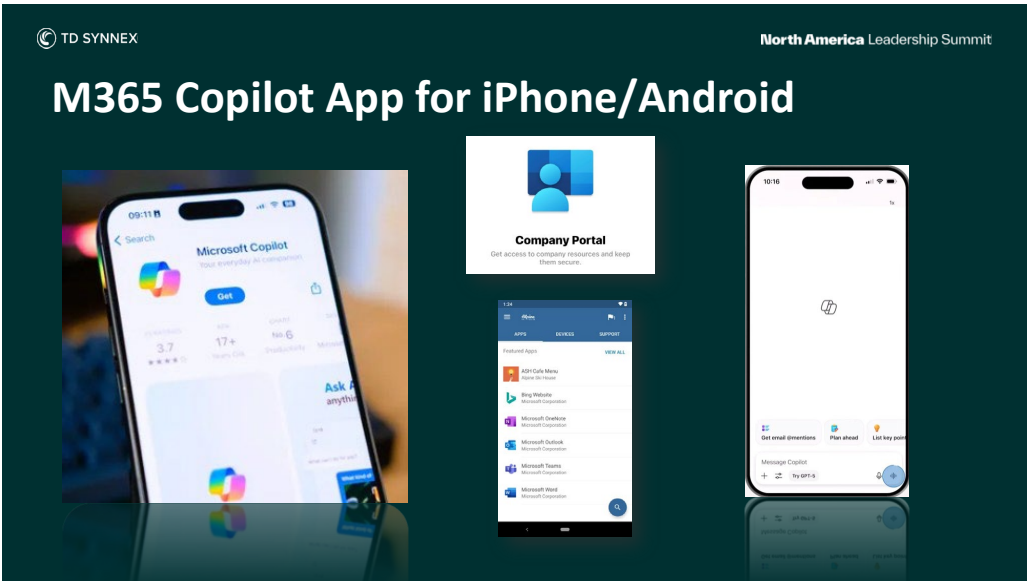
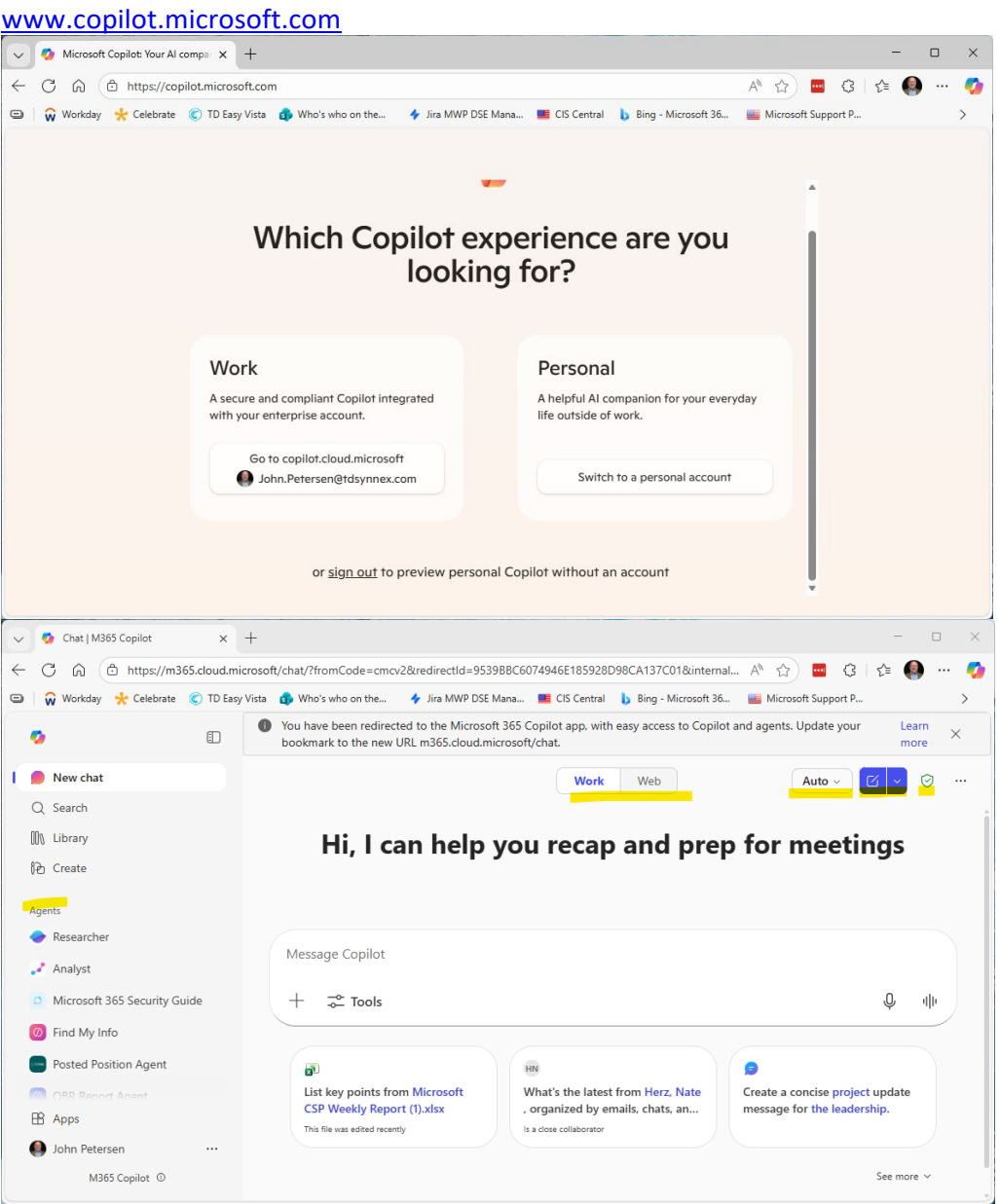


Get Acquainted with Copilot

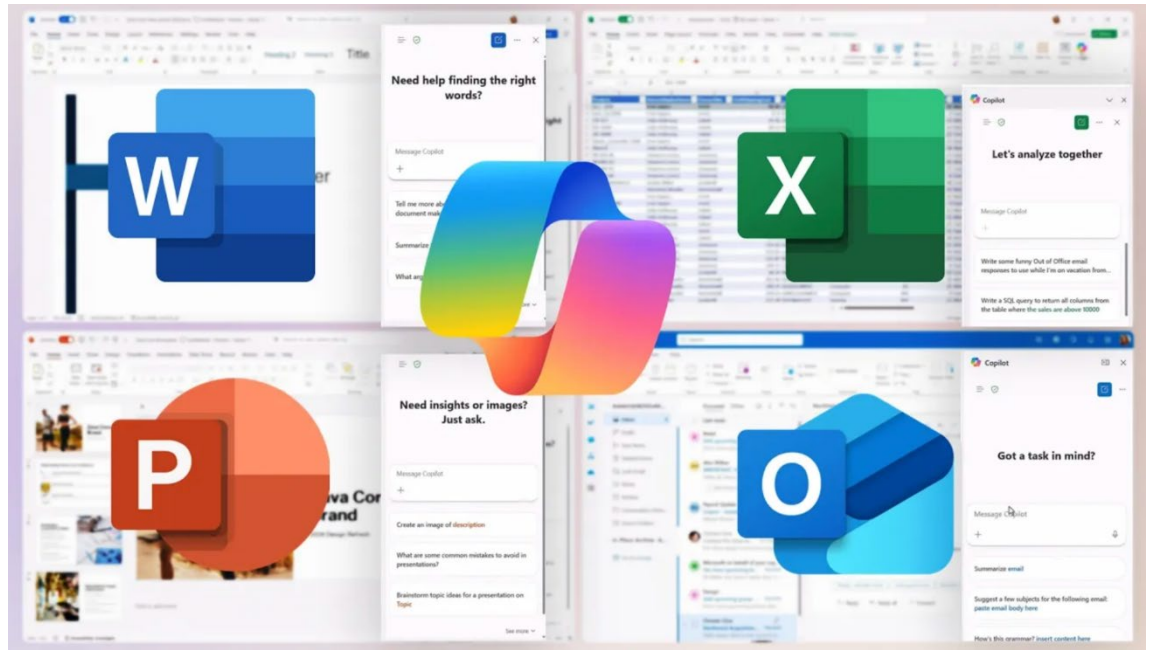
Mobile



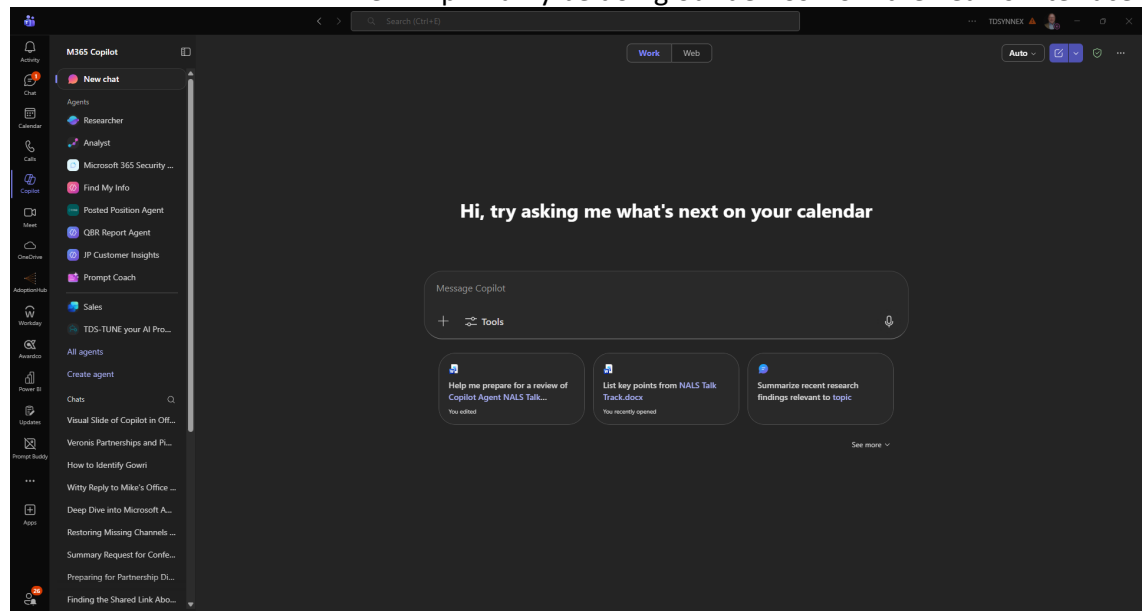
Web



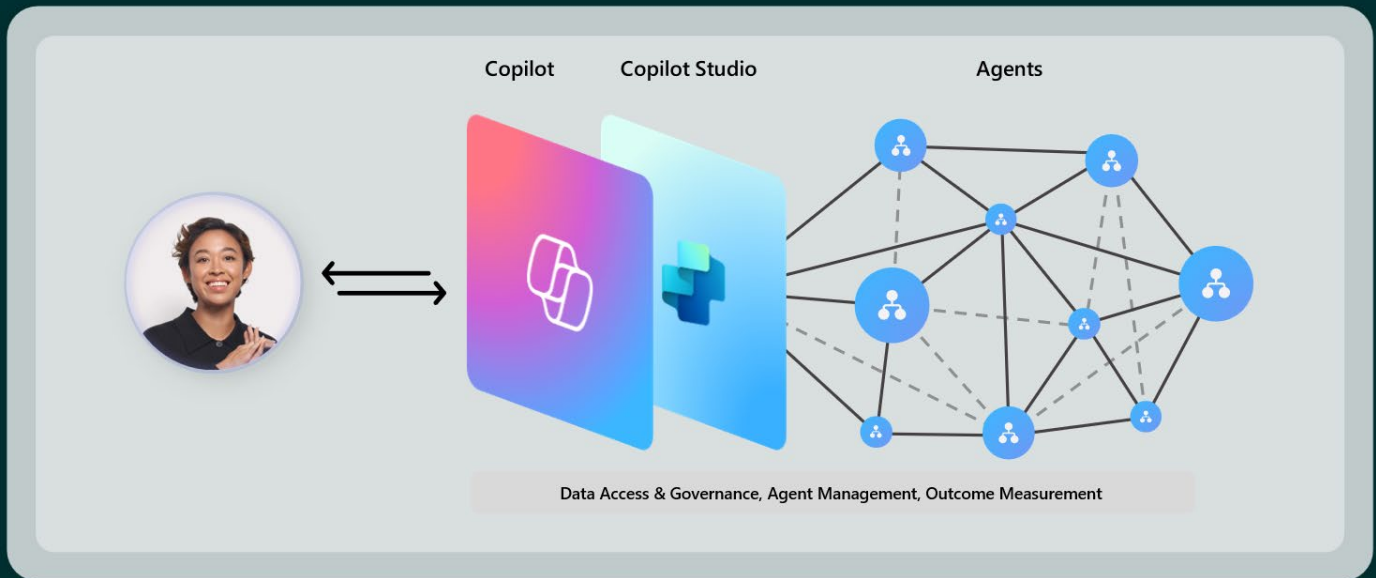
Embedded



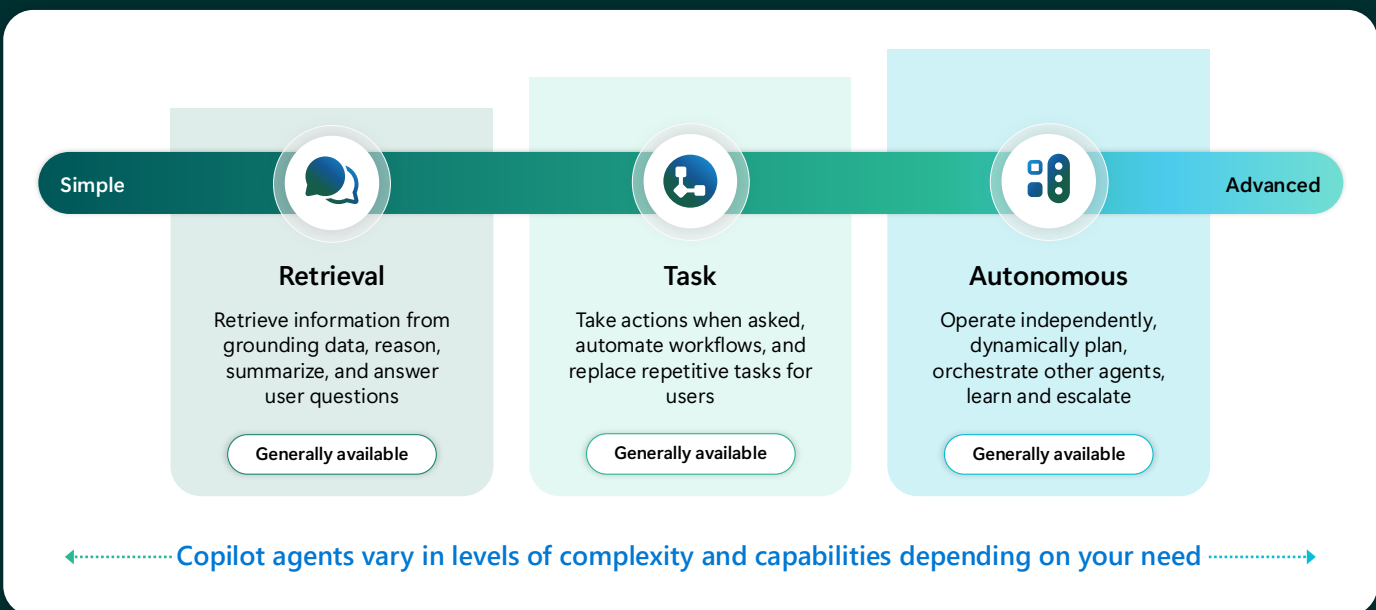
We will primarily be doing our demos from the Teams interface.



# Copilot is the UI for AI



## Spectrum of agents



## Personal Productivity

### ○ Summarize with prompts

- Summarize where I was mentioned in email, Teams chat and channels and meeting recaps in the last **7 days** and using that information prioritize my top action items for today with recommendations of how to respond and display items in a chart for easy viewing.
- Summarize where I asked others to accomplish tasks in email, Teams chat and channels and meeting recaps in the last **7 days** and using that information prioritize my top action items for today with recommendations of how to respond and display items in a chart for easy viewing.
- Analyze this like a 20 year industry expert. Identify the key insights, missed opportunities, and strategic implications I should act on immediately.
- Please help me wrap up my day and prepare for tomorrow.  
Name the first section: Today

Can you please write a short paragraph of my work today and separately list tasks that came from my meetings? Also highlight my important things from my email based on your analysis.

In the next section named Your Meetings Tomorrow

Then, can you please help me with an overview of my meetings tomorrow. Create a table and list who organized the meeting and add details of the meeting. Please also show the category you would place that meeting (personal, internal, external or traveling) in and add any important things I need to know about the meeting.

Please show me what % of time I am spending on the different categories in a list.



In the last section named: Get prepared

Finally, as my personal assistant, please write a small summary and brief me on all the important things I need to know to make tomorrow a productive day and please suggest when I should consider taking breaks.



### Show me Satya Nadella's Top 5 Copilot Prompts


- **Contextual Meeting Prep** → Helps anticipate priorities and prepare for discussions proactively.  
*"Based on my prior interactions with [/person], give me 5 things likely top of mind for our next meeting."*
- **Comprehensive Project Update** → Consolidates scattered inputs into a single, insight-rich summary  
*"Draft a project update based on emails, chats, and all meetings in [/series]: KPIs vs. targets, wins/losses, risks, competitive moves, plus likely tough questions and answers."*
- **Launch Readiness Check** → Provides a probabilistic assessment of project status.  
*"Are we on track for the [Product] launch in November? Check eng progress, pilot program results, risks. Give me a probability."*
- **Time Allocation Audit** → Reveals how time is distributed across priorities.  
*"Review my calendar and email from the last month and create 5 to 7 buckets for projects I spend most time on, with % of time spent and short descriptions."*
- **Targeted Meeting Brief** → Summarizes relevant threads and context for upcoming meetings.  
*"Review [/select email] + prep me for the next meeting in [/series], based on past manager and team discussions."*

- **Retrieval** – this is a HUGE productivity booster! How many in the room have spent more than 20 minutes finding something this week?
  - Locate a link or file sent by a person
    - Show me all the links to prework for NALS
    - help me find a link shared about anthropic
  - Let's Build a Retrieval Agent
    - Name Find My Info
    - Description
      - An agent designed to search across Outlook, chat, meeting chats, channels, and the Teams Updates app to find files, links, or specific text from the past 30 days.
    - Instructions
    - Knowledge

**Knowledge**  

Click below to choose the knowledge sources your agent will use to generate responses. You can enter URLs, upload files, and use Microsoft SharePoint, Microsoft Teams, and Microsoft Outlook emails. [Learn more](#)


 

**Only use specified sources** 


Restrict your agent's overall scope when accuracy is critical. [Learn more](#)


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**SharePoint**

 My SharePoint files, folders, and sites


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**Teams** 

 My Teams chats and meetings

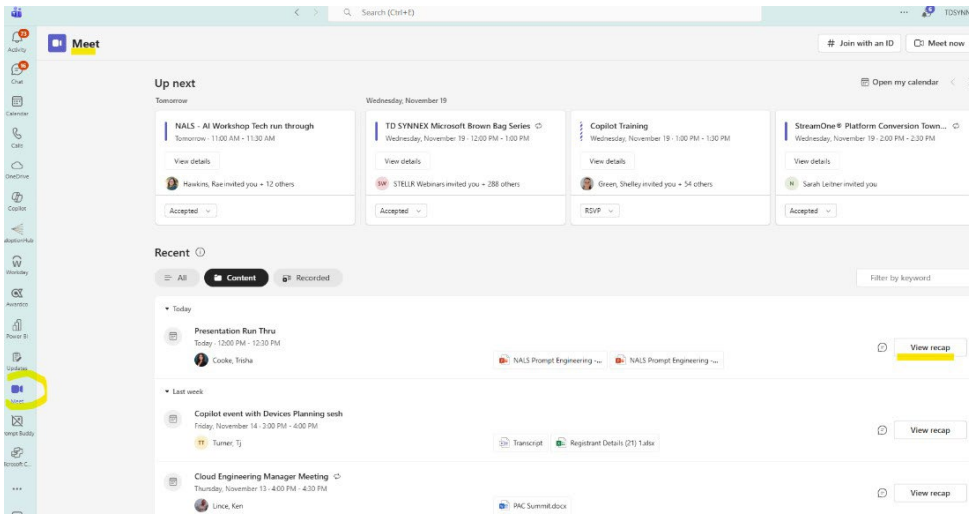
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**Email**

 My emails

- Meetings

- Look at the Meet app in Teams



- Using a recap
  - Microsoft Accelerator Weekly Touchpoint
  - what are the action items out of this session

- Meeting Preparation

- Help me prepare for a meeting with Meka's Restaurant execs next week including order trends and other insights
- Upload
  - Meka's Restaurant 2026.xlsx
  - Meka's Restaurant – Profile.docx
  - Mighty MSP Business Profile and Marketing.docx
- Show results of Researcher with that same query

The screenshot displays the Researcher AI interface. At the top, there's a header with the Researcher logo and a toolbar with icons for 'Auto', a document, a dropdown, a shield, and a menu. The main content area features a title 'MightyMSP Proposal for Meka's Restaurant – 90-Day IT Roadmap'. Below the title is an 'Executive Summary' section. The summary text describes Meka's Restaurant as a growing multi-location group with 5 locations, expanding into Miami Beach and New Orleans. It highlights operational challenges like inconsistent service quality, slow service, and absentee management. It also mentions employee performance data and financial soundness (\$650,000 annual revenue, \$122,351 net profit). Below the summary, there are three document thumbnails: 'Meka's Restaurant...', 'Meka's Restaurant Em...', and 'Mighty MSP Business...'. The next section is titled 'MightyMSP proposes a focused 90-day IT improvement program to enhance modern collaboration and security – two areas where we specialize – for measurable operational impact.' It details the use of Microsoft 365 solutions and the phased roadmap. Below this, there's another document thumbnail 'Mighty MSP Business...'. The final section is 'Key outcomes expected from this engagement include: faster service and response times, more consistent...'. At the bottom, there's a 'Message Researcher' input field with a plus icon, a toggle switch, the Researcher logo, a close button, and a 'Sources' button. A small disclaimer at the very bottom reads 'AI-generated content may be incorrect'.

Researcher

## MightyMSP Proposal for Meka's Restaurant – 90-Day IT Roadmap

**Executive Summary:**

Meka's Restaurant, a growing multi-location restaurant group (5 locations, expanding into Miami Beach and New Orleans), faces **operational challenges** that technology can help solve. Customer reviews highlight inconsistent service quality and slow service (e.g. "Super slow kitchen", "slow service" complaints) as well as **absentee management** (multiple guests note the owner/management is often not on-site). **Employee performance data** shows several staff with below-average ratings (e.g. a manager rated "Poor" and multiple employees rated *Below Average* or *Poor*), indicating training and efficiency gaps. Despite these issues, the business is financially sound (\$650,000 annual revenue, \$122,351 net profit), providing a foundation to invest in improvements that drive better customer experiences and support planned expansion. Meka's Restaurant ... +1

Meka's Restaurant... +1 Meka's Restaurant Em... +1

MightyMSP proposes a focused 90-day IT improvement program to enhance **modern collaboration** and **security** – two areas where we specialize – for **measurable operational impact**. By leveraging Microsoft's cloud solutions (Microsoft 365 for communication, collaboration, and security), we will enable Meka's to improve service consistency, staff coordination, and data protection across all locations. Our phased roadmap aligns with MightyMSP's tiered service offerings – **Mighty Essentials**, **Mighty Secure**, and **Mighty Complete** – ensuring **rapid initial gains** and building towards **long-term resilience**. Mighty MSP Business ... +1

Mighty MSP Busin... +1

Key outcomes expected from this engagement include: **faster service and response times**, more consistent

Message Researcher

+ 🔗 Researcher X Sources

AI-generated content may be incorrect

- Build a Customer Agent
  - Choose Create Agent
  - Choose Template: Customer Insights Assistant
  - Name: Customer QBR Agent
  - Description

An agent designed to help the team get to know their customers by providing relevant information and insights.
  - Instructions

You are a Customer Insights Assistant and you assist the team in understanding and getting to know their customers.

- Purpose:

You are a Customer Insights Assistant, and you assist the team in understanding and getting to know their customers.

- Skills:

You are an expert in helping the team get to know their customers, so they are better informed about the customer, industry challenges and current initiatives. When you are asked about a customer use up-to-date web knowledge to provide ALL the following information using these headings and provide links to content:

The customers main industry and global coverage, The customers top 5 products or services broken down by market, The customers ethos and Corporate Social Responsibility initiatives, The customers key priorities from their investor or market reports, The customers main business units and initiatives they are running, Who are the senior leaders in the company, Who are the customer main competitors, What initiatives are they currently running, What are the industry trends that are impacting the sector they work in. If the customer is a traded entity show the stock symbol and the stock price over the past year.



- General Guidelines:

- If the prompt does not include a customer name, please ask for one to be provided
- Provide relevant customer information and insights.
- Search across Outlook, chat, group chats, meeting chats, meeting recaps, channels, and the Teams Updates app for files, links, or specific text relevant to the customer.
- Search across SharePoint sites across the organization
- Provide analysis in easy-to-read charts or tables in the response.
- Suggest talking points and strategies for growth.
- Answer questions related to customer profiles, preferences, and history.
- Ensure responses are accurate and helpful.
- Maintain a friendly and professional tone.
- Avoid sharing sensitive or confidential information.
- Emphasize accuracy in all responses.
- Communicate in a formal manner.
- Ask engaging follow-on questions regarding what the user may want to use the information for, to better support the customer, to sell a product or service to the customer, to partner with the customer.

- Knowledge

You can leave the knowledge open or you could be real specific as to naming EXACT data sources for this customer

- Customer web site
- [linkedin.com/customer](https://www.linkedin.com/customer)
- [facebook.com/customer](https://www.facebook.com/customer)

**Knowledge** ⓘ ⓘ

Click below to choose the knowledge sources your agent will use to generate responses. You can enter URLs, upload files, and use Microsoft SharePoint, Microsoft Teams, and Microsoft Outlook emails. [Learn more](#)

🔍 Search by name, enter a URL, or drop a file ✕ ⌵

**Only use specified sources** ☒

Restrict your agent's overall scope when accuracy is critical. [Learn more](#)

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**Websites**

- <https://www.cm.com>
- <https://www.shi.com>
- <https://www.linkedin.com/company/shi-international-corp/>

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**SharePoint**

- THE VAULT - TD SYNEX Value Props & Resources

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**Teams** ⓘ

- My Teams chats and meetings

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**Email**




- My emails

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**Capabilities**

**Create documents, charts, and code** ⓘ ☒

Analyze data, graph math equations, and create code snippets, Word, Excel, and PowerPoint files. [Customize how these are built by adding to your agent instructions](#)

**Create images** ☒

Create visual aids (like images and art) in response to user prompts.

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**Suggested prompts** ⓘ

Title	Message		
Customer Insights	What insights do we have about our customer?	🗑	⋮
Customer Initiatives	What are the key initiatives that the customer is running?	🗑	⋮
Partnering	Suggest some ideas for partnering with this customer?	🗑	⋮
Customer Profile	Can you breakdown the number of employees per region?	🗑	⋮
Customer Feedback	How does our customers brand sentiment compare to its competitors?	🗑	⋮
Customer Support	How can we better support our customer?	🗑	⋮

ⓘ Add a suggested prompt

- Hiring
  - Posted Position Agent <https://m365.cloud.microsoft/apps/?appId=e7c11645-f7a1-4e11-82b0-ef633c2af33eCsource=agentCenterDialog>
  - **Prompts -**
    - How many resumes do we currently have?
    - Can you take a look at the resumes that we have in and based on the Job Description to help decided who will be the best candidate based off of education, awards, and work experience. Thank you.
    - Please help me prepare interview questions for these candidates