Unlocking Productivity with Microsoft 365 Copilot

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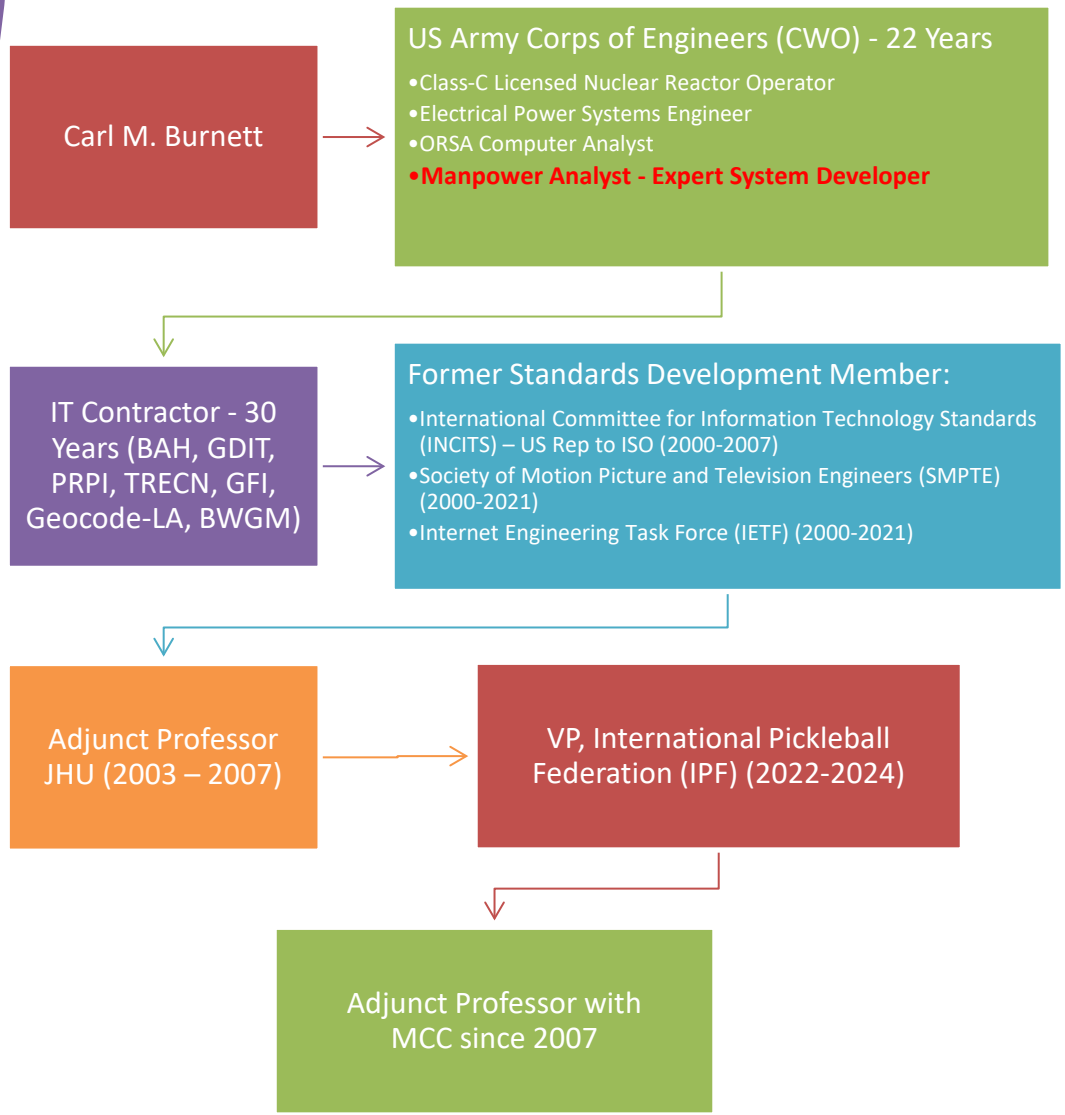
Instructor Info



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Introduce Yourselves

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

Microsoft 365 Copilot Feature Comparison Chart

Microsoft 365 Copilot Chat - Free

Plan	Word	Excel	PowerPoint	Outlook	OneNote	Toggle Available	AI Credits
Copilot Pro	✓	✓	✓	✓	✓	No	Limited
Business Enterprise	✓	✓	✓	✓	✓	Yes	Varies
Personal/ Family	Limited	Limited	Limited	Limited	Limited	Yes	Limited

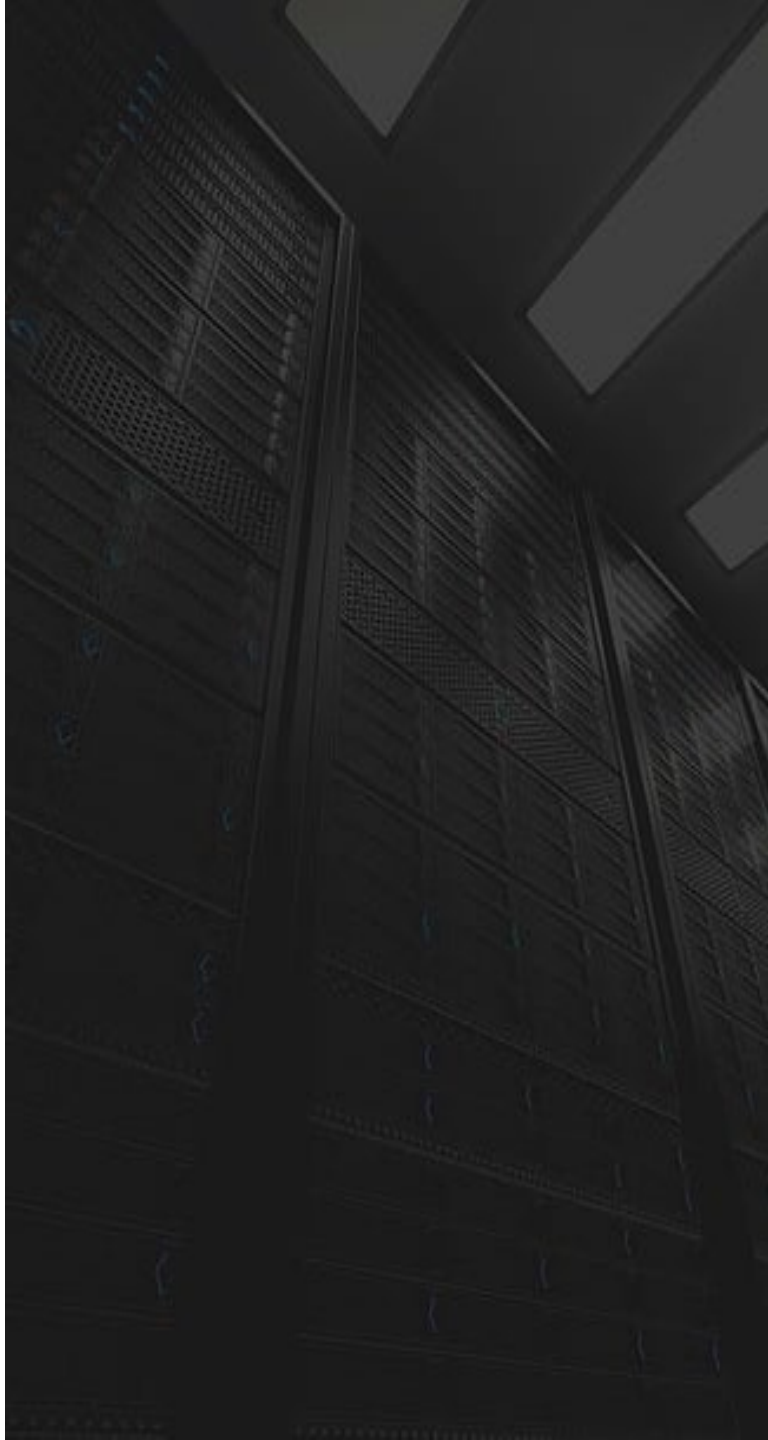
Outlook

- **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.

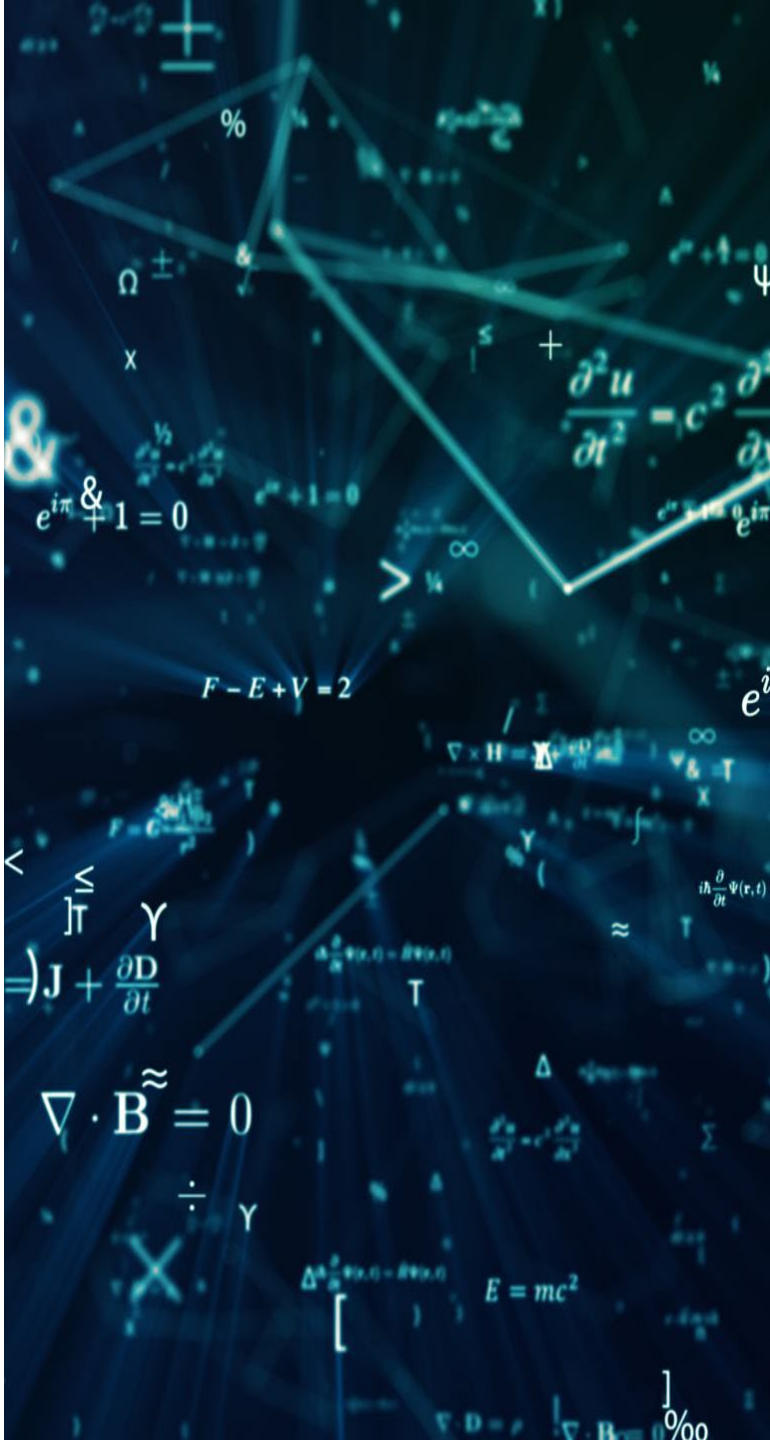
Word

- **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.

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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

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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.

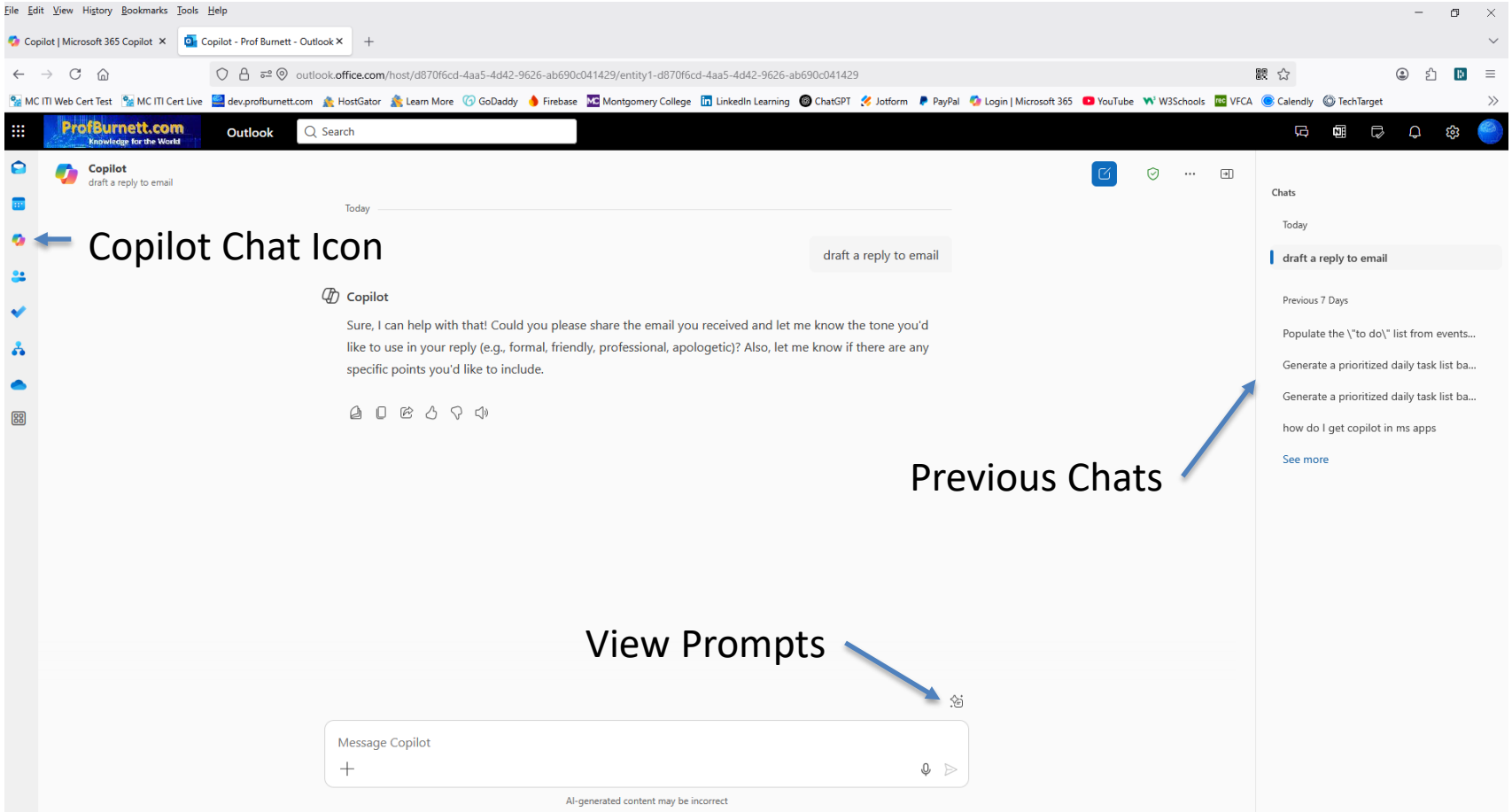
Personal Productivity

- **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.

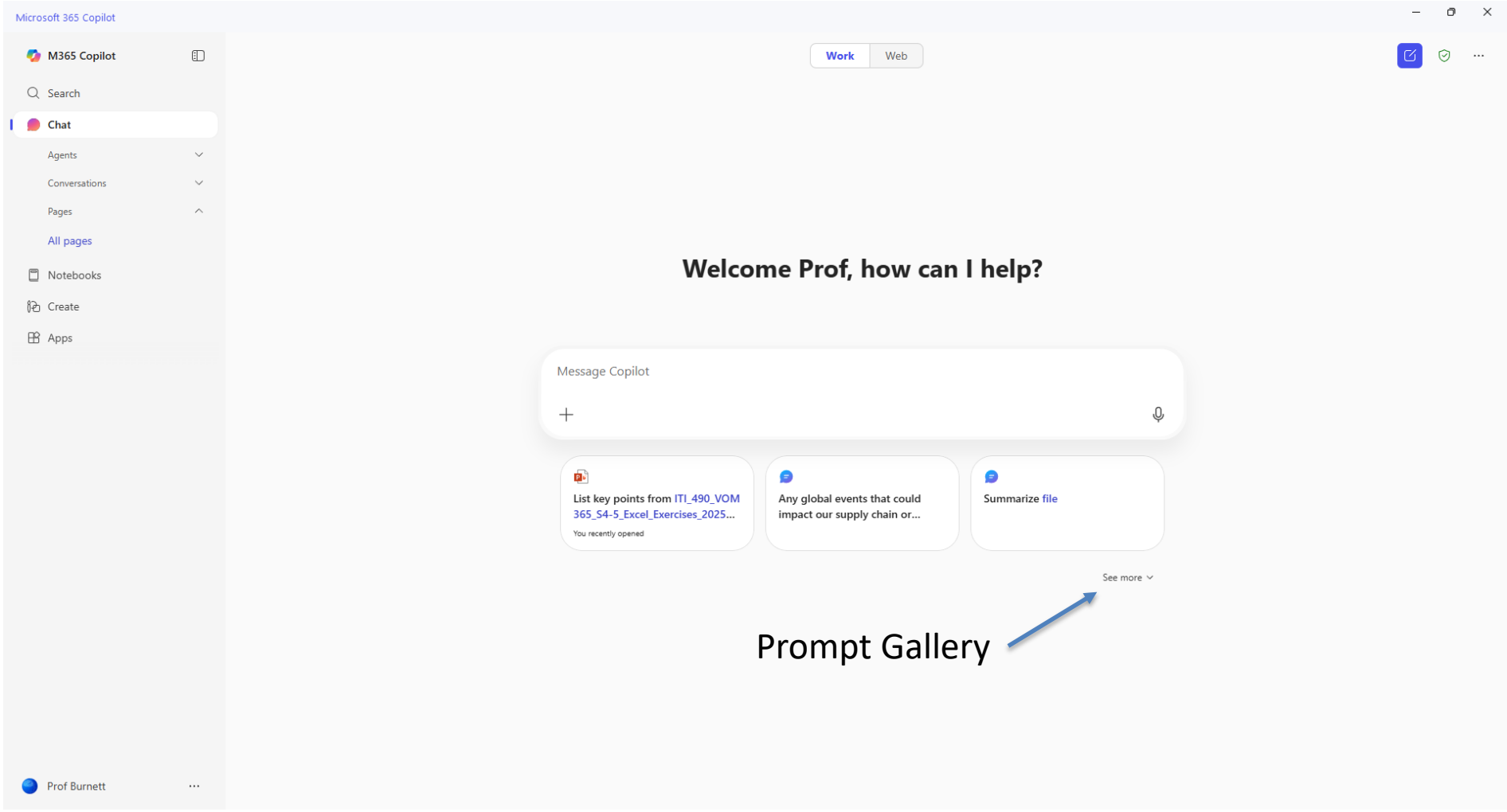
MS 365 Copilot UIs

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

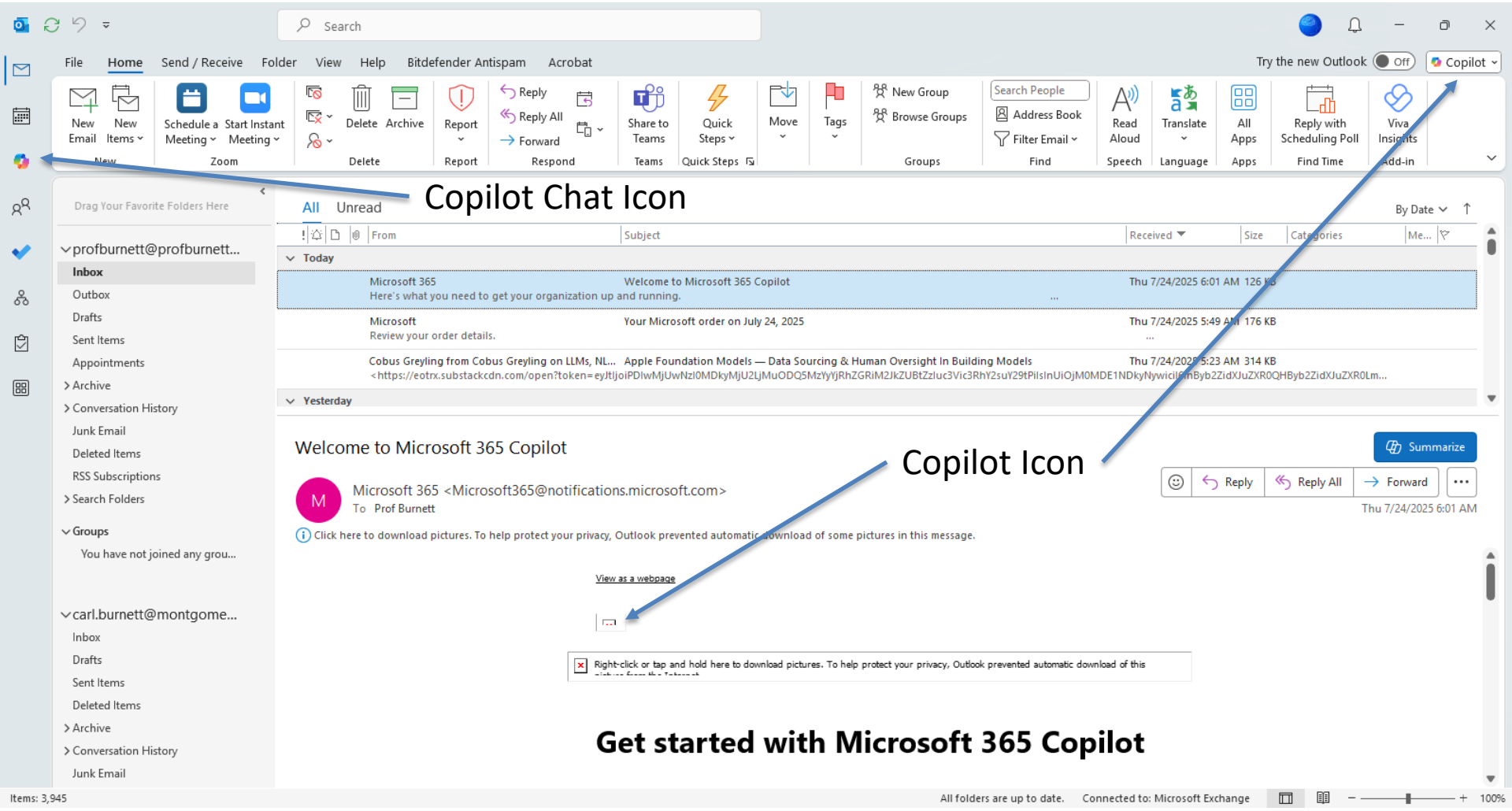
MS 365 Copilot Chat (Online)



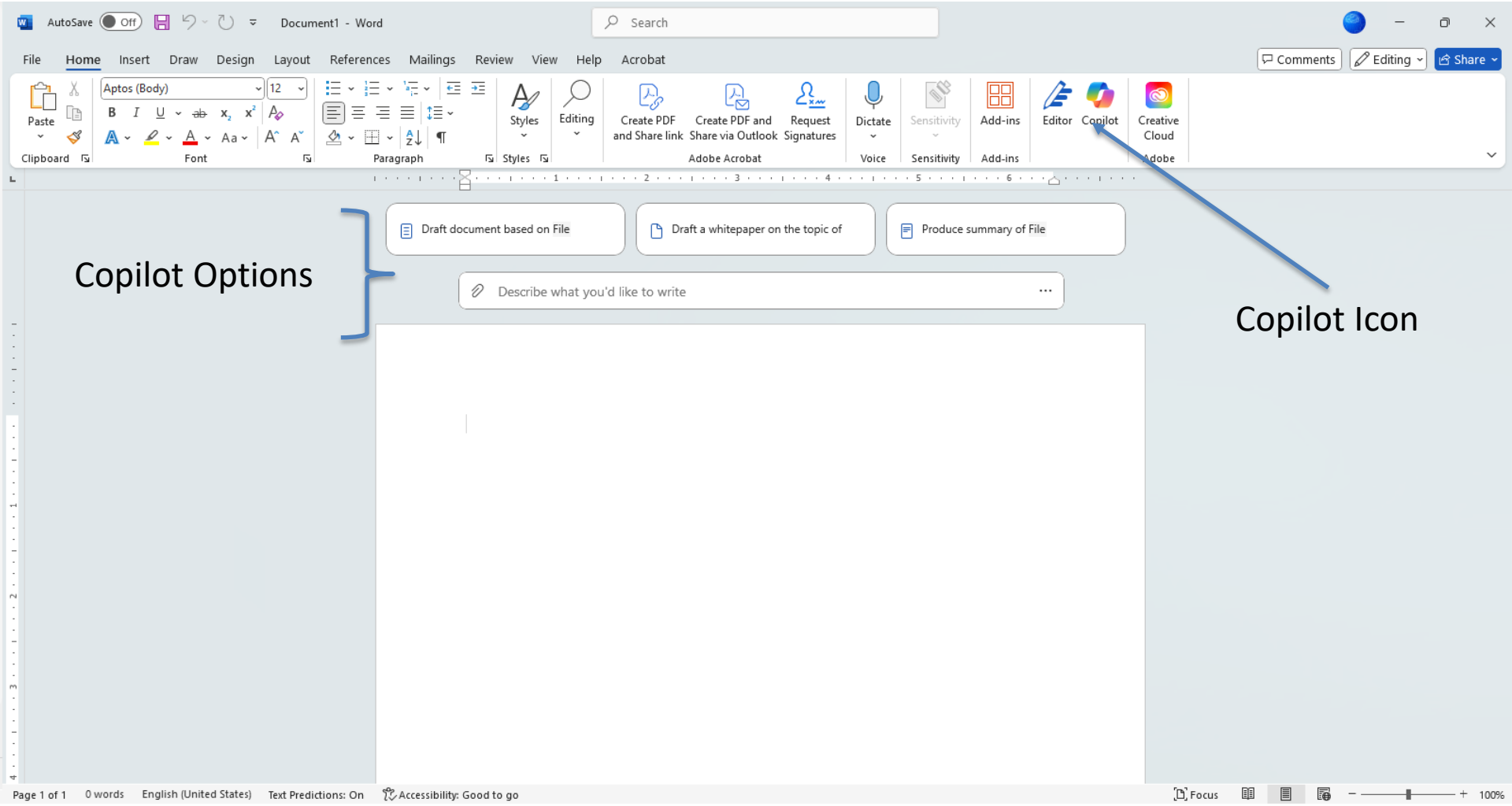
MS 365 Copilot



MS 365 Copilot in Outlook



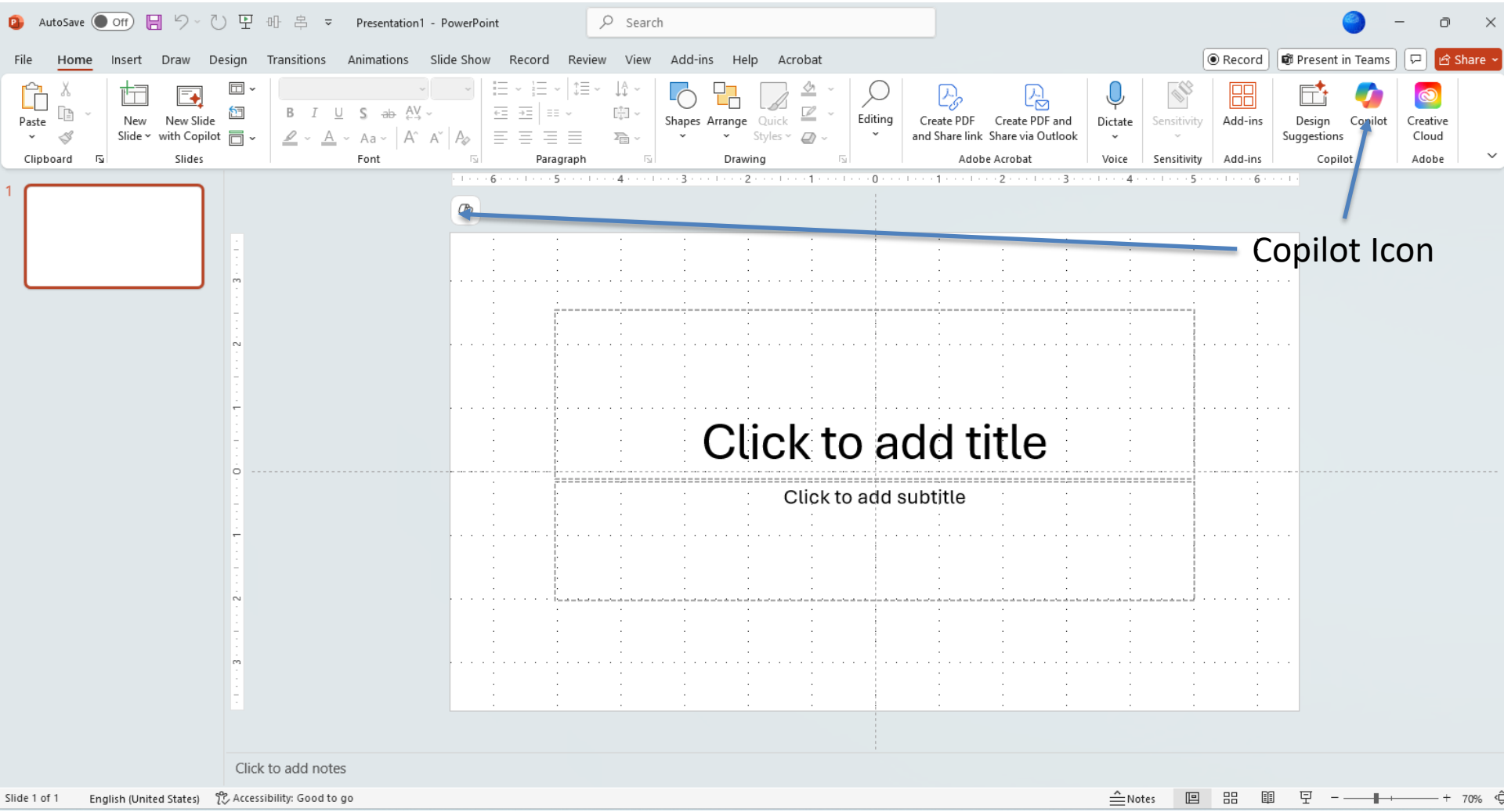
MS 365 Copilot in Word



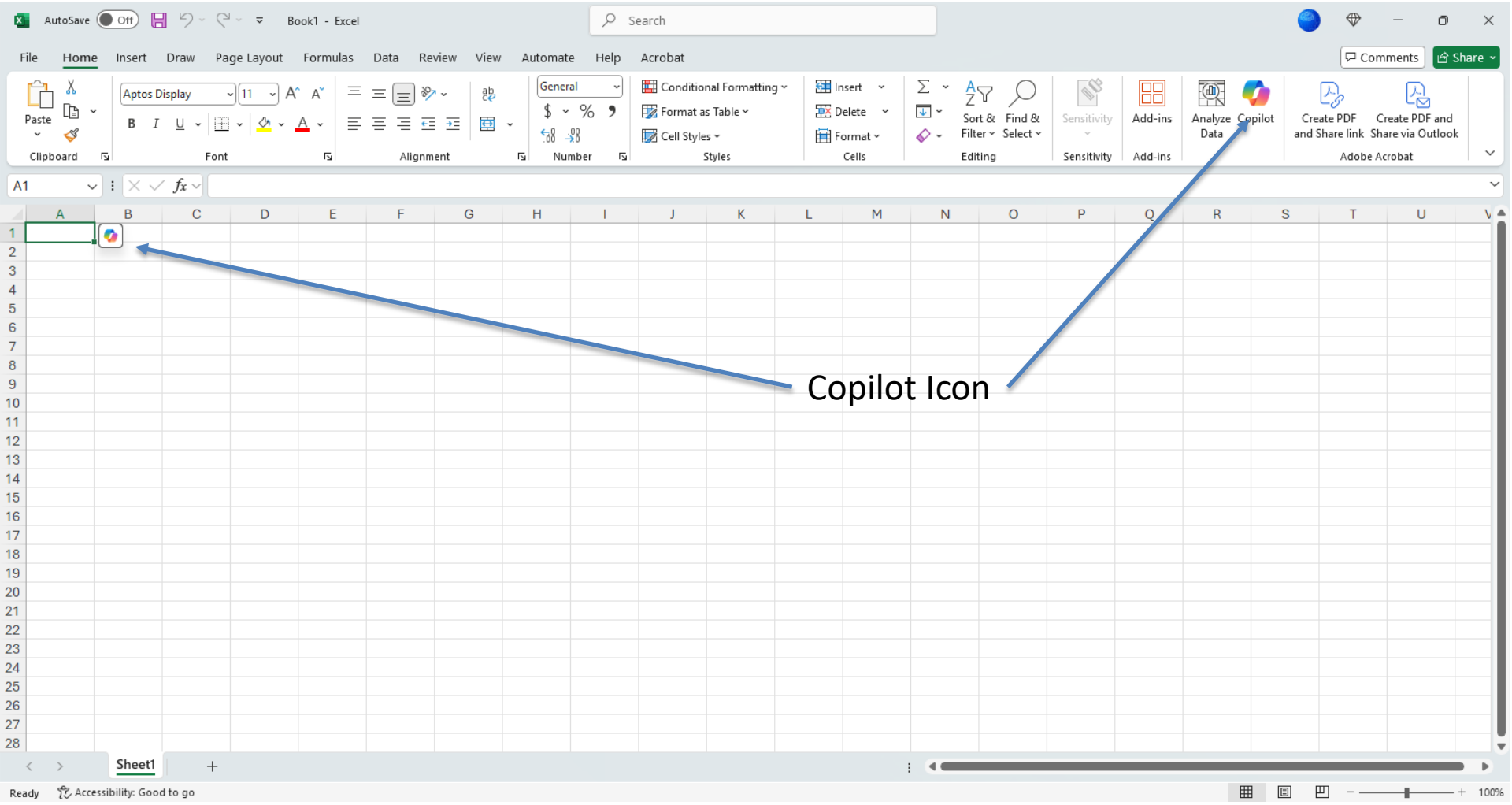
Copilot Options

Copilot Icon

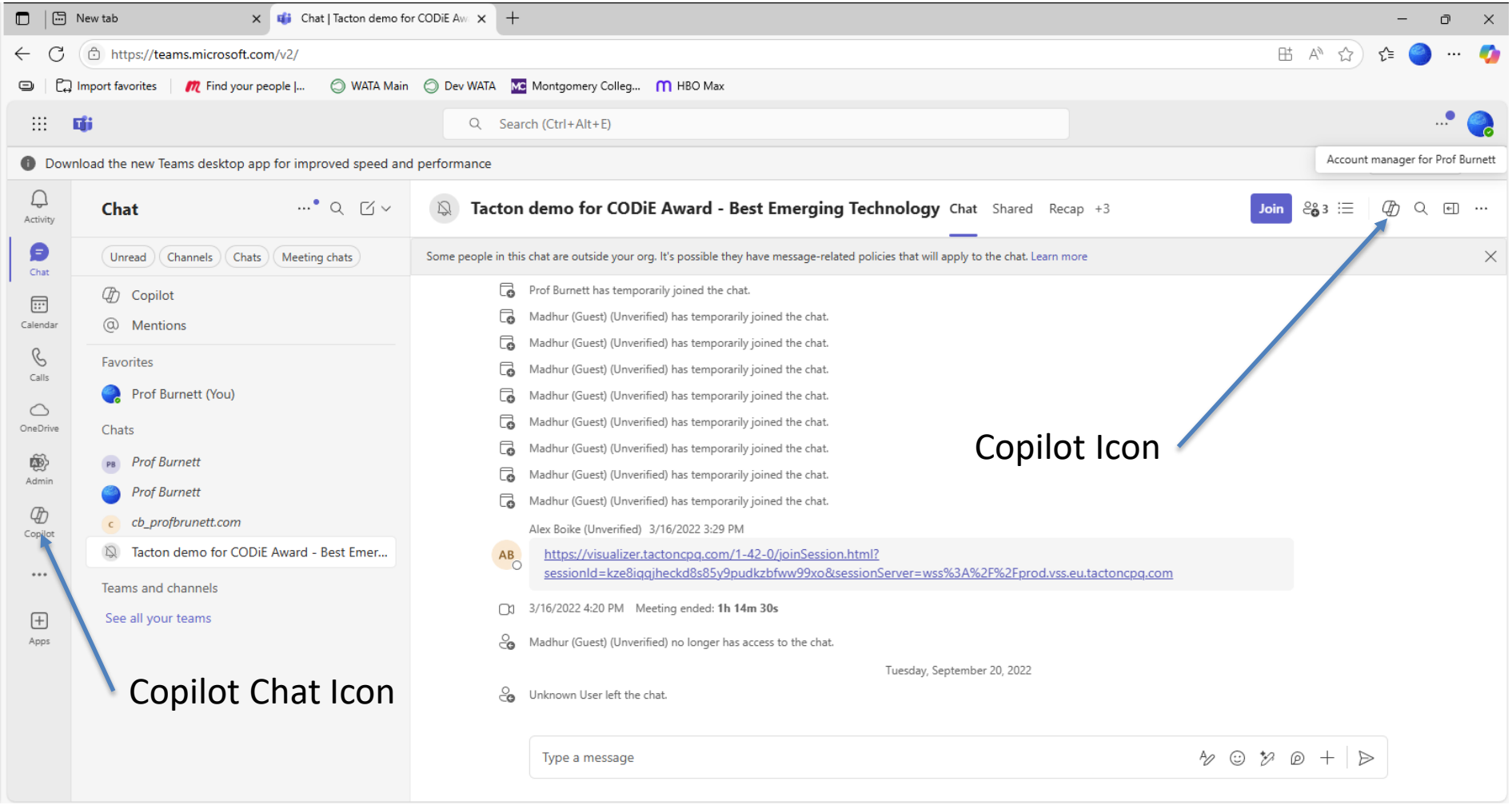
MS 365 Copilot in PowerPoint



MS 365 Copilot in Excel



MS 365 Copilot in Teams



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

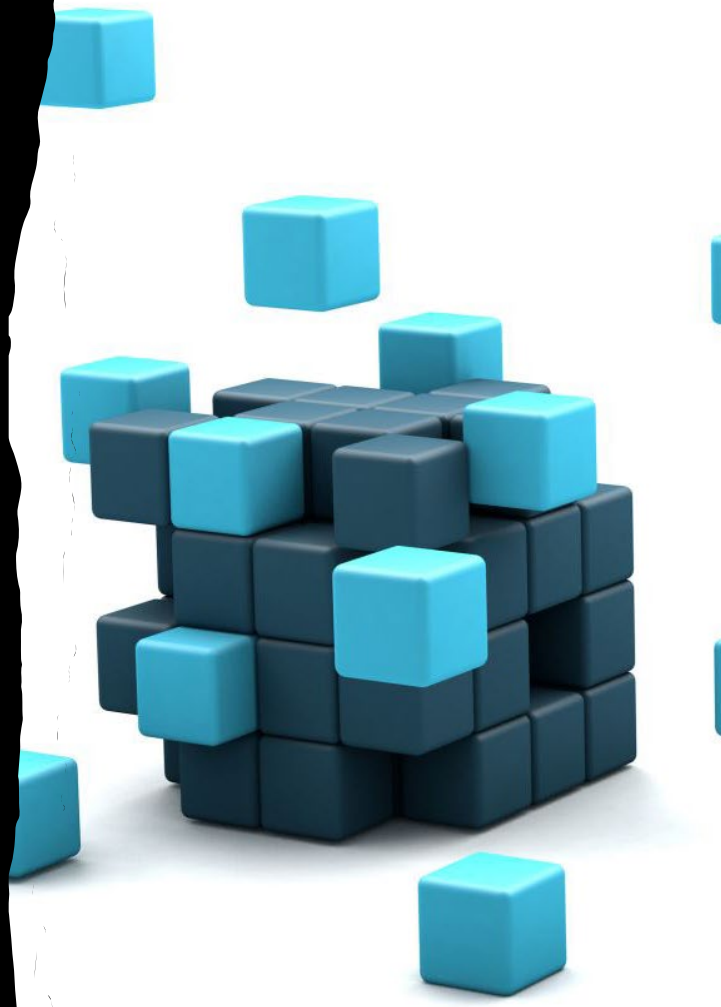
- AI-driven scheduling and meeting management in Outlook and Calendar
- **Demonstration**: Use Copilot to schedule a meeting and create an agenda

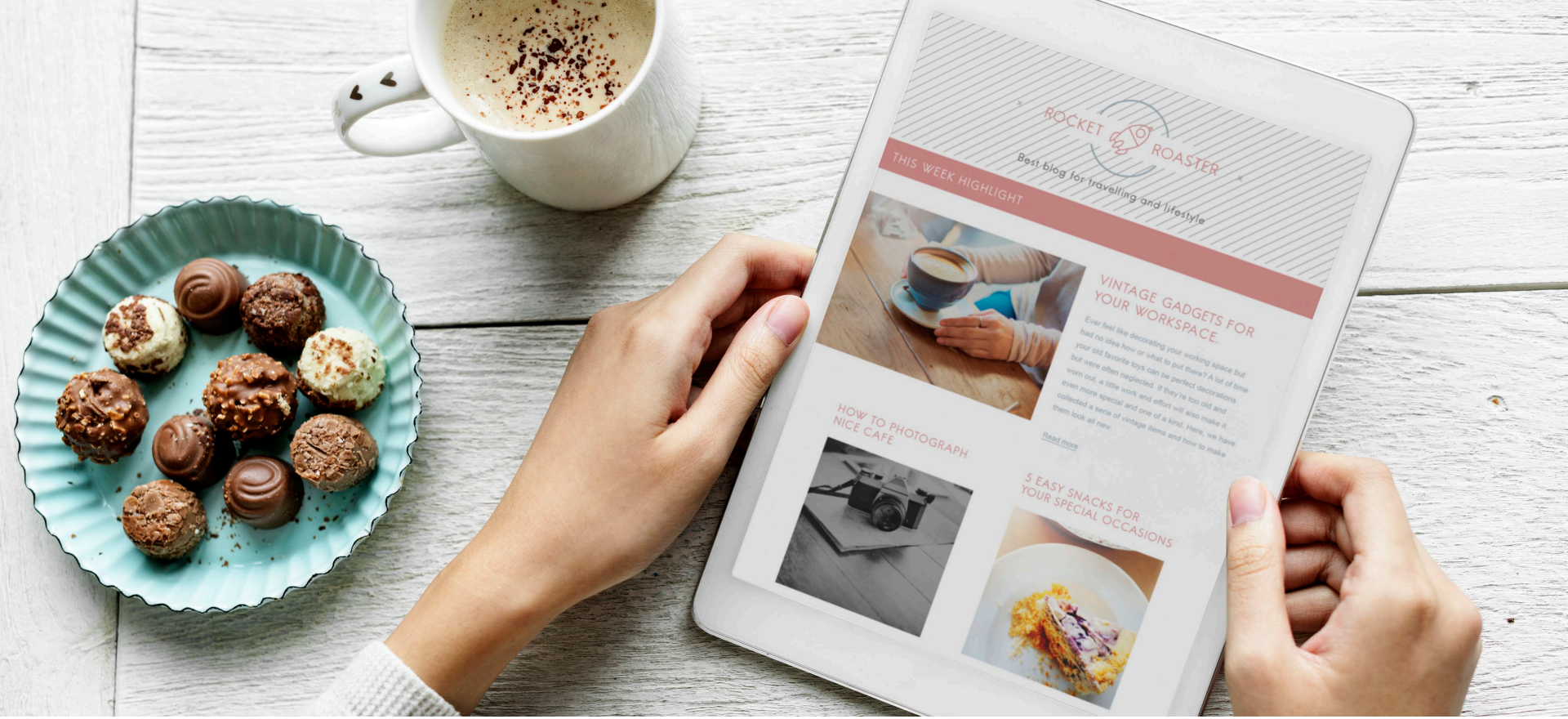
Creating Efficiencies in Daily Workflows

- 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.

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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.**

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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.

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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.**

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Compliance & Legal Risks

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

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Technical Infrastructure

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

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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.

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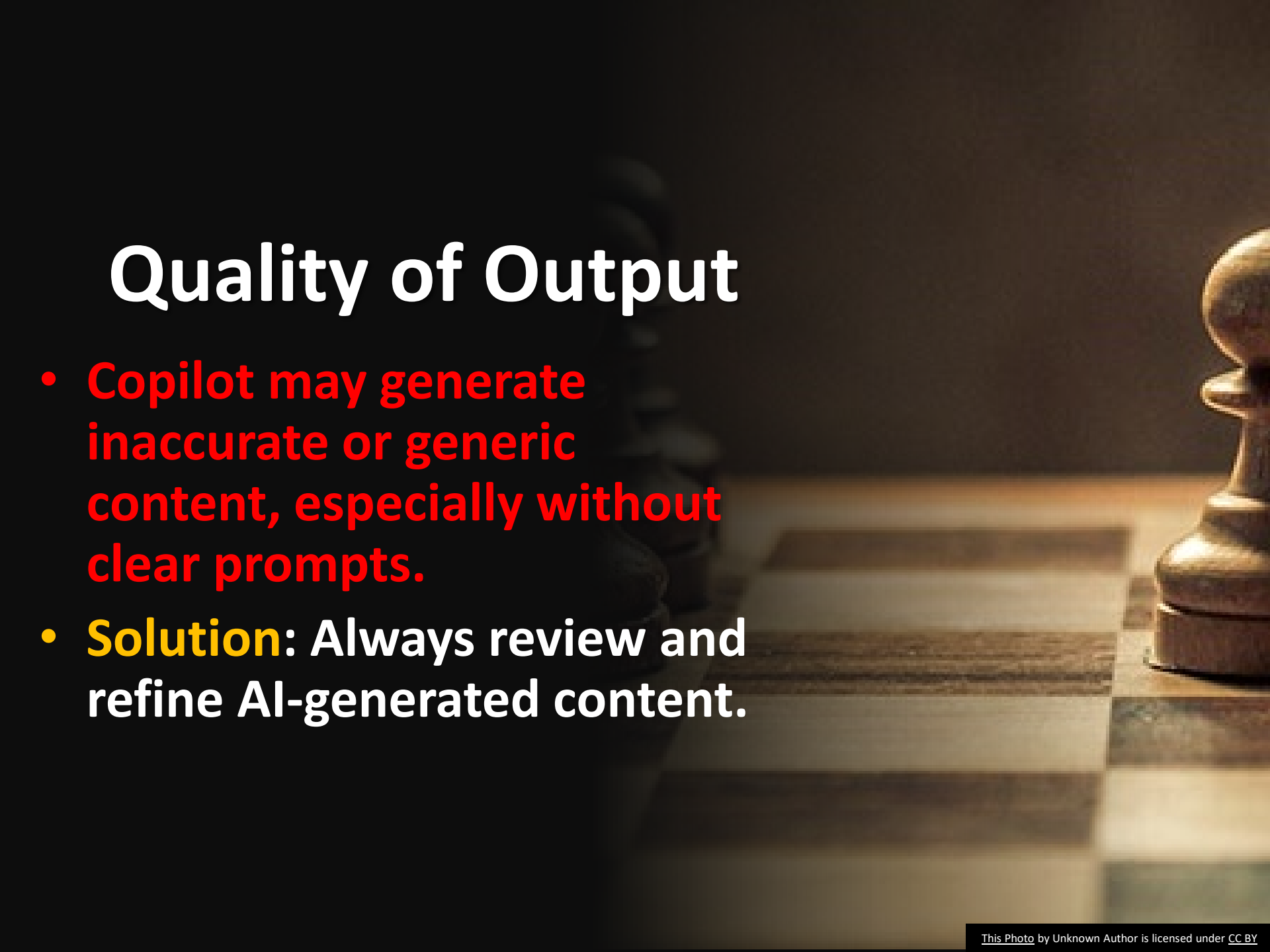
Quality of Output

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



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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.

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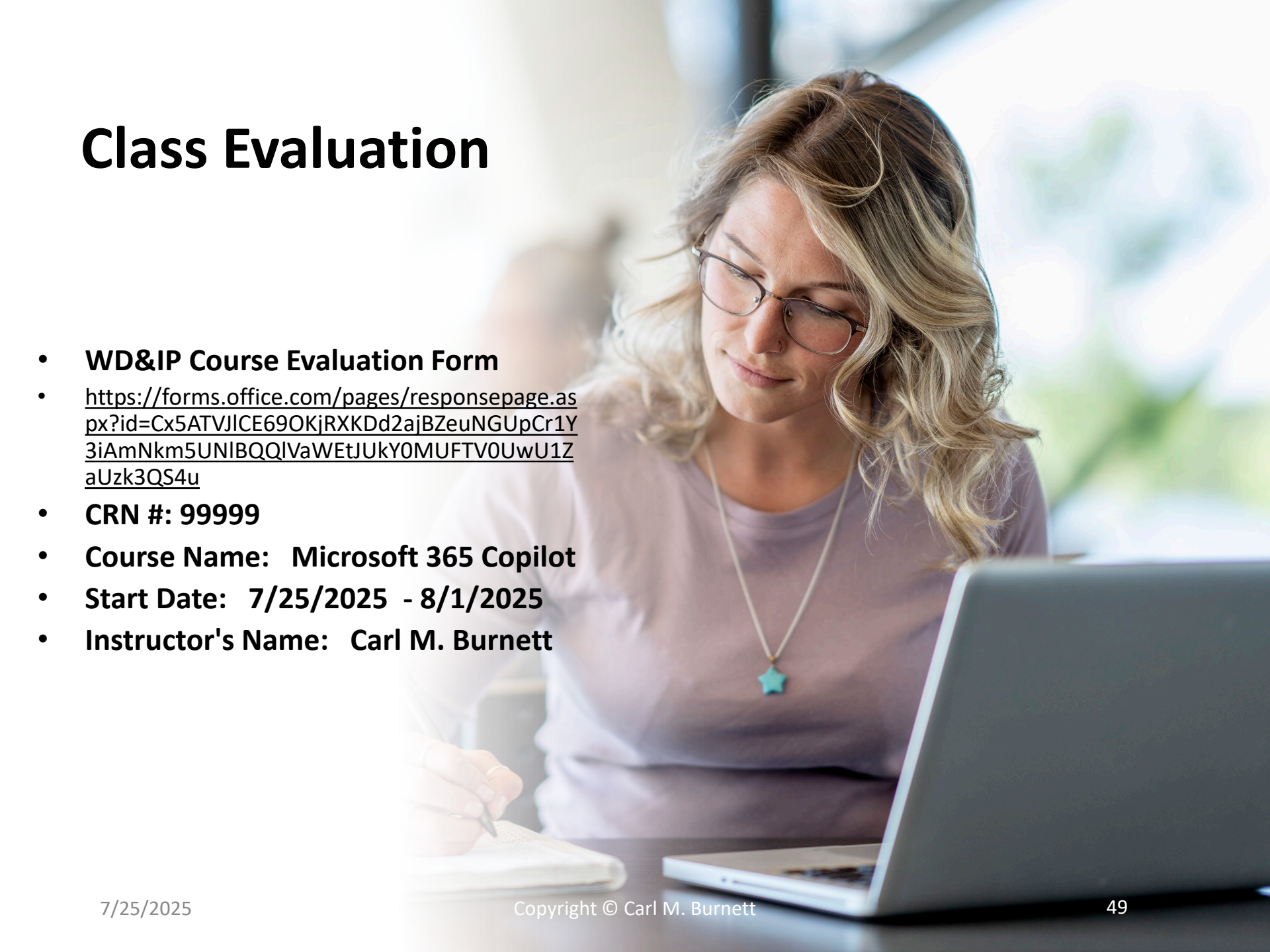
DATA PRIVACY AND SECURITY CONSIDERATIONS

Cloud Data Integrity and Compliance | Microsoft Trust Center

Q&A and Wrap-Up

- Q & A
- Additional Resources

Class Evaluation



- **WD&IP Course Evaluation Form**
- https://forms.office.com/pages/responsepage.aspx?id=Cx5ATVJlCE69OKjRXKDd2ajBZeuNGUpCr1Y3iAmNkm5UNlBQQlVaWEtJUkY0MUFTV0UwU1ZaUzk3QS4u
- **CRN #: 99999**
- **Course Name: Microsoft 365 Copilot**
- **Start Date: 7/25/2025 - 8/1/2025**
- **Instructor's Name: Carl M. Burnett**

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