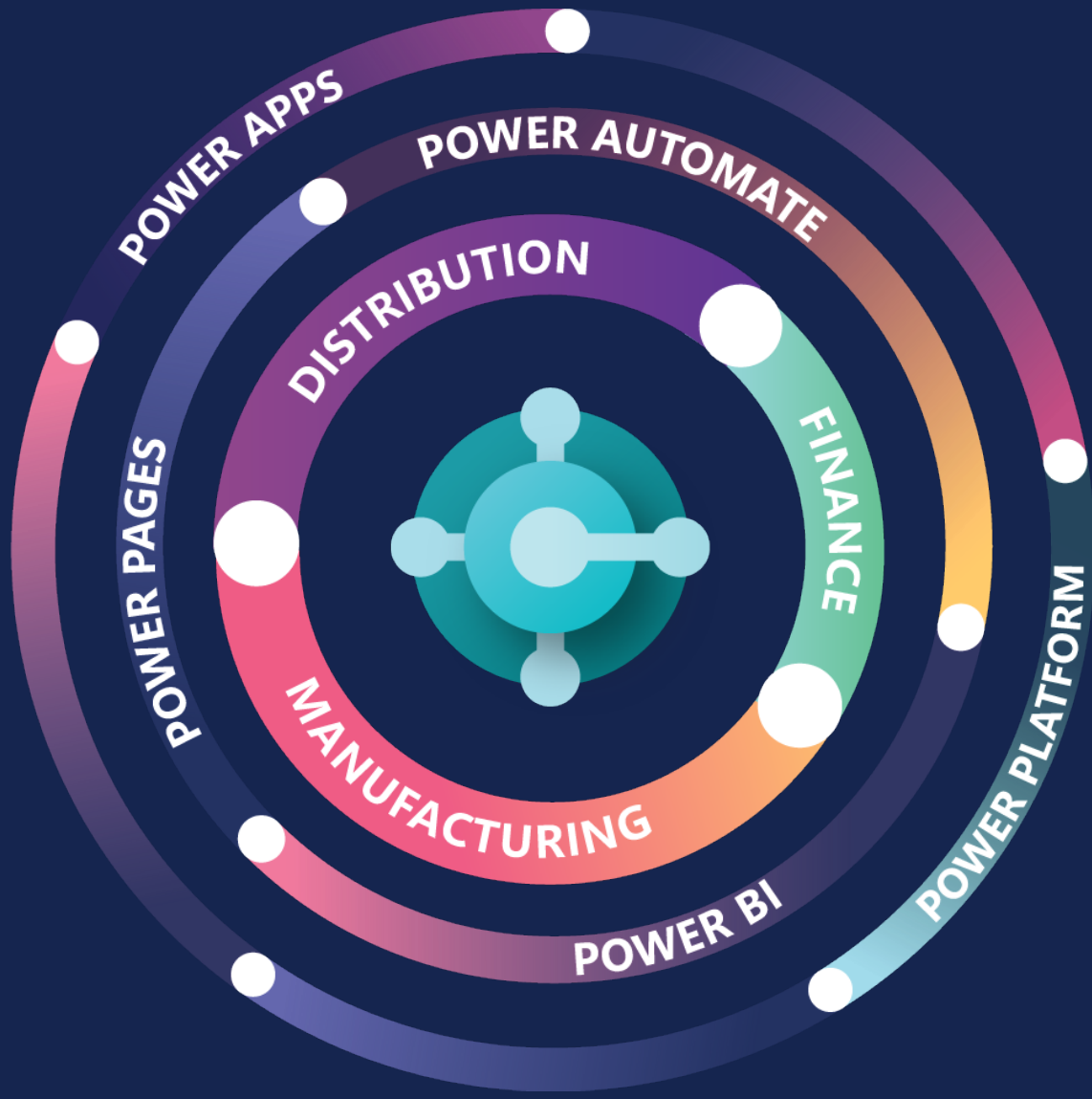
tecman

BUSINESS CENTRAL connect

AI : How every ~~business~~ user can harness the power!



15th & 16th OCTOBER 2024

Can you hear me?

Is everything clear?

~ 45 mins

Q & A

Hi!

I’m Liam

What we'll cover

1. The business need to own the AI strategy
2. CoPilot in everyday use cases
3. Changing patterns of work
4. CoPilot comes alive with your data
5. Resources to help

The Business Needs to own the AI Strategy

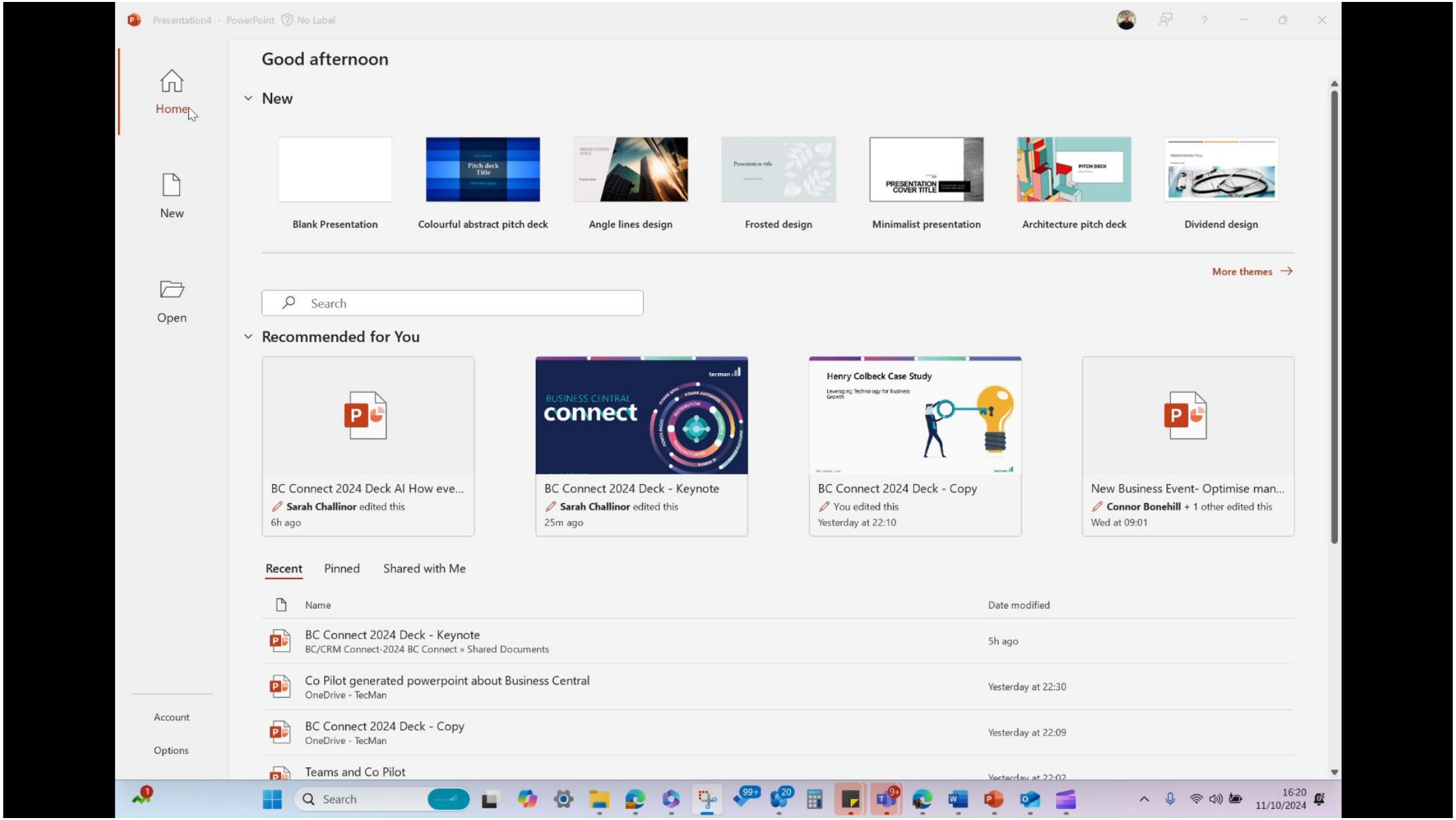
The Business Needs to Own the AI Strategy

Familiar with AI	76%	Very familiar 13% Somewhat familiar 63%
Using AI	52%	20% just experimenting with free tools (Chat GPT etc)
AI chosen by employees	60%	Most organisations not aware AI is being used
Privacy & Data Concerns		Is data safe? Are we compliant to our security policies

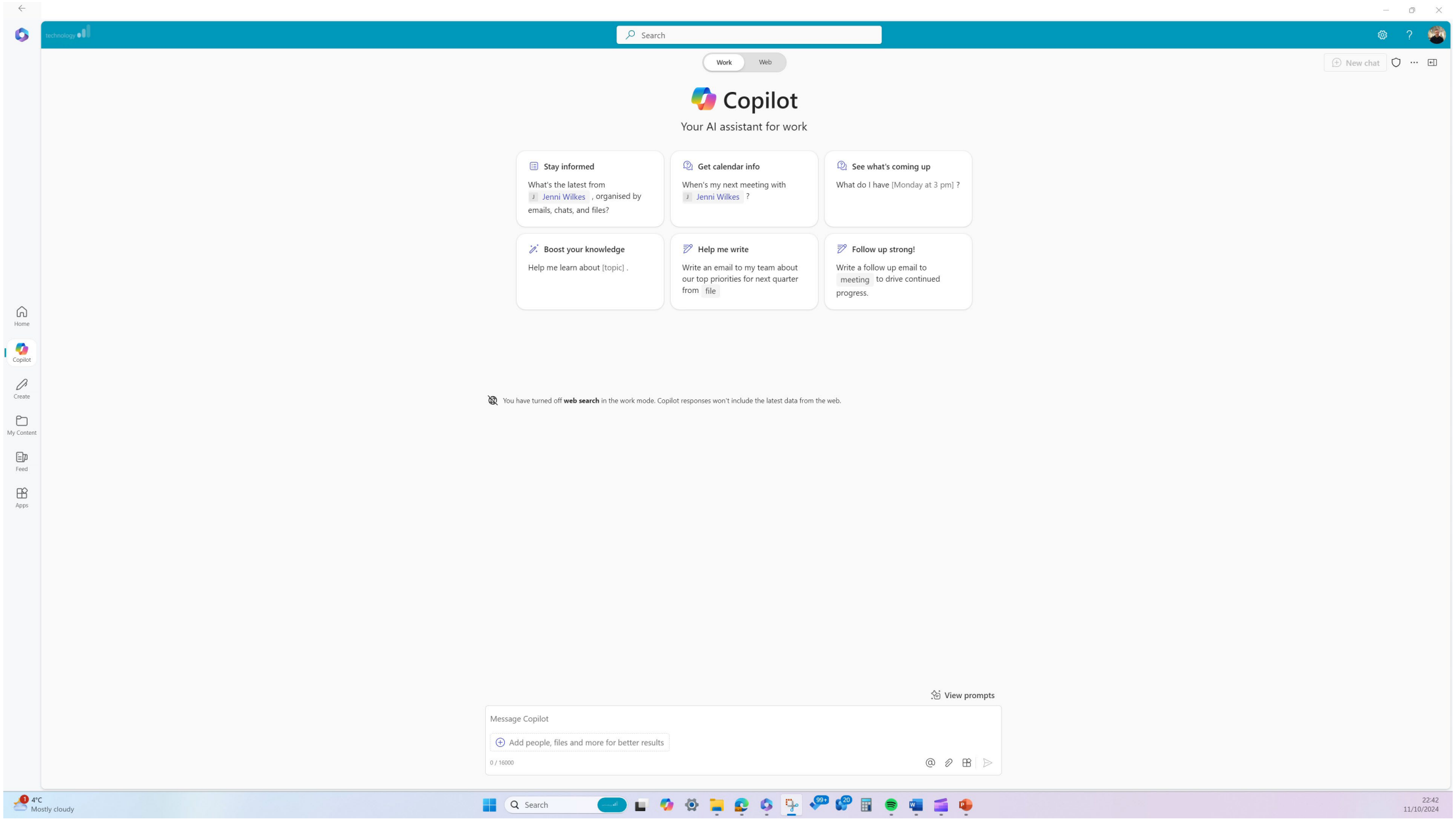
CoPilot The UI For AI

CoPilot as a research Assistant

CoPilot as a Marketing Assistant


Presentation4 - PowerPoint
No Label
Home
New
Open
Account
Options
Good afternoon
New
Blank Presentation
Colourful abstract pitch deck
Angle lines design
Frosted design
Minimalist presentation
Architecture pitch deck
Dividend design
More themes
Search
Recommended for You
BC Connect 2024 Deck AI How eve...
Sarah Challinor edited this
6h ago
BC Connect 2024 Deck - Keynote
Sarah Challinor edited this
25m ago
BC Connect 2024 Deck - Copy
You edited this
Yesterday at 22:10
New Business Event- Optimise man...
Connor Bonehill + 1 other edited this
Wed at 09:01
Recent
Pinned
Shared with Me
Name
Date modified
BC Connect 2024 Deck - Keynote
BC/CRM Connect-2024 BC Connect » Shared Documents
5h ago
Co Pilot generated powerpoint about Business Central
OneDrive - TecMan
Yesterday at 22:30
BC Connect 2024 Deck - Copy
OneDrive - TecMan
Yesterday at 22:09
Teams and Co Pilot
Search
16:20
11/10/2024

Company Meeting
September 24
tecman
Welcome to Team Tecman
Anniversaries
5 YEAR Anniversaries
10 YEAR Anniversaries
Retirement
Click to add notes


technology
Search
Work
Web
New chat
Copilot
Your AI assistant for work
Stay informed
What's the latest from Jenni Wilkes , organised by emails, chats, and files?
Get calendar info
When's my next meeting with Jenni Wilkes ?
See what's coming up
What do I have [Monday at 3 pm] ?
Boost your knowledge
Help me learn about [topic] .
Help me write
Write an email to my team about our top priorities for next quarter from file
Follow up strong!
Write a follow up email to meeting to drive continued progress.
Home
Copilot
Create
My Content
Feed
Apps
You have turned off web search in the work mode. Copilot responses won't include the latest data from the web.
View prompts
Message Copilot
Add people, files and more for better results
0 / 16000
4°C
Mostly cloudy
Search
22:42
11/10/2024

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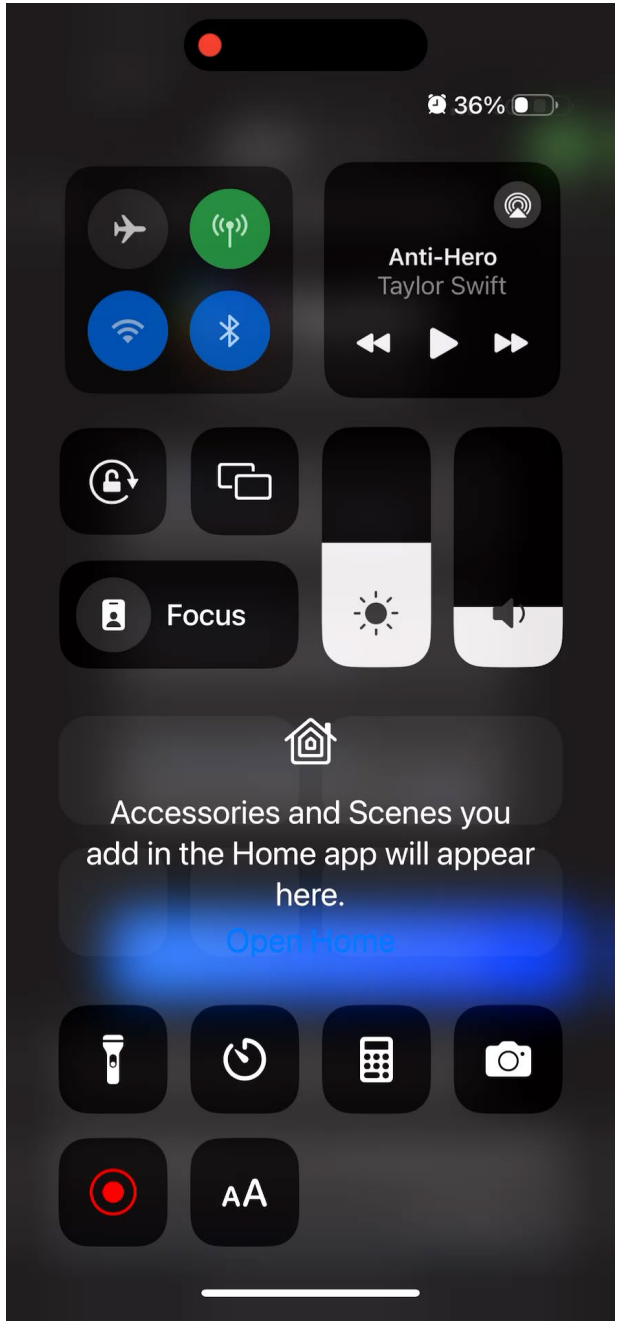
36%
Anti-Hero
Taylor Swift
Focus
Accessories and Scenes you add in the Home app will appear here.
Open Home
AA

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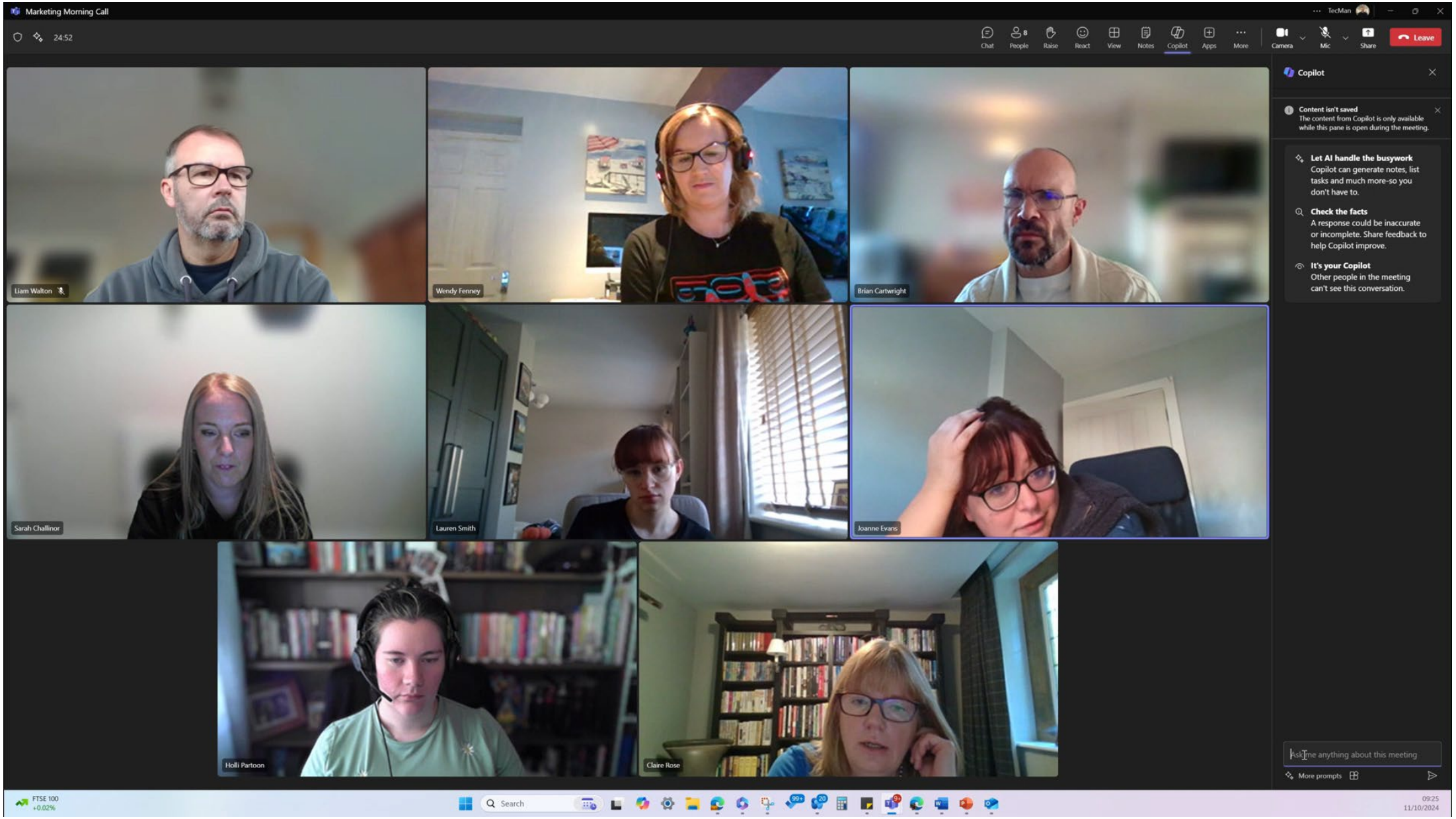
Marketing Morning Call
24:52
Chat
People
Raise
React
View
Notes
Copilot
Apps
More
Camera
Mic
Share
Leave
Liam Walton
Wendy Fenney
Brian Cartwright
Sarah Challinor
Lauren Smith
Joanne Evans
Holli Partoon
Claire Rose
Copilot
Content isn't saved
The content from Copilot is only available while this pane is open during the meeting.
Let AI handle the busywork
Copilot can generate notes, list tasks and much more-so you don't have to.
Check the facts
A response could be inaccurate or incomplete. Share feedback to help Copilot improve.
It's your Copilot
Other people in the meeting can't see this conversation.
Ask me anything about this meeting
More prompts
FTSE 100
+0.02%
Search
09:25
11/10/2024

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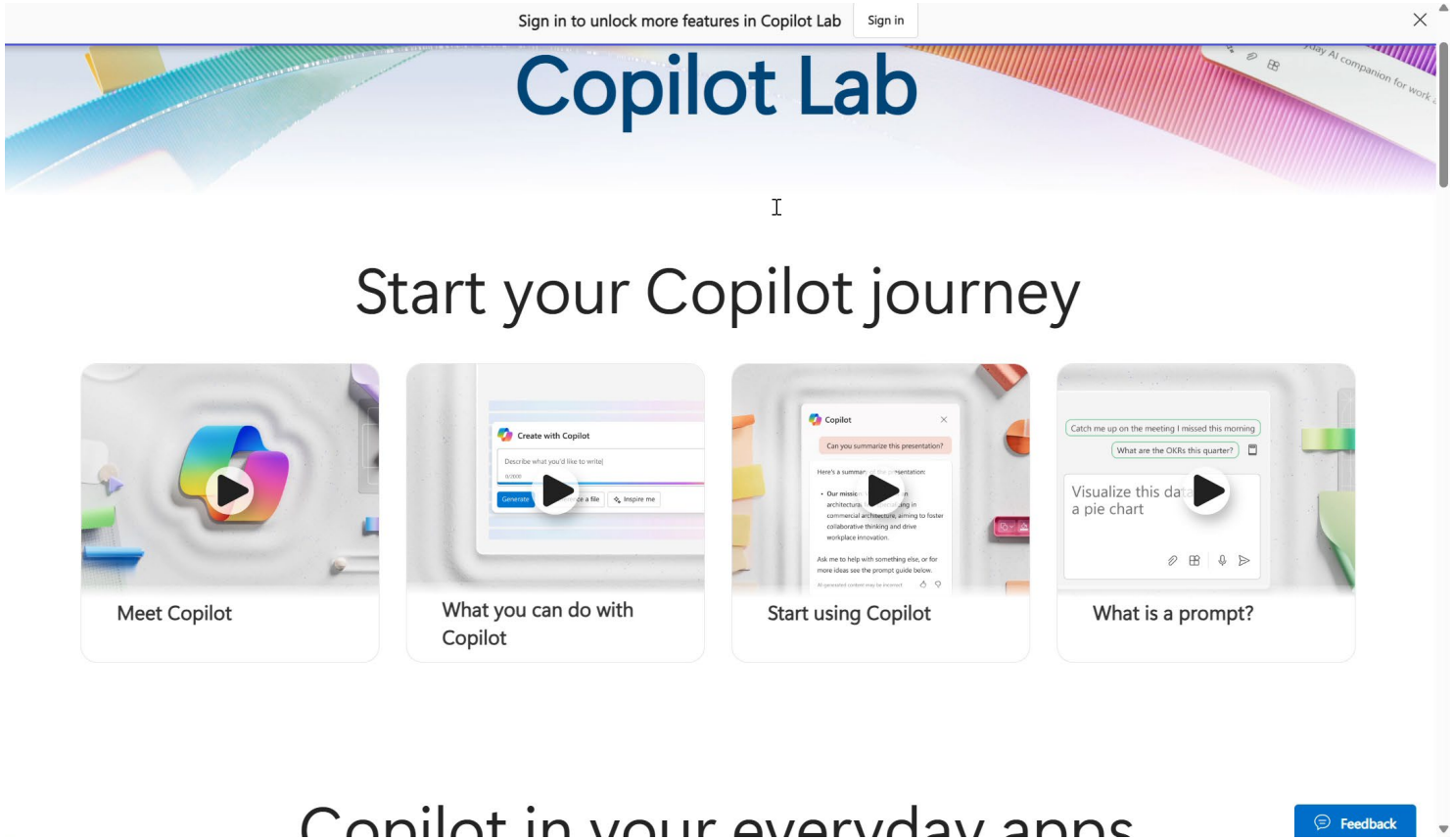
Prompting Power

- Give CoPilot a Blog and ask it to articulate 3 key messages and refine it
- Ask CoPilot to Poke holes in a document or a statement you've prepared
- Ask CoPilot if you wanted to disrupt this argument what would you say.

Resources : Copilot Lab (cloud.microsoft)

SMB Kit : Microsoft 365 Copilot for Small and Medium Business – Microsoft Adoption



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A day in the life of an Account Manager

Available with:
Copilot for Sales (includes Microsoft 365 Copilot)

Scenario level: Extend

Benefits | ~1 hour per week | Areas of investment: Customer engagement | Wellbeing & communication

Cassandra
is a Sales Lead at Contoso

8:00 am

Cassandra needs to prepare for her big pitch to Contoso so she uses Copilot to summarize emails and chats. Microsoft Copilot for Sales provides a summary of the opportunity for more context.

Business Chat[2]
+Copilot for Sales

Example prompt: **Summarize** all the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

Try in Copilot Lab: Prep for that meeting

8:15 am

Cassandra asks Copilot in Outlook to create a message to confirm the meeting. Copilot for Sales includes relevant product and pricing details from her CRM system.

Copilot in Outlook
+Copilot for Sales

Example prompt: **Draft an email** to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 am

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot in Excel to create some amazing charts to showcase the value of the offer.

Copilot in Excel

Action: **Show all data insights.**

Try in Copilot Lab: Find insights

11:00 am

Cassandra puts the final touches on the pitch presentation by having Copilot create a slide based on a summary of the annual report.

Copilot in PowerPoint

Example prompt: **Add a slide** based on [copy in annual report summary].

2:00 pm

It's time for the pitch. Cassandra can focus on her presentation. Copilot for Sales in Teams captures meeting notes, outstanding questions, and sales keywords and KPIs.

Copilot in Teams
+Copilot for Sales

Example prompt: **What questions were asked** during the meeting that have not been answered?

Try in Copilot Lab: Summarize meetings and videos

4:00 pm

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and asks Copilot to summarize the conversation to quickly catch up.

Business Chat[2]

Example prompt: **Summarize team chat** and make sure to include the key points and who made them.

Try in Copilot Lab: Get the gist

[1]Access Copilot at copilot.microsoft.com or the Microsoft Copilot mobile app and set toggle to "Web".
[2]Access Business Chat at copilot.microsoft.com, the Microsoft Copilot mobile app, or the Copilot app in Teams, and set toggle to "Work".
The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.

A day in the life of a HR Manager

Available with:
Copilot for Microsoft 365 (with Copilot Studio plug-ins)

Scenario level:
Customize

Benefits | ~1 hour per week | Areas of investment: Creative solutions | Job satisfaction and output

Omar
leads HR for a regional bank

8:00 am

Omar starts the day at home with an interview for a new bank teller candidate. He uses Copilot[1] to research the candidate's previous companies.

Copilot

What are some good follow up questions to learn more about this person's skills and experience?

9:35 am

At the office, Omar uses Copilot in Teams to summarize some chat threads that occurred overnight and can quickly assess the situation and provide guidance to his team to address the issue.

Copilot in Teams

Summarize this thread and include the key issues and suggestions for resolution along with who had the suggestions.

10:00 am

Omar asks Copilot in Word to summarize the organization's new compliance handbook to ensure it has the key points. He then commands Copilot to fill in the missing sections.

Copilot in Word

Summarize the [Contoso Compliance Handbook] in about four paragraphs for an executive and provide a list of key points.

1:00 pm

Omar prompts Copilot[1] for details about open headcount, using a plugin built in Copilot Studio to pull in HR system data.

Copilot
+Copilot Studio

Add a column that averages the other columns for each month.

2:00 pm

Omar commands Copilot in PowerPoint to add a slide to his presentation that can be used to explain the team's initiatives.

Copilot in PowerPoint

Add a slide about potential HR initiatives.

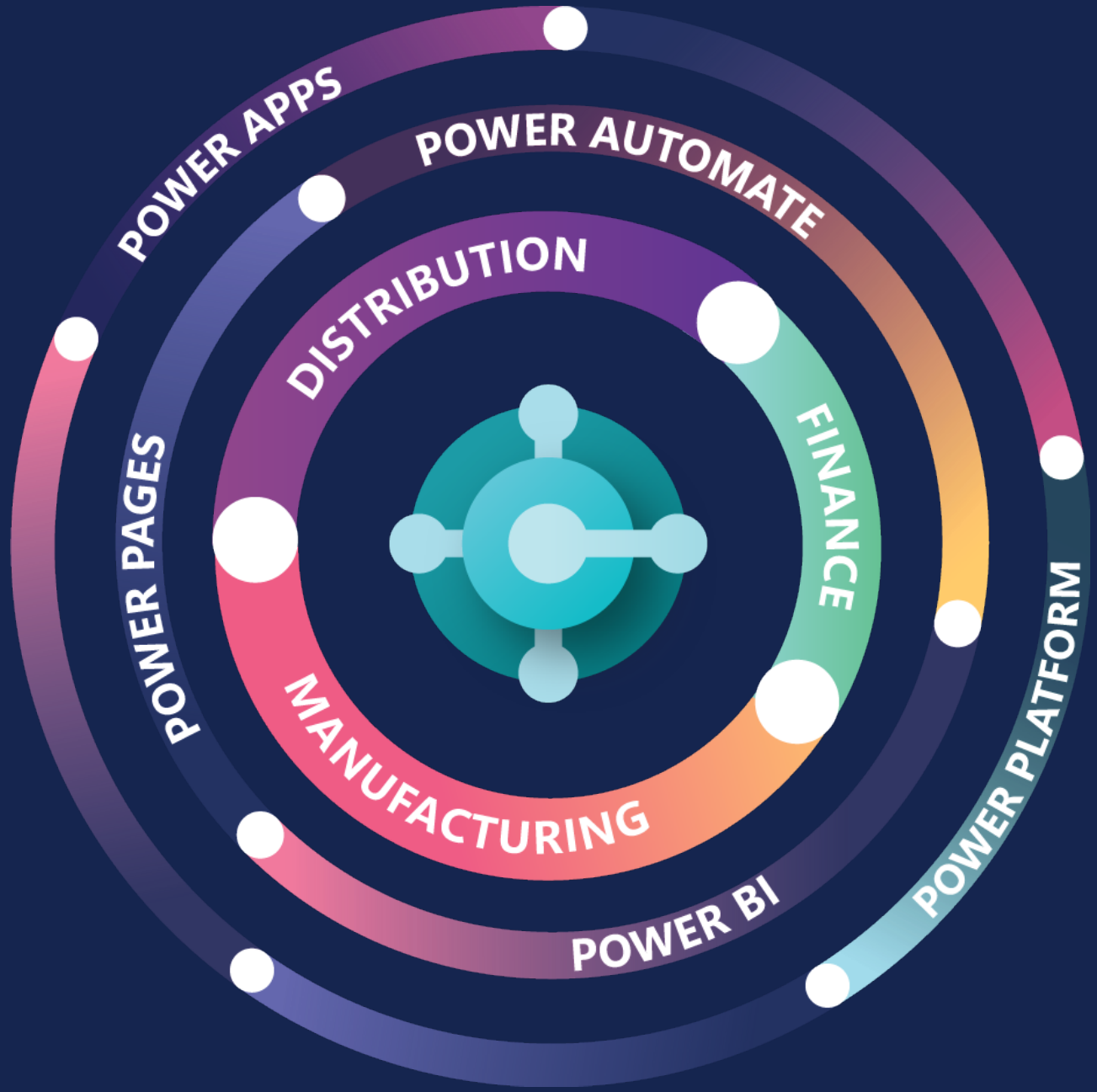
4:00 pm

Omar has missed a few calls and emails. He prompts Copilot[1] to summarize recent email threads and calls, and then uses Copilot in Outlook to draft email responses.

Copilot **Copilot in Outlook**

Summarize this thread.

[1]Access Copilot at Copilot.Microsoft.com or from the Windows taskbar or Edge browser and set toggle to "Web".
[2]Access Copilot at Copilot.Microsoft.com, from the Windows taskbar or Edge browser, or in the Copilot app in Teams, and set toggle to "Work".

Thank you.

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