Microsoft

Copilot for Microsoft 365

A whole new way of working with the power of generative AI

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Transforming productivity with generative AI
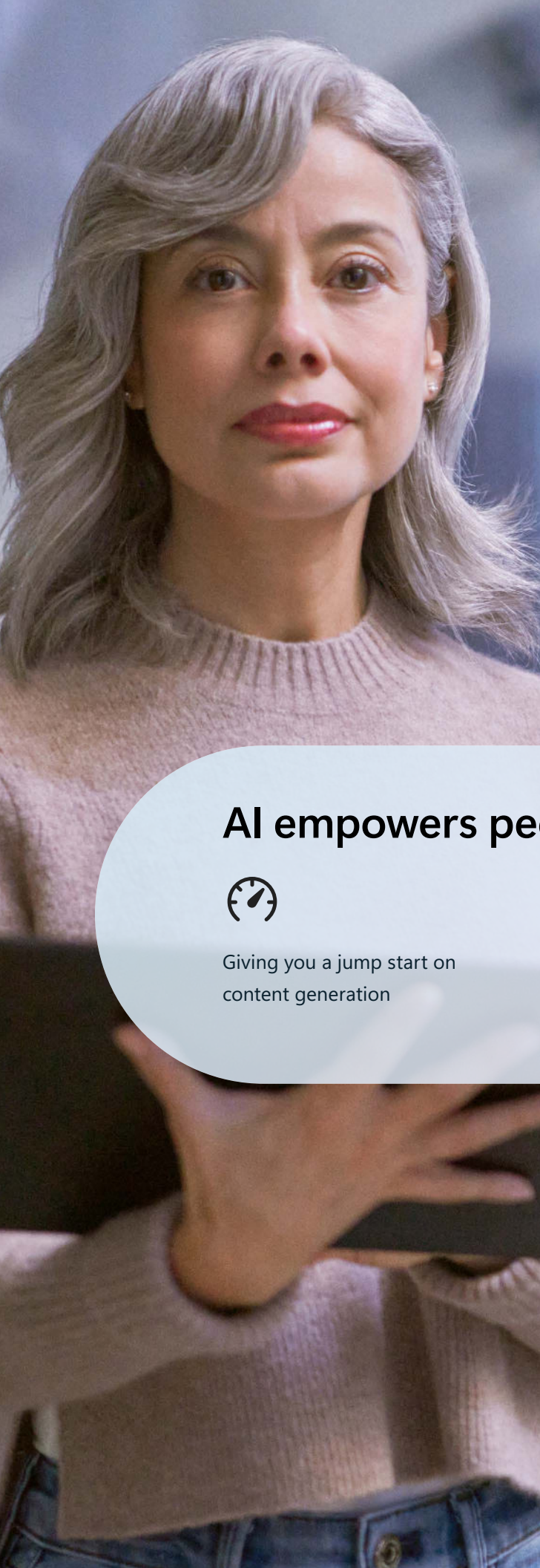
Copilot for Microsoft 365 is an AI-powered assistant that seamlessly works alongside you in the apps you use every day, like Teams, Outlook, Word, PowerPoint, and more, delivering enhanced productivity and creativity. With Copilot for Microsoft 365, you get through work faster and smarter, freeing up invaluable time so you can focus on what matters most for your business, like innovating and landing more customers.

AI empowers people to achieve more by:

Giving you a jump start on content generation

Amplifying your creativity

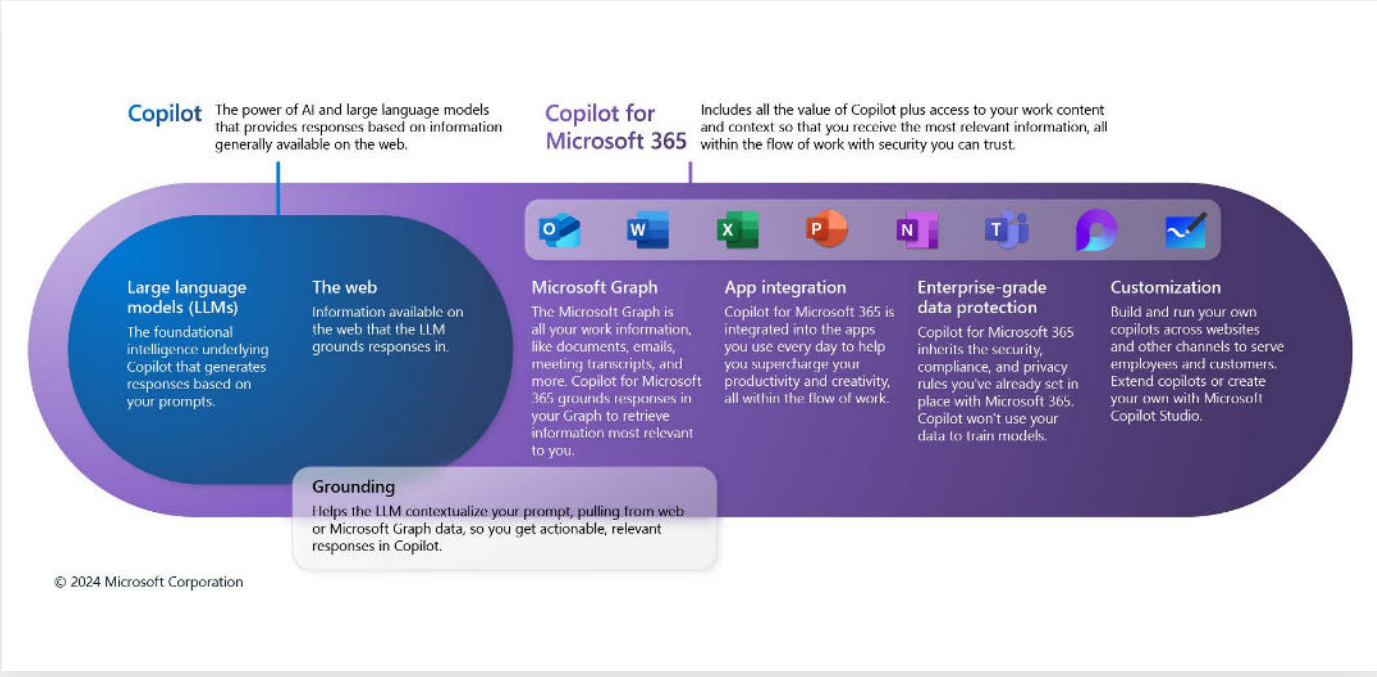Helping you find information and get through your daily work faster

We are in the age of AI and the world is changing rapidly. Small- and medium-sized businesses can gain a significant competitive advantage by embracing generative AI. Copilot for Microsoft 365 helps you and your business stay ahead of the curve while keeping you safe and secure with Microsoft's commitment to responsible AI.

How Copilot for Microsoft 365 works

Copilot for Microsoft 365 introduces an entirely new way of working by turning your words into the most powerful productivity tool on the planet with generative AI.

The magic of Copilot for Microsoft 365 starts with AI and large language models (LLMs), which make up its foundational, underlying intelligence. LLMs generate responses based on prompts that users create. The models are guided by receiving use-case specific information through a process we call **grounding**.
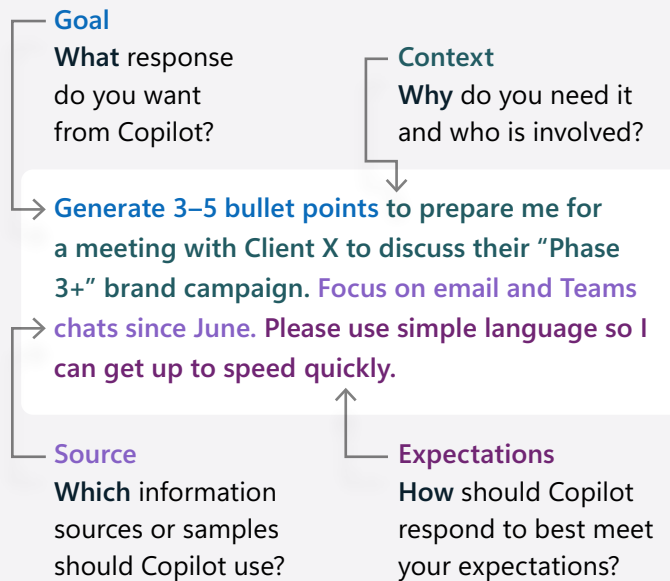
Copilot for Microsoft 365 is grounded in the Microsoft Graph, which contains all your work content and context, like emails, chats, call transcripts, documents, and more. The quality and relevance of the responses received from the LLMs improve dramatically when AI reasons over your information from Microsoft Graph. Not only do you get the most useful information, but you also receive it within the flow of your work within the Microsoft 365 apps like Teams, Outlook, Word, PowerPoint, and more. All of this is made possible along with the data protection that is automatically inherited through your existing Microsoft 365 security, privacy, identity, and compliance policies.

Copilot The power of AI and large language models that provides responses based on information generally available on the web.

Copilot for Microsoft 365 Includes all the value of Copilot plus access to your work content and context so that you receive the most relevant information, all within the flow of work with security you can trust.

Large language models (LLMs)
The foundational intelligence underlying Copilot that generates responses based on your prompts.

The web
Information available on the web that the LLM grounds responses in.

Microsoft Graph
The Microsoft Graph is all your work information, like documents, emails, meeting transcripts, and more. Copilot for Microsoft 365 grounds responses in your Graph to retrieve information most relevant to you.

App integration
Copilot for Microsoft 365 is integrated into the apps you use every day to help you supercharge your productivity and creativity, all within the flow of work.

Enterprise-grade data protection
Copilot for Microsoft 365 inherits the security, compliance, and privacy rules you've already set in place with Microsoft 365. Copilot won't use your data to train models.

Customization
Build and run your own copilots across websites and other channels to serve employees and customers. Extend copilots or create your own with Microsoft Copilot Studio.

Grounding
Helps the LLM contextualize your prompt, pulling from web or Microsoft Graph data, so you get actionable, relevant responses in Copilot.

The art of the prompt

Prompts are how you ask Copilot for Microsoft 365 to do something for you, like creating, summarizing, editing, or transforming content. Think about prompting like having a conversation—using plain, clear language and providing context like you would with a human assistant.

Ingredients of a good prompt include

Goal
What response do you want from Copilot?

Context
Why do you need it and who is involved?

Generate 3–5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Source
Which information sources or samples should Copilot use?

Expectations
How should Copilot respond to best meet your expectations?

Visit aka.ms/copilotlab for more information on prompting.

Making AI part of every day

The pace of work can feel like it is moving at the speed of light. The influx of information is never-ending, and we often find ourselves in a state of digital debt, where there is insufficient time or capacity to process it all. Sixty-four percent of employees we surveyed as part of our Work Trend Index Annual Report say that they have struggled in the last year with having enough time and energy in their day-to-day to get work done. This is where Copilot for Microsoft 365 can help.

Our small- and medium-sized business Early Access Program customers are realizing significant

> ## 64% of people say they struggle with having the time and energy to do their job.
>
> Work Trend Index Annual Report, "Will AI Fix Work?" May 2023`

gains from Copilot for Microsoft 365, with 81% reporting increased productivity and 76% reporting improved work quality. Copilot for Microsoft 365 is designed to benefit everyone across your business. No matter what your role is, Copilot can help.

Using Copilot in Sales

Close more deals faster

Research tells us that sales is becoming more challenging, with sellers being asked to support more accounts, collaborate across more teams, and prioritize even more initiatives.[1] From conducting research to creating proposals, Copilot works alongside sales teams to handle administrative, routine, and repetitive tasks. As a result, sellers can save time that enables them to focus more on building pipelines and closing deals to accelerate business performance. Let's see how Cora, an account manager, uses Copilot.

Copilot

Cora needs to prepare for an upcoming customer meeting. She does this by summarizing recent communications across emails, chats, and documents with the help of Copilot. Copilot allows Cora to sift through the tangled web of information and get up to speed quickly so she has more time to concentrate on the main problems and needs of her customers.

Copilot in PowerPoint

To ensure she puts her best foot forward in the meeting, Cora uses Copilot in PowerPoint to generate a presentation using branded templates along with the summary she received from Copilot. This allows Cora to show up with a high-quality presentation that focuses on the key points she needs to land with the customer.

Copilot in Teams

Now Cora is off to attend a Teams meeting with the customer and wants to give her full time and attention to the conversation. Cora relies on Copilot in Teams to handle the notetaking which allows Cora to have a more productive conversation, resulting in a more satisfied customer and ultimately a smoother path to closing the deal.

Copilot in Outlook

After a long day, Cora needs to send the customer meeting notes and action items in an email to all participants and stakeholders. Cora can quickly document and socialize all her notes using Copilot in Outlook to send clear communication that helps move the deal toward closure.

Using Copilot in Marketing

Make more impactful connections with customers

Delivering a great customer experience is harder than ever because customers are demanding more. Eighty-seven percent of customers increasingly expect relevant, personalized information based on their stage in the decision journey.[2] This is a key challenge facing marketers today. From developing strategic marketing plans to collaborating with other teams on composing copy, Copilot works alongside marketing teams to help them turn ideas into revenue-generating business opportunities. Let's see how Kai, a product marketing manager, uses Copilot.

Copilot in Word

Kai needs to write a messaging and positioning framework (MPF) for a new product. With Copilot in Word, he generates a first draft quickly without having to start from scratch, trusting Copilot to help with ideation like he would a trusted colleague.

Copilot in PowerPoint

Now Kai needs to create a pitch deck for the new product using the MPF he has written using Copilot in Word. Kai uses Copilot in PowerPoint to quickly generate a presentation based on the Word document to socialize with stakeholders across the company.

Copilot in Outlook

Kai wants to share the content he has started for the new product, so he uses Copilot in Outlook to quickly draft an email. Copilot provides guidance for the length, structure, and tone to make the communication effective.
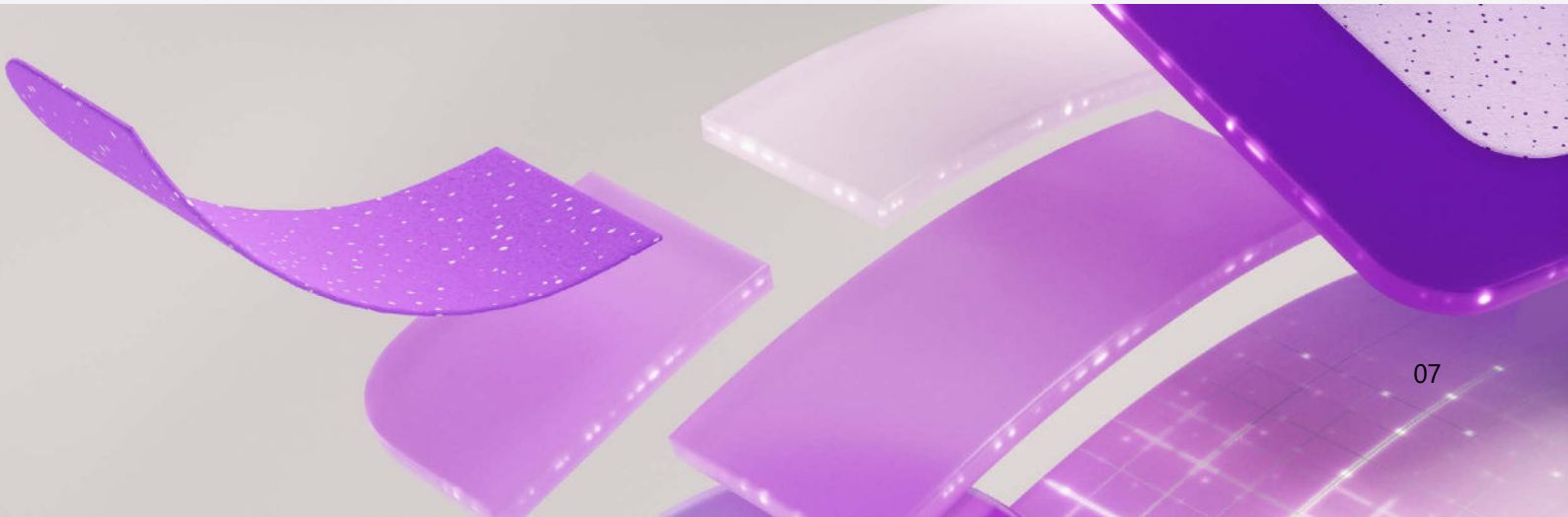
Using Copilot in Human Resources (HR)

Secure the best talent for your business

Attracting and retaining top talent is a constant challenge for human resources professionals. Copilot can help you create a more efficient and effective hiring process that reduces costs and ensures that you select the most suitable candidates. Let's see how Malik, an HR generalist, uses Copilot to augment the hiring workflow.

Copilot in Word

Malik needs to create a job description for an open role at his company. Malik uses Copilot in Word to create a job description with skills, qualifications, and responsibilities for a financial analyst.

Copilot in Loop

Malik has selected the people who will interview the applicants for the position he is looking to fill. Copilot in Loop helps Malik create interview questions based on the job criteria and develop a plan for what questions each interviewer will ask the applicants.

Copilot in Teams

Now Malik is ready to conduct a group interview in Teams and asks Copilot in Teams to summarize the contributions of each candidate and quickly generate meeting notes from the call so the team can make a quick hiring decision to secure the best talent.

Using Copilot in Finance

Get to insights faster

76% of CFOs say manual tasks still take up too much of their finance teams' time and effort.[3] From forecasting to financial reporting to drafting stakeholder communications, Copilot works alongside finance teams, so they can spend their time on the high-value tasks that make the biggest impact. Let's see how Wesley, a financial analyst, uses Copilot at work.

Copilot in Excel

As a financial analyst, Wesley spends a significant amount of time sifting through data to uncover trends and insights. With Copilot in Excel, Wesley can ask questions about the data and quickly produce visualizations.

Copilot in Teams

Insights in hand, Wesley uses Copilot in Teams to schedule time with business leaders for their perspectives on what is driving the numbers to generate a full picture of the business performance.

Copilot in PowerPoint

Wesley needs to share his report and insights with stakeholders across his company to ensure they can course-correct if needed. To enable this, Wesley uses Copilot in PowerPoint toeasily create a presentation based on his analysis of the data in Excel coupled with information gathered in calls with business leaders to summarize his findings.

Visit Microsoft Copilot Scenario Library to learn about more ways your business can use Copilot for Microsoft 365

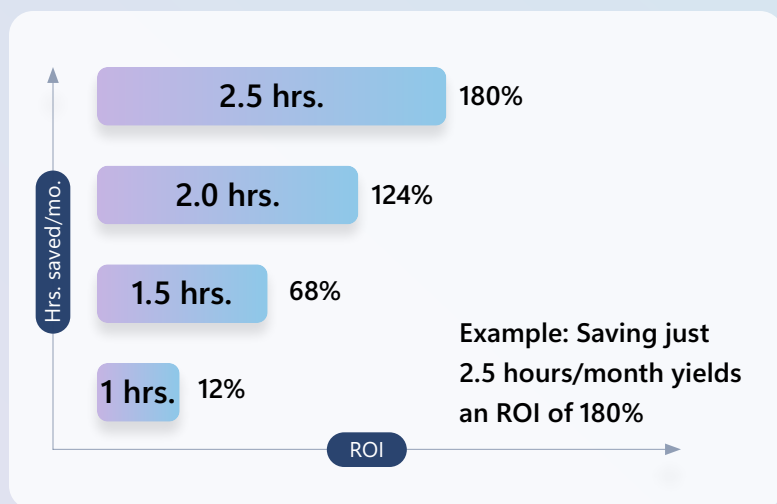# Boost your ROI with supercharged productivity

According to PwC, the right AI choices will provide companies with a significant competitive edge.[4] Copilot for Microsoft 365 enables workers in all areas of the organization to save time and get more done with a higher level of quality. Seventy-two percent of surveyed small- and medium-sized business Early Access Program customers said Copilot for Microsoft 365 saves them time so they can focus on more important work. This translates into a strong return on investment (ROI) for the

entire organization. Copilot for Microsoft 365 is an investment in workers at a cost of $30 per user per month. Given all the ways in which Copilot can save time, it's easy to see how quickly the cost can be recaptured.

Assuming an employee makes $70,000 a year, it only takes a time savings of 2.5 hours per month to recoup a 180% ROI. Similarly, this same employee only needs to save 54 minutes of time to break even cost.[5]

Looking at this another way, a Forrester report found that if one employee saved four hours per month with Copilot for Microsoft 365, their break-even wage to pay for the license cost would equate to $7.50 per hour. If the employee saved 10 hours per month, their break-even wage would be $3.00 per hour. And if the employee only saved two hours per month, their break-even wage

How much time can people save with Copilot for Microsoft 365?

Hrs. saved/mo.

2.5 hrs.		180%
2.0 hrs.		124%
1.5 hrs.		68%
1 hrs.	12%	

ROI

Example: Saving just 2.5 hours/month yields an ROI of 180%

would be $15.00 per hour. This is assuming that Copilot for Microsoft 365 would save different employees different amounts of time, based on their unique business roles and how they used Copilot.[6]

No matter how you frame it, Copilot for Microsoft 365 can save you invaluable time by helping you get through the work day faster. The best part is, with all this time saved, you will have room to prioritize more meaningful and strategic work, all with the peace of mind from Microsoft's commitment to security and responsible AI.

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I no longer need to spend time consolidating meeting notes. Copilot does it for me. I'm saving at least 10 minutes of time with each meeting.

Mahesh Patil, CTO of DLT Apps

Microsoft's commitment to safe and secure AI

Microsoft is committed to advancing AI with an approach guided by ethical principles that put people first. You remain in control as Copilot for Microsoft 365 inherits your existing security, compliance, and privacy policies that are already set up in Microsoft 365.

This means:

- Your data remains **your** data.

- Microsoft does **not** use your data to train the foundational models without your permission.

- Your data stays **protected** every step of the way with our most comprehensive compliance and security controls.

Microsoft embraces the following principles to guide our work around AI

Fairness
Treat everyone fairly

Inclusiveness
Prevent barriers with designs that accommodate people with different abilities

Reliability and safety
Ensure our AI systems operate reliably, safely, and consistently

Transparency
Educate stakeholders on how and why AI systems function the way they do

Privacy and security
Protect users' private information to resist security attacks

Accountability
Hold AI designers accountable for system operations

In addition, Microsoft offers a unique, industry-leading customer Copilot Copyright Commitment. This commitment extends Microsoft's existing intellectual property indemnity support to commercial Copilot services and builds on Microsoft's previous AI customer commitments. Specifically, this means that if a third party sues a commercial customer for copyright infringement for using the Microsoft Copilot offerings or the output they generate, Microsoft will defend the customer and pay the amount of any adverse judgments or settlements that result from the lawsuit if the customer used the guardrails and content filters built into the products.

Want to learn more?

[Copilot adoption site »](#)
to learn more about how to get set up and started with Copilot for Microsoft 365

[Copilot Lab »](#)
to learn how you can use Copilot for Microsoft 365

Citations

1. [New Research Reveals Sales Reps Need a Productivity Overhaul – Spend Less than 30% Of Their Time Actually Selling | Salesforce](#), December 2022

2. [Master-data-driven-capabilities | Deloitte Digital](#), March 2022

3. [Survey Finds 76% of CFOs Say Manual Tasks Still Absorb Too Much of Finance Teams' Time and Effort | CFO Dive](#), August 2023

4. [2024 AI Business Predictions | PwC](#)

5. At $70,000 employee cost per year, 54 minutes per month equals $30 of employee's time.

6. McQuivey, J., Curran, R., Floyd, C., & Starks, D. (2023). (rep.). Build Your Business Case for Microsoft 365 Copilot. Forrester. Retrieved from https://reprints2.forrester.com/#/assets/2/108/RES180016/report.