The Master Series

Your AI Journey Starts Here: From Fundamentals to Innovation

Presented by:

Cory Williams
Principal Solution Engineer
Microsoft, Manufacturing and Mobility

Agenda

- What to expect
- Team introductions
- M365 Copilot Fundamentals - Microsoft 365 App
- Out of the box Copilot Agents
- Building a Tariff Analyst with Copilot Studio Lite
- Q&A
- Closing

How to Engage

- Use the Q&A to submit questions when prompted
- Experts will answer your questions verbally

Etiquette

- This session will be recorded
- Help our moderators; don’t spam the chat
- Adhere to the Microsoft Code of Conduct

Want to go deeper?

- Fill this form out to setup a session with our specialist team: https://forms.office.com/r/G8HEfBzx49
- Someone will be in touch to schedule a session

Meet Our Speaker

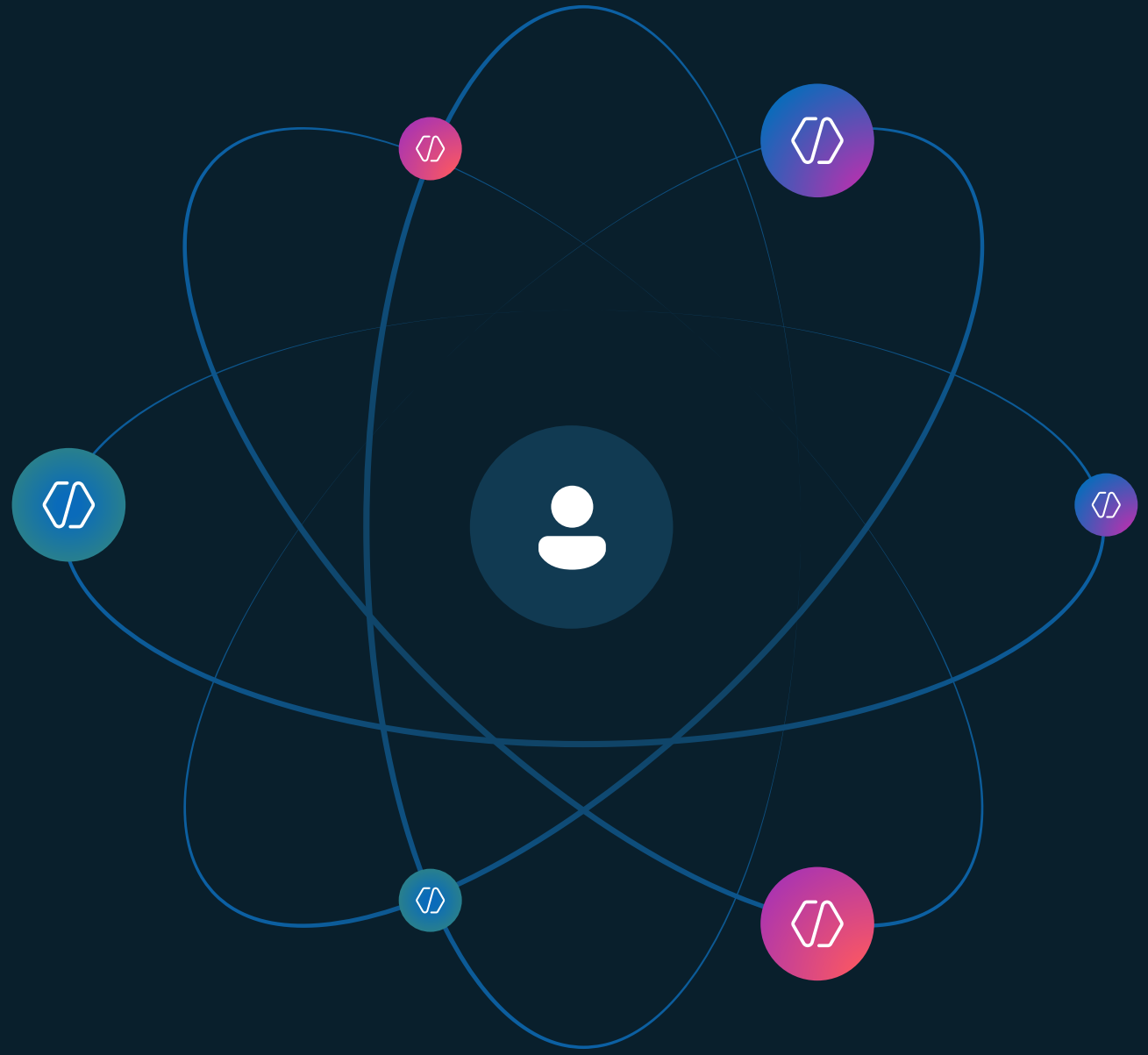
Cory Williams

Copilot Solution Engineer

Cory is a Principal Copilot Solution Engineer at Microsoft, specializing in Microsoft 365 Copilot and Copilot Studio to help enterprises adopt secure, scalable AI solutions. He brings over 15 years of experience in modern work technologies, technical strategy, and customer success, with a strong focus on improving productivity and employee engagement. He combines business insight with deep technical expertise to drive impactful AI transformation.

Microsoft 365 Copilot

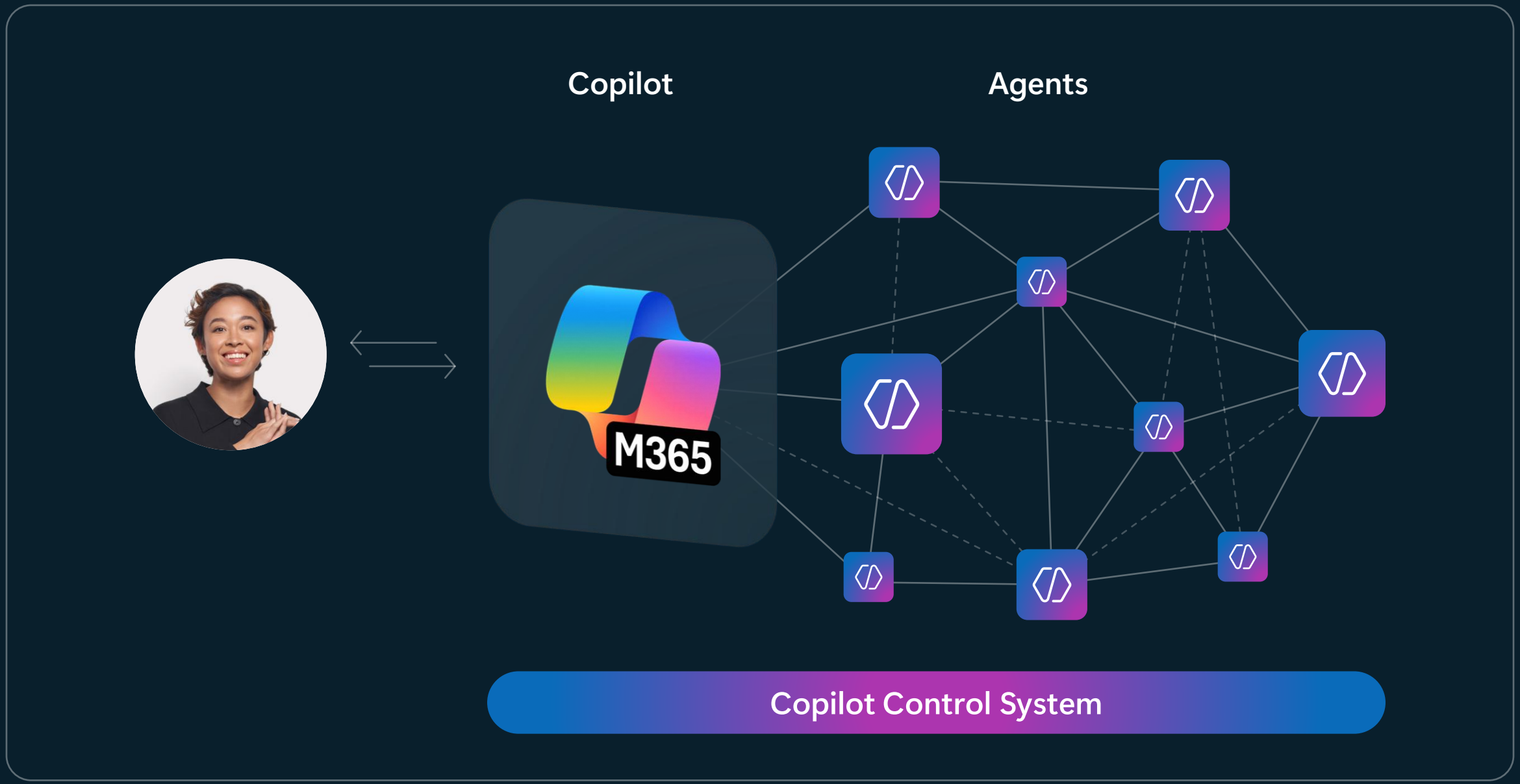
Introduction to Copilot



Poll:

Where are you in your AI journey?

- Just starting
- Experimenting with pilots
- Scaling solutions
- Fully operationalized


Copilot
Agents
M365
Copilot Control System

Microsoft commitments and controls

Microsoft 365 Copilot is built on trust

Tools to manage Copilot + agents

Learn more about AI Security Essentials

Work IQ

M365
You at work
Memory
Your style, habits, relationships, and workflows
Inference
Contextual insights and predictive actions from across your data and memory
Data
Your organization and individual content like files, emails, and meetings – plus line of business data

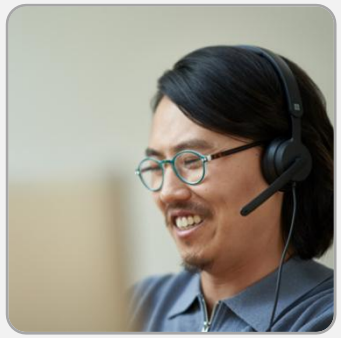
Microsoft Copilot empowers every user

Sales and Marketing

Drive growth with AI that sparks marketing creativity and sharpens sales precision

R&D

Enhance product development and innovation through insightful data analysis



Customer Service

Stay coordinated as a team to resolve more customer issues

Finance

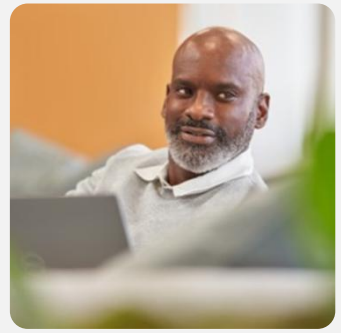
Quickly search across all your data to solve your most complex problems

Operations

Simplify quality reporting and data validation

Data & IT

Effectively manage shared projects and track progress



HR

Store, access, and prioritize notes in a fraction of the time

Microsoft 365 Copilot

Copilot Chat

- Web-grounded AI chat & agents
- Reason over open files in Microsoft 365 apps[2]
- Standard access to GPT-5 and Create
- Agent Mode in Word, Excel, and PowerPoint and Word, Excel, PPT agents[3]
- Content aware in Outlook across entire inbox and calendar[3]
- Pay-as-you-go custom agents grounded in your data

\+

Microsoft 365 Copilot License

All-in-one productivity app

- AI chat grounded in the web and Work IQ
- AI-powered Search
- AI-powered Notebooks
- AI-powered Create (priority access[1])
- GPT-5 Priority access[1]

Copilot in Microsoft 365 apps

- Advanced skills and in-app editing

Agent platform

- Pre-built Microsoft agents
- Analyst & Researcher advanced reasoning agents
- Custom agents grounded in your data[4]

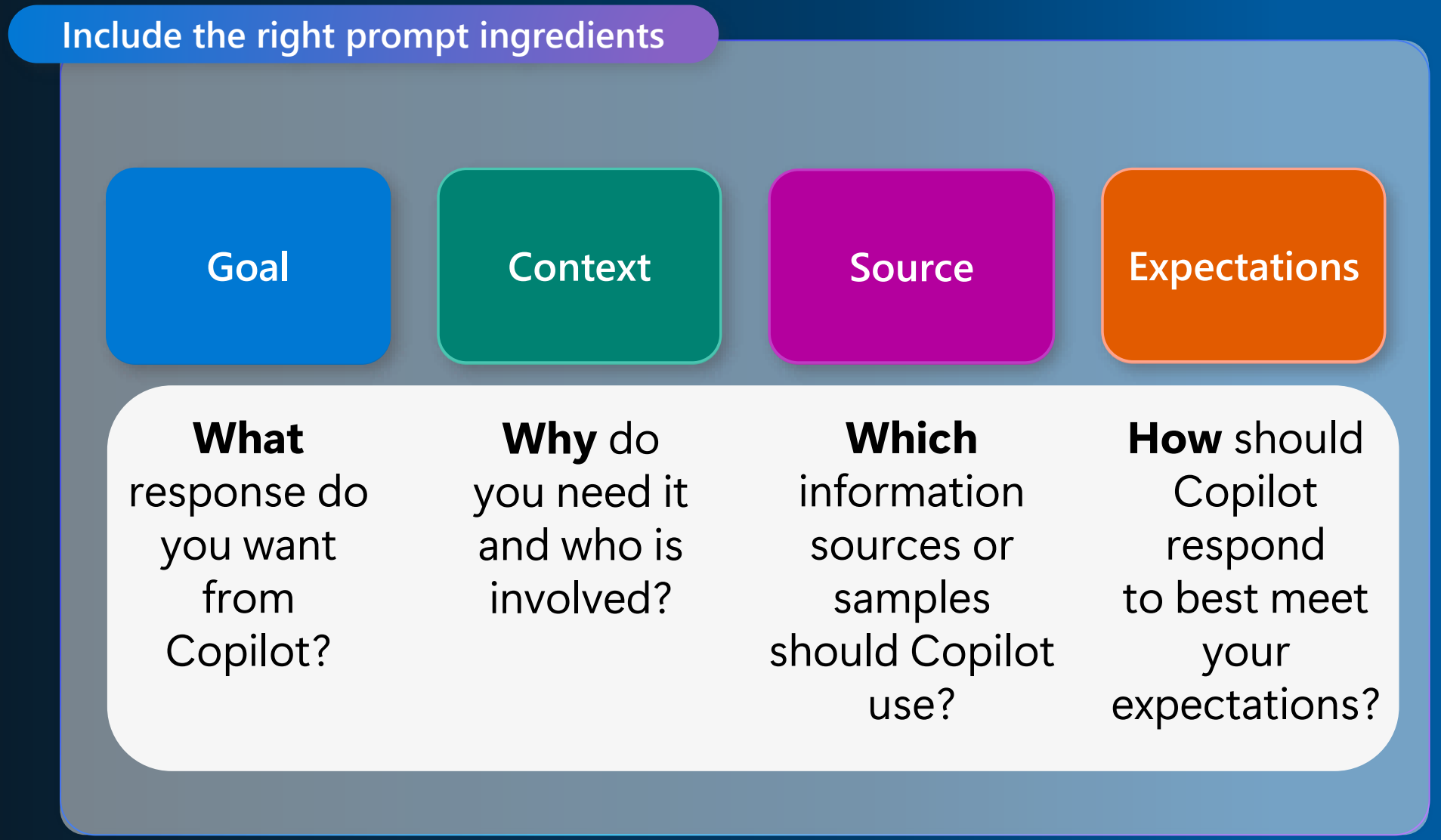
Advanced Mgmt. & Analytics

Powered by Work IQ

1. Learn about standard and priority access here. 2. Available in Word, Excel, PowerPoint, Outlook, and OneNote. 3. Rollout start to Public Preview Q1 CY 2026 for Copilot Chat users with a M365 subscription 4. Applies to assistive agents built by you on the Microsoft 365 Copilot agent platform deployed on Microsoft 365 surfaces

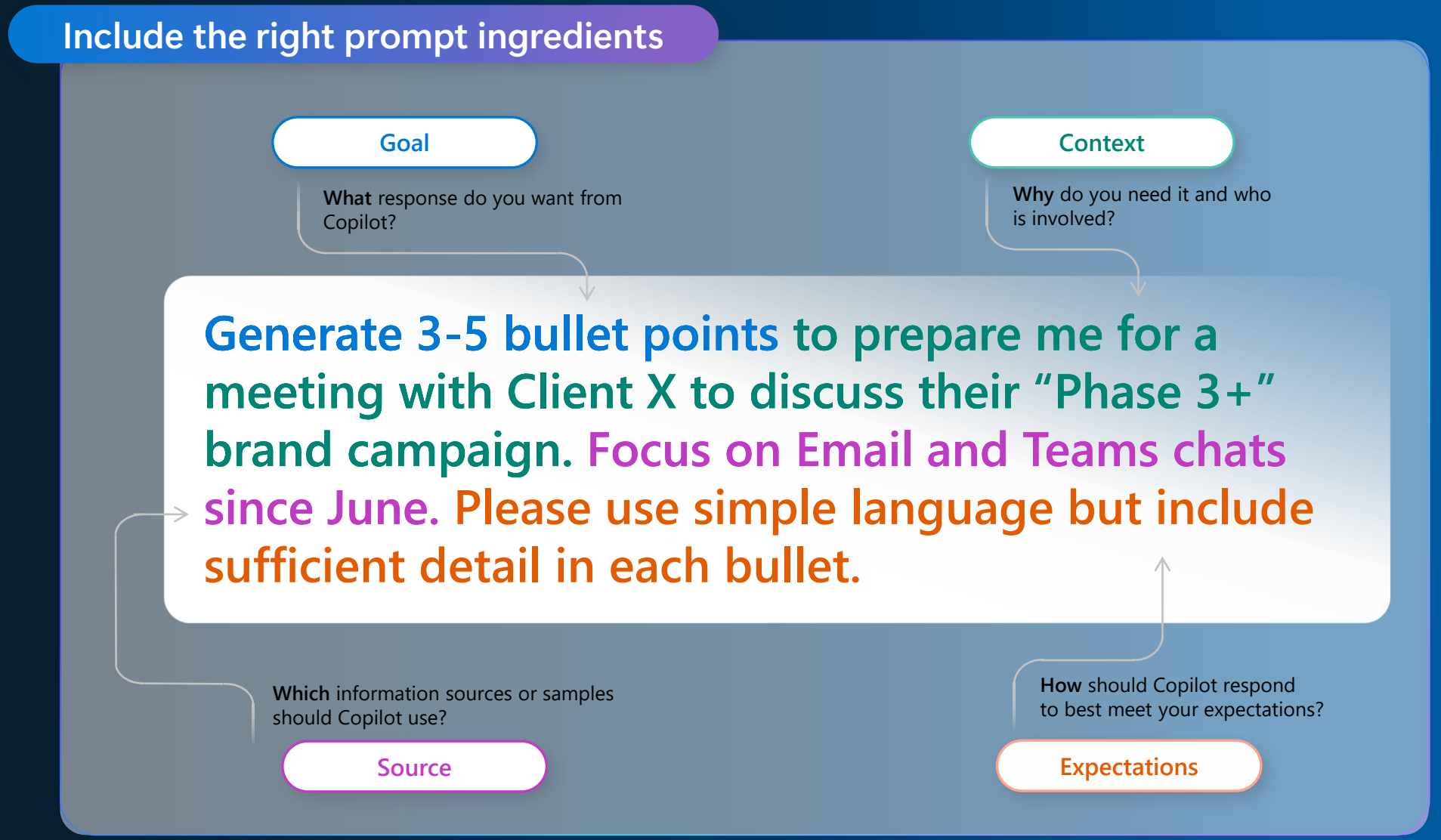
The art and science of prompting

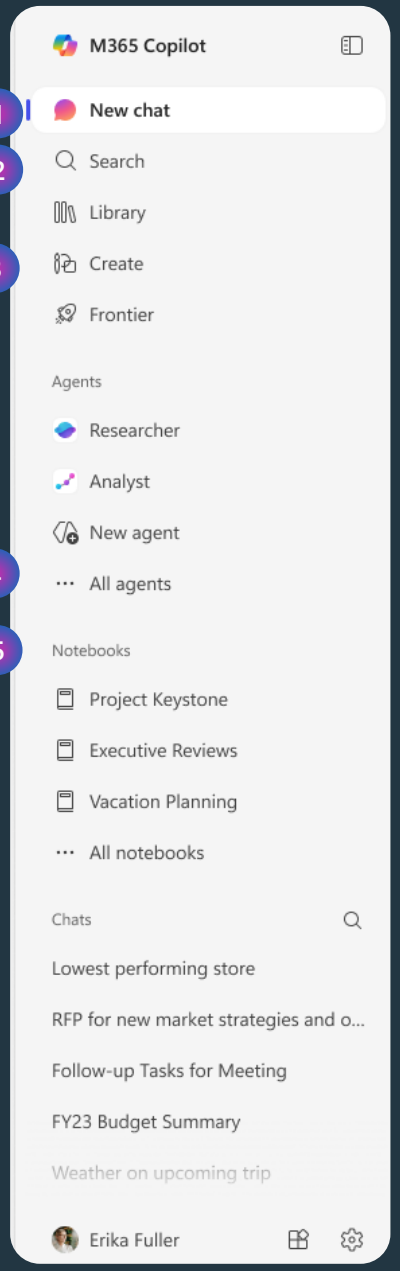
To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.



The art and science of prompting

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





Microsoft 365 Copilot: AI built for work

1

Chat

Secure AI chat with the latest models available and Work IQ intelligence layer.

2

Search

AI search enhanced by Work IQ for fast and relevant results.

3

Create

AI-generated images, posters, banners, videos, and more that are aligned to your organization's brand identity.

4

Agents

A broad ecosystem of pre-built agents available in the Agent Store and tools to build your own agents with Copilot Studio.

5

Notebooks

Copilot is grounded in your project's diverse content types to provide targeted responses and engaging audio overviews.

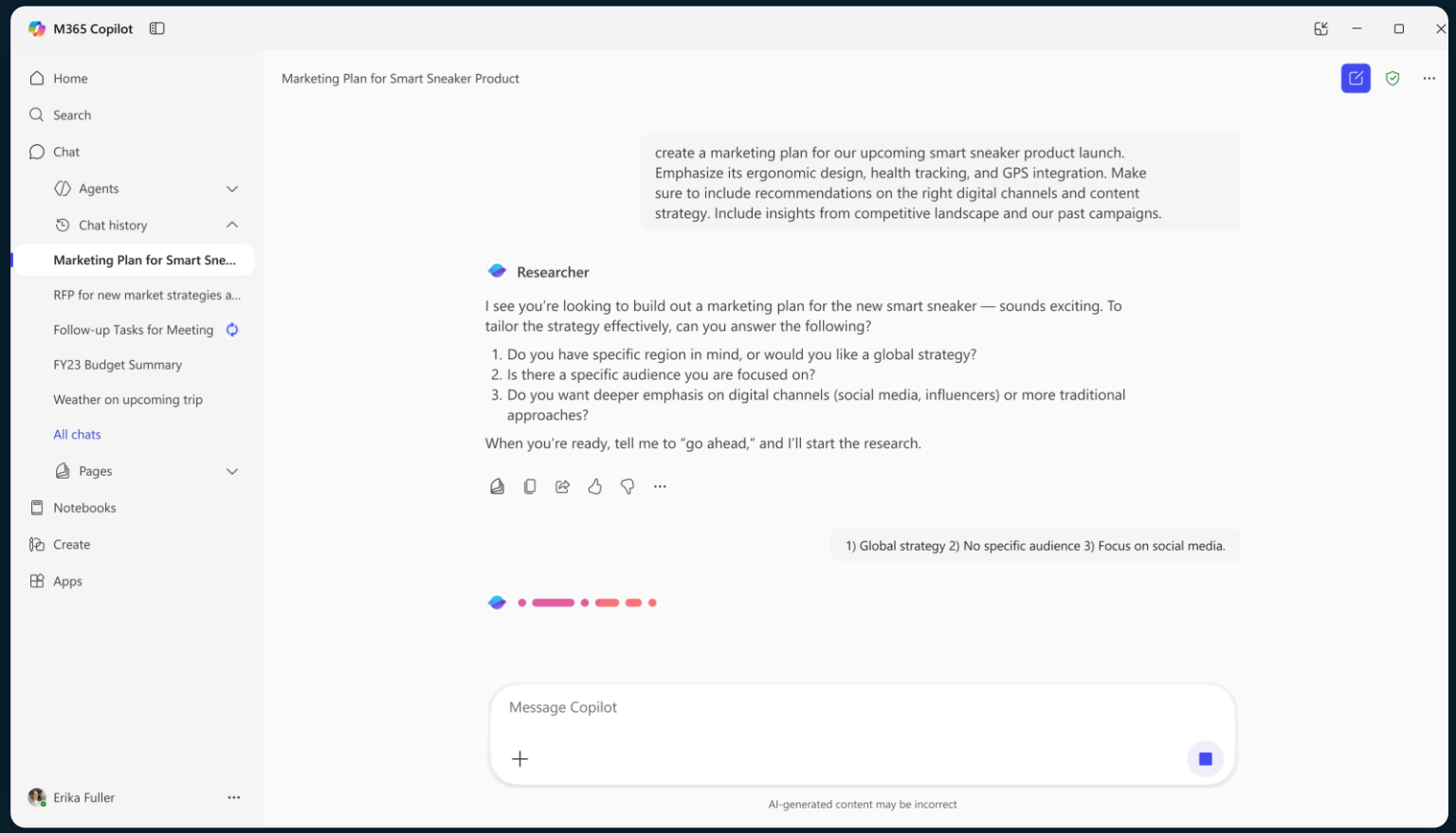
Poll:

What’s your biggest challenge with copilots today?

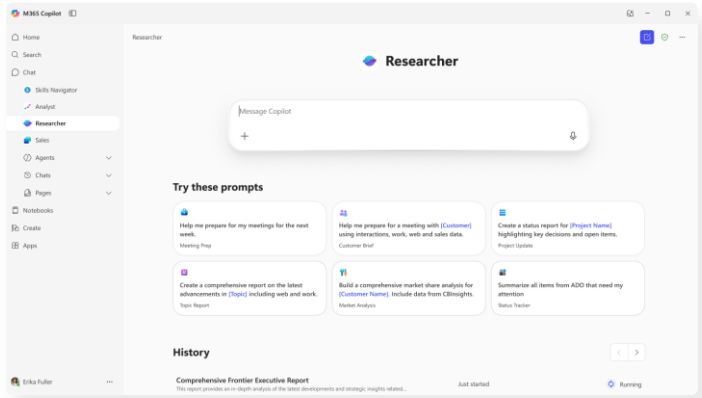
- Governance & compliance
- Measuring ROI
- Scaling from POC to production
- Driving adoption across teams
- Leadership roadblocks

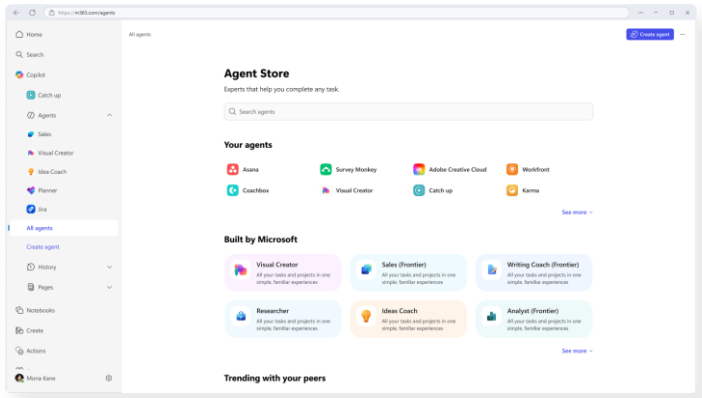
Agents

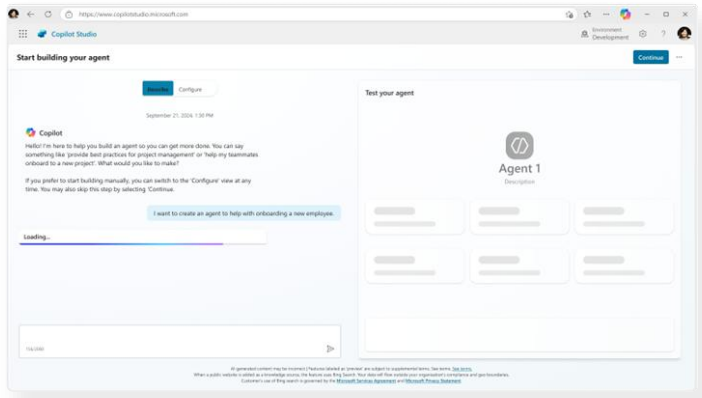
A broad ecosystem of pre-built agents available in the Agent Store, Microsoft 365 apps, and tools to build your own agents in Copilot Studio.



Agents







Use Microsoft agents

Leverage agents built by Microsoft that use advanced reasoning like Researcher and Analyst or specialized agents like Facilitator for meeting management.

Discover agents

From Microsoft to trusted third party agents, Agent Store is where you find agents that are ready to work for you.

Build custom agents

Build your own agents with Copilot Studio using natural language or pro code tooling with the Microsoft 365 Agent SDK.

Microsoft Agents

Automate tasks with pre-built agents by Microsoft that are designed for work

Researcher
Advanced reasoning
Generally available

Analyst
Advanced reasoning
Generally available

Surveys
End-to-end survey mgmt.
Generally Available

Interpreter
Multi-lingual translation
Generally available

Facilitator
Teams meeting moderation
Generally available

Knowledge
Content mgmt. & organization
Public preview

Channels
AI teammate
Public preview

Project Manager
Automate project mgmt.
Public preview

Communities
Community mgmt.
Public preview

Workforce Insights
Organizational insights
Frontier Program

Word
Document creation and iteration
Frontier Program

Excel
Data visualizations and insights
Frontier Program

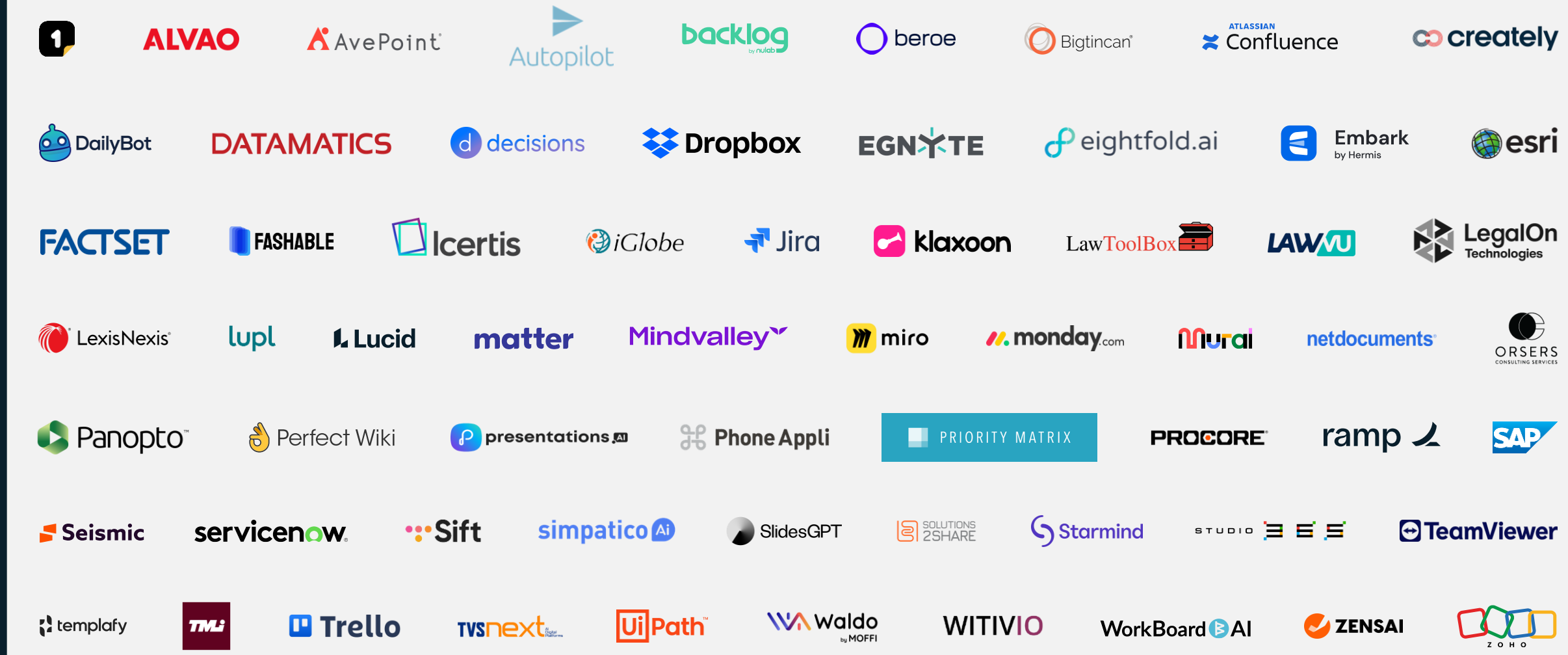
PowerPoint
Build and iterate on presentations
Frontier Program

People
Colleague connector & collaboration planner
Frontier Program

Learning
Curated AI skill building resources
Frontier Program

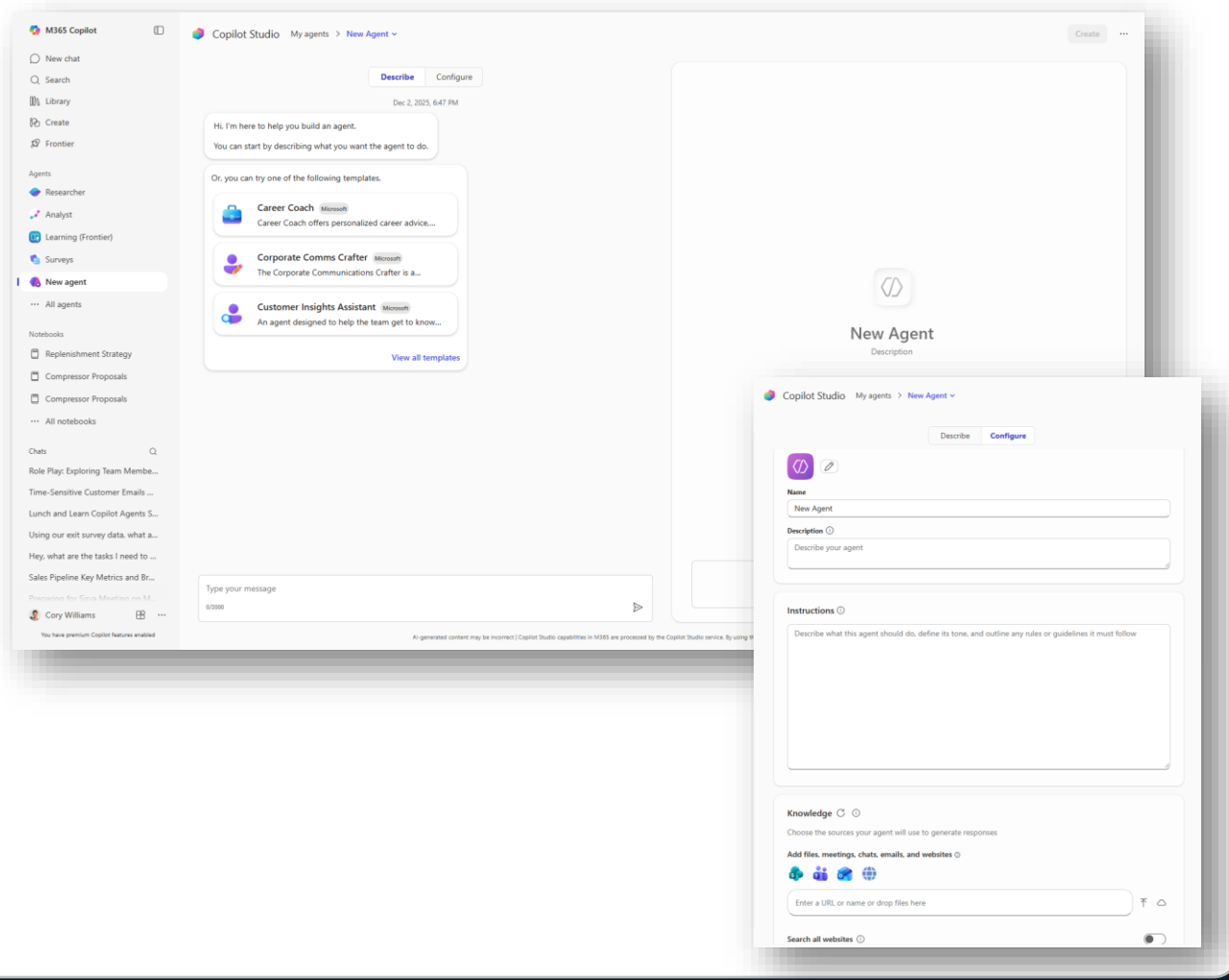
Gain agent best practices at our AI Agent Hub AI agents – Microsoft Adoption

Trusted third party agents available today



Copilot Studio Lite

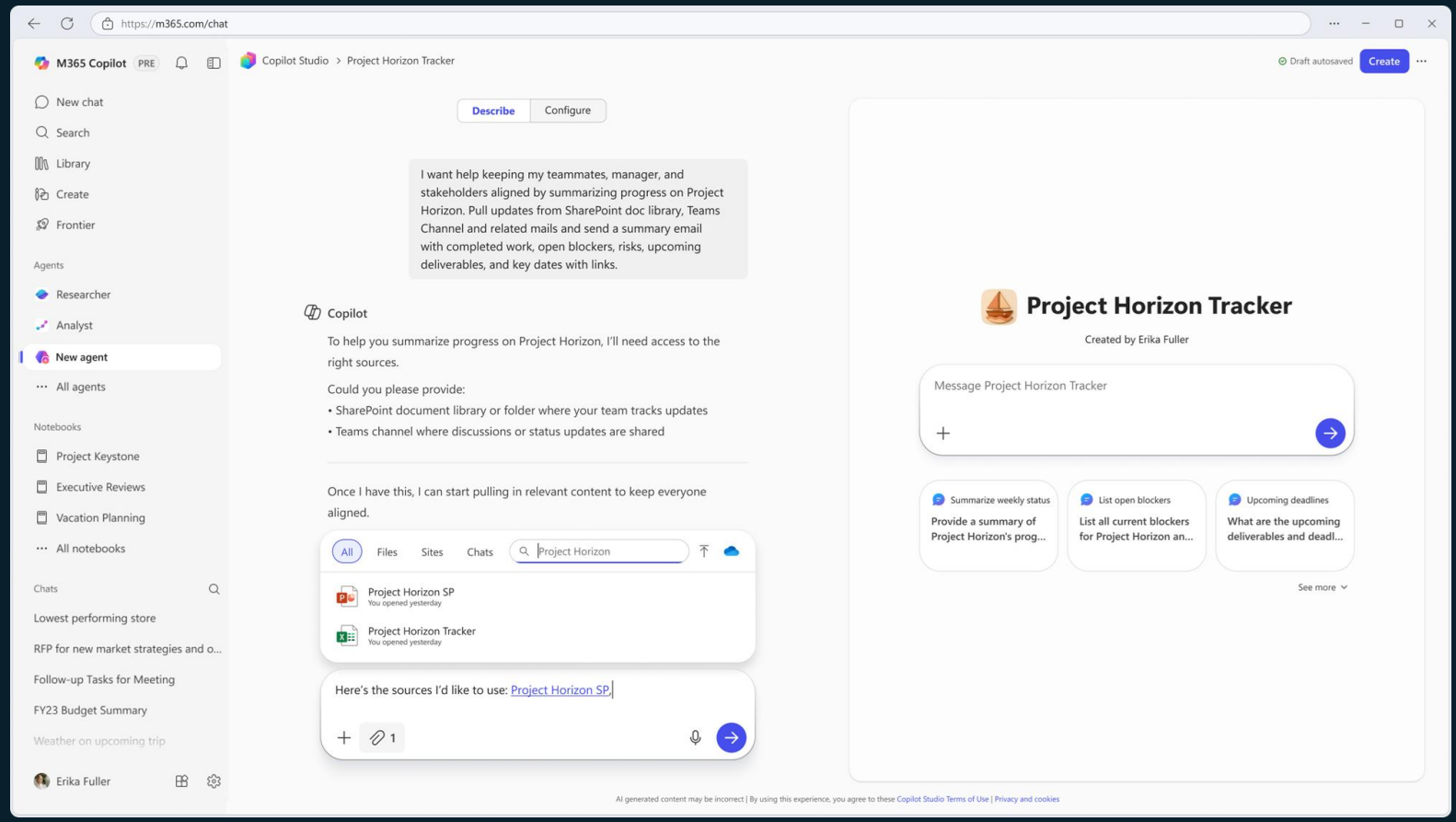
- **Copilot Studio Lite** is a no-code design environment that empowers users to create intelligent agents using natural language and guided configuration.
- It offers a streamlined and intuitive experience for building agents **integrating with your enterprise data** sources like SharePoint, Teams, and Microsoft 365.
- **Agents built within Copilot Studio Lite can be** limited to yourself for personal use, shared with peers or a security group, or shared **org-wide.**



Improved Agent Creation Experience in Copilot

Build and refine agents through natural conversation

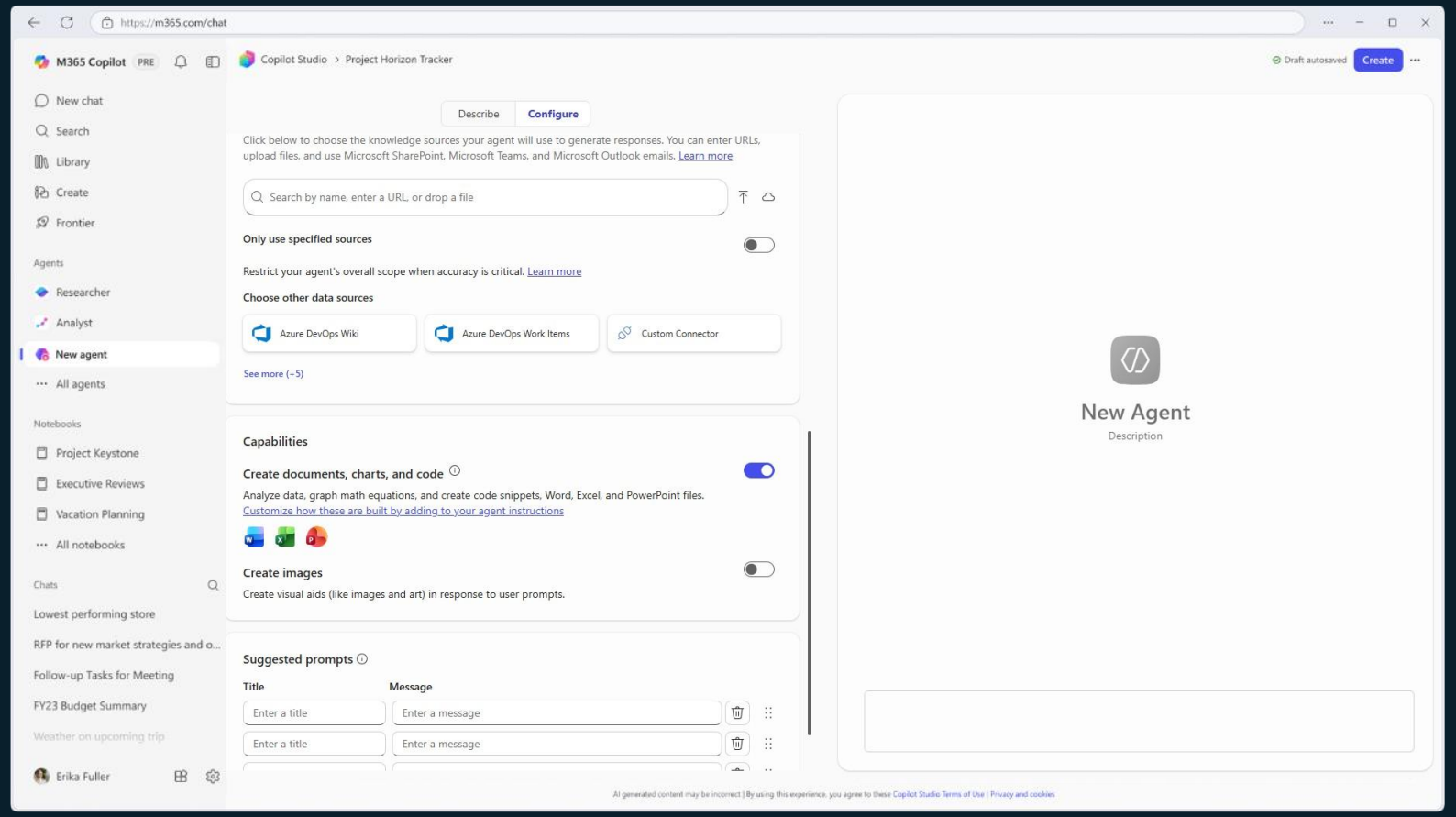
- **Conversational Development**: Build and update agents using natural language in a redesigned experience that simplifies development through improved conversational interactions.
- **Conversational Intelligence:** Build agents using advanced natural language understanding with an iterative flow that delivers real-time feedback and more accurate results.
- **Natural Knowledge Integration**: Add work-related knowledge sources by simply describing them in plain language



Agent can generate files and have expanded context access in Copilot

Generate documents and leverage organizational context automatically

- **Office Skills**: Agents can generate Word, Excel, and PowerPoint files using natural language, automatically saving them to the user's OneDrive
- **Expanded Knowledge Sources**: Access Teams meetings, calendar data, organizational directory, OneNote, and shared mailboxes for richer context
- **Secure and Scoped**: All access respects existing Microsoft 365 permissions, maintaining enterprise security and compliance



Writing Instructions

A well-structured set of instructions ensures that the agent understands its role, the tasks it should perform, and how to interact with users.

1. **Use clear actionable language**
   - Focus on what Copilot should do, not what to avoid.
   - Use precise, specific verbs, such as "ask", "search", "send", "check", or "use".
   - Define any terms that are nonstandard or unique to the organization in the instructions.

2. **Build step-by-step workflows with transitions**
   - Goal: The purpose of the step.
   - Transition: Clear criteria for moving to the next step or ending the workflow.

3. **Structure instructions in Markdown**
   - Use #, ##, and ### for section headers.
   - Use - for unordered lists and 1. for numbered lists. Use unordered lists unless the order of steps is important in which case use numbered lists.
   - Highlight tool or system names
   - Make critical instructions bold with **.

4. **Explicitly reference capabilities, knowledge, and actions**
   - Copilot connector knowledge: for example, "Use SharePoint Folder “Readiness Assets for help.”

Write effective instructions for declarative agents | Microsoft Learn

Poll:

How soon do you plan to move from pilot to production?

- Within 3 months
- 3–6 months
- 6–12 months
- No timeline yet

Interactive Q&A

How to Engage

- Come off mute and ask a question
- Use the Q&A to submit questions
- Experts will answer your questions verbally

Etiquette

- This session will be recorded
- Help our moderators; don’t spam the chat
- Adhere to the Microsoft Code of Conduct

https://masterseries.powerappsportals.com

© Copyright Microsoft Corporation. All rights reserved.