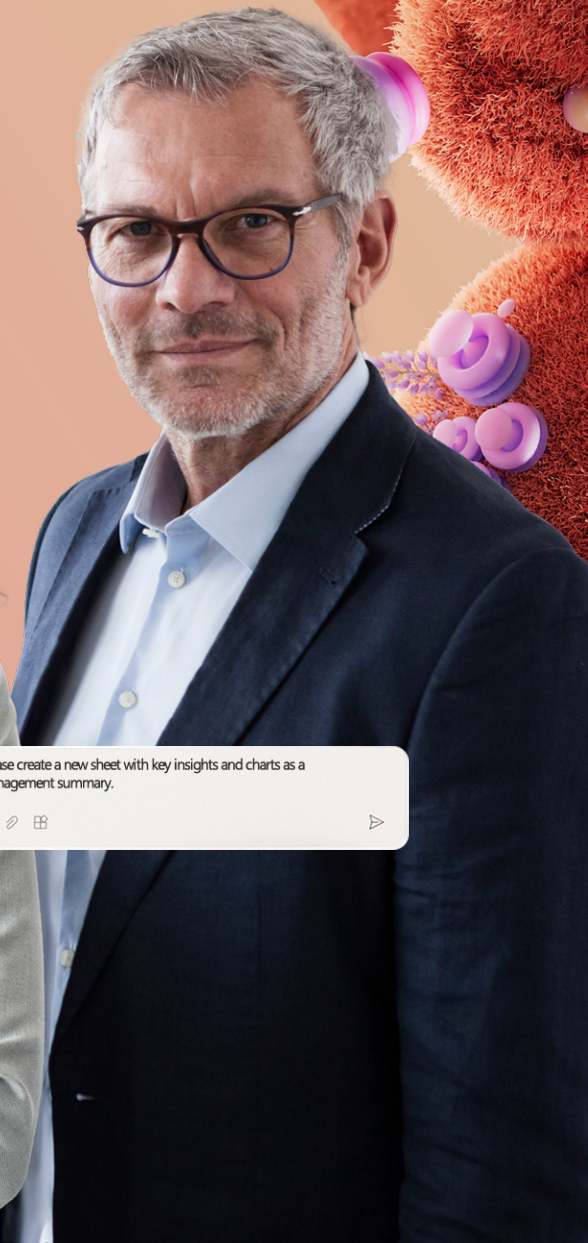




AI for All

Leadership with Microsoft 365 Copilot



Please create a presentation based on the speech in the following document: [insert the copied link here].



What questions remain unanswered about >topic of your choice<?



Create a bar chart for monthly revenues and expenses.



Please create a new sheet with key insights and charts as a management summary.



Content

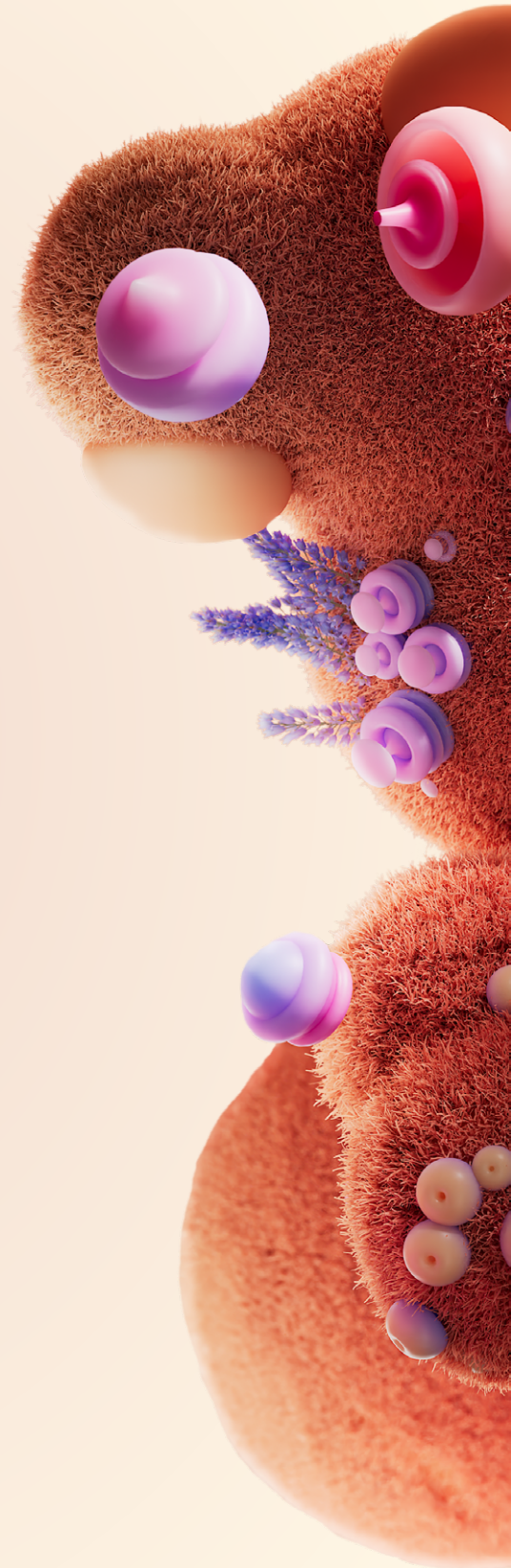
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Welcome

Our e-book series introduces you to the world of Microsoft 365 Copilot, showing how artificial intelligence can revolutionize your work. Look forward to exciting insights, practical exercise scenarios, and everything you need to know to minimize routine tasks with AI and enhance your leadership skills.

Discover how Microsoft 365 Copilot supports your analysis, ideation, and presentations – always with a clear focus on data protection and security.

Ready to get started? Your guide to the future of leadership awaits you!



Copilot for All – Introduction of Microsoft 365 Copilot Chat



It is undeniable: As humans we strive for tasks that excite us, foster our creativity, and produce results

that fill us with pride. The expansion of Microsoft 365 with **Copilot Chat** is a groundbreaking step that leads us precisely in this direction. With our new tool, the claim “AI for All” is not just a vision but a tangible reality. **Microsoft 365 Copilot Chat** brings artificial intelligence to where it has the most impact: in our daily work – paving the way to the future.

Create Routines...

Consisting of the three core areas – **Copilot Chat, Agents**, and **Security** – the free tool for Microsoft 365 subscribers offers comprehensive support that sustainably changes everyday work. Users can look forward to everyday tasks – such as monitoring email inboxes or automating workflows – being completed more efficiently, faster, and smarter.

Thanks to the integration of **GPT-4o** and the ability to create agents without prior knowledge, AI becomes accessible to everyone. Whether summarizing documents, analyzing data, or providing step-by-step instructions – **Copilot Chat** and the individually created agents ensure maximum efficiency. The three areas complement each other perfectly to offer companies a tailor-made solution: from intelligent collaboration to automated processes to state-of-the-art data security.

...in a Secure Environment

The Copilot Control System places data protection and security at the center of Microsoft 365 Copilot. With features like **Enterprise Data Protection** (EDP), company data is effectively protected, while IT departments retain full control over access, usage, and lifecycle of Copilot and the agents. Supplemented by detailed reports for analysis and optimization of usage, the system offers maximum transparency and efficiency. These comprehensive control mechanisms make **Microsoft 365 Copilot** a reliable solution for companies that want to use AI technologies safely and responsibly.

With AI to a Modern Leadership Strategy

With AI to a Modern Leadership Strategy

The business world is changing faster than ever – whether through technological innovations, market shifts, or global crises. Leaders must be able to respond flexibly to such changes and guide their teams through uncertainties. Their task is to set the direction and encourage their teams to think outside the box to remain competitive. And all this alongside the daily business.

How Can This Be Implemented?

Being open to new ideas and approaches, adapting strategies flexibly, and fostering a digital corporate culture – organizational transformation, with all its facets, is the greatest challenge for leaders. It requires not only a clear vision but also the ability to proactively shape change and bring the entire team along on this journey.



Leaders Set the Course for the Future – Including AI

Microsoft 365 Copilot can assist leaders in efficiently tackling challenges such as adapting strategies, fostering a digital corporate culture, and navigating through changes. Microsoft 365 Copilot automates routine tasks, provides data-driven insights, and frees up time for strategic and creative thinking. Leaders play a crucial role in implementing AI, as they not only introduce the technology but also cultivate the culture necessary for its acceptance and use.

Pioneers: Creating Conditions for AI Implementation

Leaders must not only promote AI integration, such as with Microsoft 365 Copilot, but also design it strategically and responsibly. This requires a clear vision, employee engagement, and alignment with measurable value. This cultural shift needs visionary leadership that encourages innovation and creativity, using AI to achieve business goals rather than just automating routine tasks.

Studies show: Leaders play a crucial role in integrating AI. They must alleviate workforce fears, clearly communicate opportunities, and position AI as a support rather than a threat. The concern of being replaced by AI, in particular, requires clear leadership and the building of trust.

With a focus on ethical standards and data protection, AI becomes a driver for growth and resilience. Companies that act early not only secure a competitive advantage but also create a culture that attracts and nurtures talent.



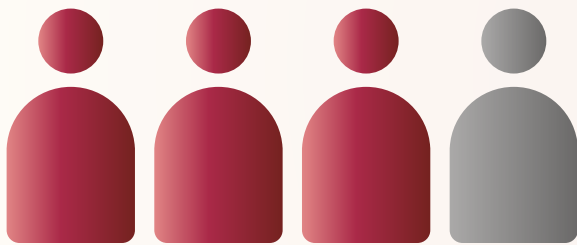
Microsoft Work Trend Index: AI by the Numbers

Microsoft Work Trend Index: AI by the Numbers

New Standards in Leadership with Microsoft 365 Copilot

Microsoft's Work Trend Index, with over 31,000 participants, reflects this precisely: While leaders agree that AI is indispensable for businesses, many believe their organization lacks a plan and a clear vision to

transition from individual impacts to using AI to enhance business outcomes. The pressure to demonstrate ROI immediately causes leaders to fall into a kind of paralysis despite the inevitability of AI.



3 out of 4

people already use AI at work

46%

of them started within the last 6 months.

53%

fear being replaced by AI when using it for important tasks.

“

To stay ahead of the curve, we have prioritized AI training so that everyone can leverage the capabilities of Microsoft 365 Copilot and other AI solutions. Additionally, we launched the GenAI Academy to foster the growth and development of our employees – aiming to train ambassadors and experienced GenAI users worldwide. We are already seeing benefits that are transforming the way we work and innovate.

”



Sheila Jordan,
SVP, Chief Digital Technology Officer,
Honeywell

Measurable Success: Key Performance Indicators

Measurable Success: Key Performance Indicators

Imagine you want to improve your fitness and decide to go to the gym regularly. Your goal after three months: better endurance. How do you measure your progress? A good Key Performance Indicator (KPI) is the time you can run without stopping. If you start with five minutes and reach 20 minutes after three months, you can clearly see that you've made progress: The KPI – in this case, the running time – shows you whether your training strategy is working.

KPIs help measure how successful processes, projects, or strategies are. They provide guidance on whether you are moving in

the right direction and enable success measurement.

Clarity, visible success, early problem detection, and efficiency – all of this is relevant.

Leadership KPIs – With the Support of Microsoft 365 Copilot

To help you clearly understand the benefits Microsoft 365 Copilot offers, the focus of its goals, and how each KPI makes this **success tangible**, we've broken down the key points for you in an organized manner. This way, you can see at a glance how Microsoft 365 Copilot can contribute to making your leadership processes more efficient and delivering measurable results.

Goal	Area	Scenario	KPI
Professionalism	Project Management	Gather News and Information	Improved Strategies
	Controlling	Analyze Data	Sustainability
	Communication	Write a speech	Time Savings
(Customer) Satisfaction	Communication	Create a PowerPoint presentation for the speech	Customer Satisfaction
	Organization	Meeting Summary	Transparency and Traceability
	Communication	Compose a thank-you email	Enhance Engagement

Data Protection as a Foundation: Your Data, Our Promise

Data Protection as a Foundation: Your Data, Our Promise

Imagine working with Microsoft 365 Copilot – your personal AI assistant that revolutionizes your workday. You’ve developed a new routine that saves a lot of time and opens up new possibilities. But during a conversation with a client, a question arises: “... that sounds great, but what about data protection?”

- **Our products and solutions continue to comply with global data protection regulations.** The AI products and solutions from Microsoft that you use continue to meet all current global data protection standards. As we shape the future of AI together, including the implementation of the EU AI Act and other laws worldwide, businesses can be confident that Microsoft maintains transparency in its privacy and security practices. We adhere to laws governing AI worldwide and support this with clear contractual commitments.
- **Your organization’s data and security are protected.** Security and privacy are integrated into every phase of the design and implementation of Azure OpenAI Service and Copilots. As with all our products, we provide a strong foundation for privacy and security, along with additional safeguards that you can choose to activate. As external threats evolve, we will continue to develop our solutions and offerings to ensure top-tier privacy and security in Azure OpenAI Service and Copilots, and we will remain transparent about our approach.
- **Your organization’s data is not used to train foundation models.** Microsoft’s generative AI solutions, including Azure OpenAI services and Copilot services and features, do not use your organization’s data to train base models without your permission. Your data is not accessible to OpenAI and is not used to train OpenAI models.

Effective Prompts? Here's How It Works

Effective Prompts: How It Works

1. Establish a Clear Context

Provide Microsoft 365 Copilot with precise information so it understands the context and delivers more accurate responses.

2. Avoid Vague Phrasing

Ensure your inputs are specific and clear. If information is missing, refine your request and ask for details directly.

3. Maintain Courtesy

Communicate in a friendly and professional manner. This encourages precise and cooperative responses.

4. Show Curiosity

Ask for additional aspects or information that could enrich your analysis.

5. Review and Deepen

Refine your prompts to achieve more detailed results and tackle complex topics.

6. Experiment with Different Styles

Experiment with different styles (creative, balanced, or precise) to tailor the responses to your needs.

Example:

Goal

What do you want from Copilot?

"I want a list of 3-5 bullet points to prepare me..."

+

Context

Why do you need it and who is involved?

"...for an upcoming meeting with [client], focusing on their current state and what they're looking to achieve."

+

Expectations

How should Copilot respond to best fulfill your request?

"Respond with a tone that is friendly but authoritative..."

+

Source

What information or samples do you want Copilot to use?

"...and focus on email and Teams chats with [people] over the last two weeks."

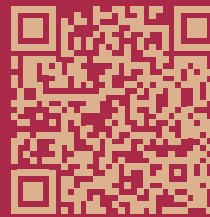
Practice with Microsoft 365 Copilot: Leadership Scenarios

Practice with Microsoft 365 Copilot: Leadership Scenarios

In this chapter, you'll learn how to use Microsoft 365 Copilot in leadership. **Six scenarios** provide step-by-step guidance on how Microsoft 365 Copilot can make your work more effective. Alongside **theoretical insights**, we offer **practical exercises** and all the necessary **materials** to try the scenarios yourself and apply them to your own strategies.

Try It Out: Downloadable Practice Files

Would you like to try the use case yourself? Great! With our prepared documents, you can simulate scenarios and experience Microsoft 365 Copilot in action. Just scan the QR code or click on the link.



[Download Now](#)

Scenario 1:

Summarizing Feedback, Messages, and More

Scenario 2:

Analyzing BMA Data for Stakeholder Speech in Excel

Scenario 3:

Drafting a Speech for a Stakeholder Event in Word

Scenario 4:

Visualizing Stakeholder Speech Content in PowerPoint

Scenario 5:

Creating a Summary of a Leadership Meeting

Scenario 6:

Writing a Thank You Email to Employees in Outlook



Scenario 1: Summarizing Feedback, Messages, and More

Without AI: Inefficient, Manual, Delayed

With AI: Targeted, Precise, Automated

Surely this sounds familiar: You have unanswered emails or unresolved questions from meetings that quickly get forgotten in the hustle and bustle of everyday life. In today's business world, effective communication is key to success. With Microsoft Teams and Microsoft 365 Copilot, you can effortlessly stay on top of things. Microsoft 365 Copilot filters relevant information from emails and meetings in Outlook, keeping you well-informed and enabling smarter decisions – efficiently and stress-free. This way, you can focus on what truly matters and achieve your goals faster.

Lea, the communications director of a multinational company, faces the task of optimizing her communication strategy. Current challenges include synthesizing insights from numerous channels, ensuring consistent messaging, and integrating data-driven decisions into strategic planning.



Initial Situation: With Microsoft 365 Copilot, Lea has the opportunity to elevate her communication planning to a new level – while considering all important content and aspects. Microsoft 365 Copilot assists in analyzing relevant data, filtering out the key insights, and developing strategic actions based on them. This not only makes communication more agile but also more sustainable and effective.

Task	Summarize Content
Area	Cross-Functional
Required Apps	Business Chat (and More)
Level	Copilot Beginner
Benefits	Efficiency Boost Consistency Time Savings

**Required Document:**

No additional files needed for the exercise. Simply work in your environment with existing files.

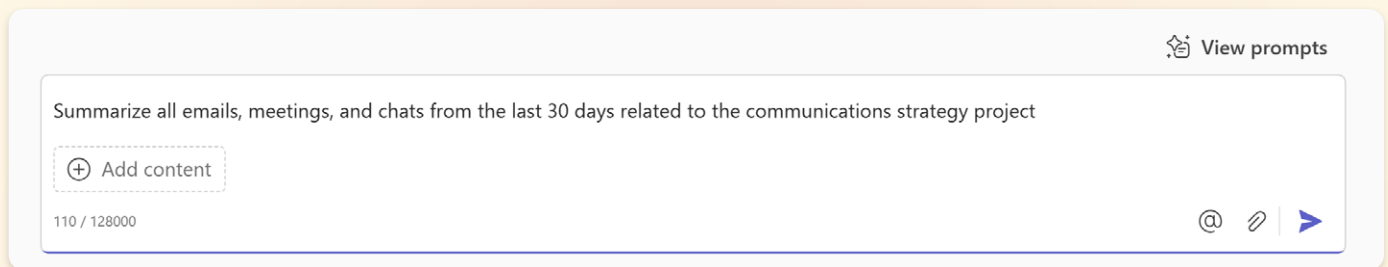
1. Launch Microsoft 365 Copilot

Start with Microsoft 365 Copilot in an environment that integrates your (communication) data, like Microsoft Teams or Business Chat. Open the Copilot window.

2. Formulate Your Prompt

The following prompt ensures that all content related to the desired topic or a specific project is summarized:

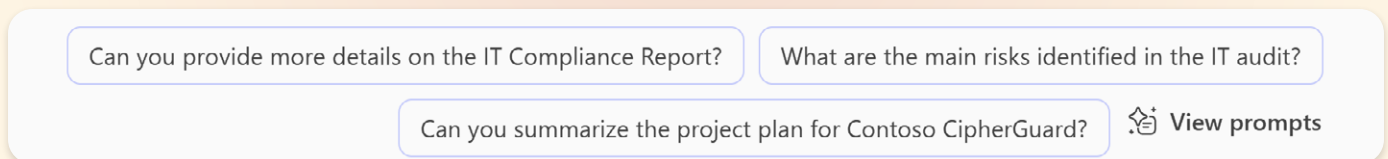
"Summarize all emails, meetings, and chats from the last 30 days related to the >topic of your choice<."



The screenshot shows a light blue rounded rectangular input field. At the top right, there is a link that says "View prompts" with a small icon. The main text area contains the prompt: "Summarize all emails, meetings, and chats from the last 30 days related to the communications strategy project". Below the text area, there is a dashed border box containing a plus icon and the text "Add content". At the bottom left, the character count "110 / 128000" is displayed. At the bottom right, there are icons for mentions (@), links, and a blue arrow to submit the prompt.

3. Consider the Options

Pay attention to the options above the input field that relate to summarized emails, meetings, and chats. Select one of the available options to see how Business Chat in Teams responds to it.



The screenshot shows three suggested prompts in rounded rectangular buttons: "Can you provide more details on the IT Compliance Report?", "What are the main risks identified in the IT audit?", and "Can you summarize the project plan for Contoso CipherGuard?". To the right of these buttons is a link that says "View prompts" with a small icon.

4. Choose an Option and Let the Summary Be Generated

If additional options appear above the prompt that are linked to your previous selection, choose one of these options to continue.

5. Add an Optional Prompt

You not only want to summarize insights, news, and more, but also find out if there have been any unanswered questions. To do this, enter this prompt: *"What questions remain unanswered about >topic of your choice<?"*

6. Let the Summary Be Generated

Every response from Microsoft 365 Copilot generates a new set of follow-up options. This allows you to delve deeper into the topics that Microsoft 365 Copilot has extracted for you. Save your summary by exporting it as a Word document, for example.

Tip: Use Microsoft 365 Copilot exactly where you need the content. This way, you get even faster responses. For example, Microsoft 365 Copilot is available in chats or in Teams channels through the familiar icon.





Scenario 2: Analyzing BMA Data for Stakeholder Speech in Excel

Without AI: Time-Consuming, Inefficient, Unclear

With AI: Structured, Goal-Oriented, Simple

Before the era of AI and automation, collecting and analyzing data for Business Management Analyses (BMA) was a real challenge. Financial data had to be painstakingly gathered manually from various sources, entered into spreadsheets, and meticulously checked. Reports like the BMA were typically created through hours of work with Excel or other basic tools – prone to errors, time-consuming, and far from efficient. Real-time insights? Unthinkable. Instead, this process often took several weeks.

Mads, the CFO of *Fabrikam, Inc.*, an IT services company, is tasked with preparing an important speech for the annual shareholders' meeting. For this speech, he needs well-founded content, such as that found in a business management report. Before using Microsoft 365 Copilot, the analysis was a highly error-prone and time-consuming process. Now, it is completed within minutes.

Initial Situation: Mads has all the relevant information from the business management evaluation in an Excel file. He has decided to conduct the analysis with Microsoft 365 Copilot – because the advantages are obvious: Without automated analyses or AI-supported tools, only simple patterns and numbers could be evaluated in the past, which greatly limited insights. Now, Mads expects a quick analysis that can be flexibly adjusted if needed.

Task	Analyze BMA Data
Area	Management, Leadership
Required Apps	Microsoft Excel
Level	Copilot Advanced
Benefits	Quick Results Clearly Organized Effort Minimized

**Required Document:**

Download the file *Fabrikam 2023 BMA.xlsx* for practice.

1. Important Information First

Ensure that the Business Management Evaluation (BMA) is available in an Excel file if you are not working with the practice file. The file should be complete and well-structured. At the same time, the file should be uploaded to your OneDrive.

2. Open Excel

Open the Excel file with the BMA data directly from OneDrive. Click on the Copilot icon in the top ribbon to get started.

3. Formulate Your Prompt

"Please analyze the BMA data in this table and create a summary of the key findings. Focus on trends, deviations, and the essential financial metrics."

4. Generate a Summary

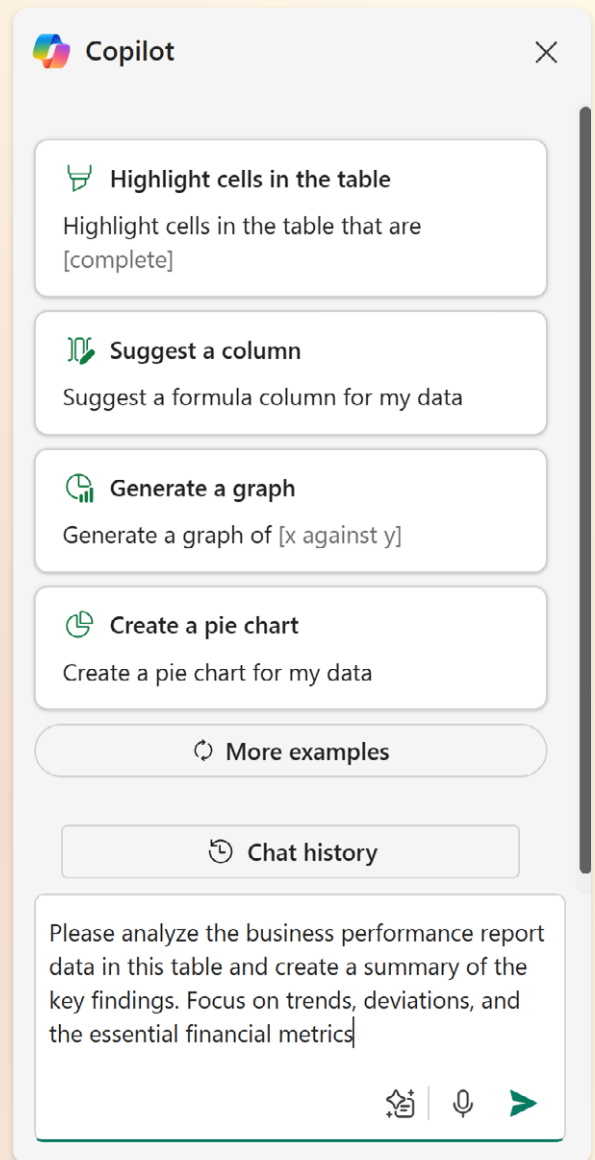
Microsoft 365 Copilot provides an initial summary that includes key insights such as revenue trends, cost patterns, and profit margins.

5. Add an Optional Prompt

Enter more specific requests to receive in-depth analyses like: *"Create an overview of the monthly sales trends and highlight particularly noticeable fluctuations."*

6. Let Copilot Create Visualizations

Ask Microsoft 365 Copilot to create charts or graphics for a visual representation: *"Create a bar chart for monthly revenues and expenses."*

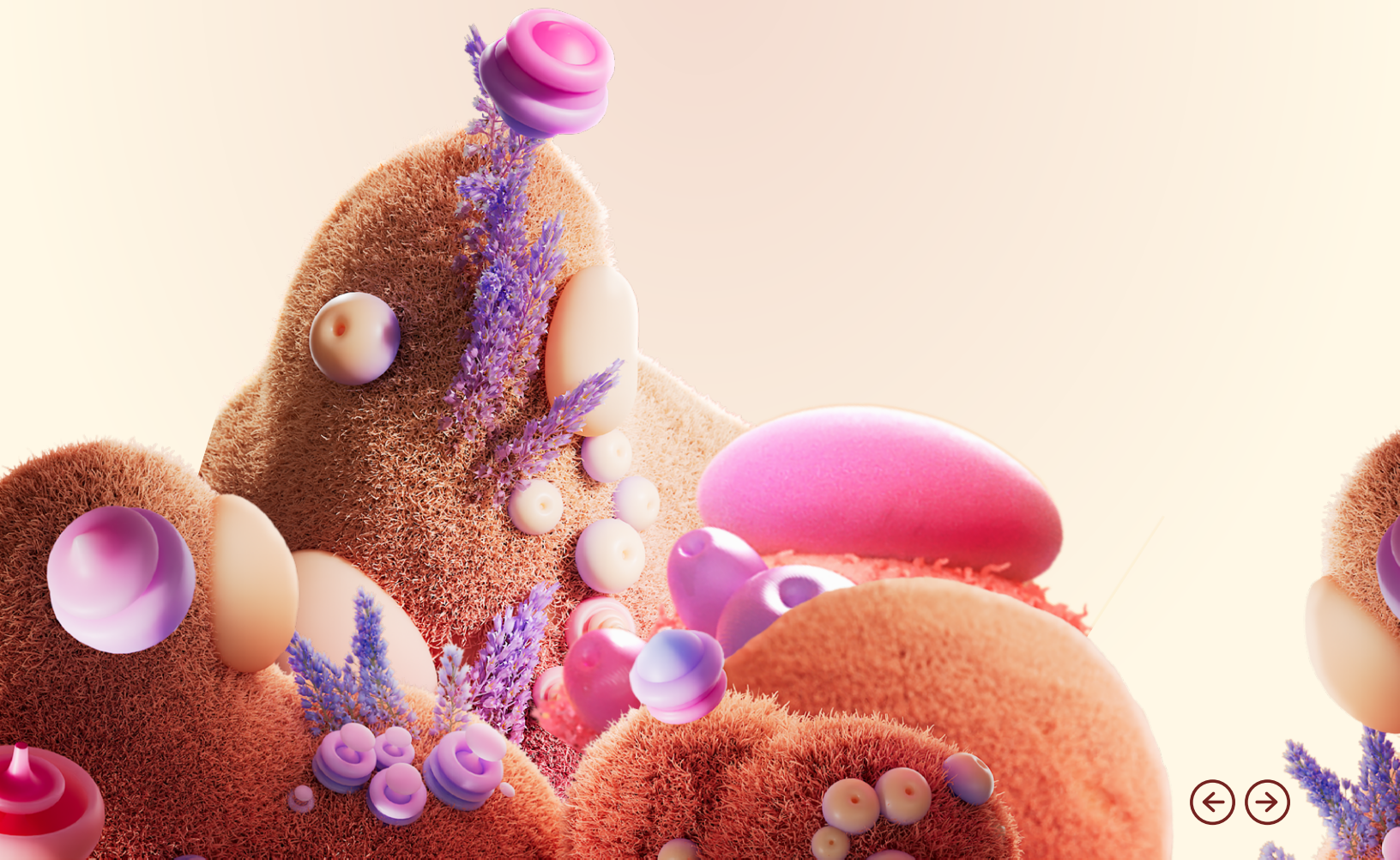


7. Generate a Report

Ask Microsoft 365 Copilot to summarize the results in a separate worksheet: *"Please create a new sheet with key insights and charts as a management summary."*

8. Save and Share the File

Save the file to OneDrive to easily share it with your team, or send the file directly via Microsoft Teams or email.





Scenario 3: Drafting a Speech for a Stakeholder Event in Word

Without AI: Resource-Intensive, Manual, Not Very Agile

With AI: Efficient, Understandable, Precise

Finding the right words, incorporating all relevant content, and convincing shareholders – a successful stakeholder speech should achieve all of this. However, writing such a well-founded and impactful speech requires time and careful preparation. With Microsoft 365 Copilot, this demanding task becomes significantly easier.

Mads has completed the crucial BMA analysis and is now working on the speech for the annual shareholders' meeting. The text should highlight key financial achievements, outline future strategic plans, and convey an inspiring vision. Previously, this process was time-consuming and required

extensive manual work. However, with Microsoft 365 Copilot, this has fundamentally changed.

Initial Situation: Mads plans to use Microsoft 365 Copilot to craft his speech based on the financial results presented in the profit and loss statement. Microsoft 365 Copilot not only simplifies the writing process but also ensures a clear, consistent, and impactful message. With Microsoft 365 Copilot, Mads can build a stronger connection with his stakeholders and set sustainable impulses for successful leadership. Let's get started!

Task	Write a Speech in Word
Area	Cross-Functional, Management and Leadership
Required Apps	Microsoft Word
Level	Copilot Beginner
Benefits	Relevant Data Clear Formulations Quickly Adaptable

**Required Document:**

Simply download the 2023 *income statement from Fabrikam* for practice.

Note: The corresponding document must be stored in your **OneDrive**. Ideally, you have opened it at least once so that it appears in the list of **recently used files**.

1. Open Word

Open Microsoft Word and start a new document. Click on Microsoft 365 Copilot or press **Alt+I**.

2. Formulate Your Prompt

In the *Draft with Copilot window*, which appears at the top of the blank document, enter the following prompt: *"Please create a speech for the Fabrikam shareholders summarizing the company's income statement results for 2023. You can find the relevant data in the attached file."*



3. Attach the Document

Before generating the draft, you need to attach the file *Fabrikam 2023 Profit and Loss Statement.docx*. This can be done using the paperclip to *link to your content*.



Please create a speech for the Fabrikam shareholders summarizing the company's income statement results for 2023. You can find the relevant data in the attached file [Fabrikam 2023 Income Statement.docx](#)



4. Let the Draft Be Generated

Click on *Generate*. Review the draft and first click on *Keep*. However, some changes are still needed.

5. Let it Rewrite Automatically

Are there sections you want to add to or rewrite? You know what you want to say – but not how to phrase it? Just highlight this sentence or section and click on the Copilot icon.

Microsoft 365 Copilot now provides you with three options to choose from. Select one of the three suggestions and either add it below the text or use it as a replacement. If the suggestion doesn't fully meet your needs, you can regenerate it using the arrows or adjust it through the *What do you want Copilot to change?* field.

The screenshot shows a document with the following text highlighted: "Thank you for joining us today to review Fabrikam's financial performance for the year 2023. I am pleased to present to you a summary of our income statement, which reflects a year of robust growth and strategic investment." A Copilot icon is visible in the top right corner of the document. Below the highlighted text, a Copilot suggestion box is open. The box has a title bar that says "Rewrite with Copilot < 2 of 3 >" and a close button (X). The suggestion text reads: "Thank you for attending today's review of Fabrikam's financial performance for the year 2023. It is my pleasure to present a summary of our income statement, which highlights a year marked by strong growth and strategic investments." Below the suggestion text, there is a disclaimer: "AI-generated content may be incorrect". At the bottom of the suggestion box, there are three buttons: "Replace" (with an upward arrow icon), "Insert below" (with a document icon), and a button with a circular arrow icon. To the right of these buttons is a text input field that says "What do you want Copilot to change?" with a right arrow icon.

6. Save the File

Review your speech for accuracy and save the final version of the speech as *Fabrikam 2023 Financial Presentation.docx* in your OneDrive.



Scenario 4: Visualizing Stakeholder Speech Content in PowerPoint

Without AI: Neglected, Inconsistent, Time-Consuming

With AI: Targeted, Professional, Flexible

Presentations require regular updates to incorporate new standards, security policies, or market developments. This can quickly become time-consuming, as manually editing charts, tables, and texts is not only labor-intensive but also prone to errors. With Microsoft 365 Copilot, these challenges can be overcome: It enables you to achieve professional results while presenting content in a compelling and engaging way for stakeholders.

After successfully crafting his speech for the stakeholder event with Microsoft 365 Copilot, Mads now wants to visualize the content in an engaging and persuasive way for the shareholders. With Microsoft 365 Copilot in PowerPoint, he can make his messages even clearer while maintaining a professional standard. This way, the presentation will not only be eye-catching but also leave a lasting impression and effectively convey his messages.

Initial Situation: Mads wants to visually present the contents of the stakeholder speech in an engaging and targeted manner for the shareholders. His goal is to clearly and professionally convey the key messages to capture the stakeholders' attention and enhance his speech with visual support. He relies on Microsoft 365 Copilot in PowerPoint to make the creation process efficient and flexible.

Task	Prepare Presentation
Area	Cross-Functional, Management and Leadership
Required Apps	Microsoft PowerPoint
Level	Copilot Beginner
Benefits	Professional and Consistent Visual Support Quickly Adaptable



Required Document:

Simply download the *2023 Profit and Loss Statement speech for shareholders.docx* for practice.

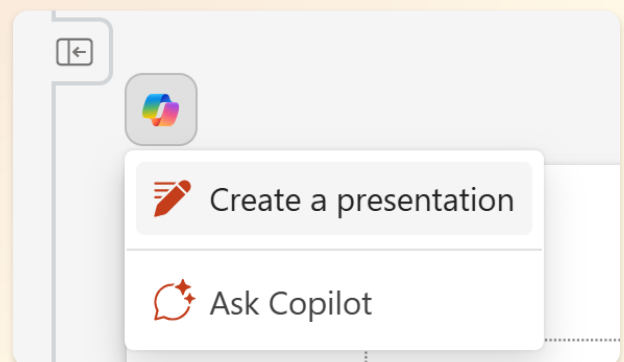
Note: The corresponding document must be stored in your **OneDrive**. Ideally, you have opened it at least once so that it appears in the list of **recently used files**.

1. Open PowerPoint

Open PowerPoint and create a new blank presentation. Click on Copilot in the ribbon or on the icon above the slide.

2. Formulate Your Prompt

"Please create a presentation based on the speech in the following document: [insert the copied link here]." or attach the file through the suggestions window, where the last three used files are displayed.



3. Have a Presentation Generated

A presentation is now being created. This will include the outline, speaker notes, images, layouts, and a general confidentiality label.

4. Make Adjustments Using Prompt or Designer

Carefully review the slides created. Check for any references to the speaker of the presentation, and also examine the added speaker notes to ensure they clearly convey the key points of your presentation. Make adjustments as needed by giving Microsoft 365 Copilot specific instructions, such as:

"Add a slide with the key financial highlights."

Microsoft 365 Copilot does not make design adjustments. For that, it's easiest to use Microsoft Designer.

5. Add a Prompt: Insert Slide

"Insert a new slide after Slide 1. This slide should contain an image of a mountain peak in the Alps. Add a text box on the slide: ,Fabrikam's company motto – "We overcome every obstacle." It should be positioned at the bottom. Also, add speaker notes to the new slide discussing how Fabrikam tirelessly works to fulfill every customer request and is not deterred by any obstacle."

6. Save the File

Review the adjustments and make any necessary changes. Once all modifications are finalized and the presentation is designed to your liking, simply save it to your OneDrive.



Scenario 5: Creating a Summary of a Leadership Meeting

Without AI: Labor-Intensive, Time-Consuming, Unstructured

With AI: Fast, Precise, Transparent

Summaries, especially after important events and meetings, often form the foundation for further gatherings and innovations. They help capture key insights, document decisions, and clearly define next steps. A well-structured summary not only ensures transparency within the team but also makes sure that everyone is on the same page – even those who couldn't attend. With tools like Microsoft 365 Copilot, this process

becomes significantly more efficient, allowing important information to be compiled quickly and accurately.

Mads and other team leads held a Teams meeting after the stakeholder event to consolidate the day's insights and develop initial ideas for the next event. Since the meeting took place a few days ago, Mads now wants to organize the content.

Initial Situation: The leadership meeting took place in Microsoft Teams, and Mads now wants to organize the content so that colleagues who couldn't attend can easily understand what was discussed. The goal is to clearly outline decisions, to-dos, and open questions from the meeting minutes and make them accessible to the team. With Microsoft Teams and Microsoft 365 Copilot, this can be done quickly: The intelligent assistant identifies the relevant content in just a few clicks and presents it in an organized manner.

Task	Meeting Summary
Area	Cross-Functional
Required Apps	Microsoft Teams
Level	Copilot Beginner
Benefits	Professional Results Quick and Flexible Enhanced Communication

**Required Document:**

No file needed for the exercise.

1. Important Information First

Ensure your Teams meeting was recorded and that meeting notes or chat logs are available. These are automatically saved in the relevant channel or in OneDrive.

2. Open the Meeting Recording

Go to the channel or chat where the meeting took place, or open the meeting recording. Open the Teams meeting or the associated chat view and click on the Copilot icon.

3. Formulate a Prompt

Enter a prompt like the following: *"Create a summary of the leadership meeting based on the meeting recording and notes. Focus on decisions, to-dos, and open questions."*

4. Generate a Summary

Microsoft 365 Copilot analyzes the meeting recording, notes, and chat logs to create a structured summary. Review the summary to ensure it includes all relevant points such as decisions, actions, and open questions.

5. Optionally Add a Prompt

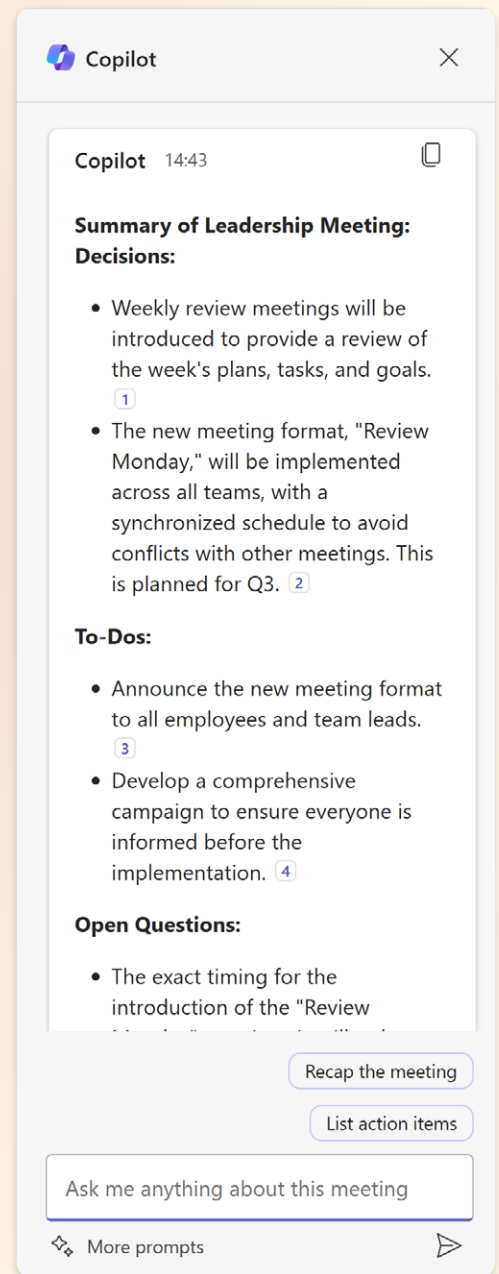
If important information is still missing, you can instruct Microsoft 365 Copilot with a specific prompt to add details or adjust style and format.

"Add details about the discussed marketing measures."

"Rephrase the summary to be more professional and concise."

6. Share or Save the File

Share the final summary directly in the meeting chat or export the content as a Word document.





Scenario 6: Writing a Thank You Email to Employees

Without AI: Time-Consuming, Impersonal, Error-Prone

With AI: Efficient, Personal, Targeted

The fiscal year is coming to a close, and it's time to find the right words for an email to all employees. But what should the content look like? Especially in dynamic times, it can often be challenging to craft a creative and coherent message that covers all important points – and finds the right words, particularly during phases of significant change. Microsoft 365 Copilot can assist you precisely here, helping you create content that makes you feel confident and comfortable.

Alexa is the CEO of *SecureIT GmbH*. The year has been marked by many changes and innovations, and the team has done an excellent job in achieving the results. However, due to her tight schedule, Alexa finds it difficult to compose an appropriate email, and several attempts have been unsuccessful so far. It is particularly important to her that the employees feel motivated and engaged by her message.

Initial Situation: Alexa has already made several attempts to draft her thank-you email, but unfortunately, she struggles to put her thoughts into the right words. The tight schedule adds to the challenge. However, with Microsoft 365 Copilot in Outlook, Alexa can rely on her digital assistant: It creates a first draft that captures her thoughts and provides helpful tips to refine the email and address key points effectively. Let's get started together.

Task	Write a Thank-You Email
-------------	-------------------------

Area	Cross-Functional
-------------	------------------

Required Apps	Microsoft Outlook
----------------------	-------------------

Level	Copilot Beginner
--------------	------------------

Benefits	Improved Communication
	Employee Engagement
	Fast and Adaptable

**Required Document:**

No additional documents needed for the exercise.

1. Open Outlook

Open Outlook and access Microsoft 365 Copilot from the top menu bar. Beforehand, consider who the email should reach: Is it specific teams or departments – or is the email intended for the entire workforce?

2. Formulate Your Prompt

Have you made your decision? Then a suitable prompt might be formulated like this:

"Please write a thank-you email to the team for their work on our last project. Highlight the teamwork and the results achieved. The tone should be appreciative and motivating."

3. Let Copilot Generate a Draft

Microsoft 365 Copilot drafts an initial version of your thank-you email. Review the draft to ensure the message aligns with your expectations.

4. New Version?

If it doesn't quite meet your expectations, you can take one of the following actions: To create a new version, select *Regenerate Draft*. To start from scratch, change your prompt and select *Generate again*.

5. Make Adjustments

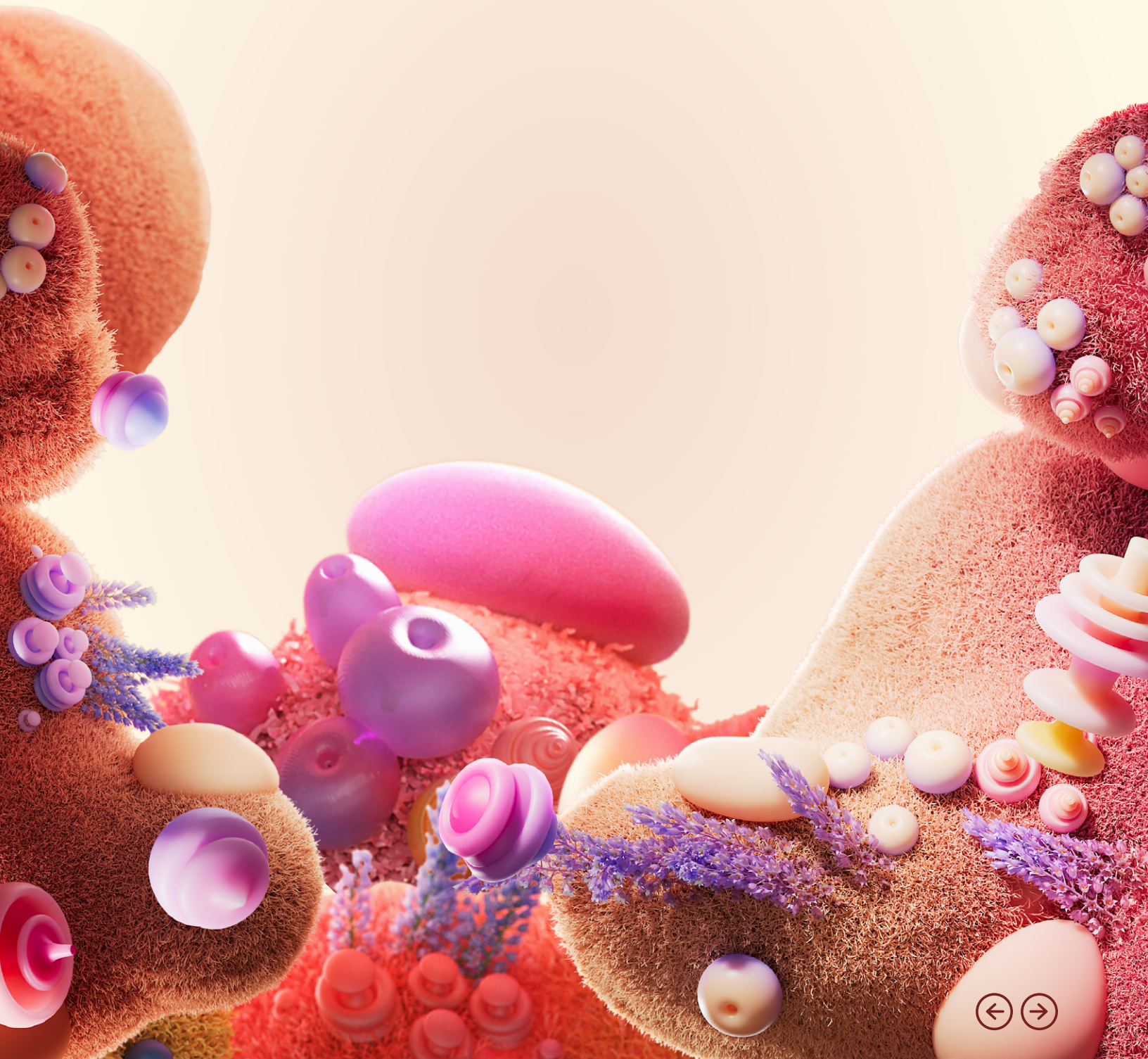
If specific details or achievements need to be highlighted, enter another prompt like *"add an example of the results achieved, such as the successful completion of the project ahead of schedule."* Or change the tone with: *"make the email a bit more personal."*

The screenshot shows the Microsoft 365 Copilot interface for drafting an email. At the top, there is a 'Send' button with a dropdown arrow. Below it are 'To' and 'Cc' fields. The subject line is 'Thank You for Your Hard Work' and the draft is saved at 14:54. The main body of the email contains a thank-you message from Ella Engel to a team, highlighting their hard work and the successful completion of a project ahead of schedule. A blue highlight is visible on the text: 'The teamwork and dedication from everyone were truly amazing, and the results we achieved together show just how much effort we all put in. Finishing the project ahead of schedule is a real testament to your hard work and efficiency. Your commitment and collaboration have not only made this project a success but also set a high bar for our future work. I'm genuinely proud to be part of such a talented and motivated team. Let's keep this momentum going and aim for even greater achievements in the future. Thanks again for all your hard work and dedication. Best, Ella Engel'. Below the email body, there is a 'Fix my grammar and spelling' button and an 'AI-generated...' label. At the bottom, a dropdown menu is open, showing options: 'Replace' (selected), 'Insert below', and 'Discard'.



6. Send the Email

Review the email thoroughly and read it carefully. Add the appropriate email addresses or groups. Enter a suitable subject and click *Send*.



Automation and Efficiency: Your World Without and With AI

Automation and Efficiency: Your World Without and With AI

Gather News and Information

WITHOUT AI

Summarizing feedback and messages was time-consuming and prone to errors. Important details could easily be overlooked.

WITH AI

Microsoft 365 Copilot efficiently summarizes messages and feedback, highlights key points, and ensures a clear and concise presentation in no time.

Analyze BMA Data

WITHOUT AI

Analyzing BMA data was tedious, time-consuming, and often inaccurate. Manual errors limited the quality of the results.

WITH AI

Microsoft 365 Copilot precisely analyzes BMA data, identifies trends, and provides clear insights that can be immediately integrated into the stakeholder presentation.

Write a Speech

WITHOUT AI

Writing speeches was time-consuming, required a lot of preparation, and was often prone to errors, especially with complex topics.

WITH AI

Microsoft 365 Copilot quickly crafts a well-informed speech that clearly outlines key financial achievements, strategic plans, and visions.



Create a PowerPoint Presentation for a Speech

WITHOUT AI

Creating presentations used to be time-consuming and often disorganized. Content wasn't always visualized effectively.

WITH AI

Microsoft 365 Copilot creates targeted PowerPoint slides that present messages in a visually appealing and professional manner, without extra effort.

Summarize Leadership Meeting

WITHOUT AI

Follow-up after meetings used to be time-consuming and unstructured. Important points could easily get lost.

WITH AI

Copilot automatically summarizes the results of meetings, highlights decisions and to-dos and shares them with the team in a clearly structured way.

Compose a Thank-You Email

WITHOUT AI

Writing thank-you emails used to be complex and time-consuming. They often lacked a personal touch and precise wording.

WITH AI

Microsoft 365 Copilot quickly crafts a thoughtful thank-you email that is precise, motivating, and personalized.

Time for Leadership: With Microsoft 365 Copilot, Not Just a Dream

Time for Leadership: With Microsoft 365 Copilot, Not Just a Dream

The introduction of Microsoft 365 Copilot opens up new opportunities for executives and business leaders to enhance their strategic decision-making roles. While traditional leadership tasks were often tied up with time-consuming processes like report generation, data analysis, or planning complex projects, Microsoft 365 Copilot creates space for strategic thinking and innovation.

With Microsoft 365 Copilot, executives can access real-time analytics, quickly summarize complex information, and make informed decisions. The efficiency is particularly impressive: Microsoft 365 Copilot generates reports, creates presentations, and assists with strategic planning – all based on up-to-date data. This allows executives to gain not only speed but also precision in decision-making.

However, it is clear that the introduction of such technologies also presents challenges. It is not enough to implement Microsoft 365 Copilot as a mere tool – 68% of executives report that the success of AI applications critically depends on how well they are integrated into existing business strategies. Therefore, leaders must ensure that their teams are empowered to work with AI technologies and fully leverage their potential.

WITHOUT AI

Executives were heavily tied up with time-consuming, manual tasks like reports, data analysis, and planning. Decision-making processes were often slow because crucial information had to be painstakingly compiled first.

WITH AI

Microsoft 365 Copilot automates routine tasks, provides precise real-time data, and gives leaders more time for vision and strategic decisions. This enables them to respond to market changes more quickly and make informed decisions, leading their teams more efficiently.



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