



# Microsoft Copilot Chat & M365 Copilot Introduction

**Stephen Eustace** – Snr Copilot Specialist

**David Kelly** – Snr Copilot Solution Engineer



# Microsoft 365 Copilot

Your AI assistant for work

## Copilot Chat

Free, secure AI chat



## Chat

Work-grounded

## Copilot in M365 apps

Teams, Outlook, Word, Excel, PowerPoint

## Agents

## Copilot Control System

## Copilot Analytics

# Enterprise Data Protection

## Microsoft commitments and controls



We secure your data  
at rest and in transit



You control your  
data



Your data is not used  
to train or enrich  
foundation models



You're protected  
against AI security and  
copyright risks<sup>1</sup>



**Microsoft 365  
Copilot is built  
on trust**

<sup>1</sup> [Learn more about the Customer Copyright Commitment](#)

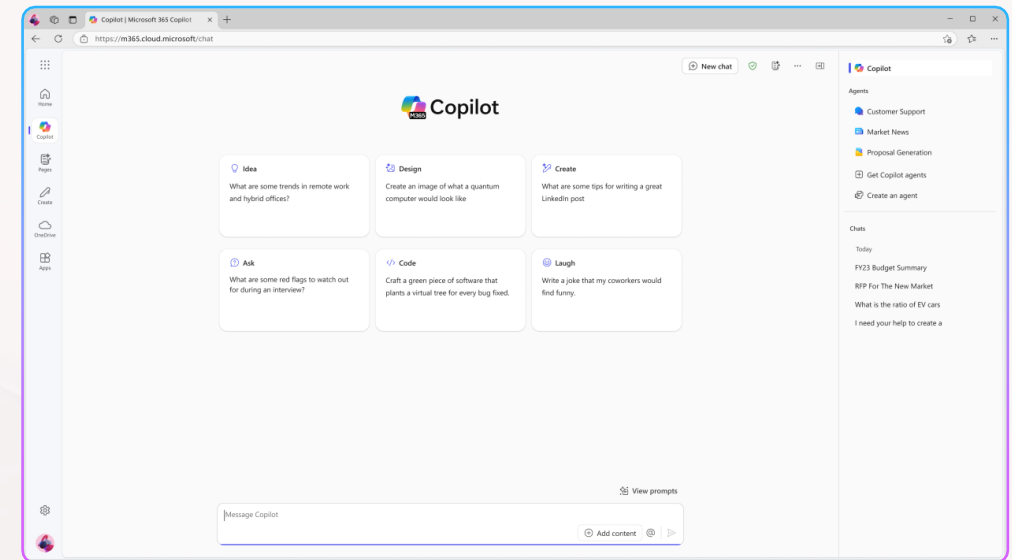
# Microsoft 365 Copilot Chat

# Microsoft 365 Copilot Chat

**Microsoft 365 Copilot Chat is an AI chat tool built specifically for work.** It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc<sup>1</sup>.
- Generate images<sup>1</sup> and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites<sup>2</sup>.




Get started by going to [M365Copilot.com](https://m365cloud.microsoft.com/chat)

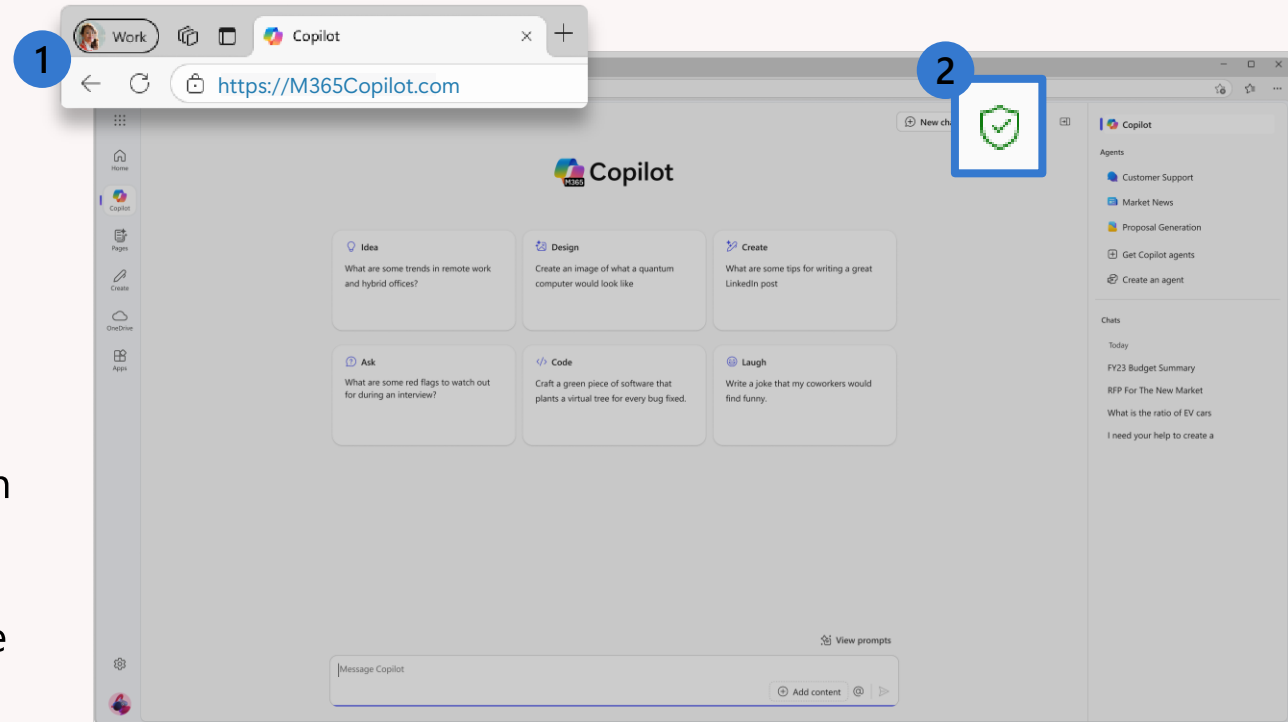
<sup>1</sup>Image generation and file upload limits apply.

<sup>2</sup>Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.

# Sign in with your work account

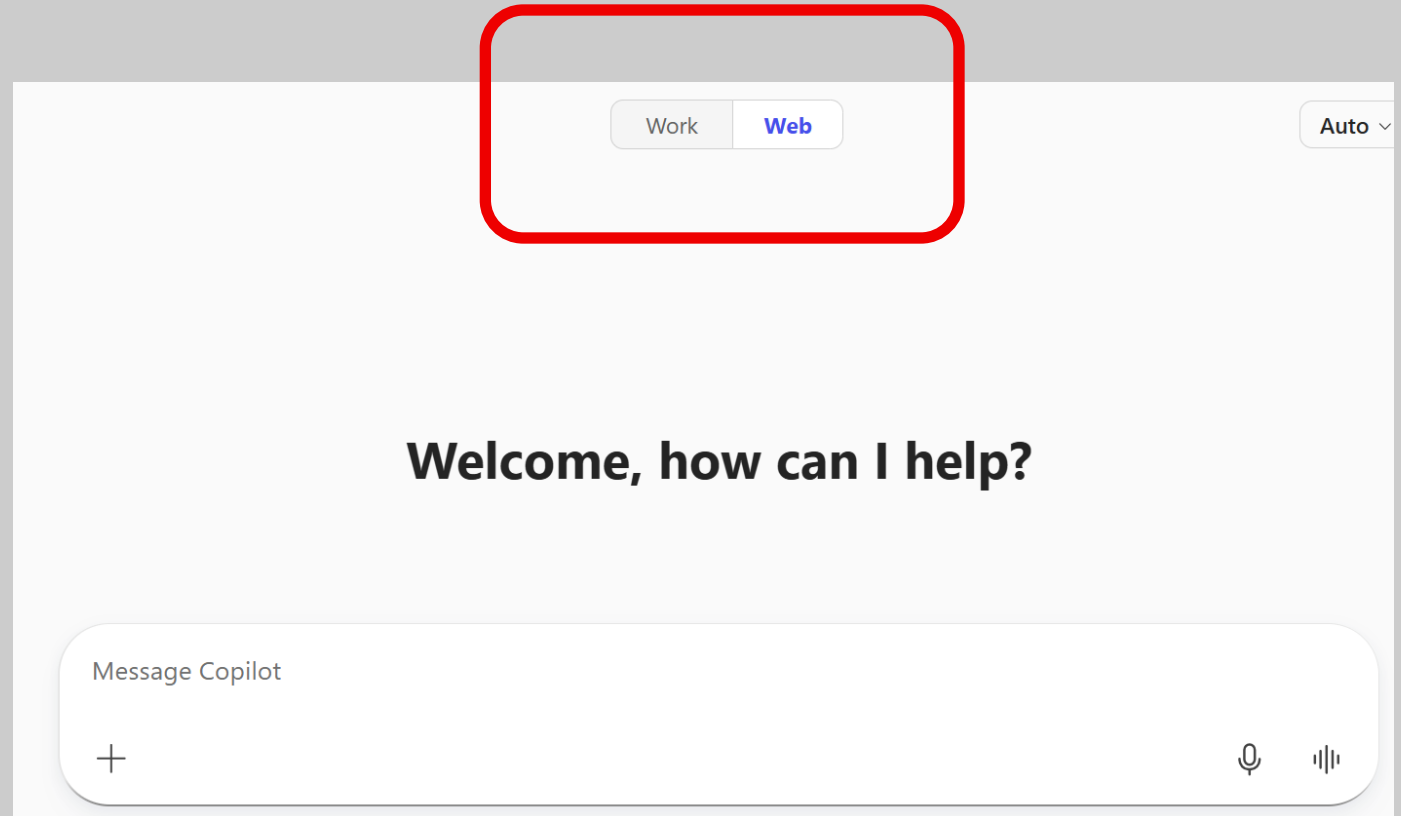
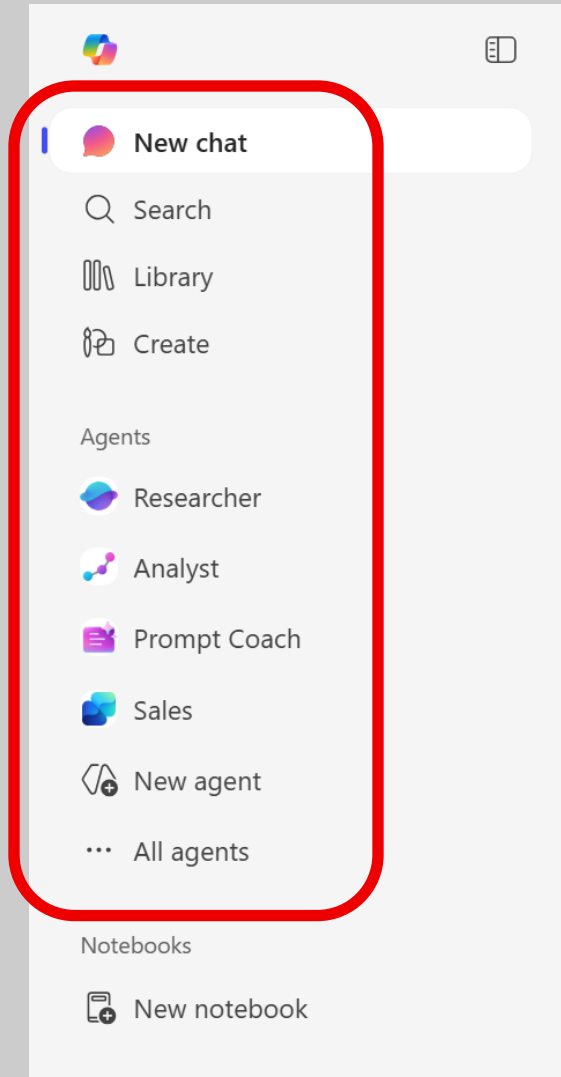
- 1 Navigate to [M365Copilot.com](https://M365Copilot.com) on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



If you are not signed in with your work account, Enterprise Data Protection does not apply.

# Identifying if you have M365 Copilot Add-on, or Chat only





# How to chat in 3 steps



## 1. Enter your prompt

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.



## 2. Check sources

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer. Vet these sources and validate your answers.



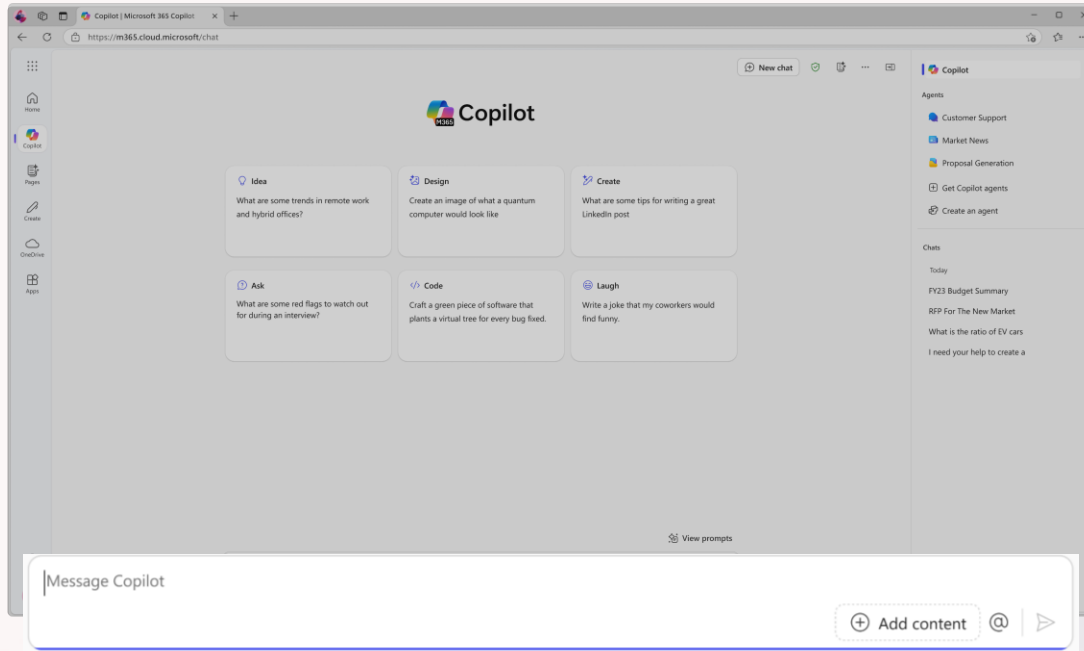
## 3. Continue the conversation

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail." You can also select suggested prompts.



# What is a “prompt?”



Get started by entering your prompt in the text box

Prompts are how you have a conversation with Copilot

Use plain but clear language and provide context like you would with an assistant.

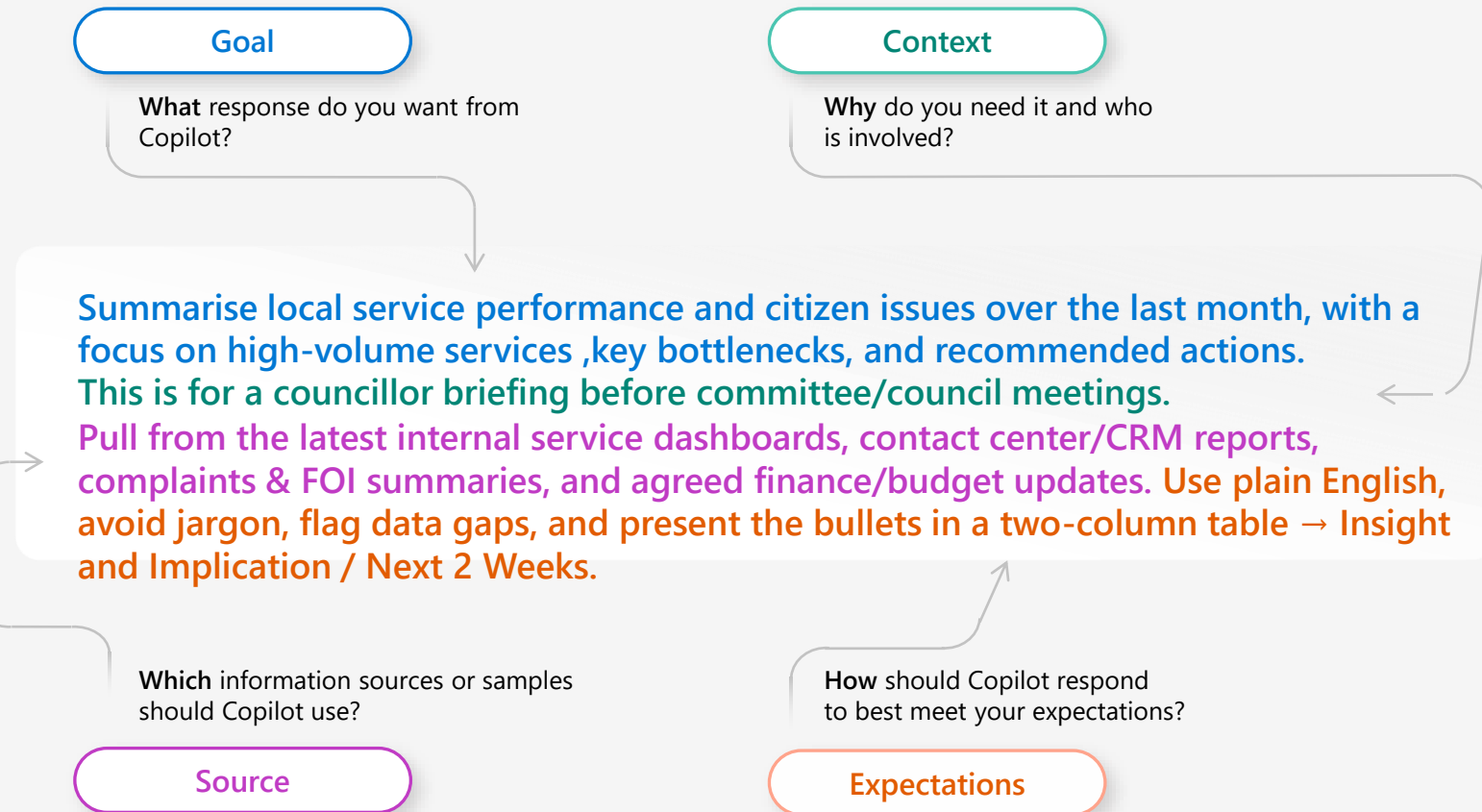
Enter your first prompt in the text box at the bottom of your screen, like *“Draft an email to residents about the proposed local area plan”*

# The art and science of prompting



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

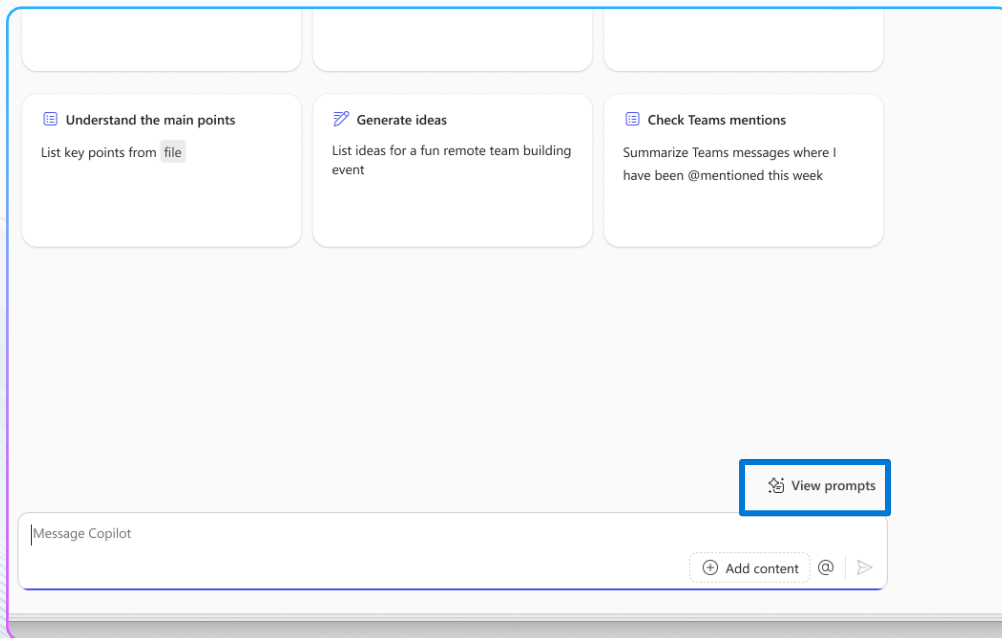
## Include the right prompt ingredients



# Navigating to the Copilot Prompt Gallery

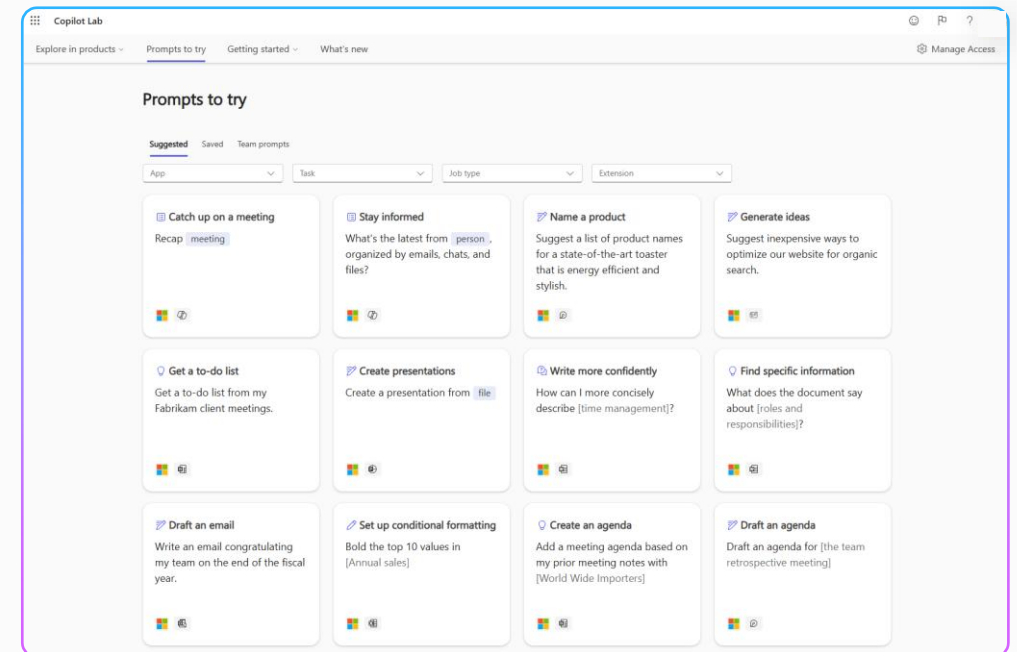
## In-product experience

Select “View prompts” next to the Copilot prompt box. Here, you’ll see suggested Copilot prompts and your saved prompts.



## Prompt Gallery website

Go to [aka.ms/Prompts](https://aka.ms/Prompts) to access the full Prompt Gallery experience. Here, you can find relevant Copilot prompt examples using the filters, view prompts that you and your team saved, and share useful prompts.



# Top 10 to try first with Microsoft 365 Copilot Chat



1

## Ask a question

Get insights and answers to your questions.

- How does [product] compare to [competitor product]? Provide the comparison in a table.



2

## Draft an email

Generate an email draft and personalize 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.



3

## Summarize a document

Simplify a long document, article, or PDF.

- Give me a bulleted list of key points from <insert file>.



4

## Generate new ideas

Boost your creativity with ideas for your tasks such as agendas, image creation, social media posts, etc.

- Suggest 10 compelling taglines based on <insert file>.



5

## Draft a document

Start from a full draft rather than a blank page.

- Write an outline for a creative brief for a video project.



6

## Improve your writing

Write and edit like a pro.

- Generate three ways to say [text].



7

## Learn something new

Quickly learn new skills and topics.

- Explain how a large language model works in simple terms.



8

## Create an image

Leave behind stock images and text-only reports by creating images easily.

- Illustrate a romantic pop art image of an office worker experiencing a dramatic coffee crisis.



9

## Translate a message

Read and write content in other languages.

- Translate the following text into French: [text].



10

## Lighten up your work

Add some fun to your emails, messages, and meetings.

- Suggest 5 office-friendly jokes.

For more prompt examples, select “View prompts” above the Copilot Chat prompt box



**Demo**

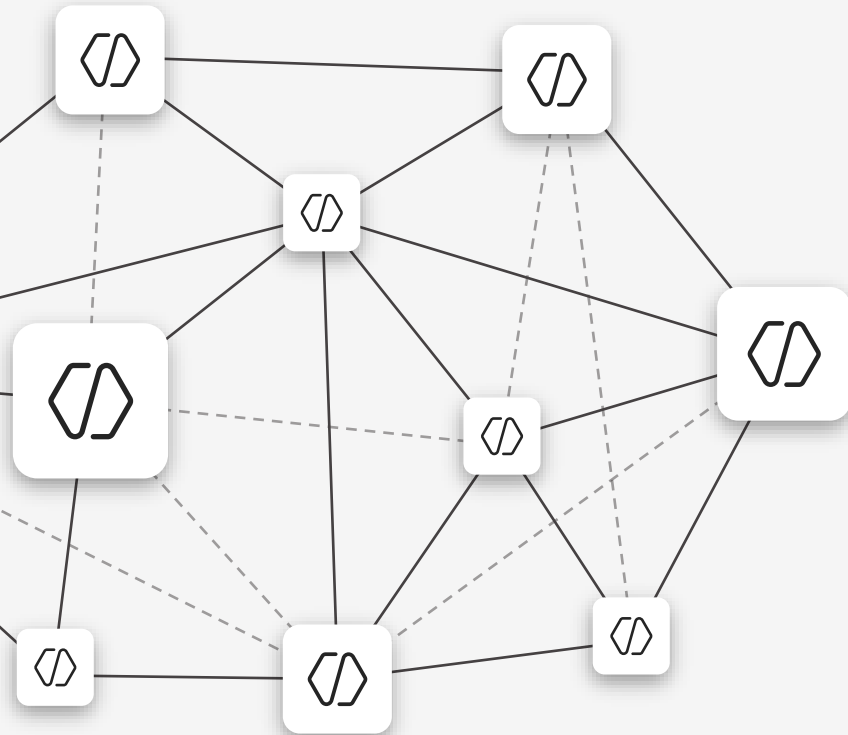
**M365 Copilot Chat**



Your AI assistant for work

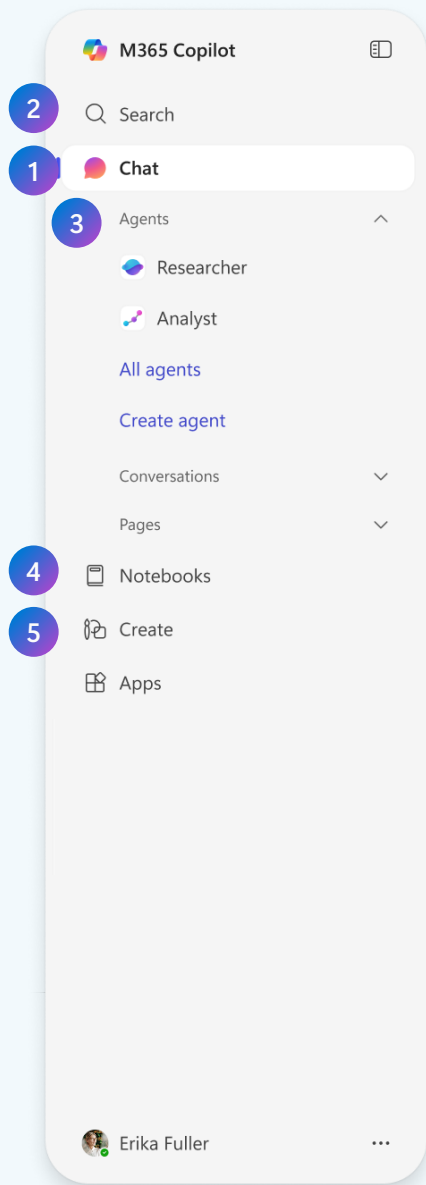
Copilot

Agents



Copilot Control System





# 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.

# Microsoft Agents

Automate tasks with pre-built agents by Microsoft that are designed for work



## Researcher

Advanced reasoning

[Generally available](#)



## Analyst

Advanced reasoning

[Generally available](#)



## Skills (Frontier)

Map organizational talent

[Frontier Program](#)



## Surveys

Survey creation, distribution,  
and measurement

[Generally Available](#)



## Project Manager

Automate planning and  
project reporting

[Public preview](#)



## Interpreter

Real-time multi-lingual  
translation

[Generally available](#)



## Facilitator

Teams meeting moderation  
and meeting notes

[Generally available](#)



## Channels

AI teammate for each  
channel conversation

[Public preview](#)



## Communities

Community engagement  
support

[Public preview](#)



## Knowledge

SharePoint content  
management and classification

[Public preview](#)

Register for our upcoming agent webinars to learn more and gain best practices! [AI agents – Microsoft Adoption](#)

Get proactive  
overviews of your day



Copilot  
Chat

Analyze  
budget Spend



Analyst

Prepare for  
a customer meeting



Researcher

Bridge your  
knowledge sources



Copilot connectors

Create  
interview guides



Researcher



## Where Copilot wows

Never take meeting  
notes again



Copilot in  
Teams Meetings

Catch up on  
missed meetings



Copilot in  
Teams Meetings

Quickly  
find content



Copilot  
Search

Be prepared  
for every meeting



Copilot in  
Teams Meetings

Quickly onboard onto  
new roles or projects

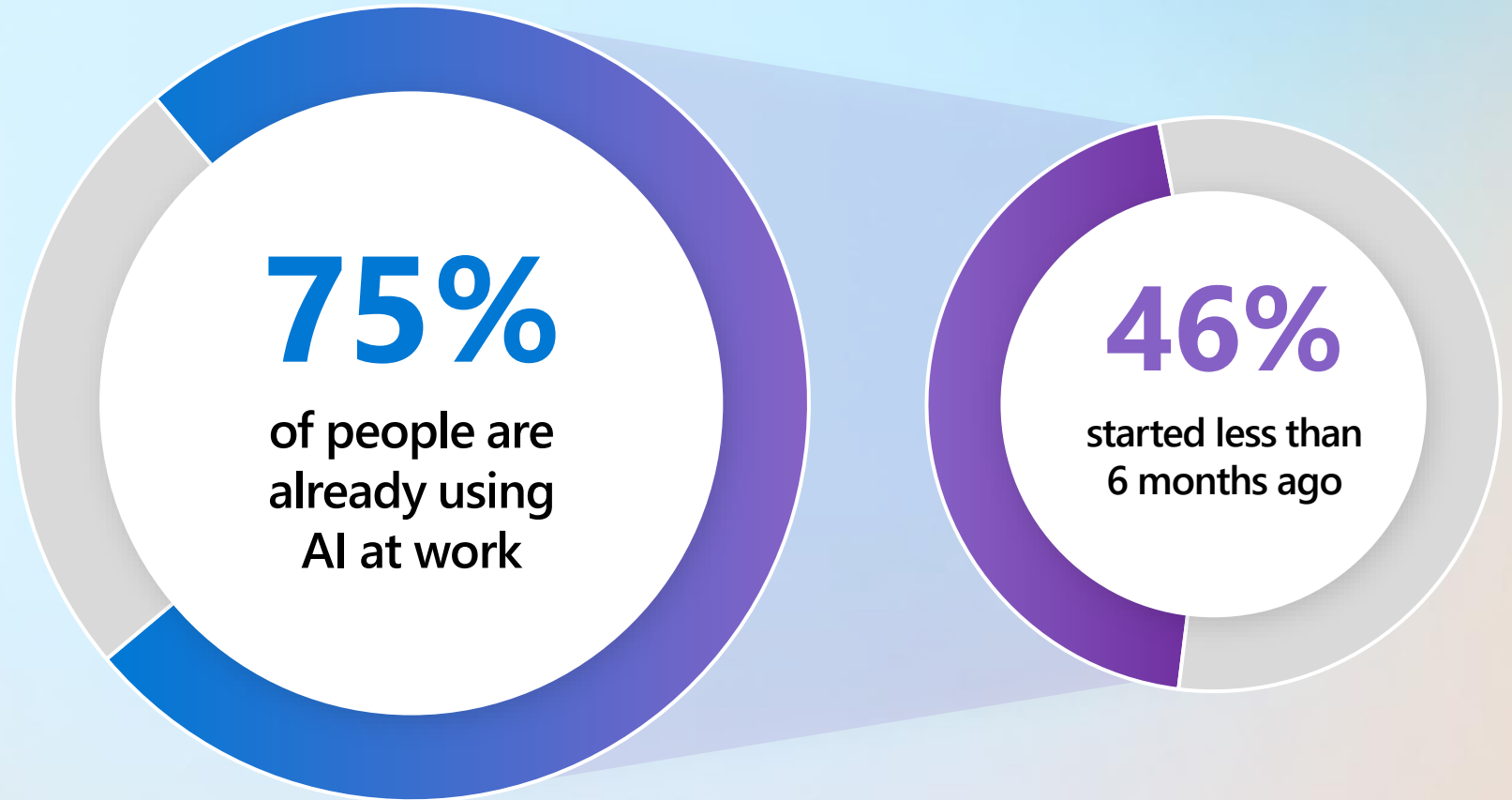


Notebooks

# Three Out of Four People Use AI at Work

78% of AI users are bringing their own tools to work (BYOAI)

Unmanaged tools increase security and compliance risk and dilute business benefits.





**Demo**

**M365 Copilot for Councillors**



**Demo**

**Researcher & Analyst**

**Researcher** helps you tackle complex, multi-step research at work, delivering insights with greater quality and accuracy than previously possible.



**Researcher**

- Deep Search Across Internal Knowledge
- Orchestrates Multi-Step Research
- Combines Context + External Sources
- Handles Complex Topics with Ease
- Saves Hours of Manual Work



# Copilot Chat with GPT-5 vs. Researcher

Copilot Chat with GPT-5 chooses which to use

	GPT-5 Chat	GPT-5 Reasoning	Researcher
Type of task	<b>Quick and straightforward:</b> Simple Q&A, summaries, or creative brainstorming	<b>Logical analysis and problem-solving:</b> Complex questions that benefit from deliberate thought, reasoning through scenarios	<b>Thorough investigations or reports:</b> Comprehensive tasks requiring gathering and synthesizing information from lots of sources
Depth of reasoning	<b>Direct and rapid answers</b>	<b>Multi-step logical reasoning</b> for “think this through”-type prompts	<b>Recursive, “exhaustive” reasoning</b> for deep inferences and synthesis
Output format	<b>Brief, concise responses</b>	<b>Structured, well-organized responses</b>	<b>Comprehensive, detailed reports</b>
Ideal use case	<b>Everyday queries</b>	<b>Analytical and structured reasoning</b>	<b>In-depth research, cross-source synthesis, deep dives</b>
Example use cases	<i>What does this acronym mean?</i> <i>Draft a 2-sentence reply thanking the team</i> <i>Summarize this document</i>	<i>Plan a 5-step project timeline from kickoff to launch</i> <i>List the decisions made yesterday on Project X and identify open questions</i> <i>Let’s walk through this problem together</i>	<i>Compile a competitive analysis on...</i> <i>Summarize the new research on x and compare it to our internal strategy</i> <i>Create a detailed brief before a large meeting</i>
Sample prompts	<i>“Write a short announcement for [product x].”</i>	<i>“Look back at last week’s activity on [product x], and write a detailed newsletter to share with all stakeholders identifying current status, key decisions, and open items.”</i>	<i>“Build a full go-to-market strategy for [product x]. Include competitive positioning, internal readiness, lessons learned from past launches, and external trends.”</i>

**Analyst** thinks like a skilled data scientist, so you can go from raw data to insights in minutes.




**Analyst**

- **Your personal Data Scientist**
- **Raw Data to Valuable Insights**
- **Built-in Analytical Reasoning**
- **Transparent Query Code for Trust**
- **Faster Decisions, Less Manual Effort**

# Let's try something together now

- 1 Navigate to [M365Copilot.com](https://M365Copilot.com) on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



If you are not signed in with your work account, Enterprise Data Protection does not apply.

3

I work in [INSERT ROLE/TITLE] at [INSERT COUNCIL NAME]. I'd like your help identifying how I can best use Copilot Chat in my day-to-day. Please guide me through a short consultation by asking one question at a time to understand:

- My responsibilities and typical tasks
- My priorities and current projects
- Any targets, KPIs, or service standards I'm measured on.

After you've asked enough questions, please summarise: (a) 5–7 high-impact Copilot use cases tailored to my role, (b) a "start today" checklist (3–5 quick wins), and (c) a 30-day plan with success measures.

Once you have enough context, please suggest:

**Two clear, practical ways** I can use Copilot Chat to support my day-to-day work in library services.

**Two creative or less obvious ways** Copilot Chat could add value to my role in local government libraries (e.g., community engagement, programme planning, or reporting).



# Custom Instructions & Demo Prompts

# Before we start

The next few slides contain the prompts to setup

- Custom instructions
- Chat demos you had seen in the presentation (summarization, doc gen, changing content for other audiences)

Microsoft also provides a free learning portal, called Microsoft Learn. It contains 1000's of modules and learning paths, with the opportunity to earn badges, an even to sit exams and get certified as a Copilot Champ.

- In a later slide I will provide a number of links to recommended learning paths that you can avail of.

As you go through these prompts and learning, you may create and download some material as part of the practice...

Feel free to use your work own documents in the practice, Remember - your information and data is safe with Microsoft Copilot

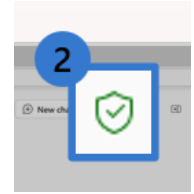
- Create a Copilot Learning folder for any learning material you create and want to share/show off with your council

# Custom instructions

1. Go To :

[M365Copilot.com](https://M365Copilot.com)

- Look for your 'green shield' friend – that is your enterprise data protection from Slide 7



2. Paste and fill in placeholders

*"Create a full set of Custom Instructions for Copilot Chat tailored to:*

*Council: [COUNCIL NAME]*

*Role supported: [ROLE – e.g., elected member / committee chair / officer]*

*Include sections on: - Role and scope of work (casework, summaries, meeting prep, research, resident comms)*

*Things that are important to me: [placeholder]*

*How I Like content structures: [placeholder]"*

3.

Once you have your custom instruction you like:

- Click on the 3 dots in the top right hand corner
- Settings
- Personalization
- Custom instructions

# Chat Prompts

## Basic Chat vs Web Search

1.

Prompt: *How many primary schools are in the regions/councils of the NILGA*

- Link to Schools excel for follow up prompt [School enrolments - Northern Ireland summary data | Department of Education](#)
- Upload the excel
- See follow on prompts suggest by Copilot... pick one you like and go for it 😊

## Summarisation of docs

2.

Prompt: *Summarize this document for me*

- Try upload your own long document, or;
- Link to Schools AILG & NILGA collab doc for an example doc <https://www.nilga.org/media/2793/ailg-nilga-collaboration-2025-2028-1.pdf>
  - Download this doc, keep in downloads folder or move to one-drive



# Chat Prompts

## Doc generation & Comparison

1.

First we will do some document generation as an extra power tool

- Prompt: *Create me 2 dummy documents for comparison. Documents should be NILGA Waste and Recycling Policies, both from different years, with slight changes between policies.*
- Download both documents and either keep in downloads folder or move/copy to Onedrive folder

2.

Open a new chat

- Prompt 1: *I have 2 waste recycling policies attached, I would like a review of the changes between different policies. I would also like to identify policies within the document that have not changed*
- Prompt 2: *Create a resident briefing note*
- Prompt 3: *Create me a poster for residents that is easy to consume, friendly and encourages good waste management practice*

# Chat Prompts

## Change Document for a different audience (i.e. explaining policy to school children)

1.

Start a new Chat, and upload the latest Waste and recycling management policy you created earlier

- Prompt 1: *Hello, I have a Waste Recycling Policy 2026 document. I am visiting a school today and need to explain the new policy, what's changed and why its important to Northern Ireland. Can you help me with creating a brief of this policy that can be easily understood by children ages 8-10*
- Prompt 2: *Now turn that guidance into a funny short story for kids (around 300 words) featuring **Taylor Swift, the numbers 6/7** (as a playful clue or rule), and **Lionel Messi**. Keep it wholesome and focused on the policy lesson and good waste management practices.*

# Learning Paths

## Self Paced Learning

Title	Level	Link
<b>Get started with Microsoft 365 Copilot Chat</b>	Beginner	<a href="https://learn.microsoft.com/en-us/training/modules/get-started-microsoft-365-copilot-business-chat/">https://learn.microsoft.com/en-us/training/modules/get-started-microsoft-365-copilot-business-chat/</a>
<b>Craft effective prompts for Microsoft 365 Copilot</b>	Beginner	<a href="https://learn.microsoft.com/en-us/training/paths/craft-effective-prompts-copilot-microsoft-365/">https://learn.microsoft.com/en-us/training/paths/craft-effective-prompts-copilot-microsoft-365/</a>
<b>Work smarter with AI</b>	Beginner	<a href="https://learn.microsoft.com/en-us/training/paths/work-smarter-with-ai/">https://learn.microsoft.com/en-us/training/paths/work-smarter-with-ai/</a>
<b>Get started with Microsoft 365 Copilot</b>	Beginner	<a href="https://learn.microsoft.com/en-us/training/paths/get-started-with-microsoft-365-copilot/">https://learn.microsoft.com/en-us/training/paths/get-started-with-microsoft-365-copilot/</a>
<b>AI Fluency</b>	Beginner	<a href="https://learn.microsoft.com/en-us/training/paths/ai-fluency/">https://learn.microsoft.com/en-us/training/paths/ai-fluency/</a>