



Microsoft Copilot Overview

Secure, private, powerful AI chat





Agenda

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

Be safe with AI-powered chat



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.

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

Copilot Security Commitments



Enterprise

(Commercial Cloud)

- Global data centers
- ISO 27001, SOC, GDPR compliance
- Encryption in transit & at rest

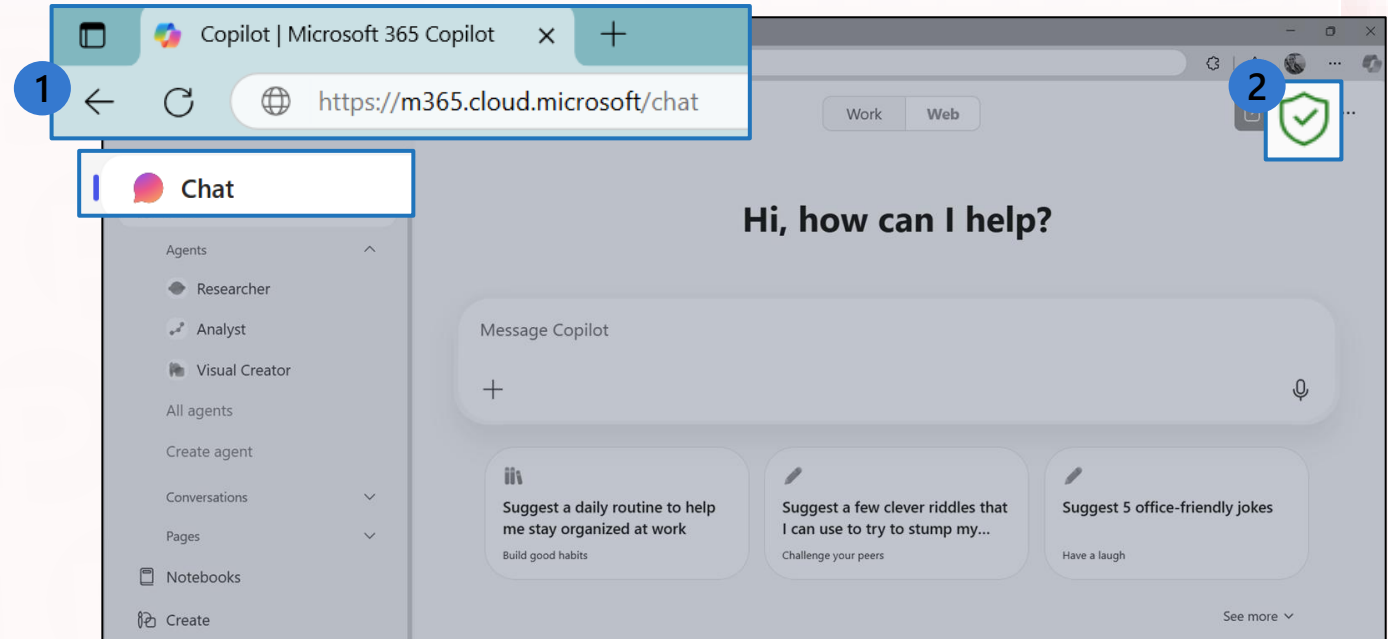


Sign in with Work Account

- 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.

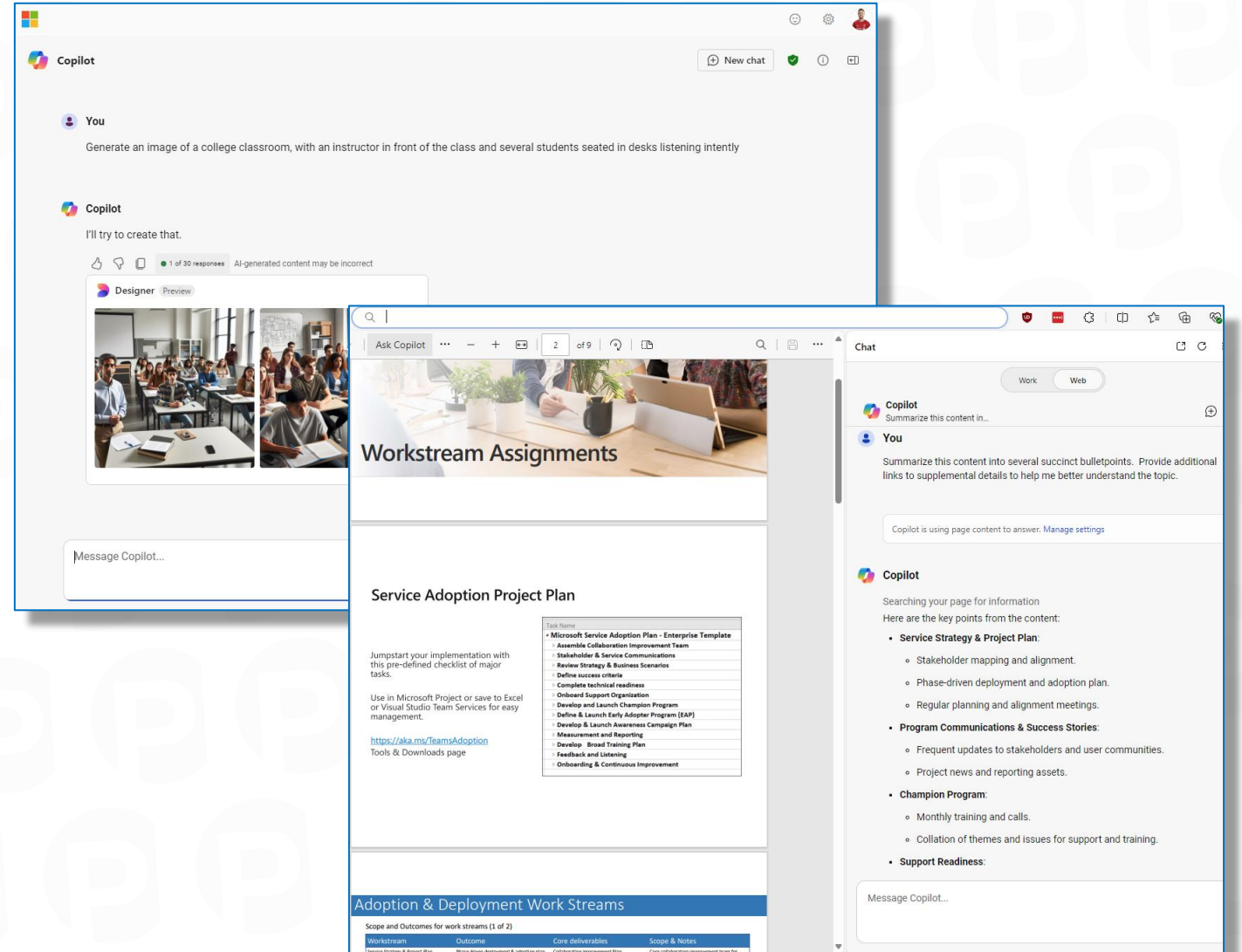
You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



 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

Get to know Copilot Chat

Here is a visual tour of Copilot Chat:

Recent chats
Return to a previous chat to continue the conversation

Prompt box
Start your conversation here.

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!

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

Send your prompt!

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

The screenshot shows the M365 Copilot interface. On the left is a sidebar with a search bar and a list of recent chats under the 'Chat' tab. Below this are icons for Library, Create, Apps, Outlook, Word, Teams, and OneDrive. The main area displays a 'Welcome, how can I help?' message above a large text input field labeled 'Message Copilot'. Below the input field are three suggested prompts: 'List key points from Building the Contoso Mark 8 (ProPlus).pptx', 'What are the latest findings and recommendations in the GEM...', and 'Summarize file'. A 'Tools' button is next to the input field. In the bottom right corner, there is a 'See more' link for the prompt gallery.

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.



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.



Demo



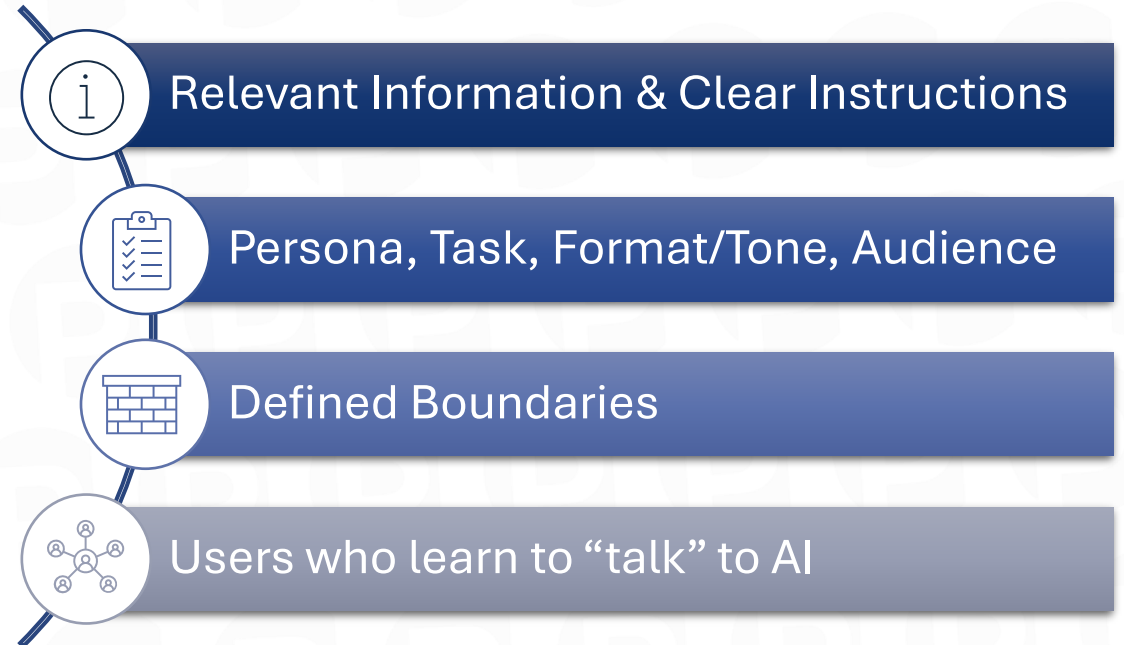
Context Engineering

Treating AI Like a New Team Member

- **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.**



What Does AI Need to Do Its Job?



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

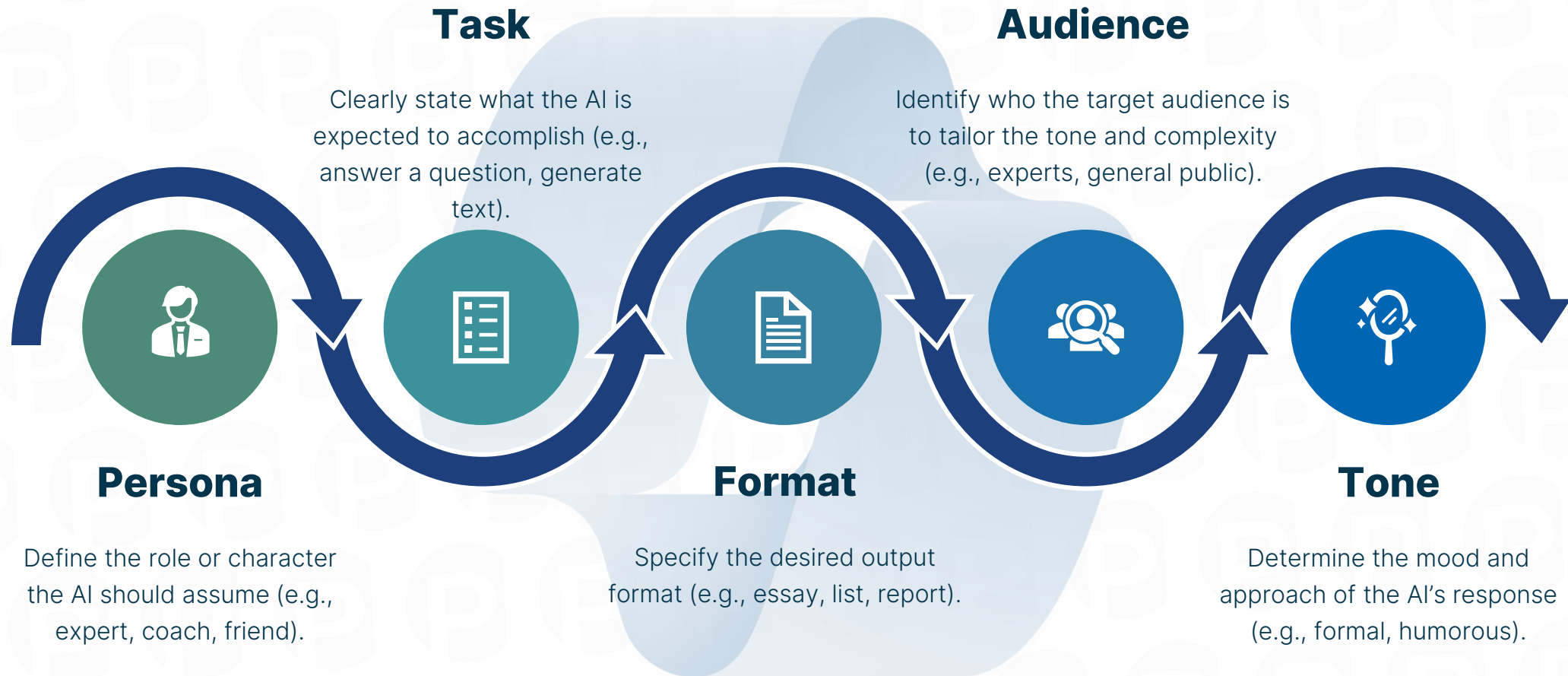
- × Vague
- × Just a few words
- × No context on preferred output

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

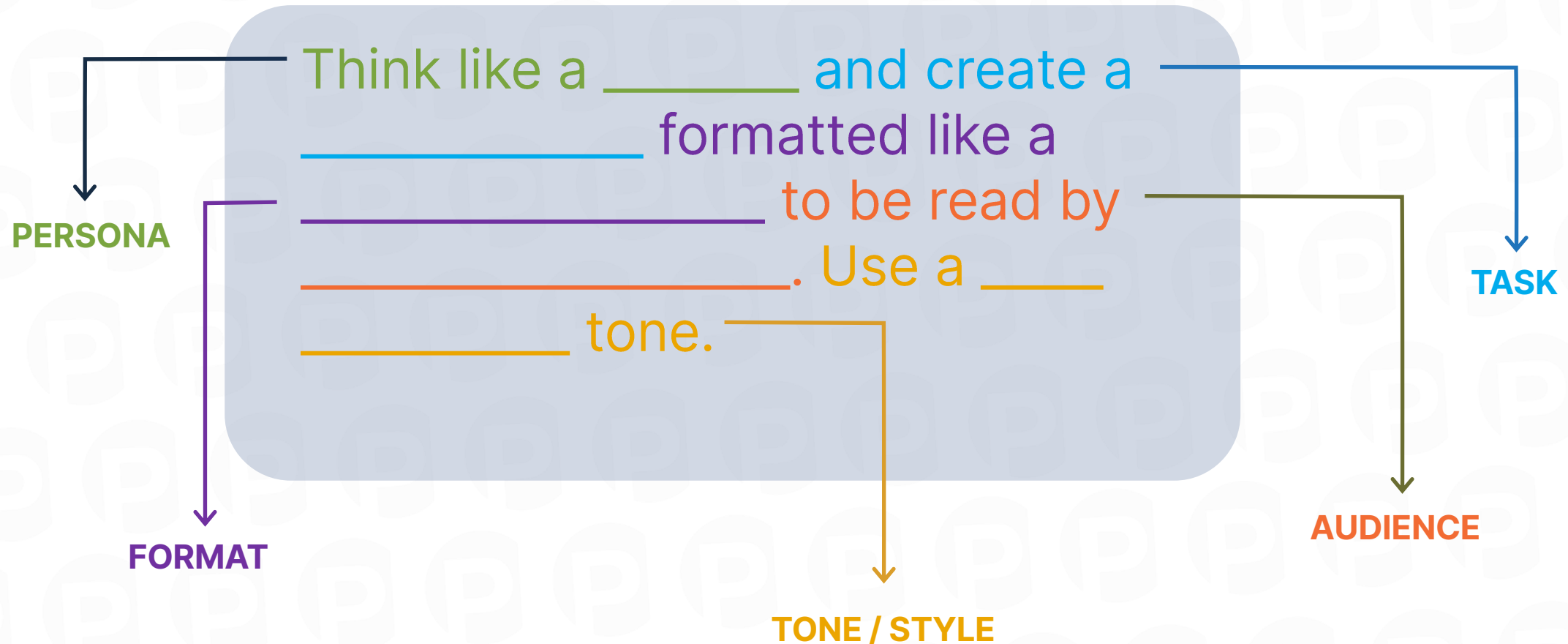
The recap may be more vague than desired, or in a format that you were not seeking.

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

Prompt Elements



Build a Prompt!



Marketing Example

Create a Marketing Strategy



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.



Demo



Understanding AI's Limitations

AI Hallucinations

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

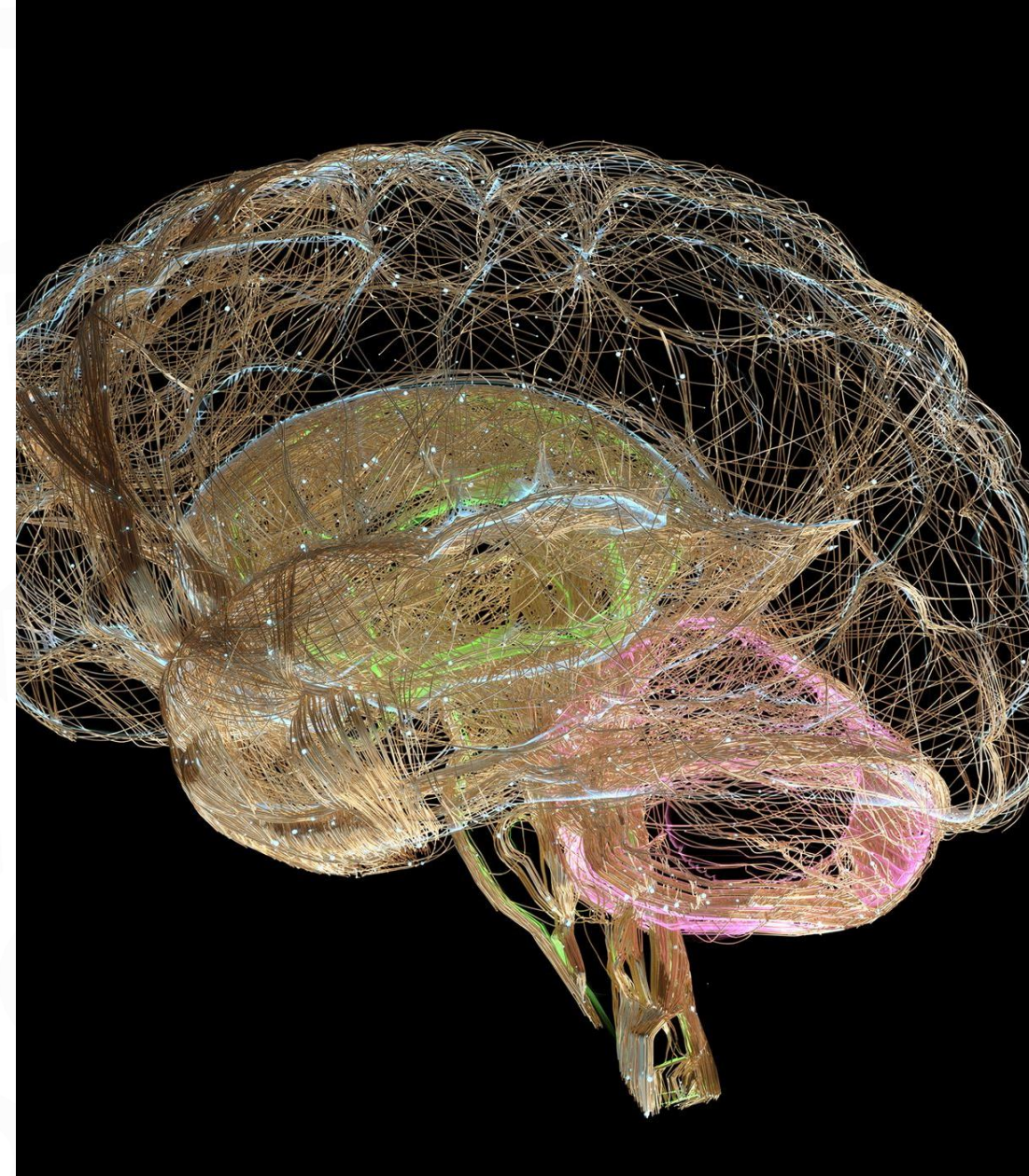
Pattern-Matching Responses

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

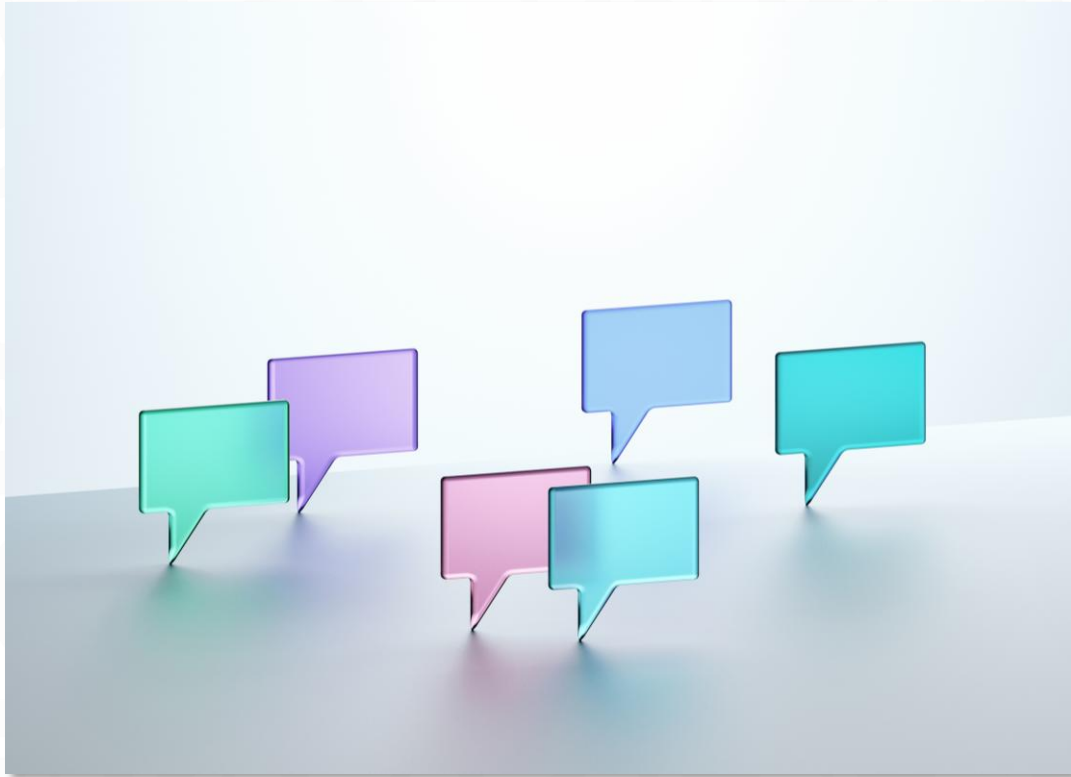
Always Verify AI Results

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 its 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”



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



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.





Thank You

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