



Microsoft 365 Copilot Chat Foundation (we'll get started shortly)

Nick Connon
Cloud Solution Architect

Cat-dad, Nerd, Amateur Tinkerer
<https://www.linkedin.com/in/nicholasconnon>



What we'll learn today:

- What Copilot Chat is and how it's different from other AI chat tools
- Recap of Prompt Remix Exercise
- Turn a Prompt into a simple Agent.
- Q&A Discussion around Advancing Use Cases with AI

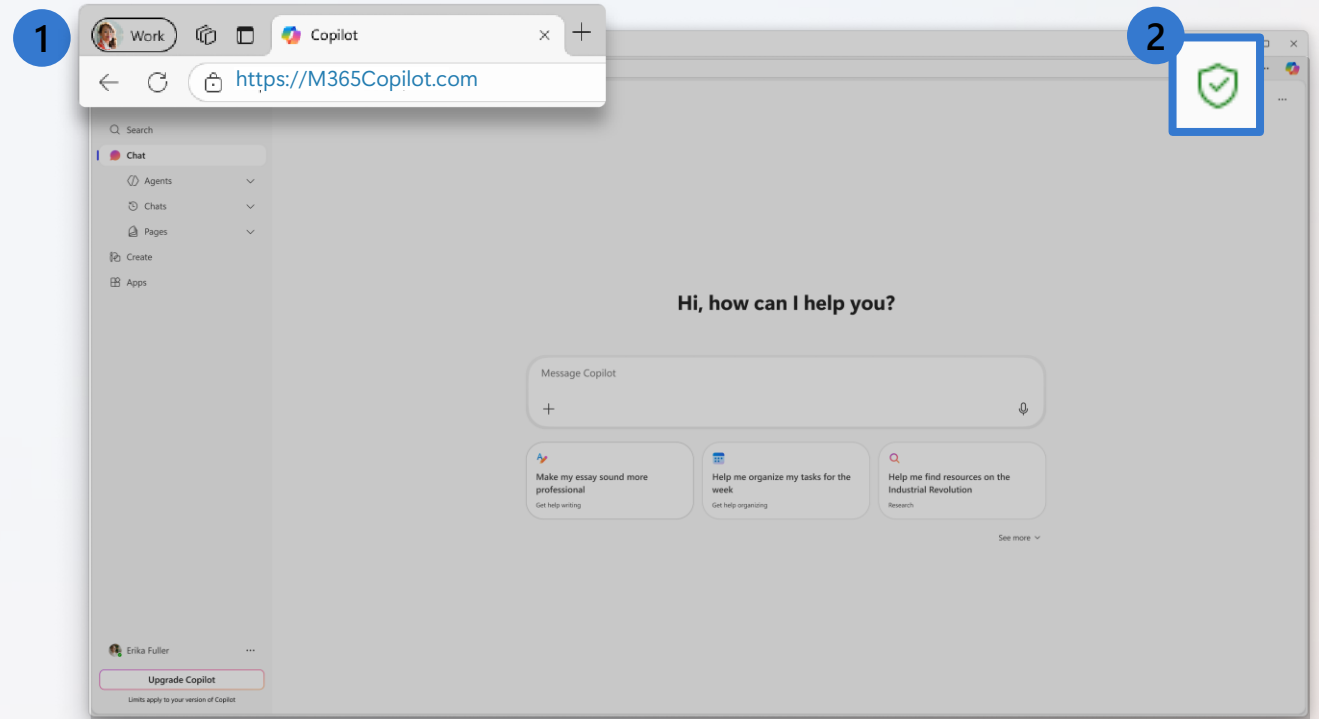


Get started with Copilot Chat

Sign in with your school 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 school 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 school account, Enterprise Data Protection does not apply.

Get to know Copilot Chat

Start at

M365Copilot.com

Agents

Use existing agents or create new ones¹. Learn more about agents in [slide 27](#).

Recent chats

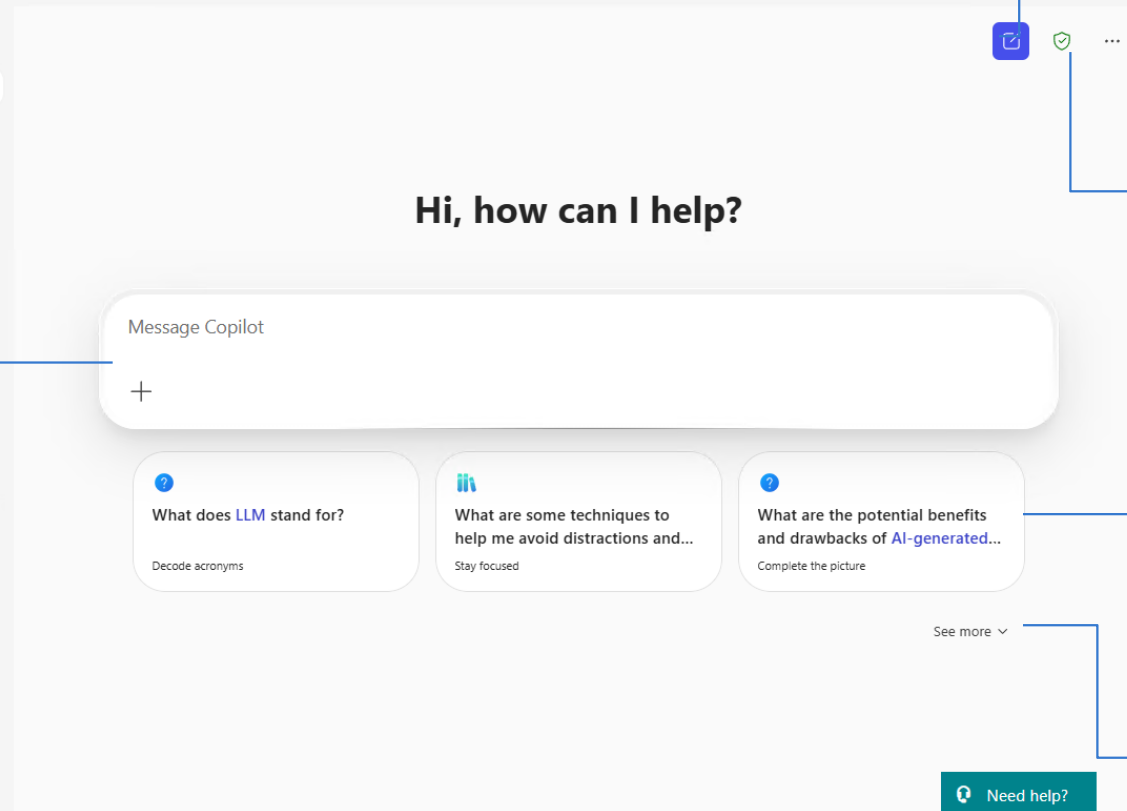
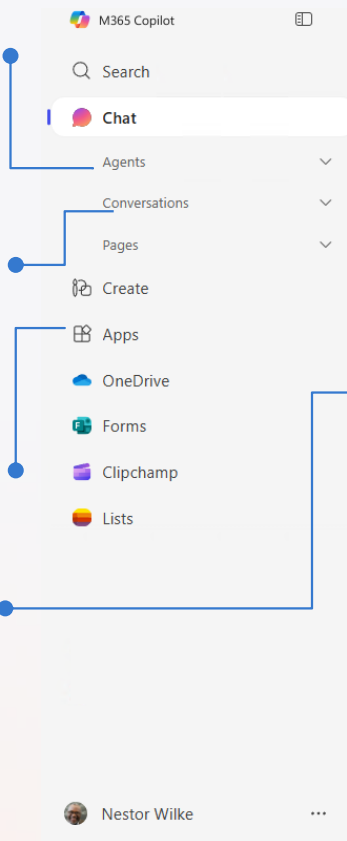
Return to a previous chat to continue the conversation

Apps

Discover, launch, and pin your favorite M365 Apps

Prompt box

Start your conversation here.



Start a new chat button

Clear your past chat and start a new conversation.

Protection Shield

You will know you are successfully signed in to Copilot Chat when you see the green shield icon

Suggested prompts

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

Copilot Prompt Gallery

Expand the suggested prompts to view the full Copilot Prompt Gallery, including saved prompts and prompts from your team

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.

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.



Prompt Crafting

An essential Copilot skill



What is a prompt?

Prompts are how you ask Copilot to do something for you — like creating, summarizing, editing, or transforming.

Think about prompting like having a conversation, using plain but clear language and providing context like you would with an **assistant**.

Tell Copilot what you need

Learn about projects and concepts:

"What is [Project X] and who are the key stakeholders working on it?"

Edit text:

"Check this product launch rationale for inconsistencies."

Transform documents:

"Transform this FAQ doc into a 10-slide onboarding guide."

Summarize information:

"Write a session abstract of this [presentation]."

Create engaging content:

"Create a value proposition for [Product X]."

Catch-up on missed items:

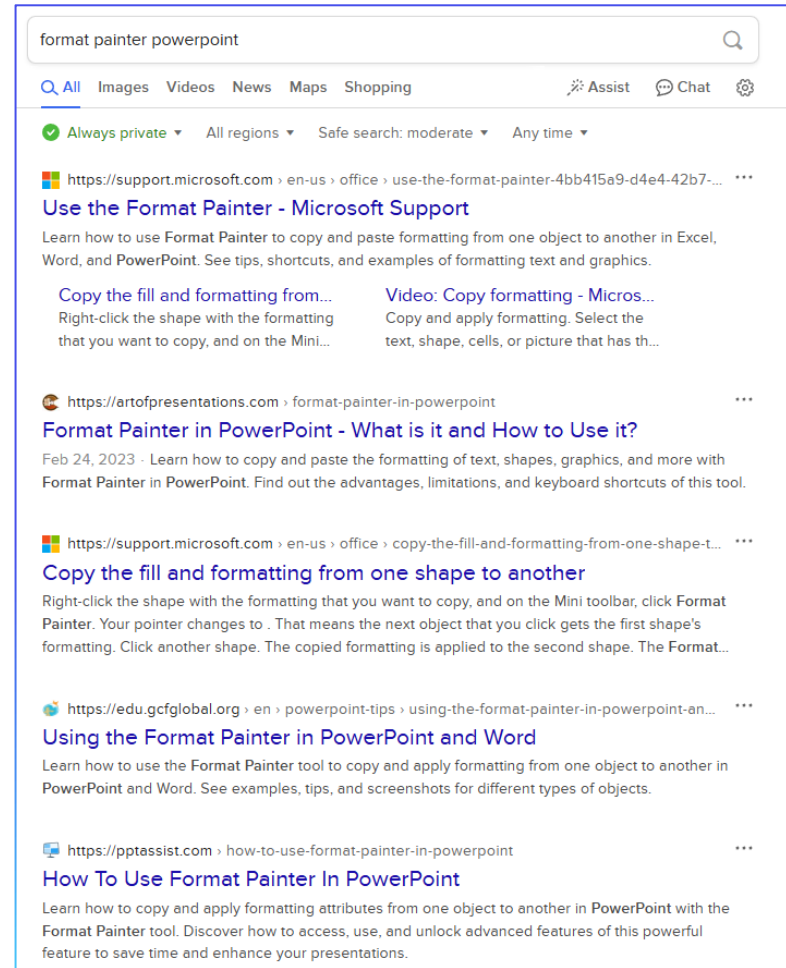
"Provide a summary of the updates and action items on [Project X]."

Break the habit!

Keywords to Conversations

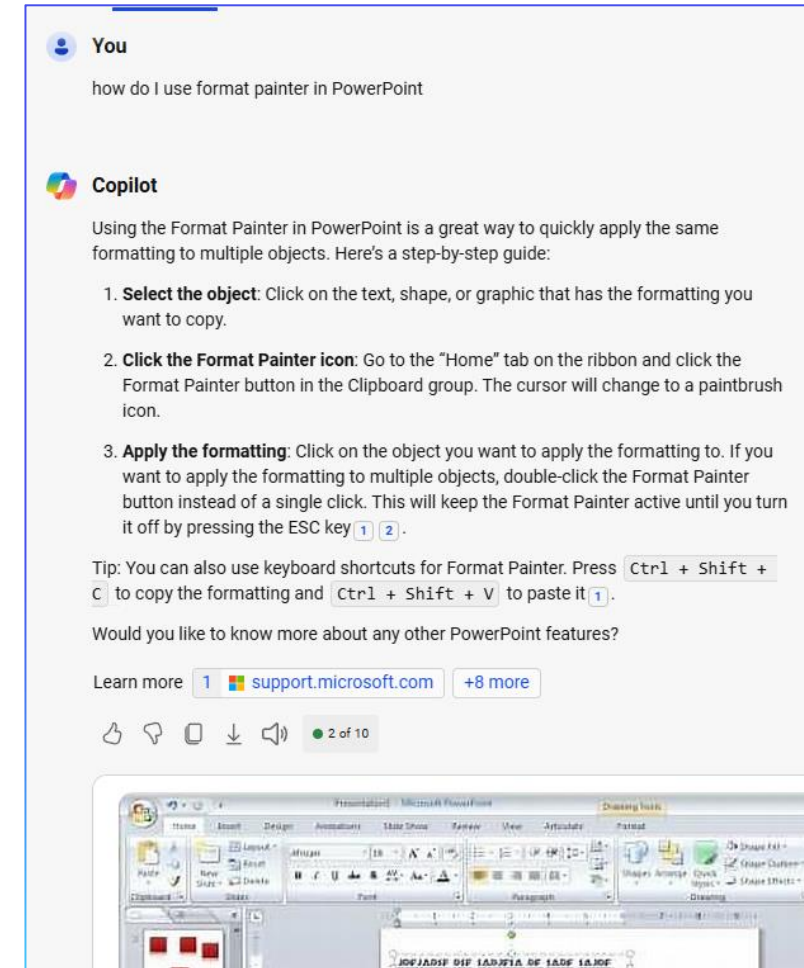
Keywords: For decades, we've been conditioned to search the internet using keywords. This method, while effective, has somewhat limited our ability to communicate naturally with technology. Keyword searching often requires us to think in terms of specific phrases or terms, which can be restrictive and sometimes frustrating.

Search Engine:



A screenshot of a Google search results page for the query "format painter powerpoint". The search bar at the top shows the query. Below the search bar are tabs for "All", "Images", "Videos", "News", "Maps", and "Shopping". There are also links for "Assist", "Chat", and a settings gear. The results are filtered by "Always private", "All regions", "Safe search: moderate", and "Any time". The first result is from Microsoft Support, titled "Use the Format Painter - Microsoft Support", with a snippet: "Learn how to use Format Painter to copy and paste formatting from one object to another in Excel, Word, and PowerPoint. See tips, shortcuts, and examples of formatting text and graphics." Below this are two links: "Copy the fill and formatting from..." and "Video: Copy formatting - Micros...". The second result is from artofpresentations.com, titled "Format Painter in PowerPoint - What is it and How to Use it?", with a snippet: "Feb 24, 2023 · Learn how to copy and paste the formatting of text, shapes, graphics, and more with Format Painter in PowerPoint. Find out the advantages, limitations, and keyboard shortcuts of this tool." The third result is from Microsoft Support, titled "Copy the fill and formatting from one shape to another", with a snippet: "Right-click the shape with the formatting that you want to copy, and on the Mini toolbar, click Format Painter. Your pointer changes to . That means the next object that you click gets the first shape's formatting. Click another shape. The copied formatting is applied to the second shape. The Format...". The fourth result is from edu.gcfglobal.org, titled "Using the Format Painter in PowerPoint and Word", with a snippet: "Learn how to use the Format Painter tool to copy and apply formatting from one object to another in PowerPoint and Word. See examples, tips, and screenshots for different types of objects." The fifth result is from pptassist.com, titled "How To Use Format Painter In PowerPoint", with a snippet: "Learn how to copy and apply formatting attributes from one object to another in PowerPoint with the Format Painter tool. Discover how to access, use, and unlock advanced features of this powerful feature to save time and enhance your presentations."

Answer Engine:



A screenshot of an AI-powered answer engine interface. At the top, it says "You" and "how do I use format painter in PowerPoint". Below this is the "Copilot" logo. The main text reads: "Using the Format Painter in PowerPoint is a great way to quickly apply the same formatting to multiple objects. Here's a step-by-step guide:". There are three numbered steps: 1. **Select the object:** Click on the text, shape, or graphic that has the formatting you want to copy. 2. **Click the Format Painter icon:** Go to the "Home" tab on the ribbon and click the Format Painter button in the Clipboard group. The cursor will change to a paintbrush icon. 3. **Apply the formatting:** Click on the object you want to apply the formatting to. If you want to apply the formatting to multiple objects, double-click the Format Painter button instead of a single click. This will keep the Format Painter active until you turn it off by pressing the ESC key. Below the steps is a tip: "Tip: You can also use keyboard shortcuts for Format Painter. Press **Ctrl + Shift + C** to copy the formatting and **Ctrl + Shift + V** to paste it." Below the tip is a question: "Would you like to know more about any other PowerPoint features?". At the bottom, there is a "Learn more" link with a "1" icon, a link to "support.microsoft.com", and a "+8 more" link. At the very bottom, there is a small image of a PowerPoint slide with the text "JODJADIF DIF IADJETA DE IADJ IADJ" and a "Drawing tools" ribbon.

A Prompt Framework



To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.

The quality of your prompt directly influences the quality of the output from Copilot

Include the right elements

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Create an agenda to prepare me for a meeting with my manager to discuss my evaluation. Focus the attached meeting transcript and job description. Please use simple language so I can get up to speed quickly.

Where information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

Collaborate with Copilot



Following up on your prompts helps you collaborate with Copilot, to gain more useful, tailored responses.

Keep the conversation going



Generating content ideas

Lead with broader requests, then give specific details about the content.



Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

ACTIVITY: Prompt Remix

<https://aka.ms/PromptRemix>

The screenshot shows a web browser window with a single tab titled 'Microsoft LiveSend'. The address bar displays a long URL starting with 'https://livesend.microsoft.com/'. The page header includes the Microsoft logo, the title 'Club Copilot Committee Meeting', and the text 'Shared by DH Dewayne Hyatt'. A 'Download' button with a dropdown arrow is highlighted with a blue box. The dropdown menu is open, showing two options: 'Download as DOCX' and 'Download as PDF'. Below the header, the main content area displays the title 'Club Copilot - April 2025 - Meeting 01', the date and time 'April 8, 2025, 8:05PM', and the duration '59m 35s'.

Microsoft

Club Copilot Committee Meeting
Shared by DH Dewayne Hyatt

Download ▾

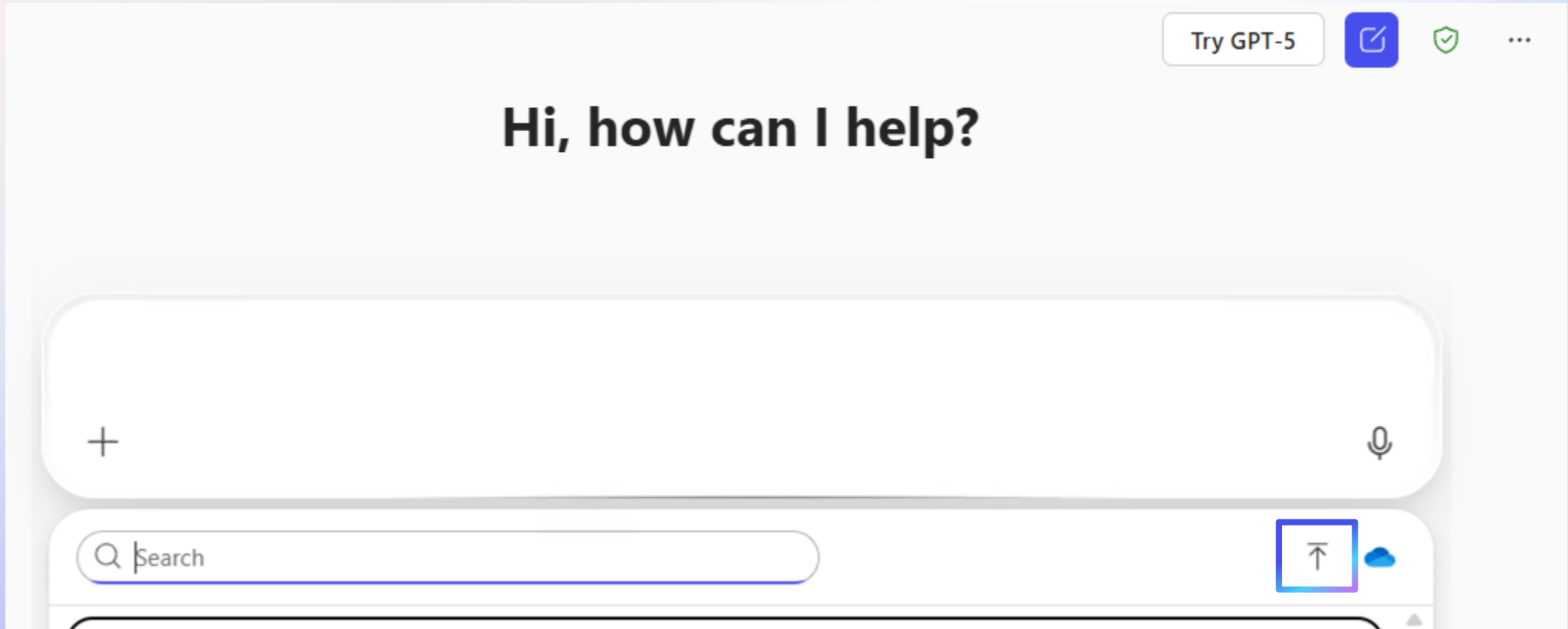
- Download as DOCX
- Download as PDF

Club Copilot - April 2025 - Meeting 01

April 8, 2025, 8:05PM

59m 35s

Start a Fresh Chat



What are some improvements we can make?

Show me meeting minutes based on this transcript

Goal

What response do you want from Copilot?

Provide a complete and thorough summary of the meeting

Context

Why do you need it and who is involved?

document discussions, decisions, and action items

Source

Where information sources or samples should Copilot use?

Based on the uploaded transcript

Expectations

How should Copilot respond to best meet your expectations?

Format the summary in sections with bold headings

What are some improvements we can make?

<https://aka.ms/PromptRemix4>

Expectations

How should Copilot respond to best meet your expectations?

Format the summary in sections with bold headings:

- **Attendees** (First Name, Last Name). List attendees in sub-bullets.
- **Meeting Purpose**
- **Summary of Topics Discussed**. Include decisions made (omit if none).
- **Next Actions** (omit if none). Format this section as a table with columns: **Action Item**, **Owner**, **Due Date**.

What are some improvements we can make?

Show me meeting minutes based on this transcript

Provide a complete and thorough summary of the meeting to document discussions, decisions, and action items based on the uploaded transcript. Format the summary in sections with bold headings:

- **Attendees** (First Name, Last Name). List attendees in sub-bullets.
- **Meeting Purpose**
- **Summary of Topics Discussed**. Include decisions made (omit if none).
- **Next Actions** (omit if none). Format this section as a table with columns: **Action Item**, **Owner**, **Due Date**.

Extra Credit:

Ask Copilot to wrap up your conversation into a single prompt:

Now that we have a final summary that is to my liking, can you look over our conversation and give me one prompt that would have given me this final output on the first try?



Here's a single, well-crafted prompt that would have led directly to the final formatted output you liked:

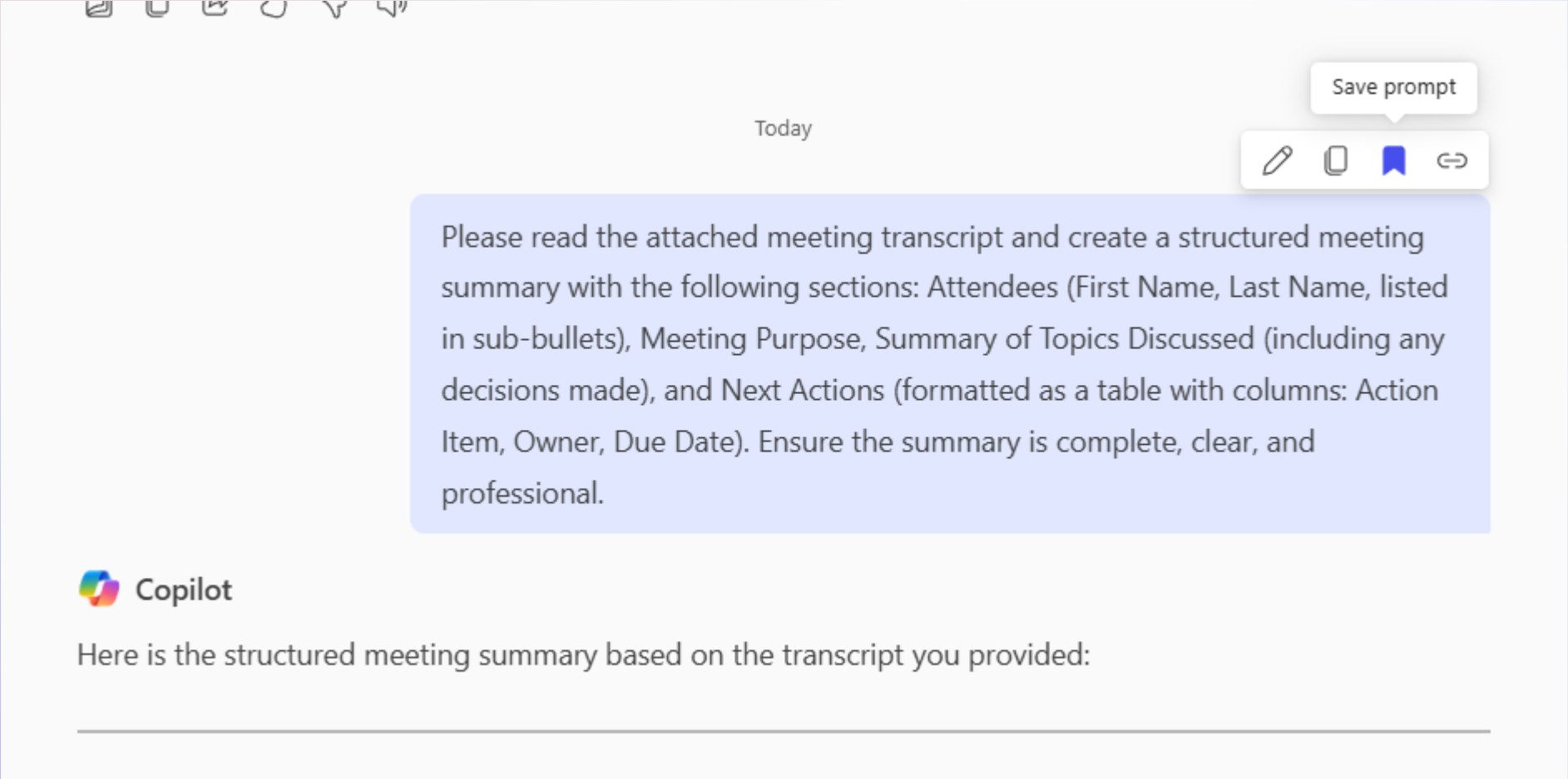
"Please read the attached meeting transcript and create a structured meeting summary with the following sections: Attendees (First Name, Last Name, listed in sub-bullets), Meeting Purpose, Summary of Topics Discussed (including any decisions made), and Next Actions (formatted as a table with columns: Action Item, Owner, Due Date). Ensure the summary is complete, clear, and professional."

Would you like me to save this as a reusable prompt template for your future meetings?



Save to the Prompt Gallery

This prompt has value, save and share it with your peers



The screenshot displays the Microsoft Copilot interface. At the top, a row of icons for various actions is visible. Below this, a section titled "Today" contains a list of prompts. One prompt is highlighted in a light blue box. To the right of this prompt, a "Save prompt" button is visible, along with icons for editing, copying, bookmarking, and sharing. The prompt text is as follows:

Please read the attached meeting transcript and create a structured meeting summary with the following sections: Attendees (First Name, Last Name, listed in sub-bullets), Meeting Purpose, Summary of Topics Discussed (including any decisions made), and Next Actions (formatted as a table with columns: Action Item, Owner, Due Date). Ensure the summary is complete, clear, and professional.

Below the prompt list, the Copilot logo and name are shown. The response from Copilot is displayed below the logo:

Here is the structured meeting summary based on the transcript you provided:

Save to the Prompt Gallery

This prompt has value, save and share it with your peers

Copilot Prompt Gallery

Microsoft prompts**Your prompts**Team prompts

All

Task

Job type

 **Meeting Summary Magic**

"Please read the attached meeting transcript and create a professional meeting summary..."

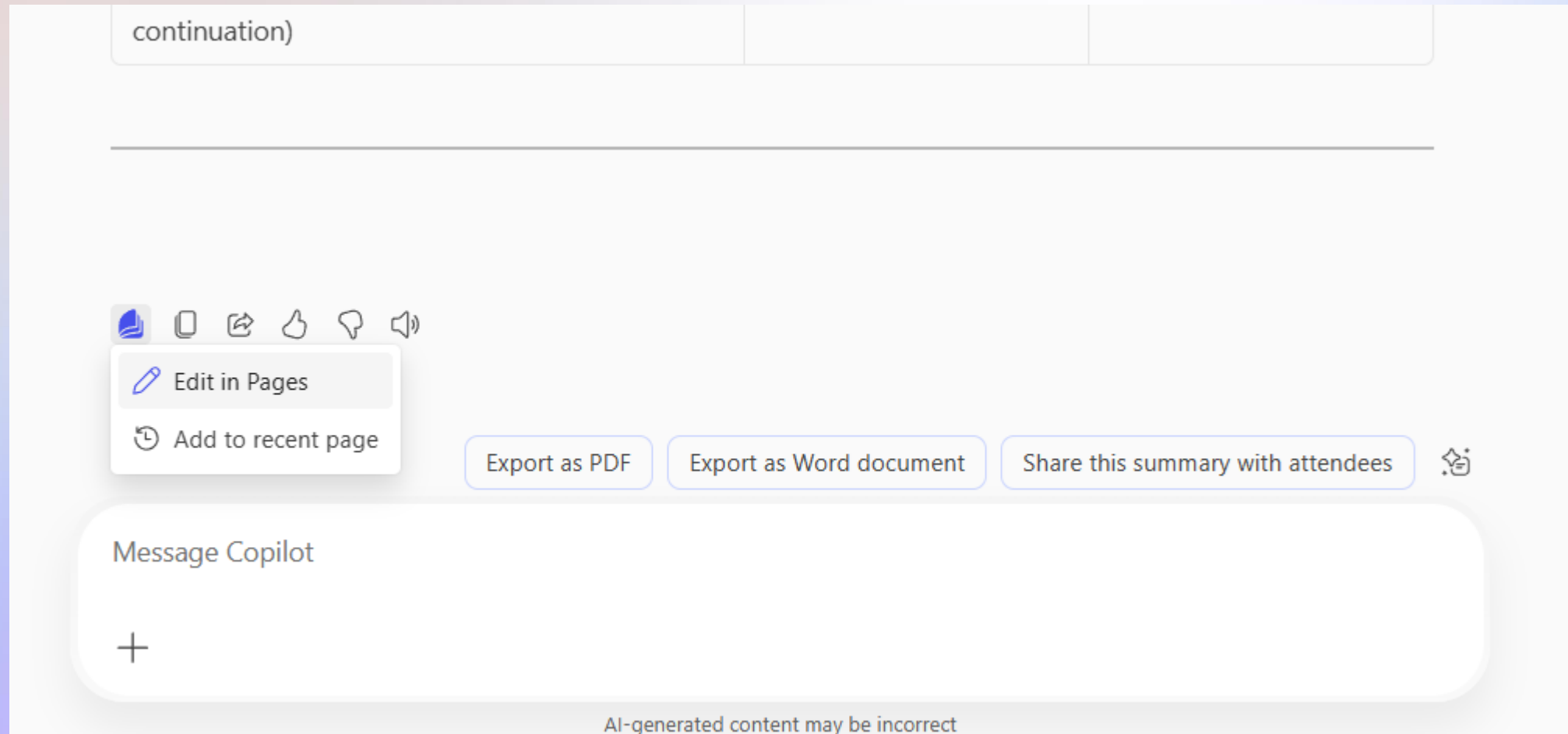
 You created this





Click: Edit in Pages

This allows you to manipulate and share the output from Copilot



Click: Edit in Pages

This allows you to manipulate and share the output from Copilot

Create meeting minutes based on this transcript\r\nC

Encourage feedback on Excel Copilot features	All Participants	Ongoing
Prepare next meeting (Golf Club theme continuation)	Organizers	April 22, 2025

Would you like this summary exported as a Word or PDF document?



 Copilot

Here's your new page:

 Create meeting minutes based o...
Pages



Export as PDF

Export as Word document

Share this summary with attendees



Message Copilot

+

Create meeting minutes based on this t...

Prompt [Please read the attached meeting transcript and create a structured meeting summary with the following sections: Attendees \(First Name, Last Name, listed in sub-bullets\), Meeting Purpose, Summary of Topics Discussed \(including any decisions made\), and Next Actions \(formatted as a table with columns: Action Item, Owner, Due Date\). Ensure the summary is complete, clear, and professional.](#)

Here is the structured meeting summary based on the transcript you provided:

Attendees

- Heather Cox
- Carlos Fernandez
- Will Thomas
- Dewayne Hyatt
- KC Lemson
- Abby Roberts
- Emily
- Jose
- Tyler
- Elayne M. Hollander
- Additional unnamed participants from the Club Copilot community

 Need help?

Behind the Scenes – Meet My Thought Partner

Chat

Agents

Chats

Pages

Notebooks

Create

Apps

Excellent, now, lets do something fun and break through the 4th wall. I want to recap this entire conversation and use it as a part of the demo. I want to show you off to the audience. I want them to see that this entire activity that they've gone through was actually created by you and I with you as my thought partner. How does that sound? Provide only the recap and demo section for the Prompt Remix activity

Copilot

Breaking the Fourth Wall: Recap and Demo

Slide Title: Behind the Scenes – Meet My Thought Partner

✓ Slide Content (Condensed for Visuals)

Everything you experienced today—from the character prompts to the visuals—was co-created in real time with Copilot Chat.

💡 This activity was:

- Iterative
- Collaborative
- Prompt-driven
- Powered by curiosity

💡 Tip: You don't need to be an expert—just bring your ideas and let Copilot help shape them.

Message Copilot

+

🔊 ➤

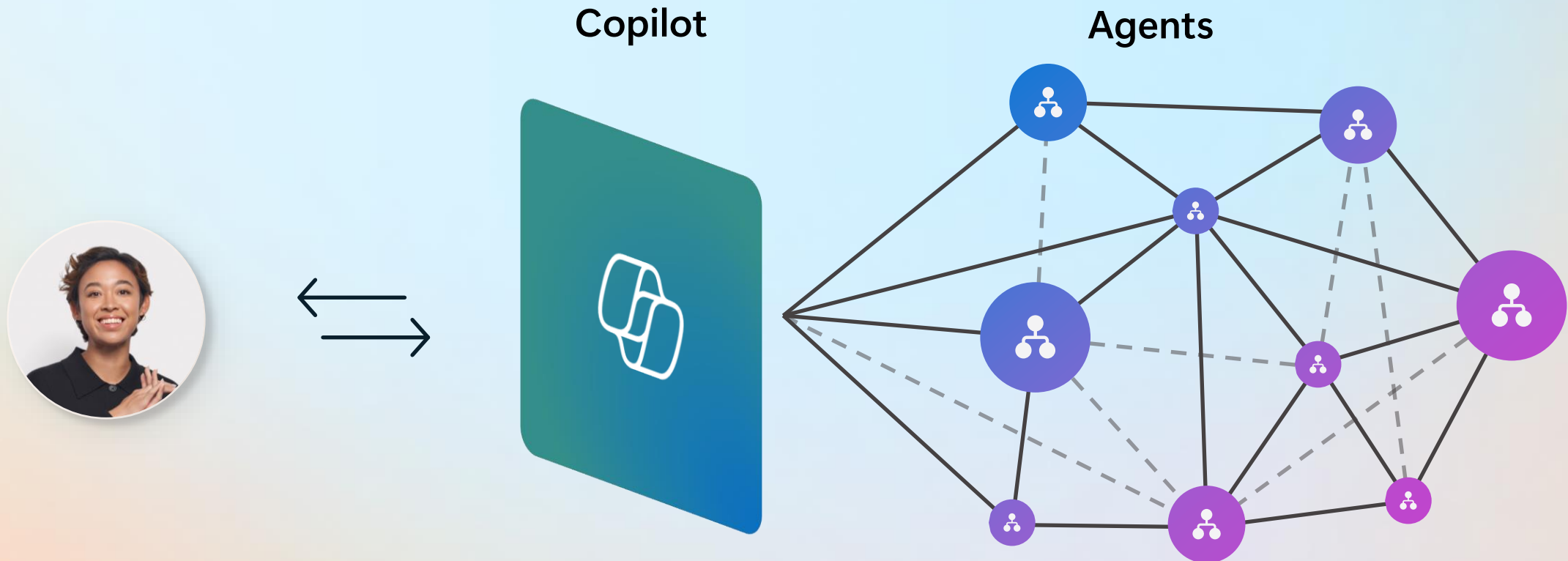
Dewayne Hyatt

...

AI-generated content may be incorrect

Copilot is the UI for AI

Our ambition is to empower every employee with a copilot and transform every business process with agents



Automate tasks and processes with agents

Agents use AI to make Copilot Chat even more personalized and intelligent for your daily work. Agents automate repetitive tasks and processes – think of them like apps for Copilot. Copilot Chat comes with a set of agent templates to get started with, or you can create custom agents for your own needs¹.

Top ways to use custom agents:

Automate contract reviews



Create an agent to identify key clauses, ensure compliance with legal standards, assess potential risk, explain clauses, and summarize lengthy contracts.

Assist new hires with onboarding



Create an agent to greet new team members, assist them with technical issues, answer questions, and provide helpful resources.

Review resumes



Create an agent to analyze resumes stored in a SharePoint library, compare them with job criteria, score candidates, and answer questions about candidates.

Retrieve research materials



Create an agent that connects to a SharePoint link with research documents so you can quickly find relevant information.

Get answers about company policies

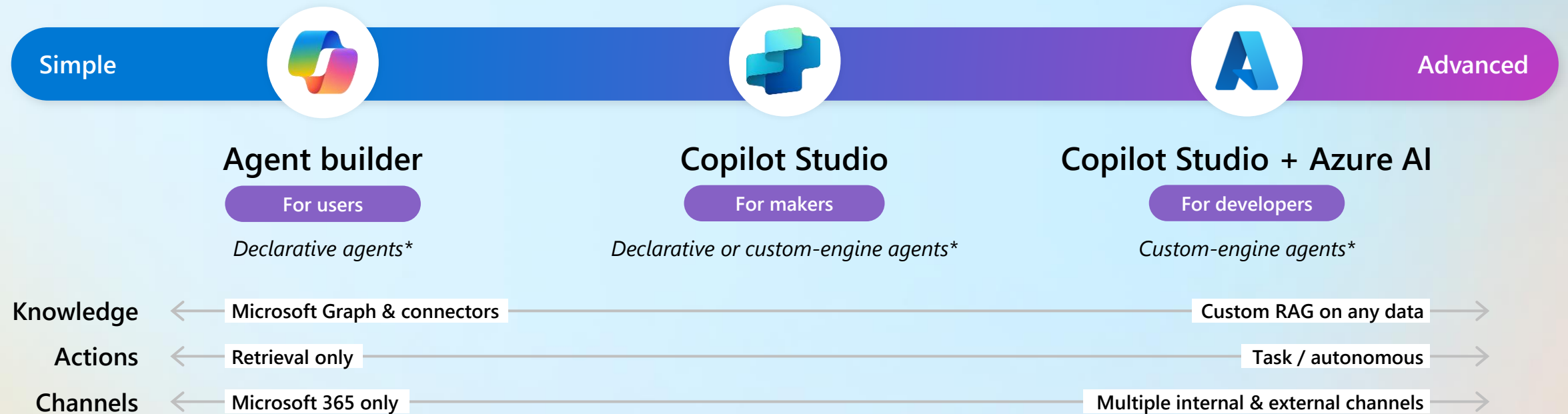


Create an agent to get answers about company policies such as time off, remote work, benefits, workplace conduct, and health and safety.

Besides the agents from Microsoft, your organization may have created agents for you to use as well. You can view these in the “Built for your org” section in the agent library.

¹Agent creation is only available if your organization admin has enabled this capability.

Tools to create agents



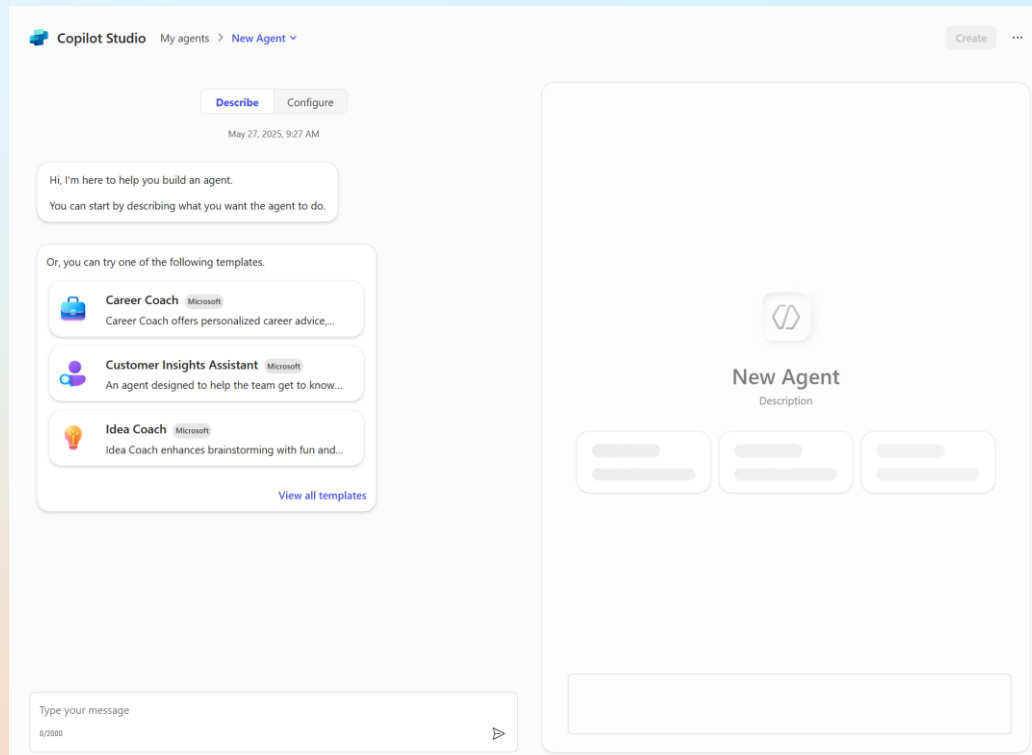
* Declarative = prompts handled by Microsoft 365 Copilot; Custom-engine = prompts handled by custom AI engine (i.e., orchestrator and foundation models)

Create custom agents

Open the agent builder by selecting “Create an agent” from the Copilot Chat side menu¹.

Get started with agent templates by selecting one of the templates, like Prompt Coach or Idea Coach.

Or, create an agent from scratch. Describe what you’d like your agent to do, and select “Configure” to further customize it. Creating an agent allows you to connect Copilot Chat to your organization’s shared data² to further unlock productivity – for example, you can connect the agent to a team SharePoint site and ask the agent questions about team documents.



Top scenarios for custom agents:

- Automate contract reviews
- Manage projects and workstreams
- Analyze large datasets
- Answer product questions
- Retrieve research insights from company databases

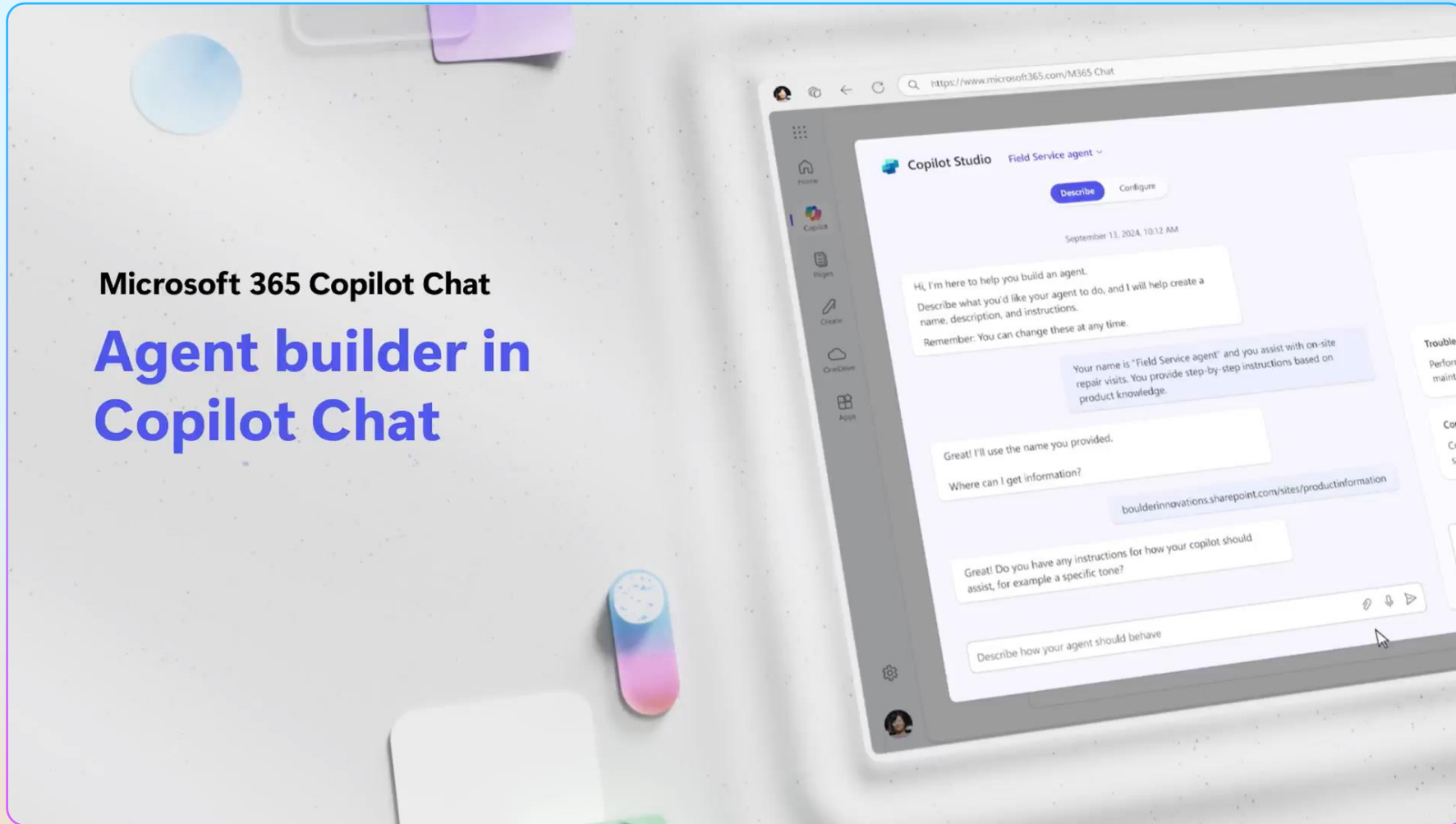
¹Agent creation is only available if your organization admin has enabled this capability.

²Shared data includes SharePoint files and data from your organization’s Microsoft Graph connectors. [Learn more about Microsoft Graph connectors.](#)

Video: Create an agent

Microsoft 365 Copilot Chat

**Agent builder in
Copilot Chat**



Copilot Chat prompt examples

Get the answers you need to move forward

Get hiring tips

How can I evaluate an interview candidate's soft skills?

Summarize a file

Summarize this document in 5 bullet points. <attach file>

Start your research

How have world literacy rates changed in the past 30 years?

Calculate the answer quickly

At \$X per unit, how many units to break even if costs are \$Y

Reach a broader audience

How do you say [thank you for your time] in Japanese?

Discover synonyms

What are some other words for [exciting]?

Understand trends

Share some trends in remote work and hybrid offices

Retrieve buried info

What are the deadlines mentioned in this file? <attach file>?

Boost your knowledge

Help me learn about [topic]. Provide 2 analogies & files to dig in.

Highlight the differences

Compare these two paragraphs grouped by differences in formatting, structure, and content: [paste content]

Monitor your PR

Give me a concise summary of recent news about [company]

Stay on top of tech advances

Summarize the main points of the latest research on AI

Make informed decisions

Create a table that compares top-selling office printers

Make your code better

Optimize and fix this code: [insert code]

Brainstorm and draft content quickly

Co-create with Copilot

Ask me 3 questions to help me draft an email about [OKRs]

Going on holiday?

Write some funny Out of Office email responses.

Make it stand out

Suggest a few email subjects for the following email: [body]

Generate ideas

List ideas for a fun remote team building event

Put info in a table

Organize the world's most valuable companies into a table

Visualize the data

Create an image of a bar chart demonstrating growth

Track changes over time

Create a line chart showing the relationship between...

Start a conversation

Suggest ways to break the ice with my new colleague.

Jump-start a draft

Create an FAQ based on this file <attach file>

Draft an introduction

Write a compelling intro paragraph for this speech <attach file>

Make it better

Improve my writing in: <attach file>

Disagree gracefully

Provide a convincing counterargument to the following: [paste content]

Rally the team

Draft an exciting email ... using <attach files>

Get started on a plan

Draft a business plan based on [idea]



Microsoft 365 Copilot Chat

Congratulations!

We want you to grow your skills in AI. We encourage you to keep exploring Copilot Chat with the resources below:

- Check out the [Copilot Prompt Gallery website](#) for more learning videos and prompt examples.
- Join the [Microsoft 365 Copilot Community on LinkedIn](#) to get more Copilot Chat tips and product updates and engage with other users.
- Keep up with what's new on the [Copilot Blog](#) or the What's New monthly [PowerPoint](#)