



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 risks¹



**Microsoft 365
Copilot is built
on trust**

¹ [Learn more about the Customer Copyright Commitment](#)

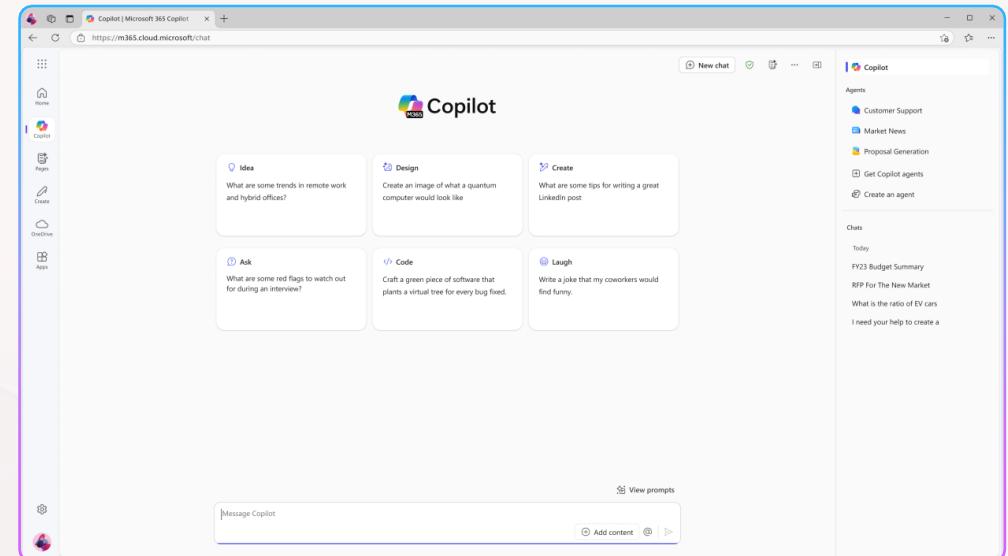
Microsoft 365 Copilot Chat

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, etc¹.
- Generate images¹ and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites².



Get started by going to M365Copilot.com

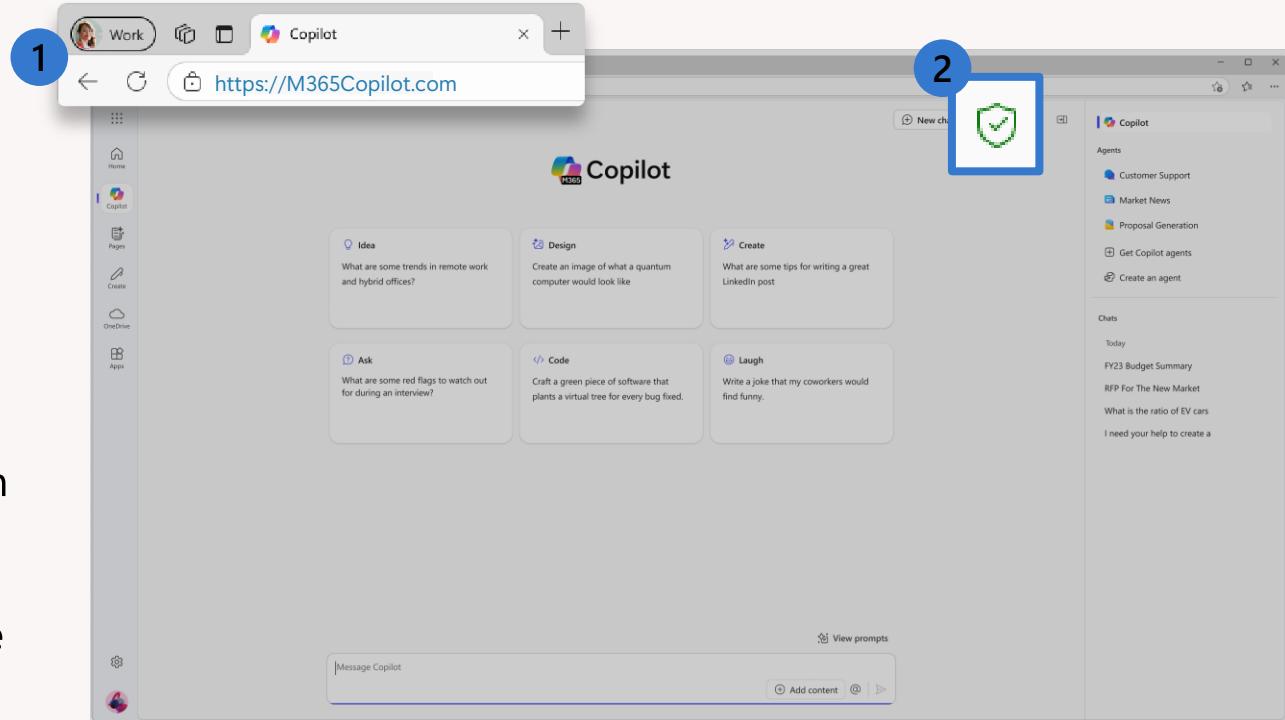
¹Image generation and file upload limits apply.

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

Sign in with your work account

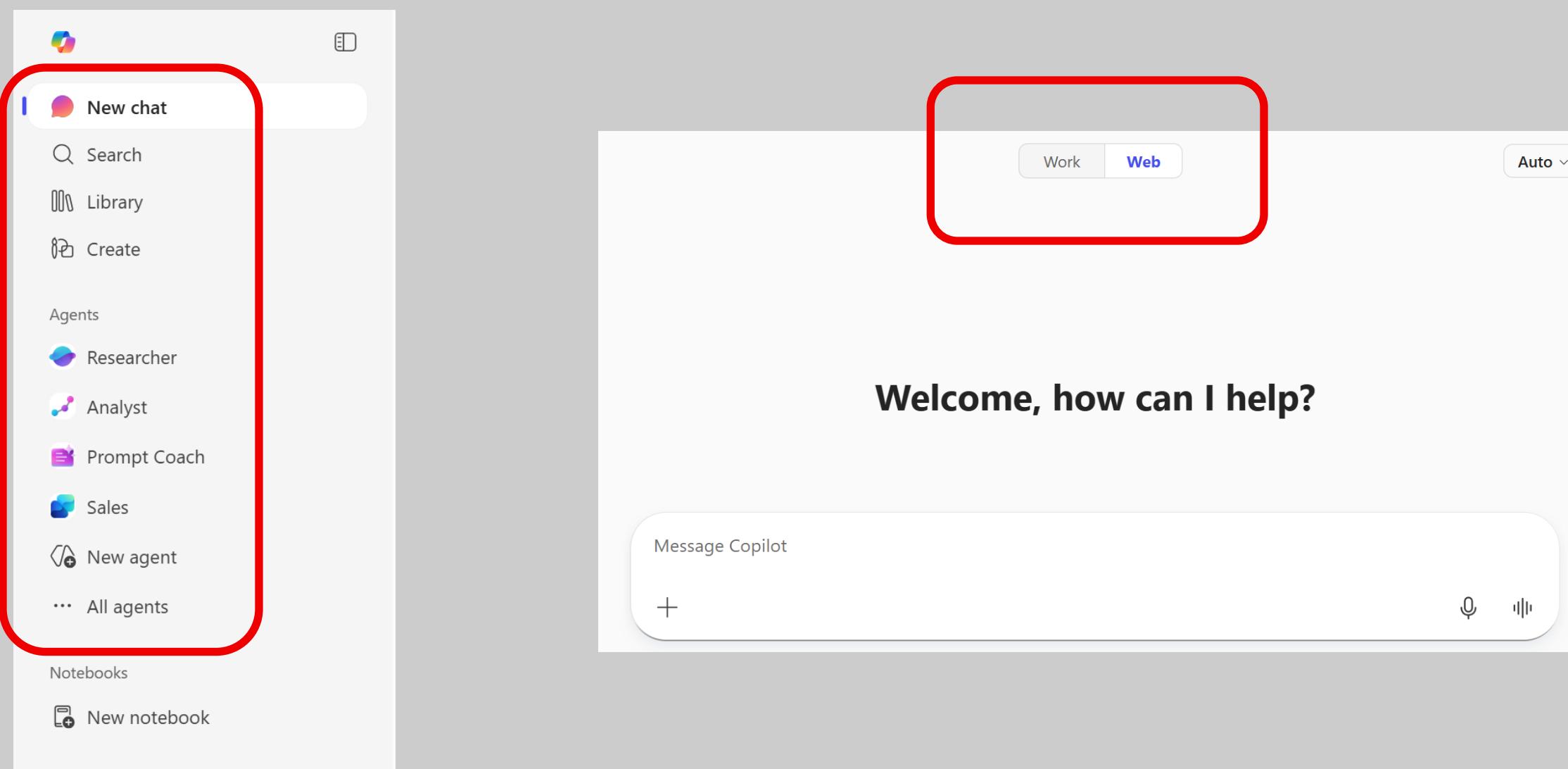
- 1 Navigate to M365Copilot.com on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work account.

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.

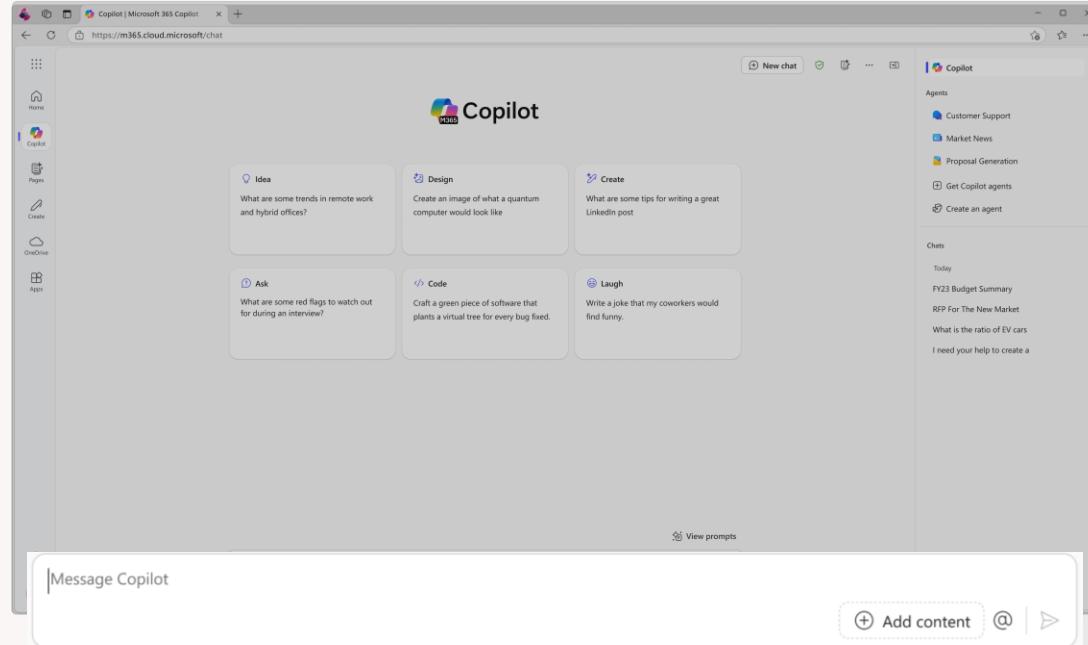


3. Continue the conversation

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

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Summarise local service performance and citizen issues over the last month, with a focus on high-volume services, key bottlenecks, and recommended actions. This is for a councillor briefing before committee/council meetings.

Pull from the latest internal service dashboards, contact center/CRM reports, complaints & FOI summaries, and agreed finance/budget updates. Use plain English, avoid jargon, flag data gaps, and present the bullets in a two-column table → Insight and Implication / Next 2 Weeks.

Which information sources or samples should Copilot use?

Source

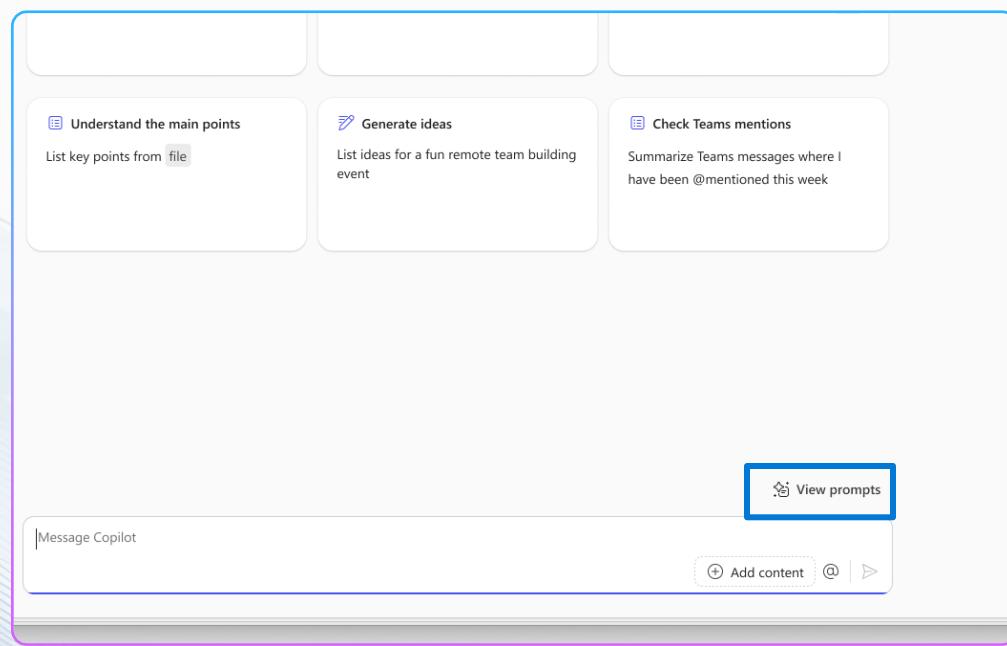
How should Copilot respond to best meet your expectations?

Expectations

Navigating to the Copilot Prompt Gallery

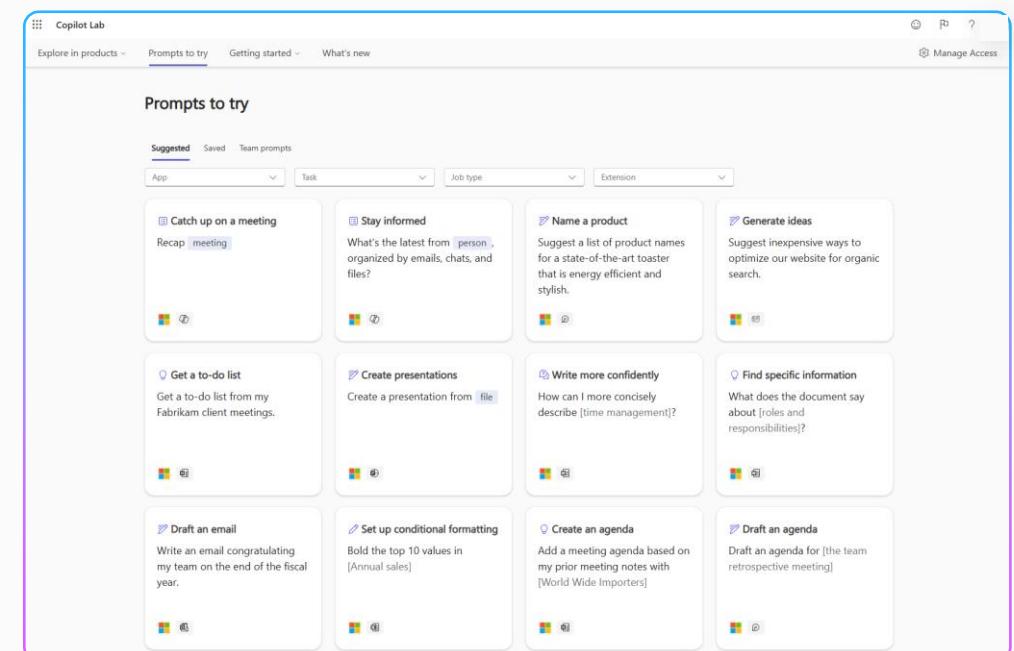
In-product experience

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 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

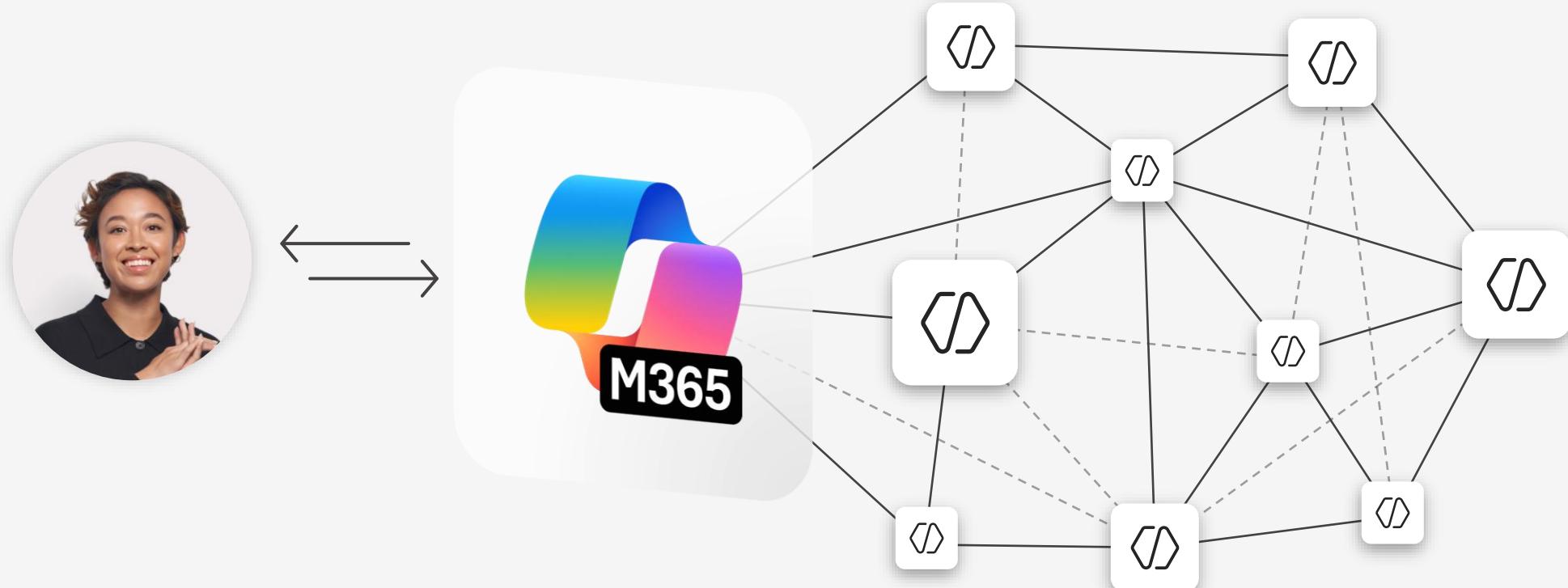
M365 Copilot Chat



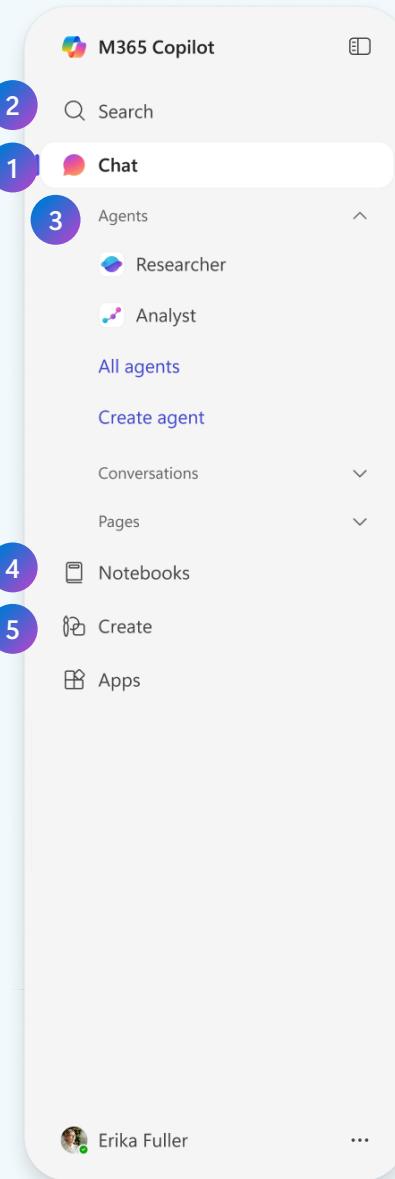
Your AI assistant for work

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



Analyze
budget Spend



Prepare for
a customer meeting



Bridge your
knowledge sources

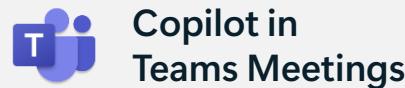


Create
interview guides



M365

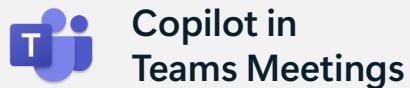
Catch up on
missed meetings



Quickly
find content



Be prepared
for every meeting



Quickly onboard onto
new roles or projects

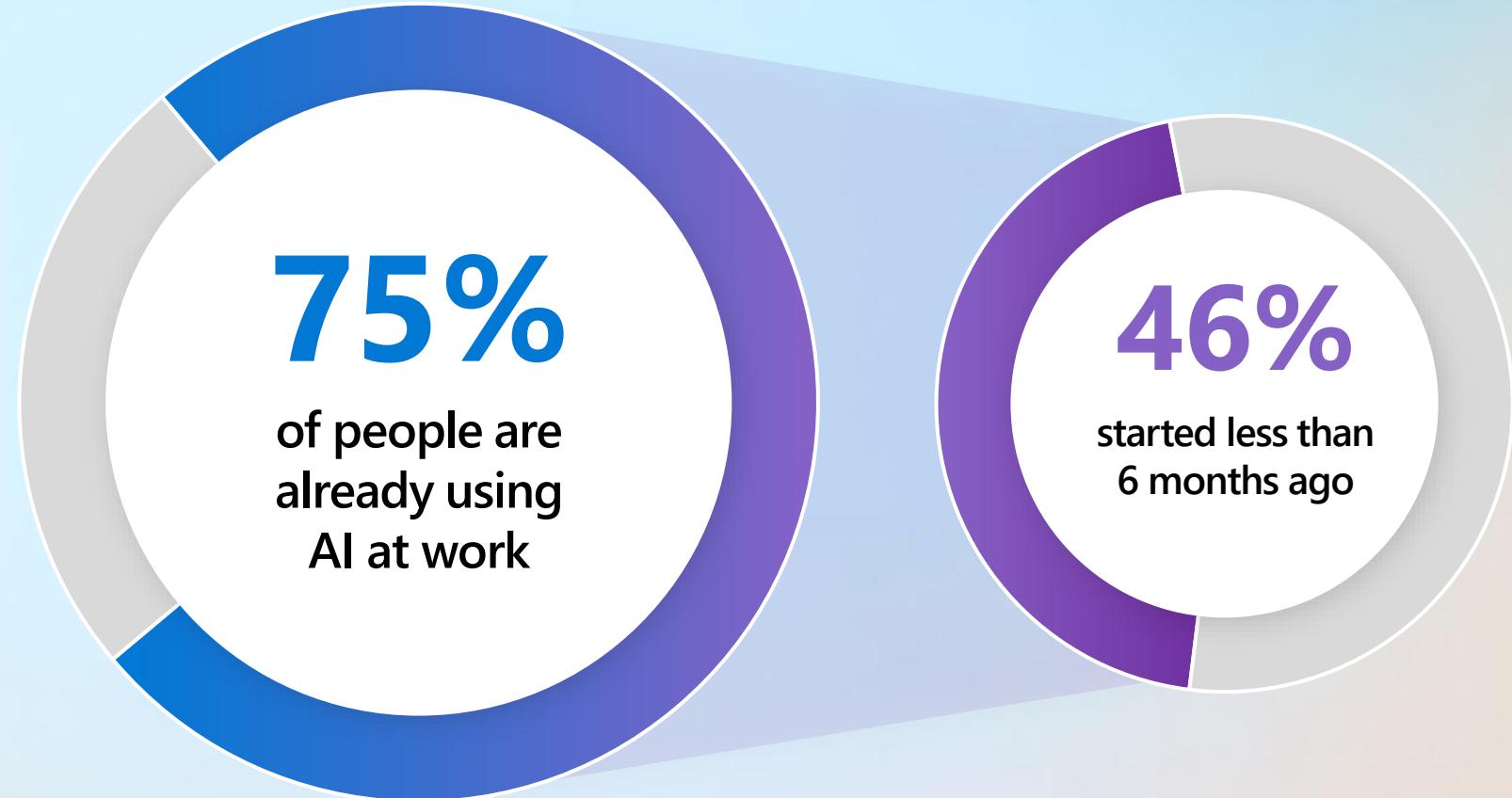


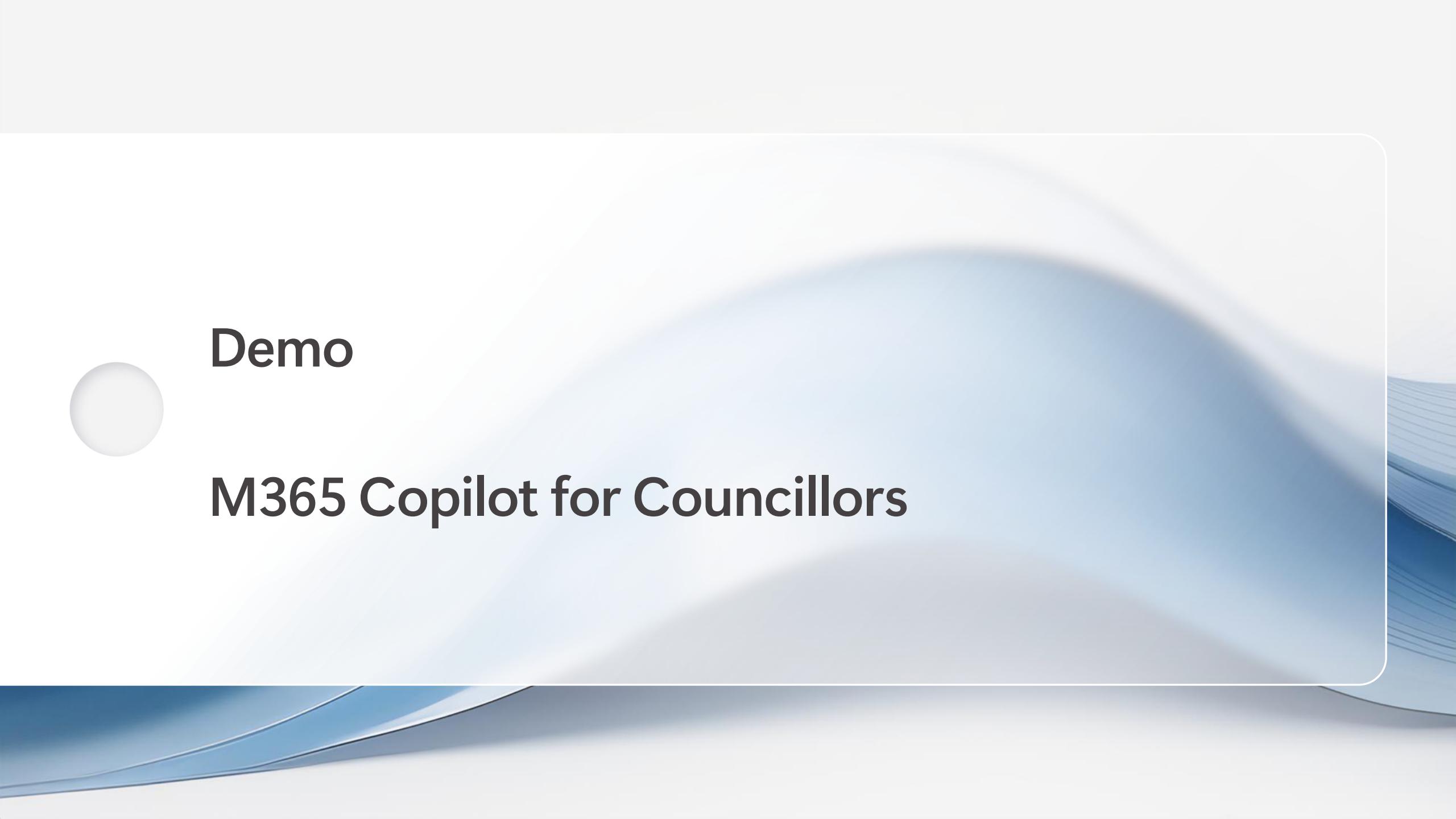
Where Copilot wows

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	Quick and straightforward: Simple Q&A, summaries, or creative brainstorming	Logical analysis and problem-solving: Complex questions that benefit from deliberate thought, reasoning through scenarios	Thorough investigations or reports: Comprehensive tasks requiring gathering and synthesizing information from lots of sources
Depth of reasoning	Direct and rapid answers	Multi-step logical reasoning for "think this through"-type prompts	Recursive, "exhaustive" reasoning for deep inferences and synthesis
Output format	Brief, concise responses	Structured, well-organized responses	Comprehensive, detailed reports
Ideal use case	Everyday queries	Analytical and structured reasoning	In-depth research, cross-source synthesis, deep dives
Example use cases	<i>What does this acronym mean? Draft a 2-sentence reply thanking the team Summarize this document</i>	<i>Plan a 5-step project timeline from kickoff to launch List the decisions made yesterday on Project X and identify open questions Let's walk through this problem together</i>	<i>Compile a competitive analysis on... Summarize the new research on x and compare it to our internal strategy 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 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 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
 - 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
Get started with Microsoft 365 Copilot Chat	Beginner	https://learn.microsoft.com/en-us/training/modules/get-started-microsoft-365-copilot-business-chat/
Craft effective prompts for Microsoft 365 Copilot	Beginner	https://learn.microsoft.com/en-us/training/paths/craft-effective-prompts-copilot-microsoft-365/
Work smarter with AI	Beginner	https://learn.microsoft.com/en-us/training/paths/work-smarter-with-ai/
Get started with Microsoft 365 Copilot	Beginner	https://learn.microsoft.com/en-us/training/paths/get-started-with-microsoft-365-copilot/
AI Fluency	Beginner	https://learn.microsoft.com/en-us/training/paths/ai-fluency/