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Microsoft Copilot Playbook

Tips, Tricks, Solutions, and Best Practices

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Why Copilot with Microsoft 365 is better

Native Integrations Exclusively with Microsoft

The integration of Copilot with Microsoft 365 applications is unique. This native integration ensures that data remains within your tenant, which helps maintain security, governance, and compliance with relevant policies. Furthermore, it allows Copilot to grasp the real-time work context across all M365 applications generating high quality outputs.

Features and Benefits		
Copilot + SharePoint & OneDrive	**Built-in AI assistance**	✓ Intelligent file summaries
		✓ Intelligent document library creation and metadata population
		✓ AI-assisted SharePoint site creation and customization with webparts
		✓ AI-powered file comparisons in OneDrive
		✓ Instantly build agents grounded in site content or selected libraries and files
	High quality outputs driven by contextual awareness	✓ Intelligent search that understands user intent powered by the semantic index
		✓ Configure and customize agents in natural language with agent builder
		✓ Agents accessible through SharePoint, Copilot Chat, and Teams chats
		✓ Podcast-style audio overviews of OneDrive files
	Data governance, security and compliance	✓ Data stays within the Microsoft 365 tenant
		✓ Sensitivity labels are fully respected and enforced
		✓ Microsoft 365 inherited compliance policies
		✓ Data residency and tenant control
		✓ IT admins have granular access control, telemetry and usage analytics
		✓ IT admins can track agent adoption, usage and ROI with a centralized dashboard

Features and Capabilities		
Copilot + Outlook	**Built-in AI assistance**	Enables you to act directly in Outlook, with minimal input or prompting to:
		✓ Surface high-priority emails & summarize their importance
		✓ Draft emails & suggest responses
		✓ Summarize attached files
		✓ Schedule meetings directly from emails, by auto-populating meeting invites
		✓ Curate meeting prep materials by summarizing meeting relevant context, tasks, documents and other resources directly in the meeting invite
	High quality outputs driven by contextual awareness	Unified chat experience across Outlook and Copilot apps, enabling users to:
		✓ Schedule meetings directly from chat
		✓ Answer complex questions using insights from your email and calendar
		Grounded in all of your work data across all Microsoft 365 apps
	Data governance, security and compliance	✓ Email and calendar data stays in your Microsoft 365 tenant
		✓ Email and calendar data is subject to your Microsoft 365 compliance controls and audit requirements
		✓ Processed according to Microsoft 365 enterprise data protection (EDP) policies and in accordance with your organization's Microsoft Online Services Data Protection Addendum
		✓ Covered under same compliance commitments as Microsoft 365 – including GDPR, HIPPA, SOC 2, ISO 27001
		✓ Data loss prevention rules and compliance checks are enforceable
		✓ AI prompt and responses in your organization's audit logs

Features and Capabilities		
Copilot + Teams	**Built-in AI assistance**	✓ Understands and connects information across M365 apps
		✓ Summarizes meetings live, answers questions mid call, rewrites messages in chat
		✓ Can take actions like scheduling meetings, summarizing chats, and generating follow ups
		✓ Captures complete meeting content: voice, chat and screen shared content
		✓ Intelligent recap with multiple speaker attribution, action items, and decisions
		✓ Facial and voice recognition for individuals in Microsoft Teams Room
	High quality outputs driven by contextual awareness	✓ Fully embedded in Teams UI across meetings, chats, channels, calls
		✓ Personalized suggested prompts based on user's work pattern and data
		✓ Invoke agents in chat for fast, autonomous, and cross-team scenarios
		✓ Summarizes long threads, rewrites messages with tone/ style adjustments
	Data governance, security and compliance	✓ Data stays within the Microsoft 365 tenant
		✓ Meeting protection: detects sensitive content screenshared and mismatched sensitively labels of content
		✓ Sensitivity labels are fully respected and enforced
		✓ Microsoft 365 inherited compliance policies
		✓ Data residency and data stays within M365 tenant
		✓ IT admins have granular access control, telemetry and usage analytics
		✓ IT admins can track adoption, usage and ROI with a centralized dashboard

ECI | Microsoft 365 Copilot Tips and Tricks

Act as (role):

Marketing, Sales, Project managers, IT administrators, Security professionals, Customer service, Finance, Operations, HR, Educators.

Create as (task):

Create content, Summarizing information, Editing documents, Transforming data, Automating tasks, Generating meeting recaps, Analyzing data, Creating presentations, Managing customers, Automating admin, Insights, Enhance Collaboration.

Show as (format):

Text, Imagery, Video, Instructions, Screenshots, Video tutorials, PDF guides, Interactive web pages, Downloadable templates, Interactive demos, Case studies.

Advanced Prompts:

Research

- Conduct a comparative analysis of the top 3 AI frameworks based on their applications in financial modeling and risk assessment.
- Summarize the findings of the latest research paper on blockchain technology and its implications for financial markets.
- Identify emerging technologies in fintech and their potential impact on investment strategies.
- Evaluate the effectiveness of different machine learning algorithms for predicting stock market trends.
- Provide a detailed report on the economic impacts of regulatory changes in the financial sector.

Efficiency

- Create a workflow automation for processing investment transactions using Microsoft Power Automate.
- Develop a project timeline with milestones and dependencies for a portfolio management system implementation.
- Set up a recurring task schedule for monthly financial reporting using Microsoft Excel.
- Generate a detailed productivity report for the last six months, including key performance indicators for investment analysis.
- Design a template for tracking investment performance and portfolio allocations in Microsoft Excel.

Analytics

- Perform a regression analysis on historical stock data to identify key drivers of price movements.
- Create a predictive model for portfolio performance based on historical data and market indicators.
- Analyze the correlation between marketing spend and investor acquisition rates.
- Generate a heatmap of website user interactions on our investment platform to identify high-traffic areas.
- Develop a sentiment analysis report based on social media mentions of major financial institutions.

Collaboration

- Set up a collaborative platform for cross-functional team projects using Microsoft Teams, focusing on investment research.
- Develop a communication plan for project stakeholders in a new fund launch.
- Create a shared calendar for team availability and project deadlines in Outlook, tailored for investment teams.
- Implement a feedback loop for continuous improvement in team processes using surveys and regular meetings.
- Facilitate a virtual roundtable discussion on emerging investment opportunities and market trends using Teams.

Standard Plugins:

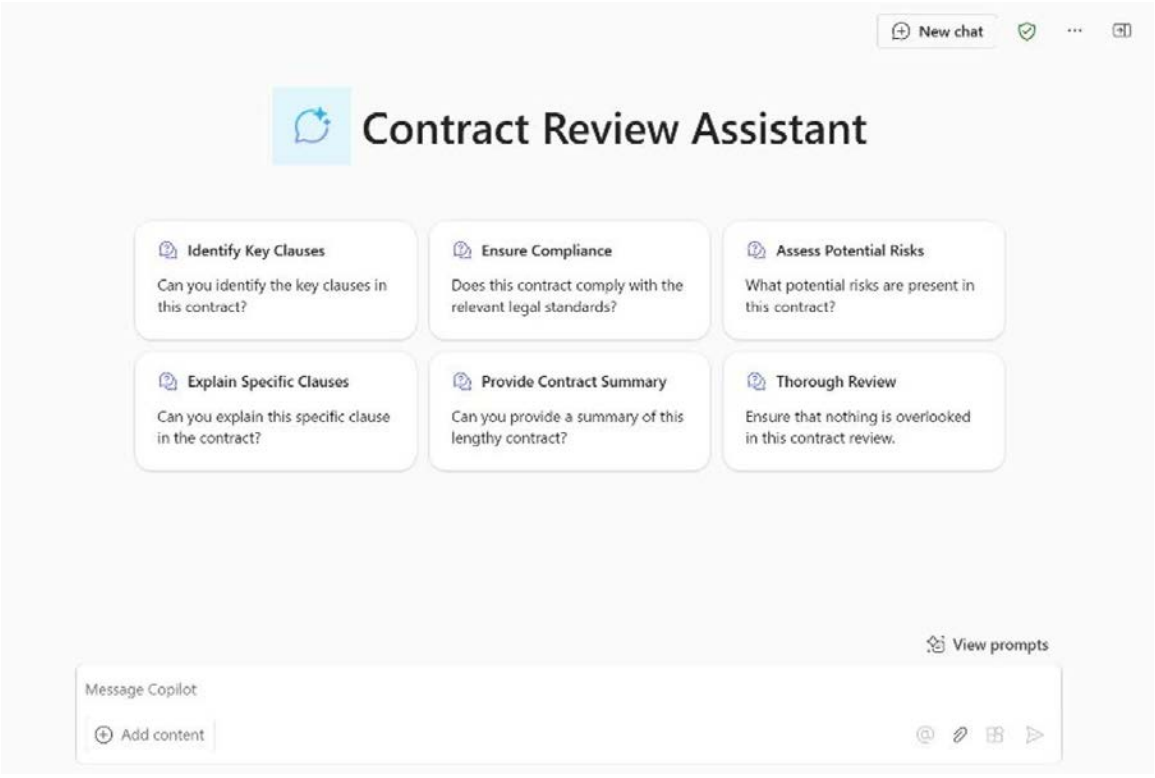
Agents:

SOLUTION OVERVIEW

AUTOMATE TASKS WITH AGENTS IN MICROSOFT 365 COPILOT CHAT

WHAT ARE AGENTS?

Agents are AI-powered tools that extend Microsoft 365 Copilot by handling complex processes and tasks for you. For example, they can help you manage projects or perform compliance checks for your documents. You can create agents easily in Copilot Chat and connect them to your organization's shared data to further unlock productivity.



Screenshot of a contract review assistant agent in Copilot Chat with sample prompts.

CREATE AN AGENT

1. Select “Create an agent” in the side pane of Copilot Chat to open the agent builder.

2. Select an agent template to start from, or create a custom agent by describing what you want to create using natural language.

3. Select “Configure” to further customize your agent. Connect the agent to relevant data sources like a SharePoint site.

4. Select “Create” to publish your agent.

You can edit or share your agents by selecting “Create an agent” to open the agent builder, expanding the drop-down menu at the top, and selecting “View all agents”.

TOP WAYS TO USE CUSTOM AGENTS

- Automate contract and legal reviews
- Manage projects and workstreams
- Audit large datasets
- Answer product questions
- Retrieve research insights from company databases
- Assist new hires with onboarding

START USING YOUR AGENT

@mention an agent in Copilot Chat to interact with it, or open the agent directly by selecting it from the side pane in Copilot Chat.

WANT TO LEARN MORE ABOUT AGENTS AND HOW TO GET STARTED?

CHECK OUT THE SUPPORT ARTICLE.

ABOUT ECI

ECI is the leading provider of managed services, cybersecurity and business transformation for mid-market financial services organizations across the globe. From its unmatched range of services, ECI provides stability, security and improved business performance, freeing clients from technology concerns and enabling them to focus on running their businesses. Learn more at www.eci.com.

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Singapore: +65 6622 2345
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Microsoft 365 Copilot: Prompting Do's and Don'ts

Get the most out of Copilot and avoid common pitfalls by learning what to do and what not to do when writing prompts.

Do's

Be clear and specific.
Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.

Keep it conversational.
Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.

Give examples.
Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.

Ask for feedback.
Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.

Write legibly.
Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses.

Check for accuracy.
Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.

Provide details.
Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

Be polite.
Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

Don'ts

Be vague.
When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.

Request inappropriate or unethical content.
Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.

Use slang, jargon, or informal language.
This may cause Copilot to give low-quality, inappropriate or unprofessional responses.

Give conflicting instructions.
Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.

Interrupt or change topics abruptly.
This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

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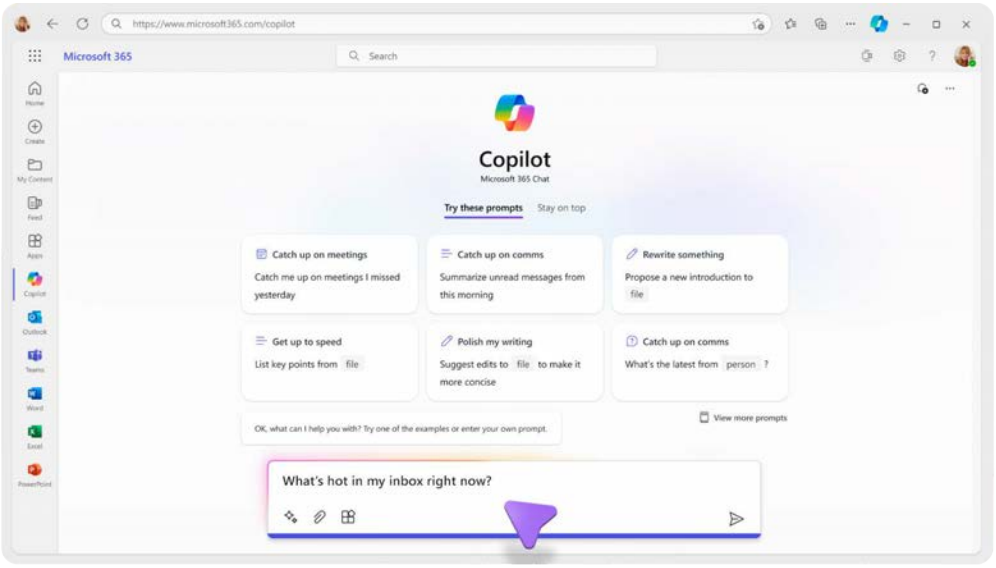
SOLUTION OVERVIEW

GET STARTED WITH MICROSOFT 365 COPILOT

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 apps millions 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 to you and your employees.

HOW TO ACCESS MICROSOFT 365 COPILOT



Business Chat can be accessed in the Microsoft 365 app and at microsoft365.com/copilot.

Copilot in the Microsoft 365 apps can be accessed by clicking on the Copilot icon in the Home tab of each app.

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HOW COPILOT CAN HELP YOU IN MICROSOFT 365 APPS

Business Chat

Quickly Catch Up on Projects

"Summarize emails where I was mentioned."

Get quick insights from a sea of content no matter where the information is

"Teach me about [Concept] in a way a non-technical person could understand."

Create content by getting data from multiple sources

"Draft a personal email I can send to people in [Role] to call their attention to [Product's] launch."

Prepare for meetings

"Create a storyboard for a 60-minute keynote where I need to engage a room full of [Audience] about [Topic]; use [File] and [File] as background."

Copilot in Teams

Catch up on missed meetings in a pinch

"What were the key points discussed?"

"Draft a summary from last week's spotlight meeting and include top customer pitch tips."

Host team brainstorm sessions

"Start a targeted promotion plan based on our meeting notes."

Copilot in Word

Draft job descriptions from scratch

"Generate a job description for a [Role]. Include bullet points from the [Role] core responsibility list."

Discover and summarize a detailed process document

"Review this document [File] and summarize all references into bullet points."

Copilot in Outlook

Draft personalized emails

"Draft an offer letter to [Name] with a start date of [Date]. Include our benefits information and use a professional tone."

Discover new sales leads

"Highlight emails from new senders."

"Invite [Client] to a meeting to discuss our core offerings. Include three time options."

Copilot in PowerPoint

Update template slides

"Update the pitch template slide using the recap from last week's Teams meeting. Include the client's logo on the slide."

Create new slides with existing content

"Summarize the client's profile, promotion plans, and taglines and separate into three new slides."

PROMPT GUIDANCE

Copilot can help you generate content ideas, gain insights, assist with storytelling, translate languages, solve technical problems, and more—all based on your prompt. Copilot Lab is a helpful resource for finding guidance on using prompts and tips and tricks for building your Copilot skills.

Visit Copilot Lab at **aka.ms/CopilotLab**

Business owner/operator

With Copilot in Outlook, business owners start their days catching up on emails, summarizing them, and quickly crafting personalized responses. With Copilot in Word, they can draft project plans while reviewing and crafting compelling visualizations for budgets and project resources in Copilot in Excel. They can also recap meetings using Copilot in Teams to assign and track follow-up tasks for different team members.

Marketing manager

Copilot in Teams helps marketing managers organize meeting notes of their brainstorm sessions on launching a new market. Copilot in Word drafts a targeted promotion plan based on Copilot-generated Teams meeting notes. Copilot in PowerPoint creates customer profiles and the promotion plan. Copilot in Word helps draft the email and create illustrations. Copilot in Outlook composes the email and attaches the campaign brief.

Customer support representative

Using Copilot in Outlook, support representatives can generate empathetic and professional email responses to customer queries, while Microsoft 365 Copilot can help by finding previous queries and summarizing the most important information in their emails.

Sales representative

Using Copilot in Outlook, a salesperson finds new leads by surfacing emails from new senders and writes with persuasive language about company offerings. With Copilot, they can reach more potential customer in less time. They can use Outlook data from previous customer emails to then draft a sales presentation faster with Copilot in PowerPoint. Lastly, Copilot in Teams will generate meeting notes for the presentation.

Financial analyst

To analyze a spike in sales, a financial analyst opens Copilot in Excel to analyze past performance of the product and create graphs from the data. Copilot in Loop includes the graphs and data in a shared link through Loop, Outlook, and Teams, while Copilot in Teams facilitates team collaboration and decision-making. Copilot in Outlook finds customer account details like balance statements and invoices and summarizes the data for a financial analyst.

IT manager

Using Copilot in Loop, IT managers who make system changes that impact customer can share tasks with teammates. Using Copilot in Word, they prompt Copilot to summarize customer references in bullet points. And Copilot in Teams summarizes the top points to turn them into a one-pager. Copilot in Outlook drafts an email to share the one-pagers.

Helpful resources

- Copilot Success Kit for Small and Medium Business
- Microsoft 365 Copilot for Small and Medium Business Adoption Page
- Microsoft 365 Copilot for Small and Medium Business Adoption Community
- Microsoft 365 Copilot documentation

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Copilot for Microsoft 365

The art and science of prompting

Prompts are how you ask Copilot for Microsoft 365 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.

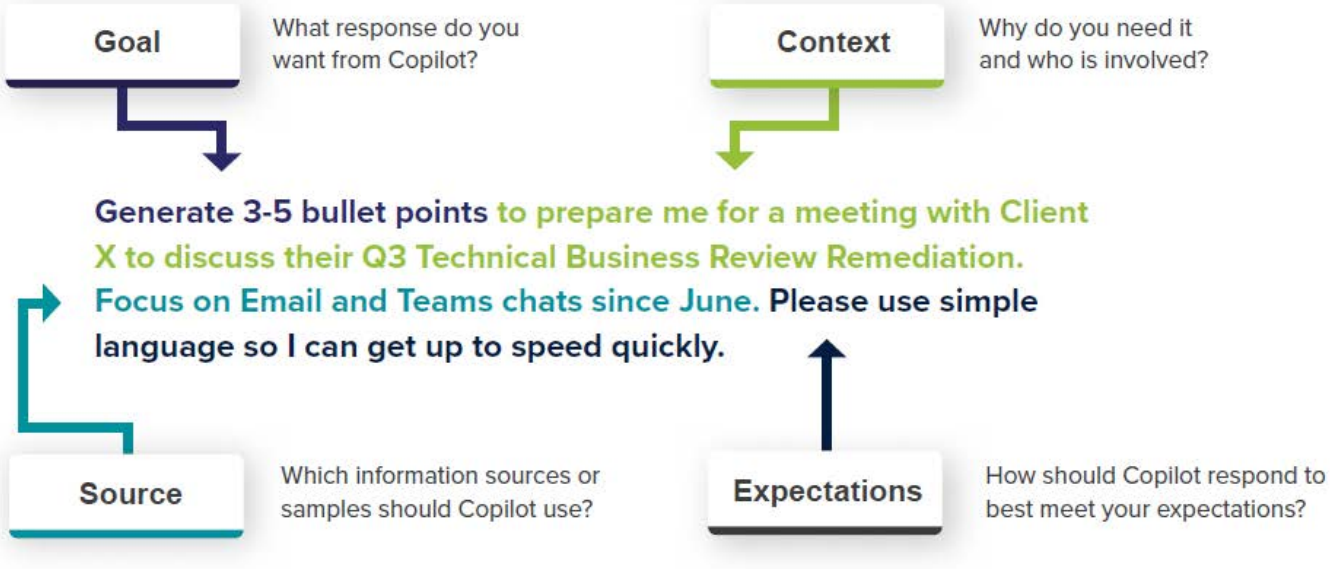
1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- **Learn about projects and concepts:**
  "What is [Project X] and who are the key stakeholders working on it?"
- **Summarize information:**
  "Write a session abstract of this [presentation]."
- **Edit text:**
  "Check this product launch rationale for inconsistencies."
- **Transform documents:**
  "Transform this FAQ doc into a 10-slide onboarding guide."

2. Include the right prompt ingredients

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



3. Keep the conversation going

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

- **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-bystep guidance .

4. Helpful hints to keep in mind

Knowing Copilot's limitations:
Copilot is limited to your current conversation, so give lots of details.

Be professional:
Using polite language improves Copilot's response.

Communicate clearly:
Pay attention to punctuation, grammar, and capitalization.

Use quotation marks:
This helps Copilot know what to write, modify, or replace for you.

Start fresh:
Avoid interrupting and type "new topic" when switching tasks.

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SOLUTION OVERVIEW

TOP 10 TO TRY FIRST WITH MICROSOFT 365 COPILOT

FOUNDATIONAL SKILLS FOR NEW USERS

RECAP A MEETING

Let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

"Draft an email with notes and action items from [meeting]."

SUMMARIZE AN EMAIL THREAD

Get quickly caught up to a long, complex email thread.

Click on the summarize icon

DRAFT EMAIL

Personalize the tone and length.

"Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone."

SUMMARIZE A DOCUMENT

Get right down to business by summarizing long documents and focusing on the relevant sections.

"Give me a bulleted list of key points from [file]."

TELL ME ABOUT A TOPIC/PROJECT

Provide insights and analysis from across multiple sources to get up to speed quickly.

"Tell me what's new about [topic] organized by emails, chats, and files."

GIVE ME SOME IDEAS FOR...

Boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

"Suggest 10 compelling taglines based on [file]."

HELP ME WRITE...

Jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

"Generate three ways to say [x]."

WHAT DID THEY SAY...

When you vaguely remember someone mentioning a topic, have Copilot do the research.

"What did [person] say about [topic]?"

HOW DO I...

Let Copilot help you build or fix formulas in Excel.

"How do I sum values that are greater than 0?"

TRANSLATE A MESSAGE...

With business becoming increasingly international, it's important to be able to read or write messages in other languages.

"Translate the following text into French..."

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How to structure your SharePoint data to be efficient and effective with Microsoft 365 Copilot:

1 Information Architecture (IA) Design

Start with a solid IA to ensure content is logically organized:

- **Sites & Subsites:** Use communication sites for broad sharing and team sites for collaboration.
- **Document Libraries:** Create separate libraries for distinct content types (e.g., Policies, Projects, Reports).
- **Folders vs. Metadata:** Prefer metadata tagging over deep folder structures for better filtering and automation.

2 Metadata & Content Types

Copilot thrives on context. Use:

- **Custom Columns:** Add metadata like project name, department, status, etc.
- **Managed Metadata:** Use term sets for consistent tagging across sites.
- **Content Types:** Define templates for different document types (e.g., Contracts, Invoices) with associated metadata.

3 Permissions & Governance

Ensure data is accessible but secure:

- **Least Privilege Access:** Avoid broad permissions; use groups.
- **Sensitivity Labels:** Integrate with Microsoft Purview for data classification.
- **Versioning & Retention:** Enable version history and retention policies for compliance.

4 Copilot Optimization

To make the most **of native Copilot in SharePoint:**

- **Use Microsoft Syntex:** For AI-powered content understanding and tagging.
- **Enrich Microsoft Search:** Add bookmarks, acronyms, and Q&A to improve Copilot's ability to retrieve relevant answers.
- **Organize with Lists:** Use SharePoint Lists for structured data Copilot can easily query.

5 Custom Copilot Agents

For building custom agents (e.g., via Power Platform or Azure OpenAI):

- **Use Microsoft Graph API:** To access SharePoint data programmatically.
- **Power Automate:** Trigger flows based on metadata or user actions.
- **Dataverse Integration:** For more complex data models and relationships.

6 Search & Discoverability

Copilot relies on Microsoft Search:

- **Optimize Titles & Metadata:** Use clear, descriptive names.
- **Use Search Verticals:** Customize search experiences for different content types.
- **Indexing Rules:** Ensure important content is indexed and searchable.