Microsoft Copilot Overview

Secure, private, powerful AI chat

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Agenda

- Overview of Microsoft Copilot
- How to Access Copilot
- Copilot Interface & Navigation Features
- Creating Prompts
- Use Cases
- Prompting Tips & Tricks

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Be safe with AI-powered chat

M365

Leveraging the advanced capabilities of the latest LLM models, Copilot empowers us to:

- Efficiently summarize lengthy documents
- Create professional and customer-ready content
- Generate captivating presentations, articles, emails, and more

It's important to note that using non-approved AI web services can risk exposing personal or confidential data to the public.

Copilot for AI chat ensures data integrity with Microsoft's built-in enterprise data protection.

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Characteristics of Generative AI

HALLUCINATIONS

AI can produce convincing but incorrect responses.

Errors are often due to a lack of understanding of its own processes.

CHANGE

AI technology rapidly evolves, improving continuously.

Today's AI will be the least advanced we'll ever use.

Copilot Chat – Data Protection

Work account

Signing into Copilot with our work account activates Enterprise Data Protections

No human eyes

After signing in, data is encrypted and is not seen by humans

Personally exclusive

Our prompts and Copilot's responses **not** used to train AI models

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GCC Security Commitments

GCC
(Government Community Cloud)

- U.S.-based data centers
- FedRAMP High, CJIS, IRS 1075
- U.S. personnel access only

Sign in with Work Account

1 Navigate to m365.cloud.microsoft/chat on your preferred browser on your device to get to Copilot Chat.
You can also get here from your M365 home page and select the "Chat" tab.

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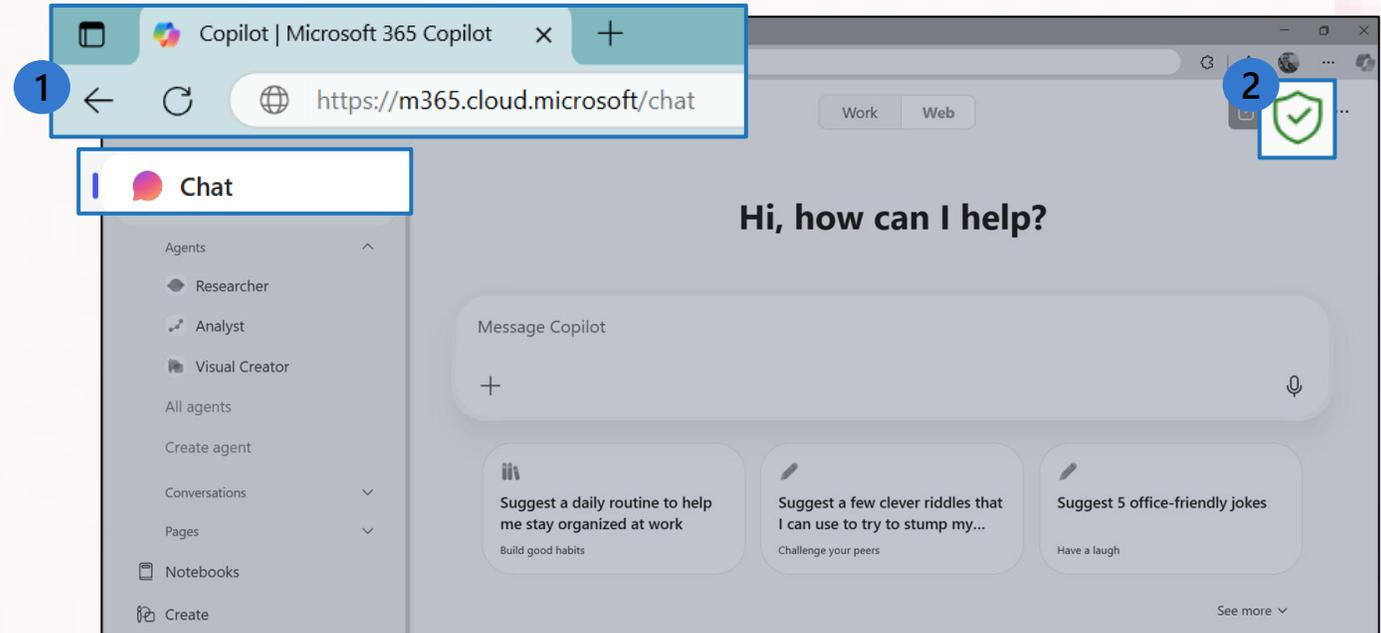
⚠️ If you are not signed in with your work account, Enterprise Data Protection does not apply.

Copilot Chat

- Far beyond search!

- Ask Copilot a question or make a request

- Engage Copilot chat conversationally for the best results and experience

- Seek explanations, gain insight, and create original, unique content.

Why Copilot

Powerful AI models

Copilot uses advanced AI models GPT-4 and GPT-5 for text and DALL-E 3 for images

Source transparency

Copilot cites the data sources behind its answers

No knowledge cutoff

Copilot can search for real-time web info, so it isn't limited to its training data.

Data Protection

Copilot conversations are encrypted and secure. Your conversations are NOT used to train the AI model

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Get to know Copilot Chat

Here is a visual tour of Copilot Chat:

Start a new chat button
Clear your past chat and start a new conversation.

Recent chats
Return to a previous chat to continue the conversation

Prompt box
Start your conversation here.

Send your prompt!

Upload files
If you'd like Copilot to source responses from information in specific files, add them here.

Suggested prompts
If you're not sure what to ask, try or modify a sample prompt!

Copilot Prompt Gallery
View additional prompt suggestions, including saved prompts.

M365 Copilot

Search
Chat
Conversations
Library
Create
Apps
Outlook
Word
Teams
OneDrive

Auto

Welcome, how can I help?

Message Copilot

Tools

List key points from Building the Contoso Mark 8 (ProPlus).pptx
Understand the main points

What are the latest findings and recommendations in the GEM...
Keep up with trends

Summarize file
Get an overview

See more

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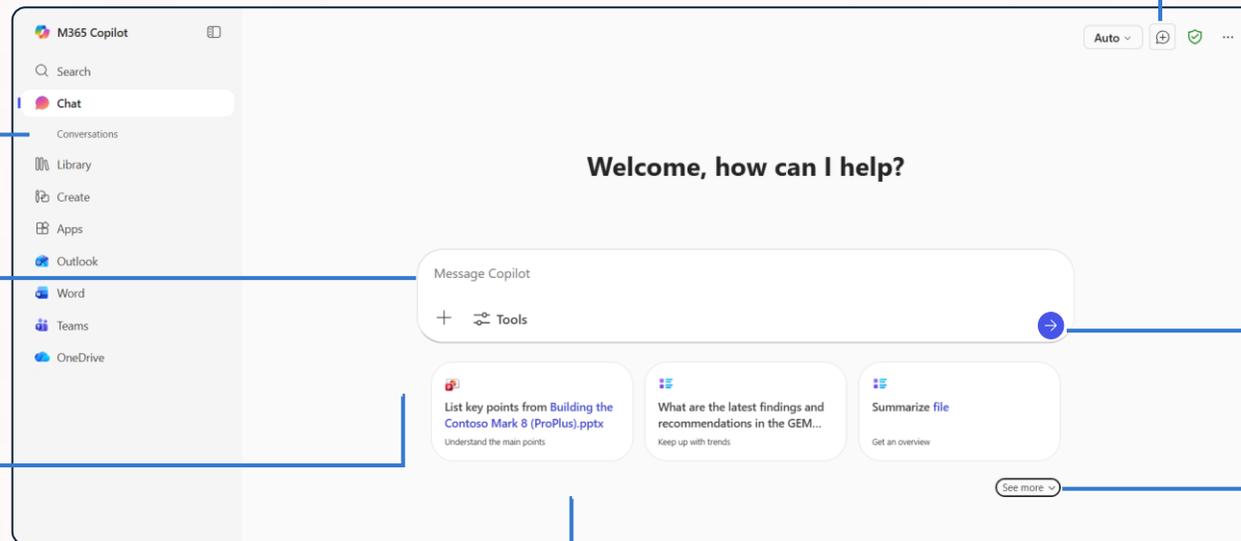
3 Easy Steps

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.

Message Copilot
⊕ Add content @ ⊳

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.

Learn more ⌄ 1 microsoft.com 2 contoso.com

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.

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Demo

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Context Engineering

Treating AI Like a New Team Member

What Does AI Need to Do Its Job?

- **Imagine AI as a new employee joining your team. Like any new hire, AI can only perform well if it has access to the right information, clear instructions, and ongoing feedback.**

Relevant Information & Clear Instructions

Persona, Task, Format/Tone, Audience

Defined Boundaries

Users who learn to "talk" to AI

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What makes an effective prompt?

Effective

- ✓ Specific and detailed
- ✓ In full sentences, with instructions
- ✓ Notes the tone, purpose, preferred format, etc.

Example: *Recap the findings of the article I've copied below and include the top 3 concerns. Provide the answer in two to three paragraphs and use a business tone.*
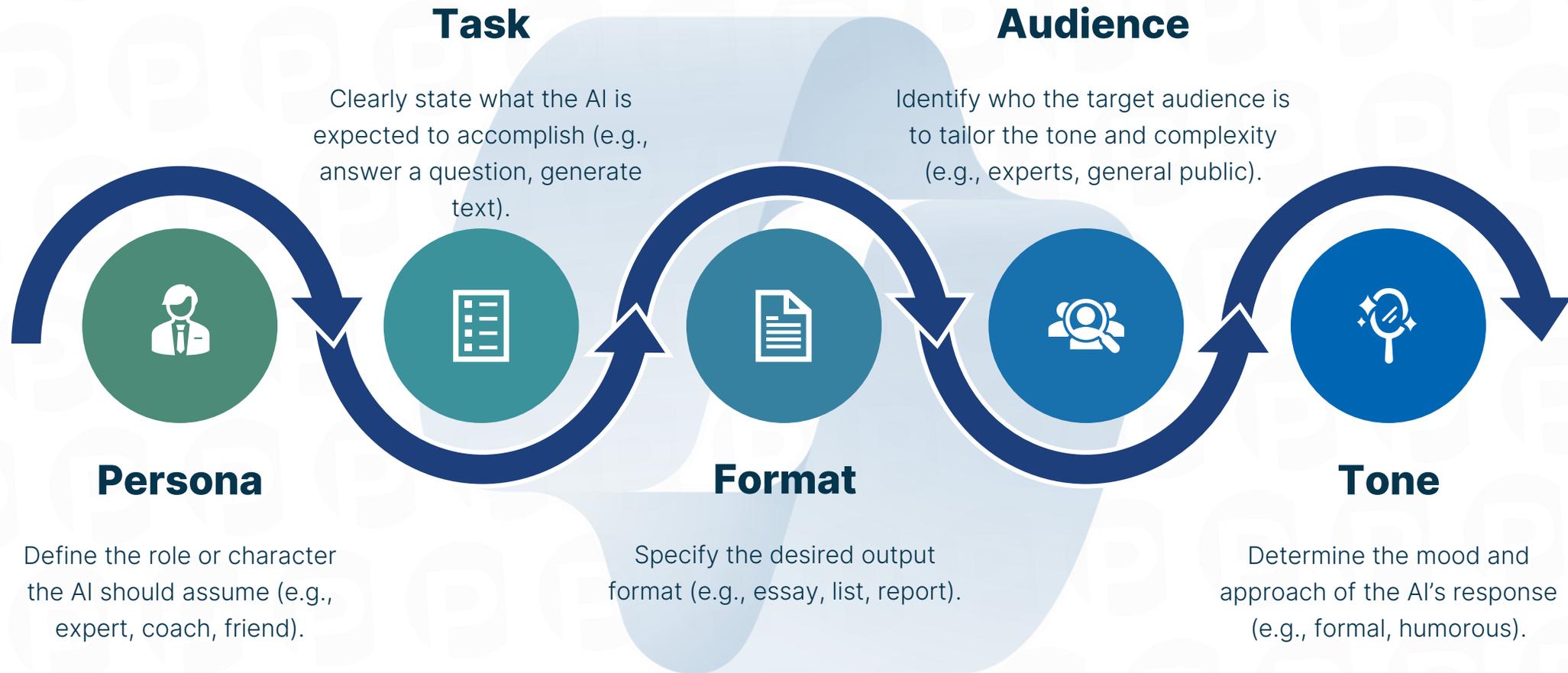
Less Effective

- ✗ Vague
- ✗ Just a few words
- ✗ No context on preferred output

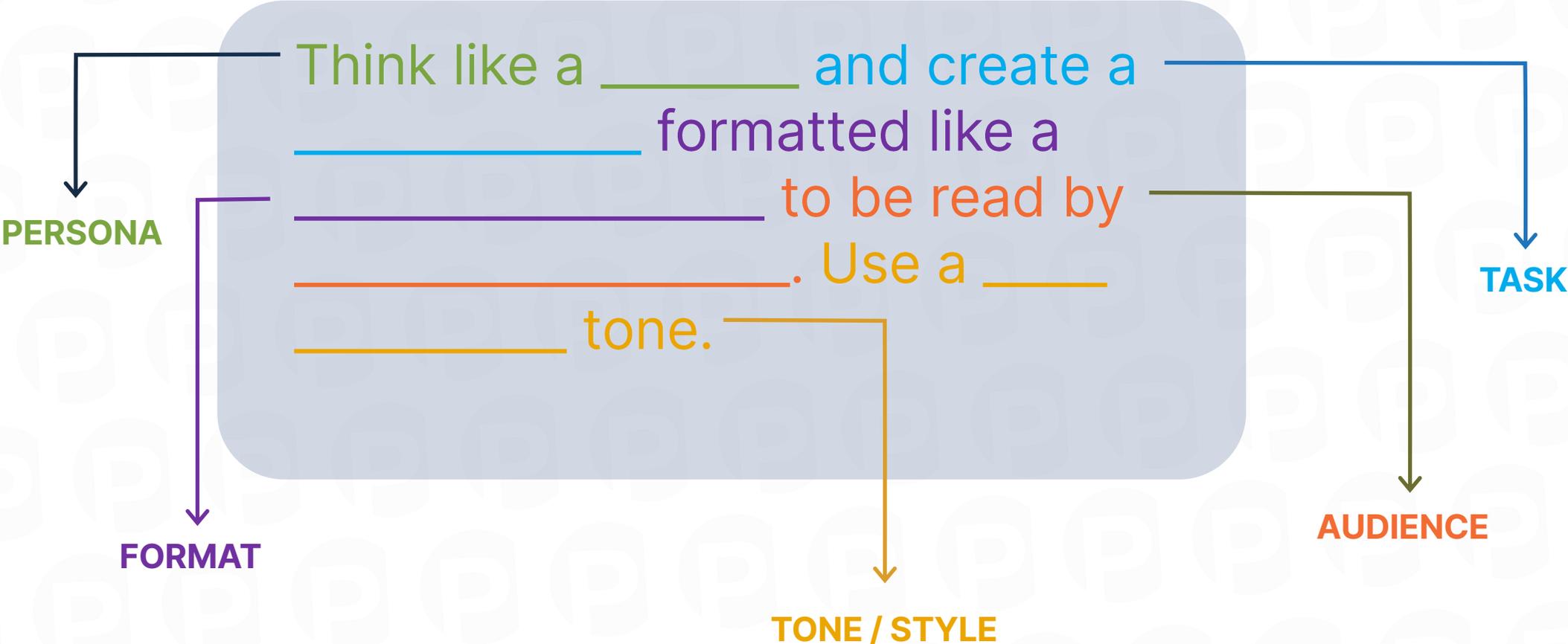**Example:** *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.

But there are no 'wrong' prompts because **natural, conversational language is welcome**. Experiment away!

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Prompt Elements

Task

Clearly state what the AI is expected to accomplish (e.g., answer a question, generate text).

Audience

Identify who the target audience is to tailor the tone and complexity (e.g., experts, general public).

Persona

Define the role or character the AI should assume (e.g., expert, coach, friend).

Format

Specify the desired output format (e.g., essay, list, report).

Tone

Determine the mood and approach of the AI's response (e.g., formal, humorous).

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Build a Prompt!

Think like a _____ and create a _____ formatted like a _____ to be read by _____. Use a _____ _____ tone.

PERSONA

FORMAT

TASK

AUDIENCE

TONE / STYLE

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Marketing Example

Create a Marketing Strategy

PERSONA

TASK

Act as a brand manager and develop a comprehensive social media strategy plan to be delivered as a slideshow presentation aimed at young entrepreneurs interested in digital marketing. Utilize a creative and motivational tone.

FORMAT

TONE / STYLE

AUDIENCE

Planet | Evolve 365
Microsoft Learning and Adoption Service

Try Copilot Chat Now!

1

Summarize policy documents

– "Summarize this federal workforce development strategy."

→ Upload a PDF or paste text — Copilot will give you a clear summary.

2

Draft internal communications

– "Write a message to agency trainers about the Evolve 365 weekly pipeline."

→ Perfect for updates to trainers, SMEs, or interagency partners.

3

Create learning assessments

"Generate quiz questions from this cybersecurity awareness guide."

→ Turn compliance or onboarding materials into interactive assessments.

4

Brainstorm engagement

– "Give me 5 ways to boost participation in virtual federal training sessions."

→ Give me a bulleted list of 5 ideas to use in my next training session

5

Summarize in Plain Language

– "Translate this DEIA training summary into plain language for public sector staff."

→ Useful for accessibility and plain language compliance.

6

Extract action items from transcripts

– "What are the key takeaways from this interagency workforce call?"

→ Upload meeting notes or transcripts—Copilot will pull out decisions and next steps.

7

Simplify complex language

– "Rewrite this HR policy in plain language for new federal hires."

→ Helps meet 21st Century IDEA and Section 508 standards.

8

Compare options

– "Compare Optionn 1 and Option 2 for federal compliance training."

→ Get a side-by-side breakdown to support procurement or program decisions.

9

Outline a workshop

– "Outline a 90-minute workshop on AI literacy for federal employees."

→ Jumpstart planning for internal or cross-agency sessions.

10

Create a word cloud from feedback

– "Visualize common themes from this training evaluation data."

→ Upload survey responses and Copilot can generate a word cloud or summary.

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Understanding AI's Limitations

AI Hallucinations

When AI gives an answer that sounds right but is incorrect, outdated, or made up.

Pattern-Matching Responses

Unlike search engines, AI uses pattern-matching to generate text without accessing or verifying real-time information.
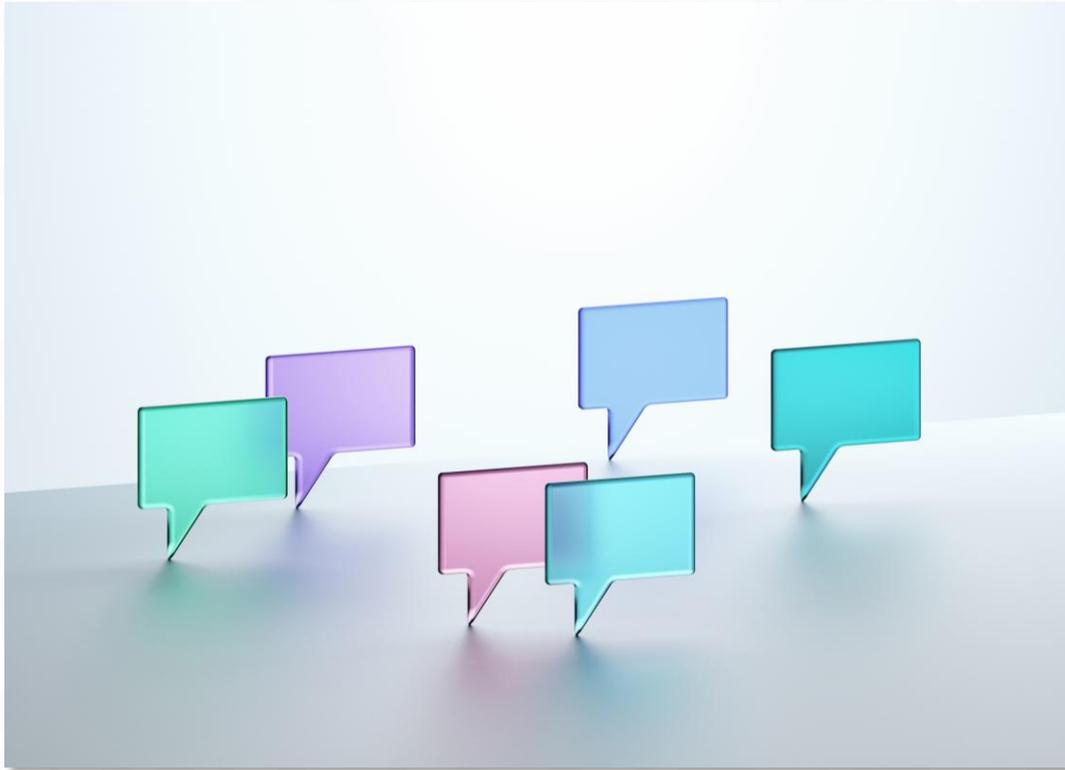
Always Verify AI Results

It is essential to evaluate AI outputs critically, as they may seem accurate but can be misleading or incorrect.

💡 *Tip: Ask AI to reference the sources or explain it's reasoning to more easily verify information*
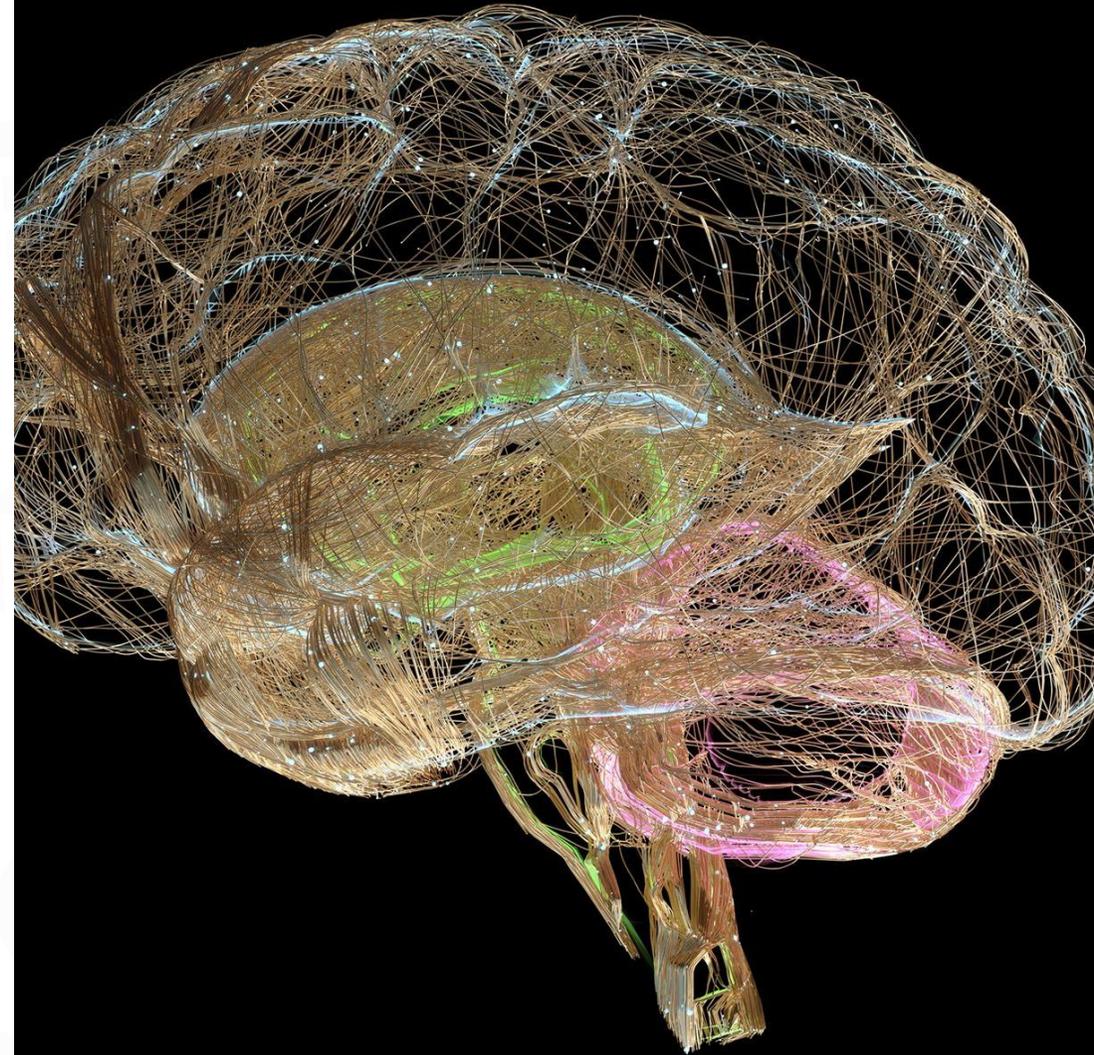
Prompting Tips & Tricks

"Ask me 5 questions that will improve your response"

- Include this at the end of your prompt
- Answer the questions and enter them as another prompt or simply add them to your original prompt

"Give me 2 options"

- Ask for 2 options – maybe one has bullets and the other is in paragraphs
- Sometimes one of the options is something you hadn't thought of

"Show your work"

- Most LLMs will explain how they 'figured it out' which is itself just predictive/generative as the LLM doesn't "know" how it "figures" anything out.

"Create a FAQ at the end of this document"

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Additional Prompting Ideas

"Help me Create a prompt for an LLM"

- Have AI help you create a prompt for AI
- Major improvement in responses due to the LLM knowing how best to prompt itself (most of the time)

"Ask Clarifying Questions"

- Easier than doing 'ask me 5 questions' feel free to ignore them

"Turn huge tasks into smaller tasks"

- Try asking for an outline of a document
- In the same conversation prompt separately to create each section

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Keys to AI Success

Growth Mindset

- AI moves fast, it's easy to feel behind.

- You'll think: Am I doing this right?

- Focus on progress, not perfection

AI Misconceptions

- "AI can't do X"
  - *AI is driver assist, not auto-pilot*

- "I missed the boat"
  - *There is no boat! Everyone feels behind because AI is evolving so quickly*

- "What is AI is best?"
  - *The best tool(s) are the ones you use. Build habits, don't chase perfection.*

- "Collect prompts like magic spells"
  - *Prompt engineering isn't magic. The magic happens with asking, clarifying, and trying again.*

- "AI is either amazing or useless"
  - *The real magic is somewhere in between, as we stick with and continue to iterate.*

Launch Copilot with Confidence.

From rollout to long-term adoption, we help your teams embed Copilot into everyday work.

If your organization is looking for help rolling out Copilot or gaining long term meaningful adoption, get in touch today! Email info@go-planet.com or check out our website for even more info, Go-Planet.com/Evolve365.

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