



Limited Places Available • First Come, First Served

Microsoft Copilot User Group

Discover how AI can help your organisation work smarter.

10:30 AM Start

Mid-Afternoon Finish

Lunch & Refreshments Included



Ask anything...

Welcome to our first Lugo Copilot User Group

Wednesday 21 October 2026 | 10:30 to 14:30

Grab a coffee, get connected, and we'll kick off at 10:45.



Guest Wi-Fi

Network

20QS Guest

Password

GardensKeyProduct70

10:45 WELCOME AND KICK-OFF

Let's get to know each other



Meet our guest expert **Euan Wilkie, Ingram**

Our Microsoft Copilot specialist, guiding us through the day.



Round the room

1. Your name and organisation
2. Your experience of using Copilot so far
3. What you'd like to come away with today



Getting started with Copilot

 10:30 Arrival and refreshments

Coffee, tea and refreshments provided

10:45 Welcome and kick-off

- Introductions
- Overview of the day
- What you can expect to take away from the session

Copilot fundamentals

- What is Microsoft Copilot?
- Enterprise Data Protection
- Understanding the AI models behind Copilot
- Where Copilot fits into your working day

Copilot in Teams and Outlook

- Using Copilot in meetings and collaboration
- Working smarter with emails
- Practical real-world examples

 12:30 Lunch

Putting Copilot to work

Prompting fundamentals

- The art and science of prompting
- The GCSE prompting framework
- Iterating and refining prompts
- From a basic prompt to a great result

Hands-on Copilot exercises

- Practical exercises across Word, Excel, Teams, and Outlook

Prompt sharing & best practices

- Sharing prompts with colleagues
- Copilot Prompt Gallery
- Scenario Library
- Reusable prompts for everyday tasks

The future of Copilot

- Copilot Cowork
- Microsoft Scout
- What's next for AI-assisted working

Protecting your data

- Understanding Shadow AI
- Microsoft Purview
- Responsible and secure use of AI

Q&A and open discussion

- Your questions, challenges, and potential Copilot use cases



Planning for next session: agree a date and agenda



14:30 Finish



Copilot Prompt-a-thon Prompt Masterclass



What is Microsoft Copilot?

Copilot is a conversational, AI-powered assistant that helps boost productivity and streamline workflows by offering contextual assistance, automating routine tasks, and analyzing data.

Copilot helps people by:

- **Boosting productivity.** Complete tasks faster with a copilot's intelligent suggestions, making content creation, data analysis, and communication more efficient.
- **Simplifying automation.** A copilot can automate repetitive tasks, no coding required.
- **Providing contextual intelligence.** AI suggestions help you make faster, more informed decisions.





Microsoft 365 Copilot

Your AI assistant for everyday work

Copilot is embedded across Microsoft 365 apps to help you save time, work smarter and achieve more.

COPILOT IN YOUR EVERYDAY APPS



Word

Create and refine content

- Draft, revise and edit content
- Summarise long documents
- Adjust tone and length
- Generate from your files



Excel

Analyse and explore data

- Analyse data and find insights
- Create formulas and models
- Visualise trends and patterns
- Generate reports



Outlook

Communicate effectively

- Draft emails and replies
- Summarise long threads
- Extract action items
- Schedule and prep faster



Teams

Collaborate and run better meetings

- Real-time meeting summary
- Identify action items
- Recap conversations
- Catch up on missed meetings



PowerPoint

Design and deliver impactful presentations

- Create presentations from documents
- Design layouts and visuals
- Refine content and structure
- Add speaker notes

HOW COPILOT WORKS

1

1. Understands You

Understands your request in natural language



2

2. Leverages Your Data

Grounded in Microsoft Graph and your organisation's data: emails, files, chats and meetings



3

3. Generates Results

Creates relevant, accurate and contextual responses in seconds



4

4. You Achieve More

Saves time, improves quality and lets you focus on work that matters

BUILT FOR ENTERPRISE



Enterprise-grade Security

Your data is protected with Microsoft's security and compliance



Privacy by Design

Your data is never used to train the model



You're in Control

IT controls, policies and role-based access



Responsible AI

Built on Microsoft's principles for fairness and transparency

KEY BENEFITS



Save Time

Automate tasks and reduce busywork



Boost Productivity

Get more done in less time with AI assistance



Improve Quality

Deliver polished work with confidence



Enhance Collaboration

Share and align across your team



Unlock Creativity

Generate new ideas effortlessly



One Copilot. Endless Possibilities.

Your AI companion across Microsoft 365.

Microsoft EDP

With many popular genAI tools, the prompts or content you generate may be exposed to the public.

Enterprise Data Protection (EDP) ensures that every interaction with Microsoft Copilot is secure, compliant, and private. Prompts and responses remain within your Microsoft 365 service boundary, protected by encryption at rest and in transit, and governed by your organization's existing security, compliance, and retention policies.



Copilot includes Enterprise Data Protection (EDP)

1

Your data
stays **private**

Microsoft won't use your
data except as you instruct

2

Your data **is never**
used to train or
enrich the
foundation
AI models

3

Your data **is**
protected at
every step &
the AI models **are**
safeguarded

Safeguard against AI-focused
risks (e.g., prompt injections,
harmful content)

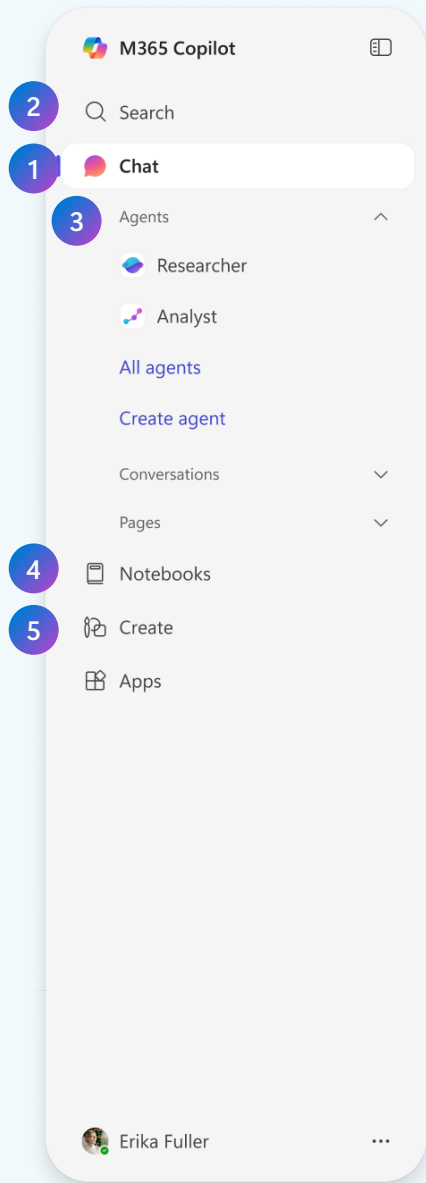
4

Microsoft
Customer
Copyright
Commitment

Learn more about Data, Privacy, and Security for Microsoft 365 Copilot on [Microsoft Learn](#)



Copilot Chat



Microsoft 365 Copilot: AI built for work

1

Chat

Secure AI chat powered by the latest models available and grounded in web and work data.

2

Search

AI-powered search that spans all your work data for fast and relevant results.

3

Agents

A broad ecosystem of pre-built agents available in the Agent Store and build your own agents in Copilot Studio.

4

Notebooks

Copilot is grounded in your project's diverse content types to provide targeted responses and engaging audio overviews.

5

Create

AI-generated images, posters, banners, videos, and more that are aligned to your organization's brand identity.

AI Models in Copilot



Coming Soon



Copilot Chat

Your AI assistant for work, powered by GPT-5.6.

Enterprise-Grade Security
Your data is protected with enterprise-grade security, compliance and privacy.

Your Data Stays Yours
Your data is never used to train the foundation models.

Grounded in Your Work
Connected to Microsoft Graph — your files, chats, meetings and permissions.

COPILOT DEFAULT



Copilot
(Default)

Automatically selects the right response mode for your task.

Best for

- Everyday work & tasks
- General Questions
- Drafting and summaries
- Brainstorming Ideas

Key strengths

- Intelligent routing
- Balanced speed and quality
- Optimised for M365

QUICK RESPONSE



GPT-5.6
Quick Response

Fast, high-quality responses for everyday work

Best for

- Real-time assistance
- Fast decision support
- Meeting & email replies
- Short-form content

Key strengths

- Fast responses
- High quality for everyday tasks
- Great balance of speed and capability

THINK DEEPER



GPT-5.6
Think Deeper

Deeper reasoning for complex problems and decisions

Best for

- Advanced analysis
- Strategic planning
- Data interpretation
- Complex Scenarios

Key strengths

- Deep reasoning
- Handles highly complex problems
- Supports complex work

EFFICIENT REASONING



GPT 6.1 Sol
Efficient reasoning

Complex professional work with efficient reasoning

Best for

- Code generation & debugging
- Document analysis
- Multi-step workflows
- Complex problem-solving

Key strengths

- Multi-step reasoning
- Long-context understanding
- Text and image understanding

How Copilot responds to your task



Your task
or question



Copilot analyses
your prompt



Response mode
auto-selected



Fast lane or
deep reasoning



Trusted answer,
right first time

Copilot uses GPT-5.6 to support quick responses and deeper reasoning.

Two response modes



Right speed
for the task



Best-suited
accuracy



Efficient
compute use



The right tool
for each job

One model, two response modes for different types of work.

Built on trust



Enterprise
grade



Your data
stays yours



Respects
permissions



Claude models in Microsoft Copilot

Powered by Anthropic

Choose the right model for the way you work.

Copilot Chat

Your AI assistant for work, powered by a choice of advanced models.

- ✓ Enterprise-grade protection
- Grounded in work and web context
- Respects permissions and policies
- Tenant data is not used to train foundation models

DEFAULT ROUTING

Copilot (Default)

Copilot can select the most suitable model for the task and experience.

Best for

- ✓ Everyday work
- ◆ Questions and answers
- Drafting and summaries
- Brainstorming

Key strengths

- Intelligent routing
- Microsoft 365 optimised
- Balanced speed and quality

BALANCED REASONING

Claude Sonnet

Efficient, high-quality reasoning for everyday tasks and structured work.

Best for

- ✓ Research and comparison
- ◆ Document creation
- Multi-step problem solving
- Structured content

Key strengths

- Strong reasoning
- High-quality writing
- Large-context handling

MAXIMUM CAPABILITY

Claude Opus

Advanced capability for complex, long-horizon and demanding work.

Best for

- ✓ Strategic planning
- ◆ Advanced analysis
- Complex business scenarios
- Long-form content

Key strengths

- Deep reasoning
- Nuanced responses
- Complex instruction following

MODEL CHOICE Ask → Understand intent → Evaluate complexity → Select model → Deliver outcome

Secure • Governed • Permission-aware

Availability varies by Microsoft Copilot experience, region, tenant configuration and admin settings.



What Grok brings to Microsoft 365 Copilot

A new model choice for different ways of working

FRONTIER PREVIEW

Copilot + Grok

Grok joins Copilot as an additional selectable model, extending Microsoft's multi-model approach.

PREVIEW ACCESS

Microsoft Frontier Programme

INITIAL APPS

Word, Excel and PowerPoint

ADMIN CONTROL

Opt-in and targeted access

VERSION

Not specified publicly

NEW MODEL CHOICE

Grok

A selectable model inside the trusted Copilot experience.

What it brings

- 1 Choice**
Another model option alongside Copilot's existing providers
- 2 In-app work**
Use from Copilot in Word, Excel and PowerPoint
- 3 Evaluation**
Compare outputs and model fit for a task
- 4 Feedback**
Lets early adopters help shape the experience

INITIAL EXPERIENCE

Where users will see Grok



Word

Drafting and document work



Excel

Analysis within spreadsheets



PowerPoint

Presentation creation and editing

IMPORTANT NOW

Preview and governance considerations

UK availability	The initial preview is not available in the UK, EU or EFTA.
Admin action	Frontier and the dedicated provider setting are off by default.
Model transparency	Microsoft has not publicly named the Grok model version.
Deployment posture	Treat as an evaluation, not a broad production rollout.

Positioning: more model choice inside Copilot, with controlled preview access and app-based evaluation.



Copilot Work

Your work. Your data.



Designed for your organization.
Works with your data, apps, and people.



Works with your data
Access your files, emails, meetings, and chats in Microsoft 365.



Enterprise-grade security
Your data stays protected and compliant within your organization.



Built into your apps
Use Copilot in Word, Excel, PowerPoint, Outlook, Teams, and more.



Context that matters
Gets context from your work to deliver relevant, personalized assistance.



Best for doing your work



Copilot Web

Your questions. Our best answers.



Designed for the open web.
Powered by the latest public information.



Web-powered answers
Gets the latest information from the web to answer your questions.



Great for research & learning
Explore topics, get summaries, and understand anything.



Create anything
Draft content, brainstorm ideas, and spark creativity.



Available to everyone
Use it from any device, anytime —no work account needed.



Best for exploring and learning

VS.



Same AI. Different focus.

Use **Copilot Work** for your organization's work.
Use **Copilot Web** for the world's knowledge.

Outlook with Copilot

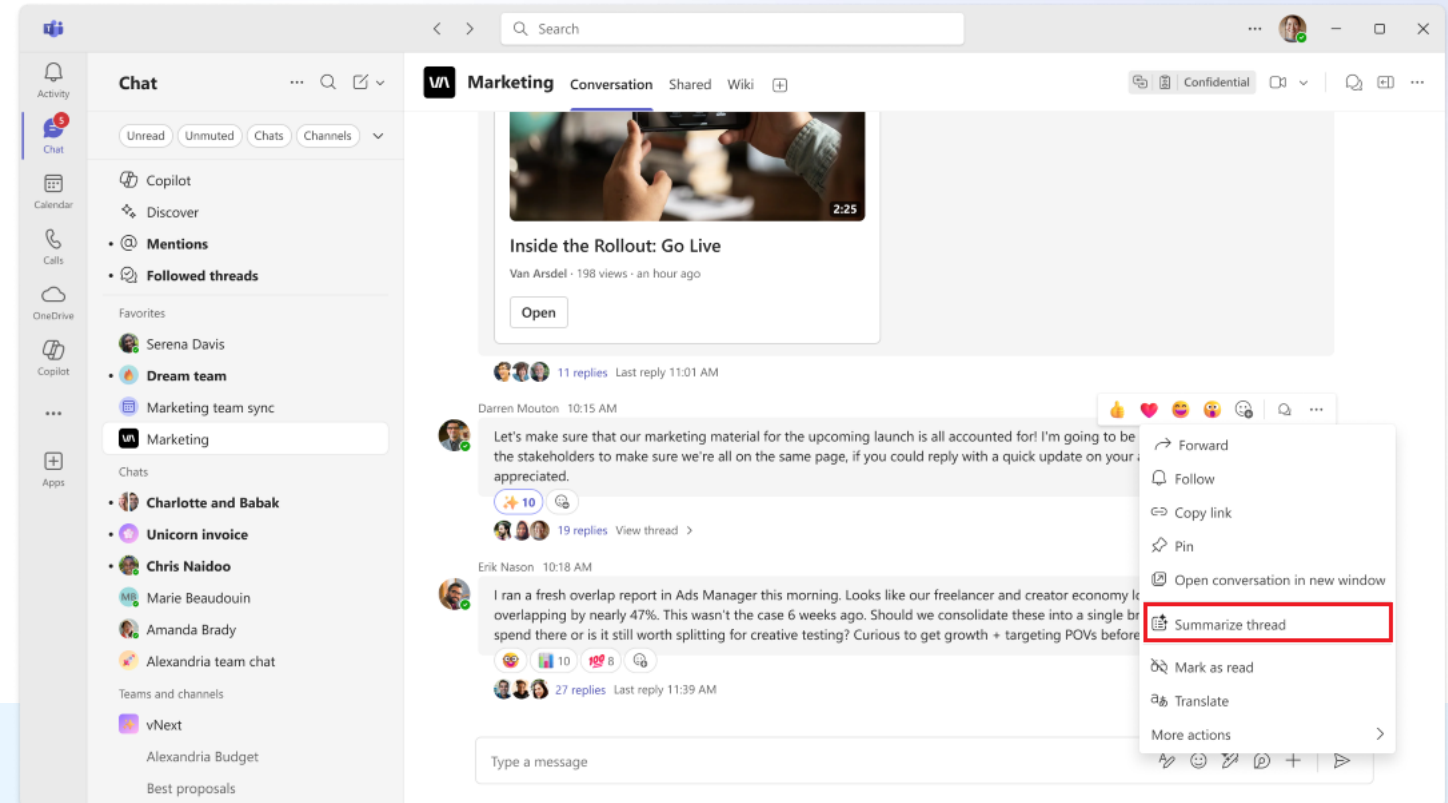
- **Manage your inbox with** multi-step support from Copilot to draft messages, create and manage rules, surface what needs attention, and triage emails.
- **Delegate calendar management** – Copilot follows your preferences to RSVP, proactively reschedule 1:1s when there are conflicts, and protect focus time.
- **Visualize your priorities** across your week, identifying important meetings, collating prep materials, and flagging when you're overbooked.

Agentic email capabilities available in Frontier across all Outlook endpoints beginning April 27

Teams with Copilot



- **Collaborate with the right work context**
With Work IQ, Teams with Copilot draws on emails, chats, channel conversations, calendar, shared files, and meeting transcripts to provide richer more relevant support.
- **Communicate with clarity**
Rewrites and adjusts tone and length on any message, keeping communication consistent and professional across teams and time zones.
- **Protect focus time**
Copilot catch up recaps key points, decisions, and action items in seconds no scrolling threads or rewatching recordings. Hours back, every week.
- **Turn collaboration into execution**
Facilitator, Interpreter, Channel, and Planner agents capture decisions and assign work automatically so less slips through the cracks.



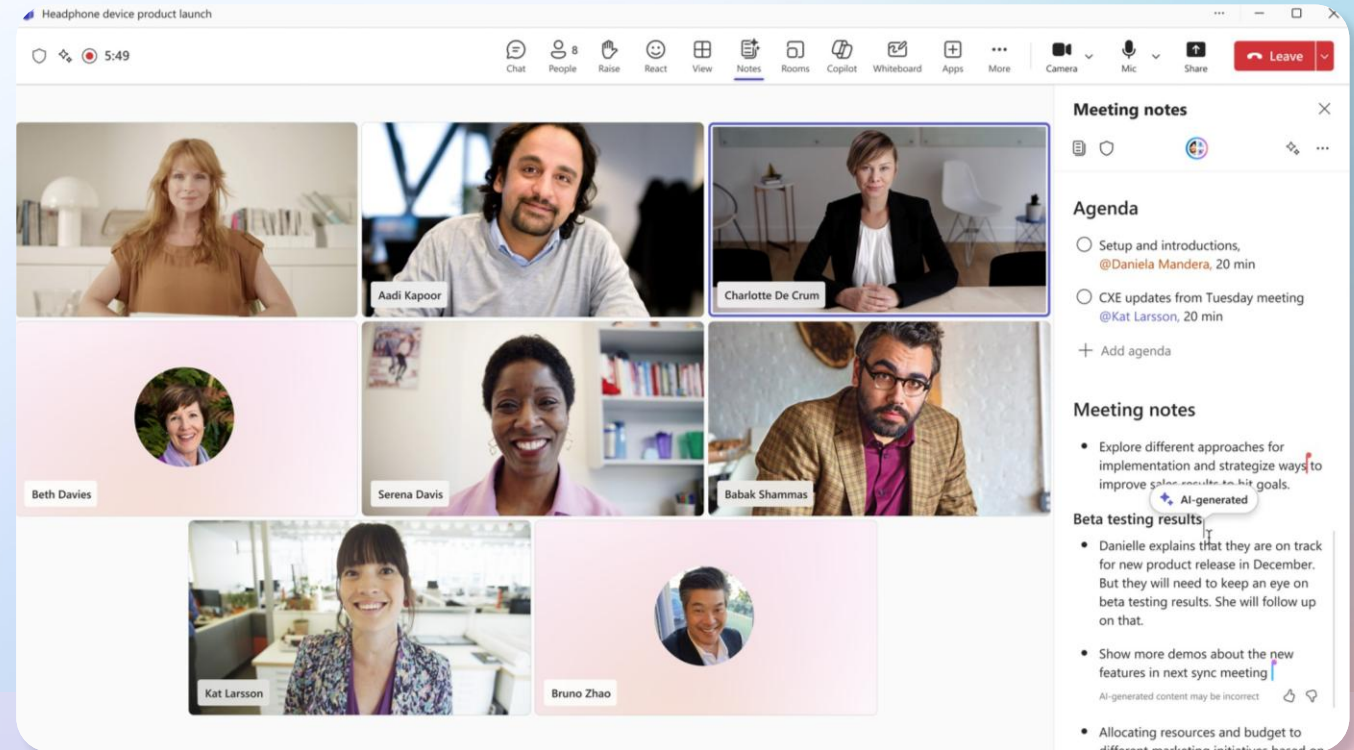
[*The Projected Total Economic Impact™ Of Microsoft Teams With Microsoft 365*](#)

[*Copilot*](#)

[*PepsiCo unifies global workforce with Microsoft Teams and Copilot*](#)

Copilot and Agents in Teams

- Stay updated and aligned with key decisions using **Intelligent Recap** for Teams Meetings and Calls, accessing audio, visual or written recaps of conversations.
- Run more effective meetings with the **Facilitator** agent: driving alignment with agenda progress, shared notes and decisions captured; moving work forward by assigning action items and drafting documents.
- Communicate across languages with **interpreter capabilities** in Teams meetings, 10 languages currently supported
- Drive greater customer satisfaction with the **Teams Phone Agent** that answers calls, resolves common requests, connects callers to the right person, and seamlessly hands off to custom voice agents.



Prompting Guidance



What is a prompt?

Prompt 1: Short & Simple — a goal only

"Summarise this month's team activity for a report."

Prompt 2: Moderate Detail — adds format, topic and audience

"Create a short presentation explaining how digital tools improve team coordination and customer outcomes, aimed at managers."

Prompt 3: Rich Context — adds analysis, sources and the points to cover

"Draft a report analysing trends in customer satisfaction across our main service lines, using the last two quarters of survey data. Highlight the key factors influencing feedback and service quality, and set out the areas we should improve."

Prompt 4: Strategic & Collaborative — adds priorities, deliverables and standards

"Create a strategy document setting out our priorities for compliance, workforce development and digital transformation. Include recommendations for improving audit readiness and staff retention, actions for each department, and how the plan supports long-term growth and meets regulatory standards."



The art and science of prompting

Tell Copilot what you need

Prompts are how you ask Copilot to do something for you — like creating, summarizing, editing, or transforming.

Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

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."

Summarize 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]."

The art and science of prompting – Questions to ask

Consider how to make your prompts more **impactful** by thinking about how Copilot can help in your **entire** workflow.

Ask yourself these questions when prompting



Why am I using this prompt?

What is the context for this task.



What will I do with the output of this prompt?

Am I going to send it on to someone else?
Transform it into a different format?



Can I extend Copilot's remit to save more time

Can I ask Copilot to do a bigger task to automate more work?

The art and science of prompting – Keep it conversational

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

Keep the conversation going



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.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Top 10 to "Try First"

with Microsoft 365 Copilot

Foundational skills for new users



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from meeting



2

Summarise an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarise icon



3

Draft email

– personalise the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarise a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from file



5

Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about topic organised by emails, chats, and files?



6

Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on file



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did person say about topic



9

How do I ...

– let Copilot help you build or fix formulas in Excel.

→ How do I sum values that are greater than 0?



10

Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

For more prompts, visit Prompt Gallery at: aka.ms/prompts



Microsoft 365 Copilot:

Prompting do's and don'ts

Do's

- ✓ **Be clear and specific.**
Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.
- ✓ **Keep it conversational.**
Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.
- ✓ **Give examples.**
Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.
- ✓ **Ask for feedback.**
Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.
- ✓ **Write legibly.**
Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses.
- ✓ **Check for accuracy.**
Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.
- ✓ **Be polite.**
Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.
- ✓ **Provide details.**
Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

Get the most out of Copilot and avoid common pitfalls by learning **what to do** and **what not to do** when writing prompts.

Don'ts

- ✗ **Be vague.**
When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.
- ✗ **Request inappropriate or unethical content.**
Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.
- ✗ **Use slang, jargon, or informal language.**
This may cause Copilot to give low-quality, inappropriate or unprofessional responses.
- ✗ **Give conflicting instructions.**
Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.
- ✗ **Interrupt or change topics abruptly.**
This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

The art and science of prompting – Prompt ingredients

Include the right prompt ingredients

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

Goal

What
response do
you want
from
Copilot?

Context

Why do
you need it
and who is
involved?

Source

Which
information
sources or
samples
should Copilot
use?

Expectations

How should
Copilot
respond
to best meet
your
expectations?

The art and science of prompting - Prompt ingredients

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

Include the right prompt ingredients

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their Copilot launch. Use best practice guidance from the Microsoft Adoption site. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

The Art of Prompting

Few examples

Goal

I want a list of 3-5 points to best prepare myself...

Help me write the content of the new web page...

Give me detailed tips on how to create a successful ad campaign...

Context

... for an upcoming meeting with client X, focused on project Y

... I'm the marketing manager for product X, which is a modern drone.

... acting as a marketer on the Microsoft Teams product

Source

Based on emails and Teams chats from the last 2 weeks...

Refer to product sheet X [\[link to document\]](#) ...

Takes into account current market trends and collaboration preferences

Expectations

... and respond with detail and without using technical jargon.

... and uses a captivating tone by referencing cult films

Use a professional tone. The following keywords should appear: year of the Voice, productivity, return on investment

Good Prompt vs. Bad Prompt

Meeting preparation example — same task, different results

✗ Ineffective Prompt

Prep me for my meeting tomorrow.

Why this falls short:

- **No goal** — what kind of prep? Talking points, agenda review, background research?
- **No context** — who is attending, what is the meeting about, what decisions are needed?
- **No source** — no files, emails, or prior notes referenced for Copilot to use
- **No expectations** — no format, length, or tone specified for the output

✓ Effective Prompt

I have a project review meeting tomorrow at 2pm with the leadership team. **Prepare a one-page briefing document** that includes: a summary of our Q1 progress against milestones, the three biggest risks and proposed mitigations, and recommended discussion points. **Use the latest project status report in my OneDrive and last week's team standup notes from Teams.** Format it as bullet points with bold headers for each section, and keep the tone professional but concise.

Goal

Clear task: prepare a briefing document

Context

Who, when, and what the meeting is about

Source

Specific files and channels to pull from

Expectations

Format, structure, and tone defined

Tip: The more specific your prompt, the less rework you'll do later. Think: Goal + Context + Source + Expectations.

COPILOT MASTER CLASS

Prompting = Getting Better Answers

The more **clarity** and **detail** you provide, the better Copilot performs.

	G GOAL What do you want Copilot to do?	C CONTEXT Why + who is involved?	S SOURCE What data / files / inputs should Copilot use?	E EXPECTATIONS Format, tone, output style?
BASIC Vague prompt. Limited context.	Summarise the sales data.	For my team.	Sales data.	Summary.
BETTER Some context. More detail.	Summarise the Q1 sales performance.	For the leadership team in our weekly business meeting.	Use the Q1 sales report in SharePoint folder "Sales Data".	Provide key insights in bullet points with a professional tone.
BEST Clear, specific, and actionable.	Create a summary of Q1 sales performance, highlighting key trends, top products, and year-over-year change.	For the leadership team to review in our weekly business meeting.	Use the Q1 sales report in SharePoint folder "Sales Data". Include data from all regions.	Provide key insights in bullet points and include 2–3 charts. Use a professional tone. Keep it concise.
✦ Think of prompting as a conversation. Start — Get a response Refine — Add clarity Improve — Get better results				



GCSE in practice

Example of GCSE framework

Try the following two prompts using Copilot in Word and compare the responses you get.

Which prompt gave you a richer and more concise blog post draft?

- *Prompt 1:* Write a job description for a senior project manager
- *Prompt 2:* Generate a comprehensive job description for a senior project manager focused on technical project management for consumer electronic hardware. This role is urgent, and the candidate will join a dynamic team. Reference our company's standard specs and industry norms. The description should be concise, max two pages, including responsibilities, qualifications.

Goal

Context

Source

Expectations

- Home
- Copilot
- Pages
- Create
- OneDrive
- Apps
- Admin

 Copilot

 **Show me the result**
Execute and explain this code...

 **Make an informed decision**
Create a table that compares top-selling office printers

 **Decode acronyms**
What does [LLM] stand for?

 **Start your research**
How have world literacy rates changed in the past 30 years?

 **Compare trends**
Compare 10 of the most innovative and creative workplace designs

 **CSS at a glance**
What are three popular CSS techniques to lay out responsive web apps?

 View prompts

Ask me anything...

0 / 8000

 Copilot

- Agents
-  Get agents
 -  Create an agent
- Chats
- 2024
 - You are a product researcher f
 - Summarise Fabrikam Sustainability ...
 - I am a team manager and I want to...
 - You are a customer satisfaction lea...
 - Analyse this meeting
 - [See more](#)

Keep iterating to improve your prompts

You are an HR Manager who needs to prep for an upcoming Candidate hiring interview for a new position within the IT department for an AI Engineer. Create a prompt that will help you prepare for the interview.

Good

Help me prepare for an upcoming candidate interview for a new AI Engineer role in our IT department by creating a list of questions

Better

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please prepare a list of appropriate questions for the candidate, so that I looked prepared during the interview

Best

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please review the candidate's resume that is attached, and the position detail attached and provide me a comprehensive list of questions that I can use to determine the candidate's fit against the position

Goal

Context

Source

Expectations



Expand the purpose of the prompt

Example – extending the prompt's purpose

We're all familiar with creating a list of actions in Teams meetings but why are you doing this? If it is to send to someone else then why not get Copilot to write the email for you. It saves you time and improves the quality of your meeting follow up.

- *Prompt 1:* Recap the /Contoso and Fabrikam Sustainability meeting creating a table for action items, owners and due dates.
- *Prompt 2:* Write a follow up e-mail to the attendees of the /Contoso and Fabrikam Sustainability meeting with a table showing decisions made, another showing actions and owners and lastly a list of considerations for the next meeting

Goal

Context

Source

Expectations



Exercises

Practice - Provide Specific Instructions

Copilot is built to take action, so telling Copilot what “**to do**” or what “**not to do**” can be very effective.

- *Prompt 1:* Write an overview of how Microsoft 365 Copilot can help improve productivity in enterprises. **Generate 3 bullet points.**
- *Prompt 2:* Summarize the latest Microsoft AI announcements for a keynote speech on stage at Ignite, Microsoft's annual conference. **Do not include any announcements from before January 2025 and ensure to highlight the impact of these innovations.**

Goal

Context

Source

Expectations



Word Copilot

Scenario: We have been asked by our manager if we can help to provide a post for LinkedIn providing an overview of the organisation, and she needs it in 10 minutes!

Activity: "Write a prompt to create the post. Think about what we have learned from the GCSE framework, can you get a better output by improving the detail in the prompt?"



GCSE Example

Can you create a 250-word post for LinkedIn, which will give readers an insight into Ingram Micro. I want the output to explain the CSP offering and professional services we deliver, the sectors we support, and our goals and aspirations as a Distributor to support MSPs. The website: <https://www.ingrammicro.com/> and our LinkedIn company page are good initial sources of information. Please make the tone friendly but professional



Editing and redrafting in Word?

Scenario: Improve an existing document

Prompt: Rewrite the LinkedIn Post to make it clearer and more concise. Remove jargon and ensure it is suitable for a non-technical stakeholders.

Prompt: Create another version, formatted for leadership readers

Action: Highlight phrases, sentences or paragraphs and click the Copilot Pen/Edit With Copilot 

You can then amend your text, using Copilot's drafting features, explore the **Writing Suggestions** or **Structure and Refine**. You can ask to make it more **formal** or **Shorter** or just describe what you want to change in **plain language**



Excel Copilot

Prompt: Analyse this table and explain:- Key trends- Any unusual figures- Potential risks or concerns. Highlight our top 5 products by qty and by net sales. Provide a plain-English summary suitable for a management update.

Stretch Prompt

Based on this data, what 5 questions should leadership be asking? Highlight one area that may require further investigation.



Excel Copilot

Prompt: Create a loan calculator using loan amount, interest rate, and loan term. Show the monthly payment.

Expanded Prompt

Prompt: Build a loan calculator that computes monthly payments based on user inputs for loan amount, annual interest rate, and term in years. Generate a schedule showing month, payment, principle, interest and remaining balance. Present the results in a clear, formatted table. Pull in the latest data on interest rates from the web



PowerPoint Copilot

Using the example we ran in the demo earlier

Open PowerPoint and under the “New” ribbon,
select Create with Copilot



Create with Copilot

Prompt

Create a PowerPoint Deck to give me an overview of Ingram Micro. I want the slides to reflect the history, values and unique offerings for the business for an audience who will include potential new customers. Use the website <https://www.ingrammicro.com/en-us/solutions/cloud> as a core source. Please keep the output tone professional but friendly and conversational



Let's have a look at Copilot in Teams Chat

"Help me start my day"



Let's have a look at Copilot in Teams Chat

"Help me start my day"

"Help me set an agenda of tasks I need to perform today based on my calendar and meetings so I can prioritise my workload this week."



Copilot in Teams Chat

"Help me start my day"

"Help me set an agenda of tasks I need to perform today based on my calendar and meetings so I can prioritise my workload."

"I need to plan my week effectively commencing the *"first week of October"* as I do not believe I have time to complete a presentation due this week. Pay attention to gaps in my day where I can focus, and summarise tasks I need to prepare in bullet points and attach relevant meeting notes and files I need for my upcoming meetings. I need to understand what emails I urgently need to respond to today and what I can postpone until tomorrow and any meetings I may not need to be a participant in that I can follow to catch up on."



Let's have a look at Copilot in Outlook

"Can you summarise any emails threads I need to respond to"



Copilot in Outlook

"Can you summarise any emails threads I need to respond to"

"I need a bullet point list of emails that I need to respond to paying attention to ones marked urgent or from "Joe Blogs"



Prompting In Outlook

"Can you summarise any emails threads I need to respond to"

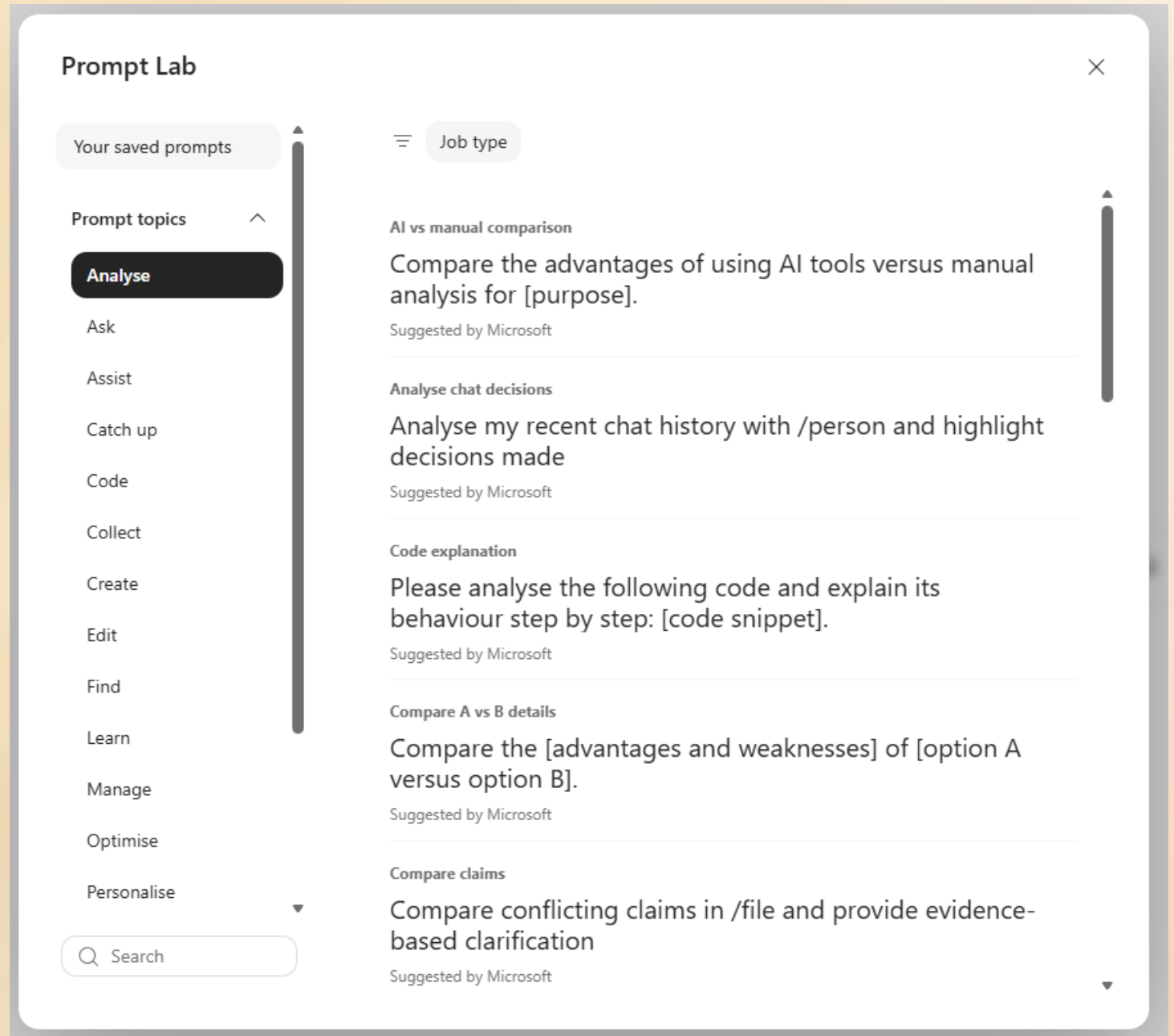
"I need a bullet point list of emails that I need to respond to paying attention to ones marked urgent or from "Joe Blogs"

"Provide me with a list of 5 emails I need to respond to urgently providing me a summary of the conversation and ask to me. I would also like you to highlight emails I haven't responded to in the last 3 days or were there is outstanding actions. Where availability for a meeting is requested, please recommend timeslots for those emails this week."

Sharing your prompts



Leverage the Copilot Prompt Lab



Copilot Prompt Gallery

Boost AI confidence and success through prompting



Inspirational Prompt Collections

Explore prompts tailored to a variety of roles, industries, or scenarios.



In-App Prompt Ideas & Suggestions

Find and use prompts directly in Microsoft 365 Copilot, Copilot Chat, and agents.



Viral Prompt Sharing & Discovery

Empower users to save and share their own prompts and learn from others.

Novice

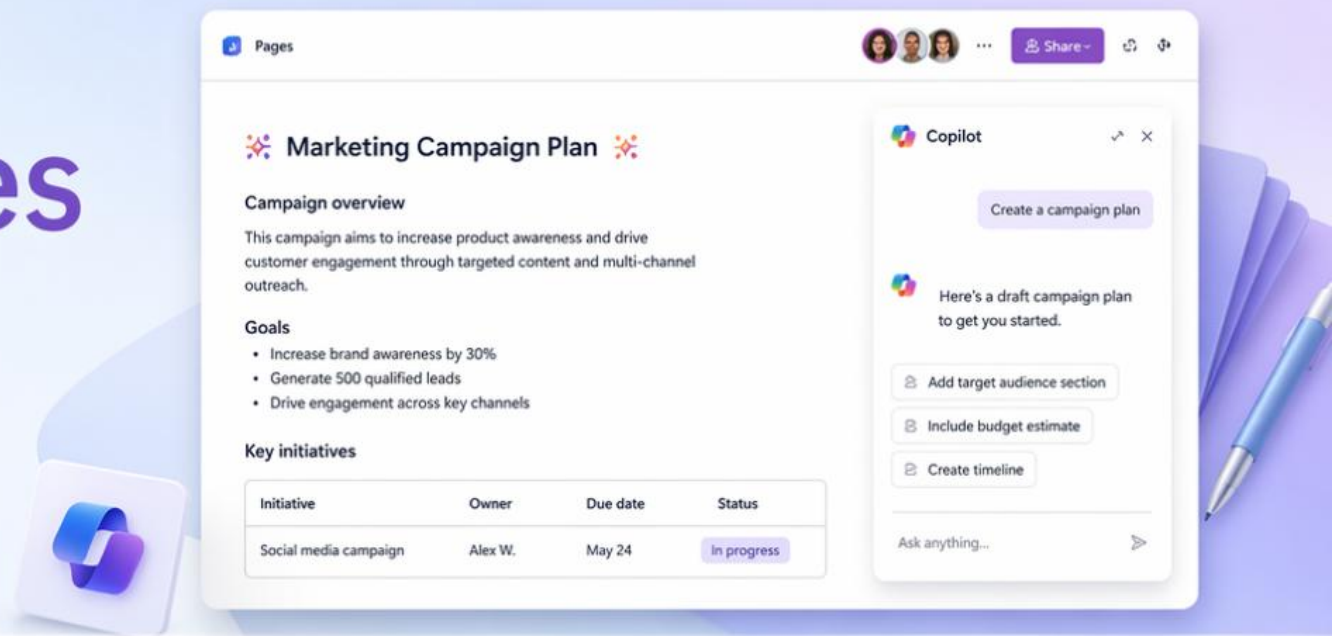
Proficient



Copilot Pages

Collaborate with Copilot. Create, edit, and share content that stays in sync.

Copilot Pages is your AI-powered workspace for creating and collaborating on rich content—documents, plans, briefs, project updates, and more.



Why use Copilot Pages?



AI-powered creation

Start from a prompt or let Copilot draft, summarize, and organize content for you.



Real-time collaboration

Work together with your team in real time—everyone stays on the same page.



Rich, flexible content

Add text, tables, images, checklists, and more to build content that fits your needs.



Easy to share

Share a page with others in your organization and control permissions easily.



Secure and compliant

Your content is protected with enterprise-grade security, privacy, and compliance.

How it works



Great for



Project plans



Meeting notes



Strategy documents



Team briefs



Research summaries



And much more



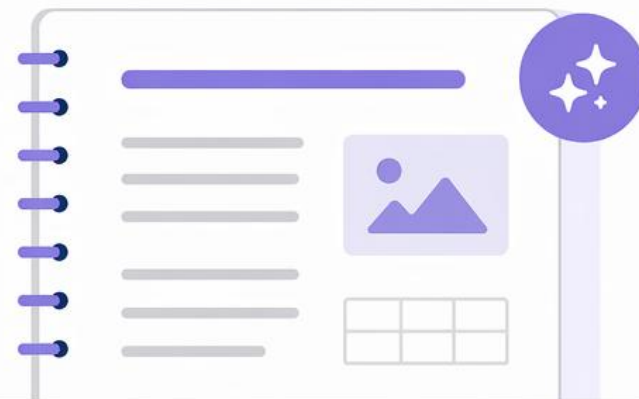
Your ideas. Your team. In sync with Copilot.

Copilot Pages helps you turn ideas into action—faster, together.



Copilot Notebook

Your AI-powered notebook for thinking, creating, and getting work done.



KEY BENEFITS



AI-Powered Assistance

Get help with ideas, writing, summaries, and more—right in your notebook.



Organize Your Work

Capture notes, plans, and content in one place that's easy to structure.



Work with Any Content

Add text, tables, lists, images, and files to bring your ideas to life.



Collaborate Seamlessly

Share and co-create with your team in real time.



Enterprise Ready

Built on Microsoft 365 with security, privacy, and compliance you trust.



Think it. Write it. Build it. Together.

Copilot Notebook helps you turn ideas into action—faster and smarter.

Prompting best practices



1

Prompt **length** and **clarity** matters



If it's too short, you will get generic results.

If it's too long, AI might not follow all your instructions.

2

Break down a problem into multiple steps



Single-Step Approach: Write a comprehensive report on the impact of digital transformation in commercial banking, including key trends, statistics, and case studies.

Step-by-Step Approach:

Step 1: "Generate an outline for a report on the impact of digital transformation in commercial banking."

Step 2: "Expand the section on key trends in digital transformation within the commercial banking sector."

Step 3: "Provide statistics and case studies for each key trend."

3

Persona based prompting



This approach offers specialised guidance, providing solutions tailored to each persona's unique characteristics.

It results in more satisfying interactions, with responses aligned to users' expectations and needs

4

Ask Copilot what it needs from you



Instead of guessing, ask Copilot what information you need to provide for success.

Example: "Copilot, what specific details or context do you need from me to create an effective strategy for improving customer satisfaction in our banking services?"

5

Take a **Holistic Approach** with Copilot



Don't limit Copilot to specific tasks. Consider entire processes like Risk Management, Stakeholder Communication or improving the overall customer experience at your bank.

Break them into individual tasks to see where Copilot can transform the whole process for greater impact.

6

Be curious



Experiment! Explore different prompt structures and approaches.

Curiosity fuels creativity and helps you discover Copilot's capabilities.

7

Test and refine



Like any collaboration, iterate. Adjust prompts based on results.

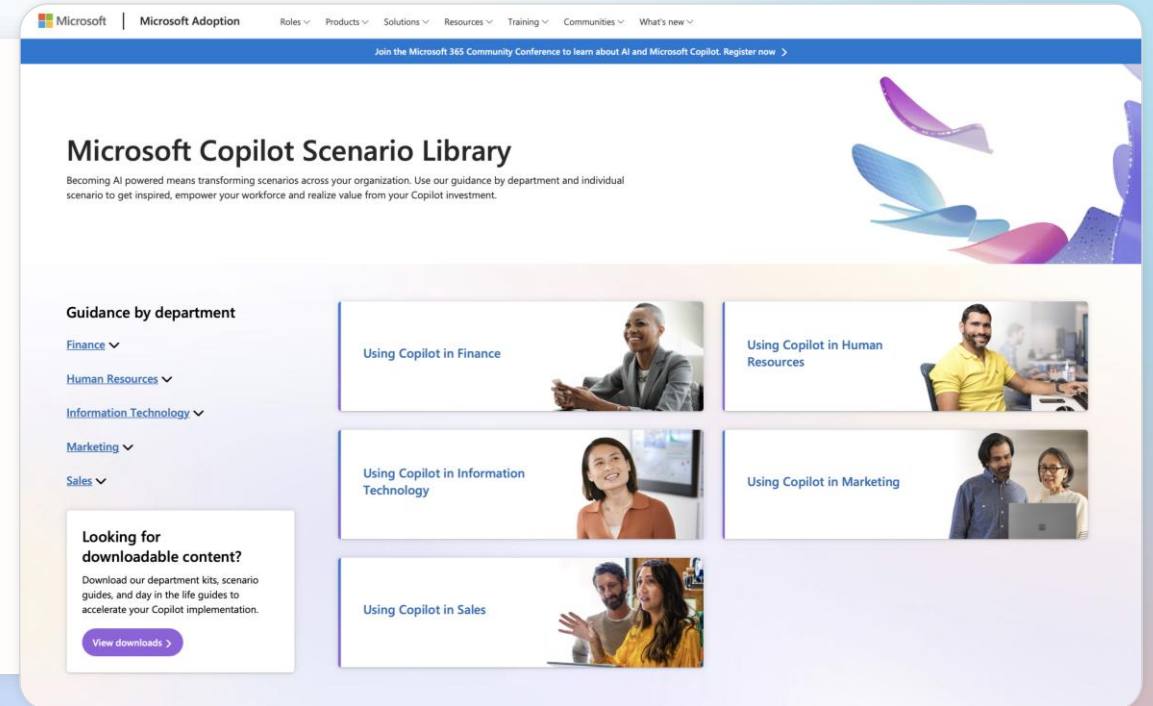
Test variations, observe outcomes, and fine-tune your approach.

Get ideas from the Copilot Scenario Library



Copilot brings AI value
across **lines of business**

Use the [Scenario Library](#) to identify top use cases and key metrics you would like to improve in that functional area.



All roles and leaders

Improve meetings
Content creation
Manage daily agenda

HR

Cost per hire
Employee turnover
Compliance risk reduction

Marketing

Leads created
Brand value
Cost per lead

Sales

Number of opportunities
Close rate
Revenue per sale

Protecting Your Data





Purview Suite

Data security

Microsoft Purview Information Protection

Microsoft Purview Data Loss Prevention (DLP)

Microsoft Purview Insider Risk Management

Data compliance

Microsoft Purview Data Lifecycle Management

Microsoft Purview Audit

Microsoft Purview Communication Compliance

Microsoft Purview eDiscovery

Microsoft Purview Compliance Manager

Microsoft Purview Suite

Unified data security, governance and compliance solutions for the era of AI



Simplify controls

Secure and manage data confidently with prebuilt templates, automated monitoring, and guided workflows.



Automate data security

Automatically classify and retain data, and enforce data loss prevention policies.



Streamline compliance

Streamline meeting regulatory compliance with built-AI that helps cut down complexity.



Get AI-ready

Adopt AI securely with automatic safeguards that helps prevent oversharing, risky prompts, and unintended exposure.

Unified, affordable, AI-powered data protection

Microsoft Purview Suite

Microsoft 365 Business Premium/M365 E3

Easy productivity with
built-in security

- ✓ Peace of mind for everyday work
- ✓ Core Protections built-in with simplified setup.



Microsoft Purview Suite

Helps you stay compliant and protect sensitive info

- ✓ Automatically protect sensitive data important to your business
- ✓ Extend data loss prevention and detect insider risks
- ✓ Help maintain compliance and regulatory readiness

Thank you



Thank you

A big thank you to Euan Wilkie from Ingram for sharing his expertise, and to all of you for joining our first Lugo Copilot User Group.

See you next time

We'll share the date and agenda for our next session soon.

Uniting - connecting people and tech

