



LIVE WEBINAR

Copilot for Microsoft 365: **Real-Life AI Use Cases**



**Welcome, the webinar is
starting soon.....**

Discover how AI-powered tools can enhance your daily tasks, streamline workflows, and open up new integration possibilities tailored to your business needs.

Brought to you by:



About the speaker



Aidan Clifford

Microsoft Business Manager Team Lead, Pax8

Aidan is a seasoned professional with extensive experience in strategic marketing, project management, product development, and campaign optimisation.

Aidan has driven business growth and innovation, enhancing Pax8's market presence and customer engagement.

Getting Started with Copilot for Microsoft 365



Agenda



The Copilot for Microsoft 365 Opportunity



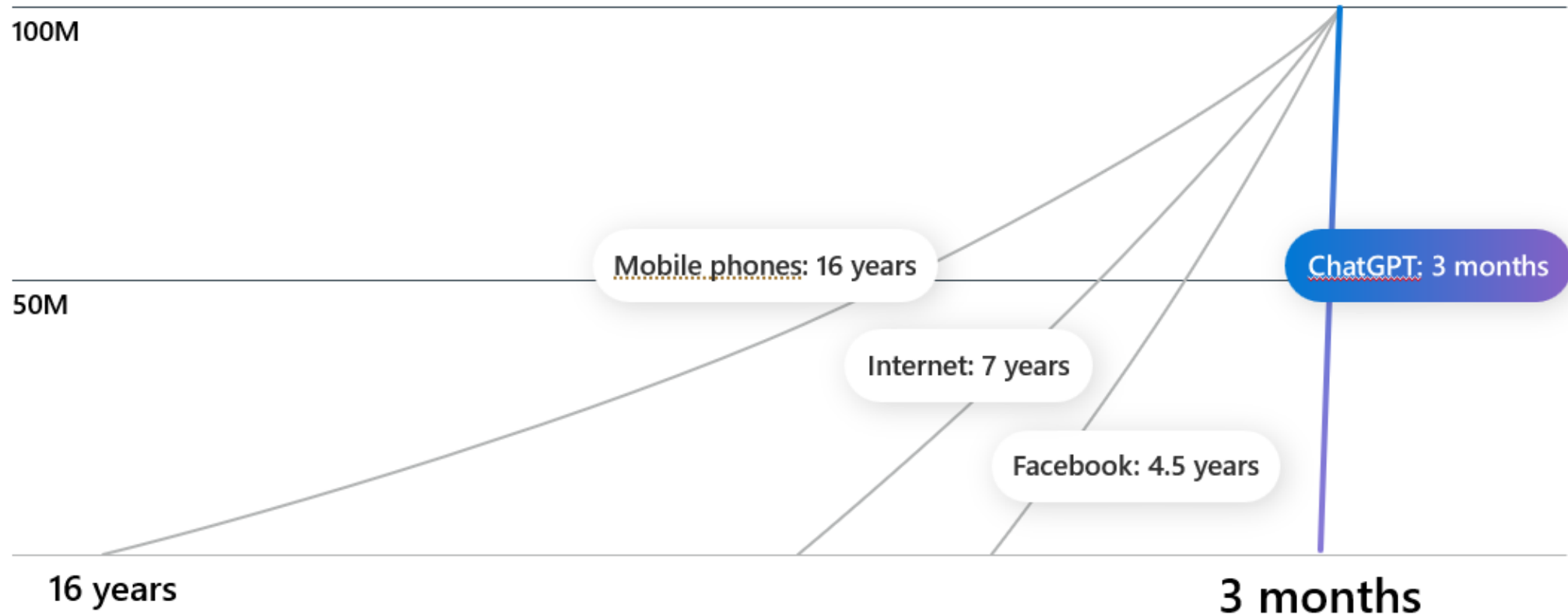
My Experience with Copilot for Microsoft 365 so far



Demo Time – Lets get hands on!



Copilot & Generative AI is here!



And the opportunity is growing

- ChatGPT reached an impressive 100 Million users within months of launch
- 83% of businesses say AI is a top priority...
- Only 23% of business say they have “some kind of” plan for AI adoption





Microsoft 365 Copilot

Natural Language



Large Language
Models



Microsoft Graph
- Your Data -



Microsoft 365
Apps

Works along side you in your Microsoft 365 apps



Understanding the options

Copilot with data
protection

Copilot Pro

Microsoft 365
Copilot

	Free for M365+	Consumer	Work
Foundational Capabilities	✓	✓	✓
Web Grounding	✓	✓	✓
Commercial Data Protection	✓	✓	✓
Copilot in Word, Outlook, Excel, PowerPoint, and OneNote		✓	✓
Copilot in Teams			✓
Microsoft 365 Graph (content & context)			✓
Microsoft 365 Enterprise Security, Compliance & Privacy			✓

Impact By Role Function

Human Resources



Create a more efficient hiring process

Create a job description by asking Copilot in Word to suggest skills, qualifications, and responsibilities.

Conduct a group interview in Microsoft Teams and ask Copilot to summarize the contributions of each candidate.

Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.

Marketing



Create a marketing pitch in record time

Discover trends and outliers in the latest market research with Copilot in Excel to identify which markets to target with promotions.

Draft a targeted promotion plan with suggested taglines using Copilot in Word.

Transform the engineering team's design documentation from a Word doc into a pitch deck in PowerPoint with Copilot.

Sales



Drive better sales presentations with an AI assistant

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.

Give the customer your full attention in a meeting by relying on Copilot to handle the meeting notes.

Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.

IT



Deploy a critical update with the help of Copilot

Create a project plan for the upcoming rollout based on a previous project plan and product documentation.

Meet on Teams to discuss the plan and use Copilot to keep track of unanswered questions.

Create a presentation on the rollout by using Copilot to create slides based on the project plan Word doc.

Finance



Focus on the high-value tasks to complete an acquisition

Summarize the due-diligence information from the operations and legal team.

Use Copilot to add a section to the offer sheet discussing some conditions for the deal based on a previous meeting transcript.

Use Copilot in Excel to refine the deal analysis based on negotiations and changes in the economic environment.

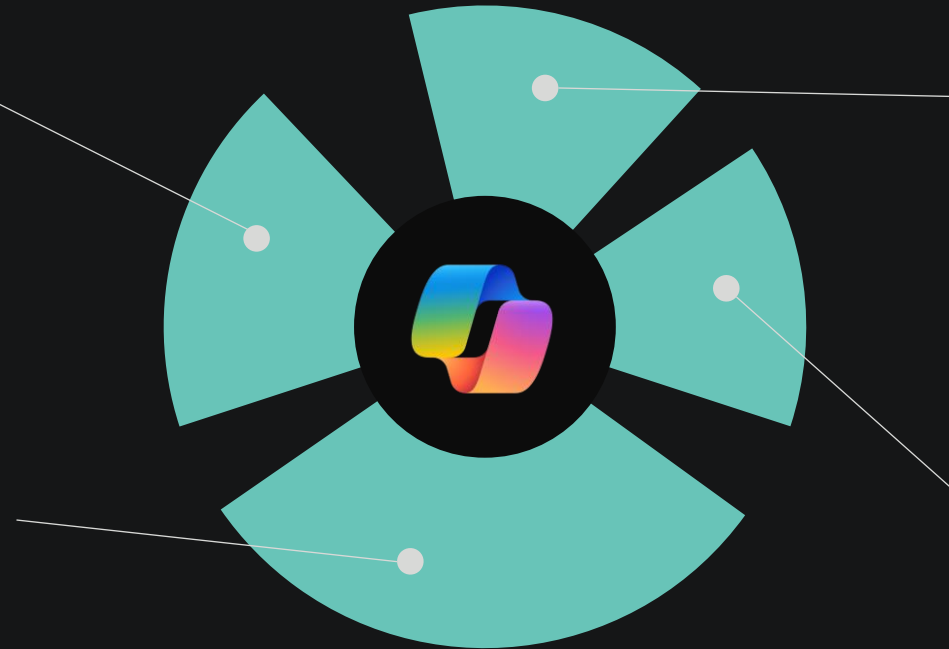
The results are coming in

70%

Copilot users said they were more productive

4x

Copilot users summarized a 35-minute meeting 4x faster than non copilot users



29%

Users were 29% faster in a series of task vs non-Copilot users (searching writing & summarizing)

90 mins

Average time per week sales users saved per week

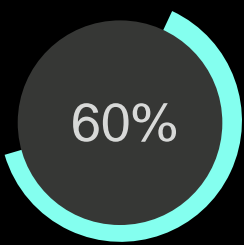
What Can Copilot's Earliest Users Teach Us About Generative AI at Work?
(microsoft.com)

There is a great opportunity!

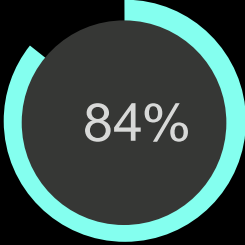


60% of SMBs and 84% of midmarket firms either using or planning to use Generative-AI within the next six months

There is a great opportunity!



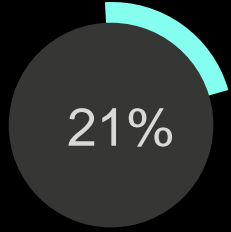
60%



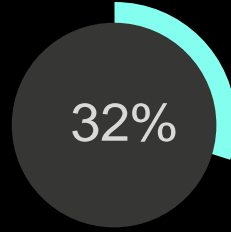
84%

60% of SMBs and 84% of midmarket firms either using or planning to use **Generative-AI** within the next six months

...there are some considerations



21%



32%

Only 21% of organisations using AI have **management policies** in place and only 32% are **working to mitigate its risks** such as inaccurate information



**My experience with
Copilot for Microsoft 365
so far!**

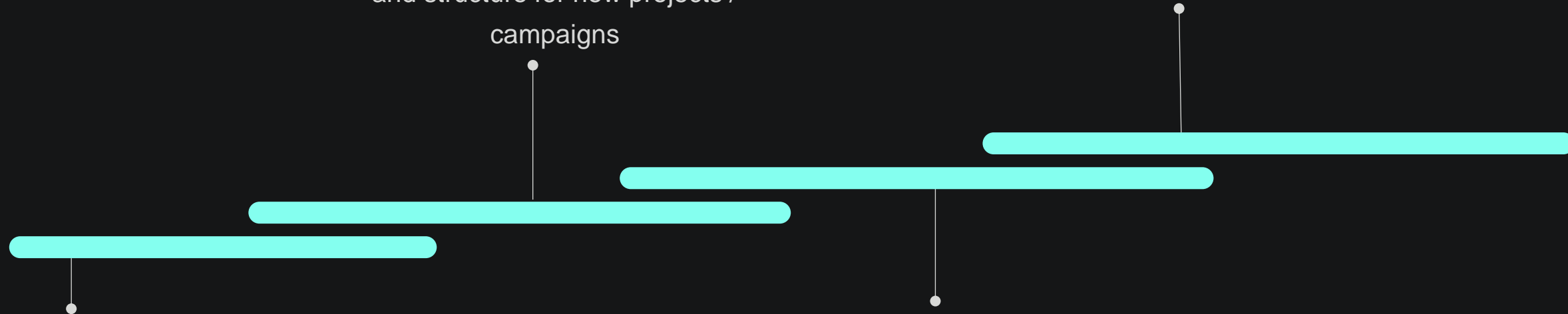
What are my pain points?



Struggling to get started with content and structure for new projects / campaigns



Spend more time formatting the data than analysing it for financial forecasting



Multiple meetings, messages, emails across different timezones.

Timely process to mine through piles of content and to convert into an effective presentation.
Difficult to capture all partner questions



Prompts that have saved me the most time



- Create a one-page brief for the sales team based on this [document].
- Create a 1-page summary of this document, create a table of pros and cons.
- Create an email invitation template based on these dates and themes



- Summarize this meeting, and list any action items
- Recap the last 10 minutes / what [person] was talking about



- Create a one-page executive summary of the chats, emails, and documents about [customer].
- Can you provide a list of documents I've recently collaborated on with [person]
- List any emails or teams messages I haven't replied to from today

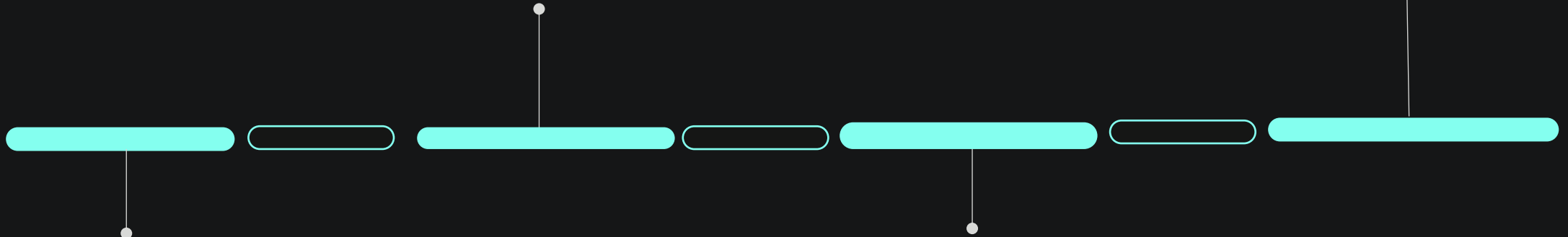
How did Copilot help?



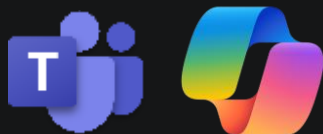
Draft a two-page campaign update based on this [document]. Create a graph visualising the data in this [spreadsheet]



Consistently format the data in [spreadsheet] and draft into a one-page forecasting report [document].



Recap last week's emails, messages and meetings from [person].
What emails haven't I responded to?



Prep: Provide a summary of the key points within [file]. Use this summary to create a 3-slide presentation.
Workshop: Provide summary of all action items, questions from this meeting.





Risks of Implementing Copilot Without Proper Business Readiness

Understanding the Stakes:

Premature Integration:

Launching Copilot without a strategic plan may lead to misalignment with business objectives and workflows.

Operational Disruption:

Sudden changes in processes can cause confusion and reduce productivity among employees.

Security Concerns:

Without proper safeguards, sensitive data may be exposed to vulnerabilities.

Mitigating the Risks:

Comprehensive Assessment:

Conduct a thorough business readiness assessment to ensure alignment with goals and capabilities.

Employee Training:

Invest in training programs to familiarise staff with Copilot's features and best practices.

Data Protection:

Implement robust security measures to protect against data breaches and maintain compliance.



Readiness Assessment for Copilot for Microsoft 365

Kaine Mathrick Tech's Special Proposition:

- **Comprehensive Readiness Assessment:** Tailored for businesses preparing to adopt Copilot for Microsoft 365.
- **Essential Service:** Ensures seamless integration and addresses key areas such as infrastructure compatibility, licensing, and data management.

Deliverables:

- **Detailed Readiness Report:** Analysis of current setup and actionable recommendations.
- **Benefits Overview:** Insights into productivity and efficiency enhancements across departments.
- **Bespoke Readiness Roadmap:** Customised implementation plan with steps and timeline.

A nominal fee for the in-depth assessment by KMT's experienced Microsoft engineers, crucial for a secure and effective Copilot integration.

**Thank you all
for attending
today's
webinar.**

See you in the next webinar!