



Microsoft 365 Copilot

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



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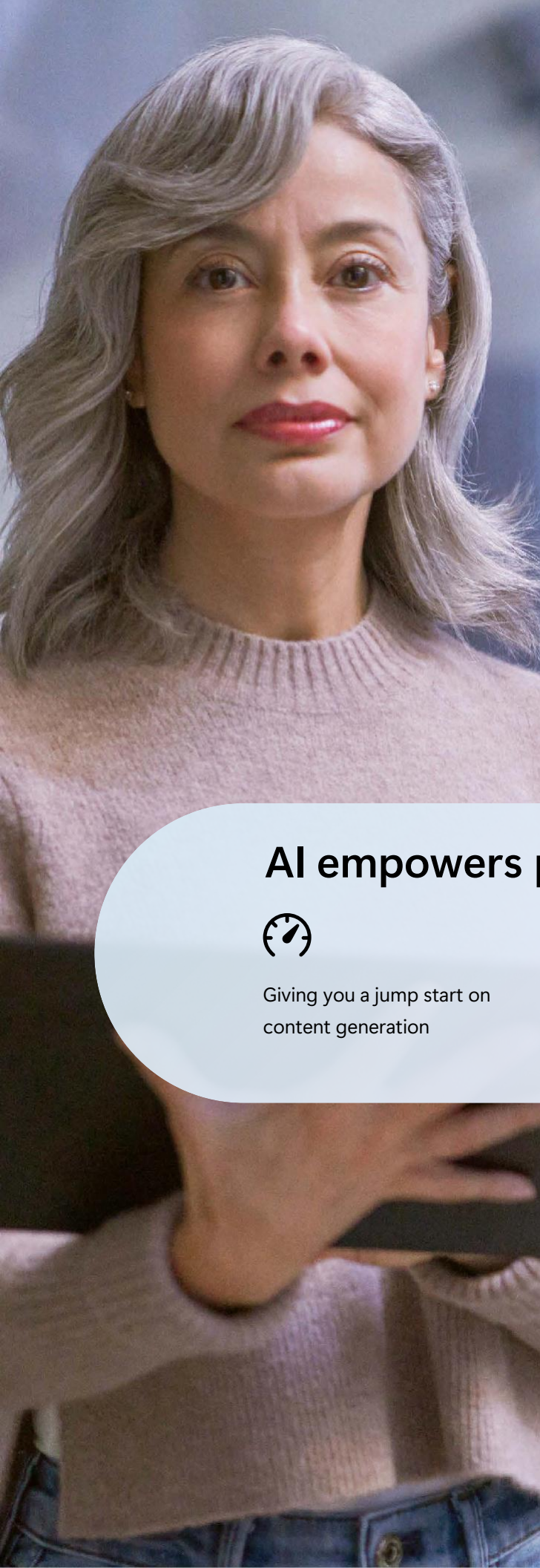
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Transforming productivity with generative AI

Microsoft 365 Copilot is an AI assistant for work that boosts productivity and creativity, helping you unlock more value to grow and run your business. Integrated into the Microsoft 365 apps you use every day, it combines the power of the most advanced AI models with the web and your business data, offering real-time intelligent assistance and improved collaboration for you and your employees. Microsoft 365 Copilot automates business processes so you can focus on gaining new customers and scaling securely while staying in control of your business data.

AI empowers people to achieve more by:



Giving you a jump start on content generation



Boosting 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. Microsoft 365 Copilot helps you and your business stay ahead of the curve while keeping you safe and secure with Microsoft's commitment to [responsible AI](#).

How Microsoft 365 Copilot works

Microsoft 365 Copilot 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 Microsoft 365 Copilot 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.

Microsoft 365 Copilot 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 Microsoft 365 apps like Teams, Outlook, Word, PowerPoint, and more. All of this is also backed by our enterprise data protection that is automatically inherited through your existing Microsoft 365 security, privacy, identity, and compliance policies.

Comparing Microsoft Copilot and Microsoft 365 Copilot

	Microsoft Copilot	Microsoft 365 Copilot
Cost	Free ^a	\$30
Foundational capabilities	GPT-4o	GPT-4o
GPT Large Language Model	●	●
Web grounding^b for results based on public information on the Internet	●	●
Work grounding for results from internal resources through Microsoft Graph		●
Microsoft 365 in-app integration		●
Agents i.e., specialized assistants that enhance Copilot capabilities		●
Copilot Prompt Library for a robust prompt library	●	●
Copilot Dashboard for measurement and adoption metrics	●	●
Enterprise data protection^c	●	●
AI-specific management tools		●

^aRequires Entra account.

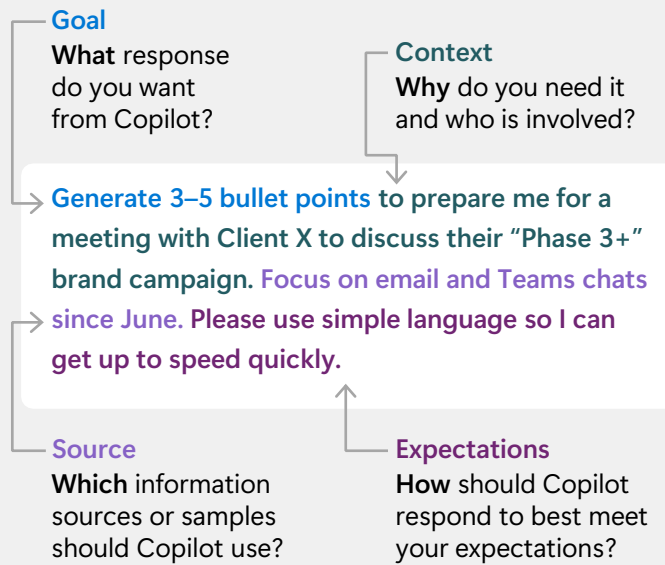
^bCustomers can access Copilot chat experiences in Teams, Outlook, and other Microsoft 365 apps if admin or user has chosen to pin Copilot.

^cEnterprise data protection applies when users are signed into their work and/or school account using their organization's Entra account.

The art of the prompt

Prompts are how you ask Microsoft 365 Copilot 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



Visit aka.ms/promptgallery 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. 64% 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 Microsoft 365 Copilot can help.

Our small and medium-sized business customers who participated in our Early Access Program that launched in September 2023 realized 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 Microsoft 365 Copilot, with 81% reporting increased productivity and 76% reporting improved work quality. Forrester Consulting, on behalf of Microsoft, uncovered additional financial benefits from SMBs using Microsoft 365 Copilot. You can read about those starting on [Page 11](#).



Using Copilot for 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, Microsoft 365 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 Microsoft 365 Copilot.



Copilot Chat

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 Chat. It 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 Chat. 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 for Marketing

Make more impactful connections with customers

Delivering a great customer experience is harder than ever because customers are demanding more. 81% of customers prefer companies that offer a personalized experience²—a key challenge facing marketers today. From developing strategic marketing plans to collaborating with other teams on composing copy, Microsoft 365 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 Microsoft 365 Copilot.



Copilot Chat

Kai asks Microsoft 365 Copilot Chat to brainstorm a list of assets for an upcoming product announcement and to cross-check those asset ideas against existing content. Satisfied with the final list of suggestions, Kai then asks Copilot Chat to recommend ideas for personalizing the assets based on different targeted industries and specific clients in his portfolio.



Copilot in Word

One of Copilot's suggestions was a messaging and positioning framework (MPF). With Copilot in Word, Kai quickly generates a first draft without having to start from scratch, trusting Copilot to help with ideation like he would a trusted colleague.



Copilot in PowerPoint

Copilot also recommended Kai create a one-pager that he can email to clients to announce the new product. He uses Copilot in PowerPoint to quickly generate a single slide based on the MPF and the personalization ideas that Copilot Chat recommended.



Copilot in Outlook

Kai is ready to share the one-pager with select clients and uses Copilot in Outlook to quickly draft an email. Copilot provides guidance for the length, structure, and tone, which Kai can tweak for a more personalized communication.



Using Copilot for Human Resources (HR)

Secure the best talent for your business

Attracting and retaining top talent is a constant challenge for human resources professionals. Microsoft 365 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 Microsoft 365 Copilot to augment the hiring workflow.



Copilot Chat

Before starting the actual hiring process, Malik asks Microsoft 365 Copilot Chat for the latest industry trends and data around competitive job descriptions. He iterates with Copilot Chat to gather pertinent results based on his company's needs and industry.



Copilot in Word

Malik uses Copilot in Word to create a job description based on the Copilot Chat results. The description includes all the required skills, qualifications, and responsibilities for the open position, a financial analyst.



Copilot Agent

Malik leverages a Copilot agent to access his company's HR system and automatically identify potential candidates based on keywords from the job description. Before Copilot agents, this process would have required an API.



Copilot in Loop

Using results from the Copilot agent, Malik selects his final candidates for interviews. 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. He 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 and secure the best talent.



Using Copilot for Customer Service

Identify the root cause for customer issues

Effective customer service directly impacts the bottom line; in fact, 83% of customer agree that great service will turn them from one-time into lifetime shoppers.³ Microsoft 365 Copilot can help customer service representatives assess and summarize customer interactions to quickly identify the root cause for common issues and then socialize those findings with colleagues and across internal documentation. Let's see how Felix, a customer service rep, uses Microsoft 365 Copilot.



Copilot Studio

Recently, Felix has been fielding a lot of customer calls about the same general issue. He knows that if he can identify the issue's root cause, it will save him and his colleagues significant time, boost their CSAT scores, and, most importantly, improve future customer experiences. To start, Felix uses Copilot Studio to [build a custom agent](#) for his org's CRM. The agent prompts Microsoft 365 Copilot to review customer interactions like chat logs, emails, and support tickets to identify recurring issues, patterns, and common themes.



Copilot Chat

Felix then asks Microsoft 365 Copilot to analyze CSAT feedback and specific behavior, words, or phrases that may lead to negative customer responses to better understand the underlying reasons for customer contacts. He formats the responses in [Copilot Pages](#).



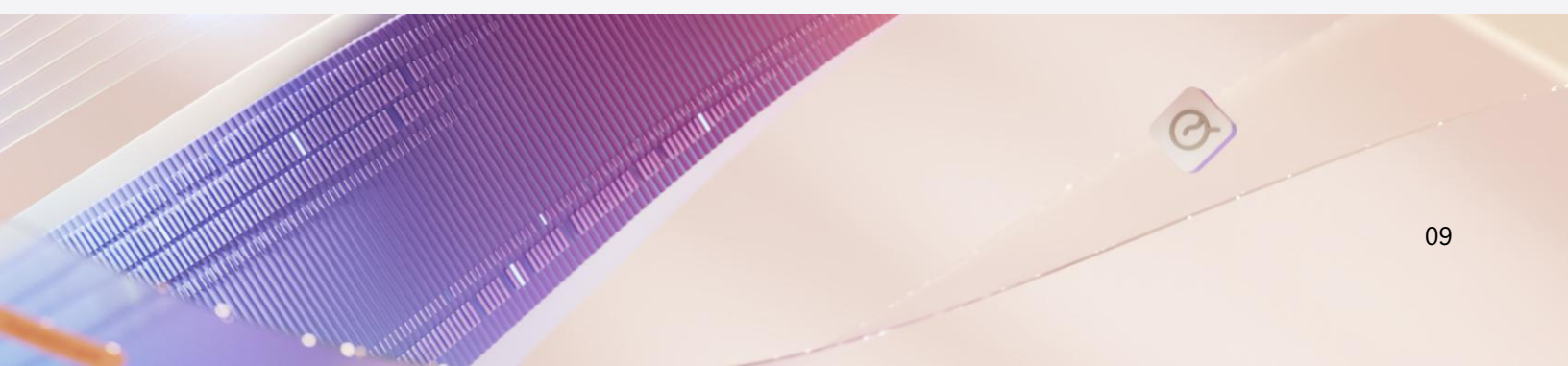
Copilot in Teams

Using Copilot in Teams, Felix presents his findings to leadership and customer service and product teams. Copilot recaps the meeting and drafts recommendations for process and product improvements.



Copilot in Word and Outlook

Based on his Teams discussions, Felix uses Copilot in Word to rapidly update FAQs, scripts, knowledge articles, and best practices documents. He then leverages Copilot in Outlook to rapidly pull information from those documents to draft an email that details the root cause and suggested solution steps.





Using Copilot for Finance

Get to insights faster

76% of CFOs say manual tasks still take up too much of their finance teams' time and effort.⁴ From forecasting to financial reporting to drafting stakeholder communications, Microsoft 365 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 Microsoft 365 Copilot.



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 to easily 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 Microsoft 365 Copilot.

Boost your ROI with supercharged productivity

According to a Microsoft-commissioned Forrester Total Economic™ Impact report, the [return on investment from Microsoft 365 Copilot](#) for small to medium businesses can range from 132% to 353%.⁵ Forrester also found that SMBs can experience up to 6% greater net revenue, 20% less operating costs, and 25% faster onboarding for new hires. Microsoft 365 Copilot helps SMBs achieve these potentially huge financial benefits from faster time to market, increased productivity, and improved employee satisfaction.

Faster time to market. Nearly a quarter of survey respondents expected their time to market for new products to decrease between 16% and 20%. A big reason for this is the time people save from using Microsoft 365 Copilot to create marketing content and sales proposals. Those time-savings, along with streamlining other business processes and automating tasks like data analysis, can enable sales and marketing teams to go to market faster.

Increased productivity. 51% and 59% of businesses using Microsoft 365 Copilot reported up to 20% savings in supply chain and operating costs, respectively. Since SMB employees wear so many hats, every cost reduction equals more productive time for high-priority initiatives.

Improved employee satisfaction. By freeing up employees to take on more fulfilling tasks, SMBs expected, on average, an 18% increase in employee satisfaction and up to 20% reduction in churn.

Projected three-year benefits for the composite SMB organization⁶

up to

353%

projected ROI
(132% low -end ROI)

up to

\$1.2M

projected benefits
(\$629K low -end PV)

\$271K

total implementation
costs

“Upskilling on AI now is absolutely critical to being prepared for its capabilities in a few years. In five years, running a business without Copilot would be like trying to run a company today using typewriters instead of computers.”

Forrester Study: Head Vice President of Technology Services, IT Services and Business Consulting

“With Copilot, we have faster turnarounds... with the ability to turn things around more quickly, clients can come to us with more work. It can be 15% more business.”

Forrester Study: Head Vice President of Technology Services, Managed Technology Solutions

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. Those principles are defined by our systematic approach to responsible AI. We're also committed to building a secure AI experience through our enterprise data protection policies, which keep you in control when using Microsoft 365 Copilot.

Responsible AI

Responsible AI is of paramount importance to Microsoft. Since laws and norms are still catching up the unique risks that AI presents, we've created robust requirements for our product development teams to follow when building out Microsoft 365 Copilot. Those requirements are set in our [Responsible AI Standard](#) release, which dives into development goals for each of our six responsible AI principles.

The global discussion around the ethical development of AI tools is hugely important to our own progress, so please send us your feedback at aka.ms/ResponsibleAIQuestions.

Microsoft embraces the following principles to guide our work around AI

Fairness

Treat everyone fairly

Reliability and safety

Ensure our AI systems operate reliably, safely, and consistently

Privacy and security

Protect users' private information to resist security attacks

Inclusiveness

Prevent barriers with designs that accommodate people with different abilities

Transparency

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

Accountability

Hold AI designers accountable for system operations

Enterprise data protection in Copilot

In addition to our AI principals, Microsoft offers enterprise data protection (EDP) in Microsoft 365 Copilot and Microsoft Copilot when users are signed in with a Microsoft Entra ID account. In fact, the same enterprise terms that apply to Microsoft 365 commercial offerings also apply to Copilot. Ultimately, our EDP commitment ensures:

- **Your data is private:** We won't use your data except as you instruct.
- **We secure your data:** We help protect your data with encryption at rest and in transit, rigorous

physical security controls, and data isolation between tenants.

- **Your access controls and policies apply to Copilot:** Copilot respects your existing settings around things like sensitivity labels, retention policies, and admin controls.
- **You're protected against AI security and copyright risks:** We help safeguard against risks like harmful content and prompt injections, as well as copyright concerns through our [Customer Copyright Commitment](#).
- **Your data isn't used to train foundation models:** This includes all Copilot prompts, responses, and data accessed through Microsoft Graph.



Want to learn more?

[Copilot adoption hub »](#)

to learn more about how to get set up and started with Microsoft 365 Copilot

[Copilot Prompt Gallery »](#)

to learn how you can use Microsoft 365 Copilot

[Copilot SMB Success Kit »](#)

to help streamline and accelerate your time to value with Microsoft 365 Copilot skills

[Copilot Product Videos »](#)

to learn how to perform specific tasks across Microsoft 365 apps using Microsoft 365 Copilot

Citations

1. [New Research Reveals Sales Reps Need a Productivity Overhaul – Spend Less than 30% Of Their Time Actually Selling | Salesforce](#), December 2022
2. [State of Customer Service and CX Study | Forbes](#), April 2024
3. [Is Customer Service Still Important? On A Scale Of 1 To 10, It's An 11 | Forbes](#), July 2022
4. [Survey Finds 76% of CFOs Say Manual Tasks Still Absorb Too Much of Finance Teams' Time and Effort | CFO Dive](#), August 2023
5. [New Technology: The Projected Total Economic Impact™ Of Microsoft 365 Copilot For SMB | Forrester, commissioned by Microsoft](#), October 2024
6. For this study, findings are based on aggregated interviewees' and survey respondents' experiences and expectations, resulting in a single composite organization that is a small to medium-size business with 200 employees and annual revenues of \$35 million.

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