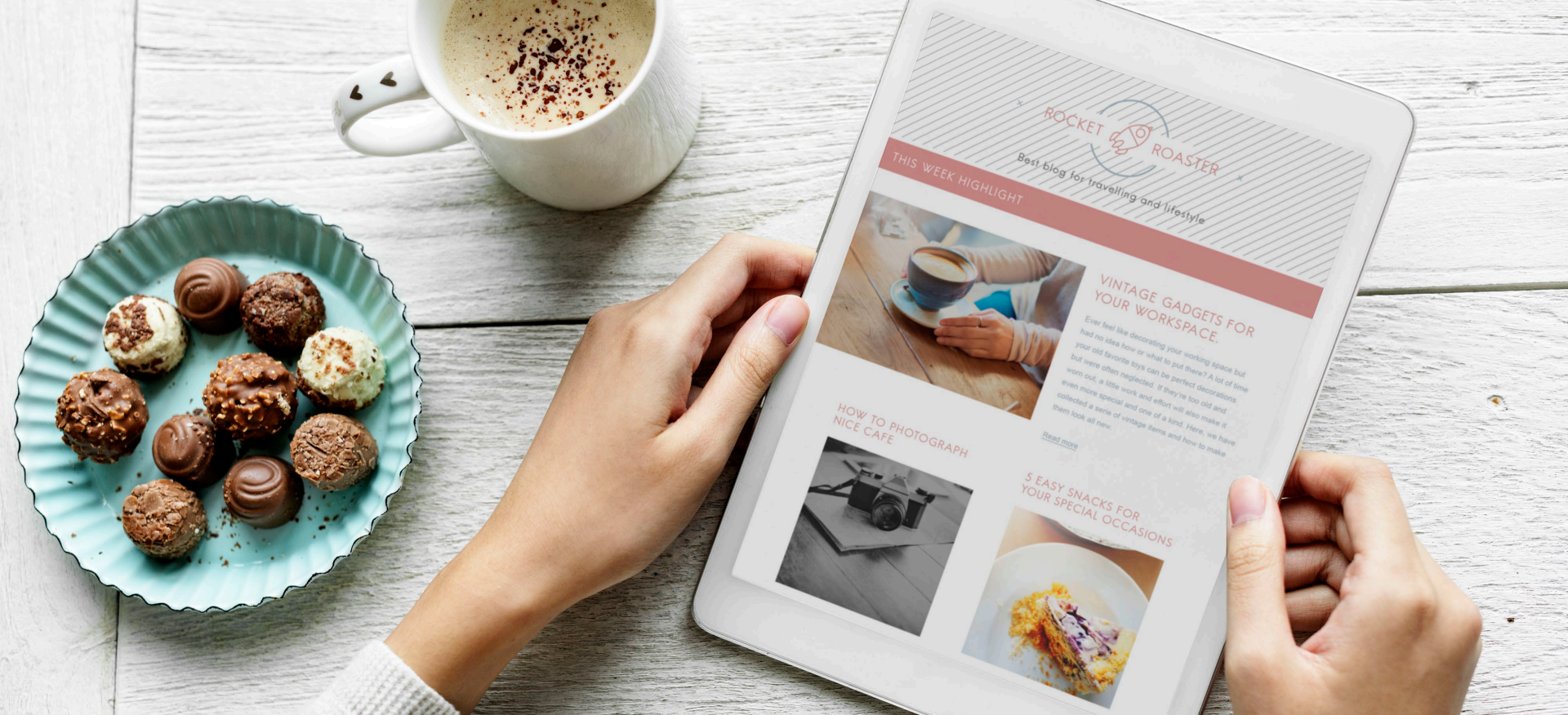
Creating Efficiencies in Daily Workflows

- Automating routine tasks (email drafting, summarizing, presentations)
- **Demonstration:** Draft an email, create a PowerPoint slide with Copilot

Best Practices & Change Management

- **Tips for integrating AI into daily routines**
- **Overcoming common challenges and misconceptions**
- **Data privacy and security considerations**





TIPS FOR INTEGRATING AI INTO DAILY ROUTINES

Start with Daily Planning

- Use AI to generate a daily agenda based on your calendar, tasks, and priorities.
- Ask it to summarize your meetings and suggest prep steps.
- Let it set reminders or send follow-up emails automatically.



Automate Repetitive Tasks

- Use AI tools to:
 - Draft emails or reports.
 - Summarize long documents or articles.
 - Auto-fill forms or generate templates.



Enhance Learning and Research

- Ask AI to explain complex topics in simple terms.
- Use it to quiz you or generate flashcards.
- Summarize research papers or compare sources.

Boost Work Productivity

- Integrate AI with tools like Excel, Notion, or Trello to:
 - Analyze data and generate insights.
 - Track project progress.
 - Suggest next steps or improvements.





Support Personal Growth

- **Use AI to:**
 - **Track habits and goals.**
 - **Recommend books, podcasts, or learning paths.**
 - **Reflect on your day or journal with prompts.**

Make It a Habit

- Start small: use AI for one task a day.
- Set a “**Copilot check-in**” time to review your day or plan tomorrow.
- Gradually expand to more areas as you get comfortable.



KEY CHALLENGES AND COMMON MISCONCEPTIONS



Common Misconceptions

Misconception	Reality
Copilot is plug-and-play.	It requires setup, integration, and governance.
It replaces human workers.	It's a support tool, not a replacement.
It's always accurate.	AI can make mistakes— human oversight is essential.
It understands context perfectly.	Copilot relies on the data and prompts it's given.
It's secure by default.	Security depends on how it's configured and managed



Data Security & Privacy

- **Copilot accesses and processes organizational data, raising concerns about sensitive information exposure.**
- **Solution:** Implement strict access controls, encryption, and regular audits.



Compliance & Legal Risks

- **Copilot must align with regulations like GDPR, HIPAA, and CCPA.**
- **Solution:** Review data governance policies and consult legal experts.

Technical Infrastructure

- Legacy systems or outdated software can hinder Copilot's performance.
- **Solution:** Assess and upgrade IT infrastructure before deployment.

Over-Reliance on AI

- **Users may become too dependent on Copilot, reducing critical thinking and skill development.**
- **Solution:** Encourage a balance between AI assistance and manual problem-solving.



Quality of Output

- **Copilot may generate inaccurate or generic content, especially without clear prompts.**
- **Solution:** Always review and refine AI-generated content.

Change Management & Training

- **Employees may resist adoption or misuse the tool due to a lack of understanding.**
- **Solution:** Provide training, clear guidelines, and ongoing support.



DATA PRIVACY AND SECURITY CONSIDERATIONS

Cloud Data Integrity
and Compliance |
Microsoft Trust Center



Q&A and Wrap-Up

A large audience of people is seen from behind, filling a dark room. They are all looking towards a bright, glowing screen at the front of the room, which is out of focus. The lighting is dim, with the primary light source being the screen, creating a silhouette effect on the audience members.

- **Q & A**
- **Additional Resources**

Class Evaluation

- **WD&IP Course Evaluation Form**
- <https://forms.office.com/pages/responsepage.aspx?id=Cx5ATVJICE69OKjRXKDd2ajBZeUeNGUpCr1Y3iAmNkm5UNIBQQIVaWEtJUKY0MUFTV0UwU1ZaUzk3QS4u>
- **CRN #: 99999**
- **Course Name: Microsoft 365 Copilot**
- **Start Date: 7/25/2025 - 8/1/2025**
- **Instructor's Name: Carl M. Burnett**