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@M365MN #M365WorkshopDay

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Thank you for your participation!

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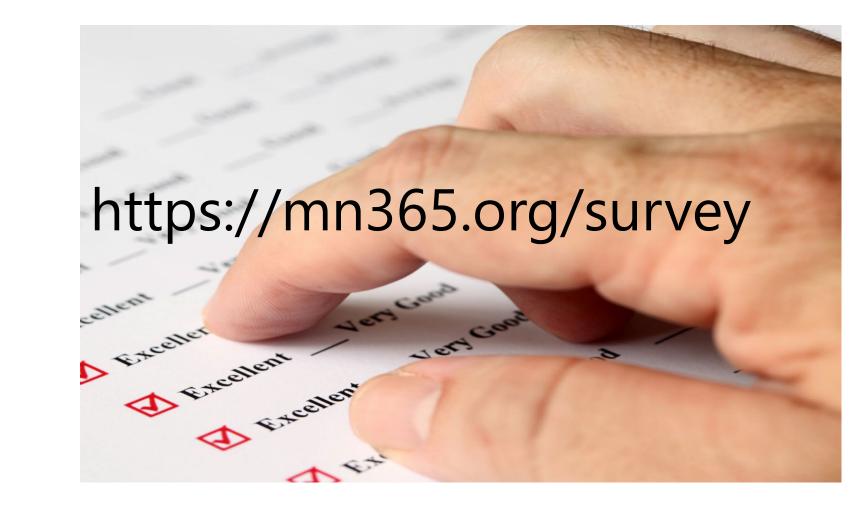








# Workshop Survey





## Chris Blackburn



20+ year Microsoft IT Consultant



Married for 24 years, 3 boys (oldest at UWEC, turning 21 in December, middle is graduating in June on his 18<sup>th</sup> birthday, youngest in 6<sup>th</sup> grade)



Architect and Delivery Lead on Microsoft 365 end-to-end (Hybrid / Cloud + Identity / Collaboration / Security & Compliance / Endpoint Management) – including Copilot



When he's not behind the keyboard he's traveling across the world as an electronic music fan and renowned DJ, plus he's a foodie that loves to try new local cuisines around the world





blackburnc



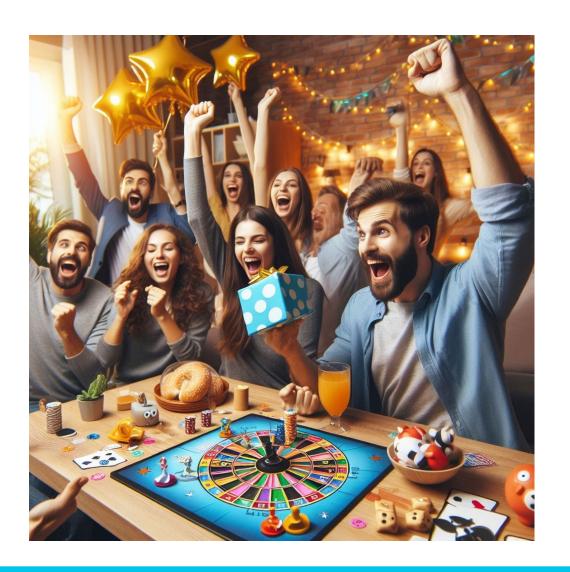
memphistech.net



### Let's play the Al Game!



- Count how many times you think I've used AI in this presentation
- The winner gets a prize!





#### Synopsis

From the dawn of computing, one story remains: our data is the same, but the way it's presented has changed. we're always striving to improve efficiency with how we work and how we communicate.

With the many Copilots beginning to improve our lives, the dilemma remains - which is the right one to do the job?

In this session we'll journey through "the past" of when to use what technology for job, step into "the present" and see how each of the Microsoft Copilots work in the real world, then into "the future" with a handy guide that will help you know when to use what Copilot.





# The History of Collaboration

Where have we come from

## What really is "collaboration"



Collaboration = Common Goal + Effort + Commitment

#### Technology has helped the common goal





The common goal of collaboration is to bring together individuals with different skill sets, experiences, and backgrounds to work towards a shared objective.

## Technology has helped effort & commitment statement stat











We are still children, but we can pout to get what we want 1980s

Technology invades the home and starts to change behaviors.



Like teenagers, we now have some control but don't know what to do with it yet.

1990s

Technology is now everywhere. A great leap forward. It begins to connect us around the globe.



We are growing up, and feeling pretty cool about it.

#### 2000s

Technology enables more seemless communications across the globe. Growth is emptorion, but like "explosions" is uncontrolled – all over the place.

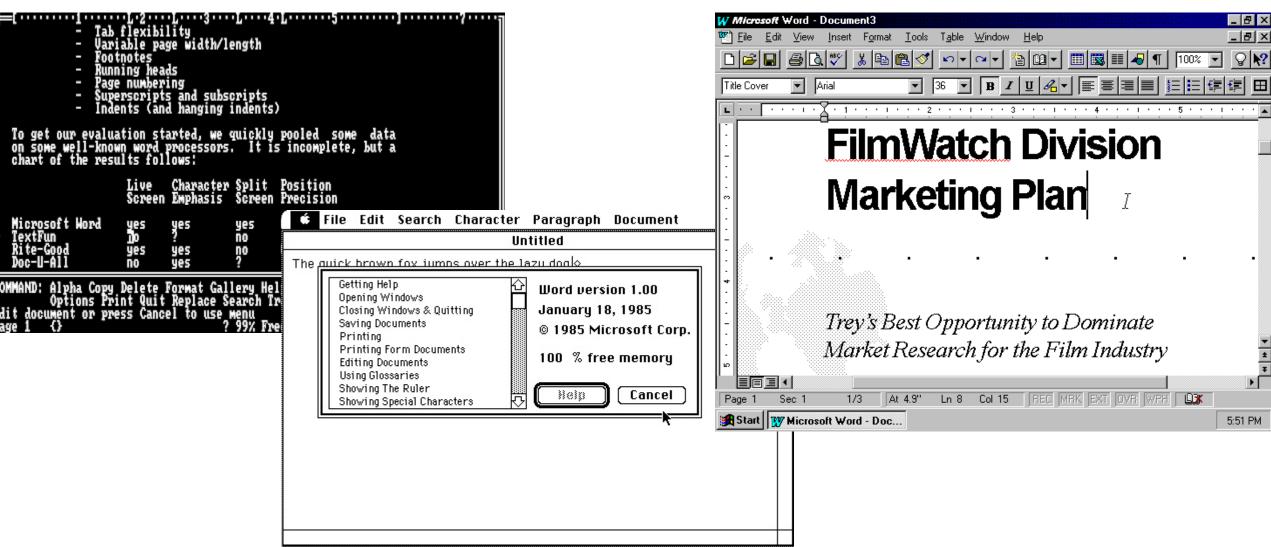


Welcome to adulthood!

Technology becomes fully intergrated into our daily lives. We live more fully in a sligital world.

### Creating content has improved

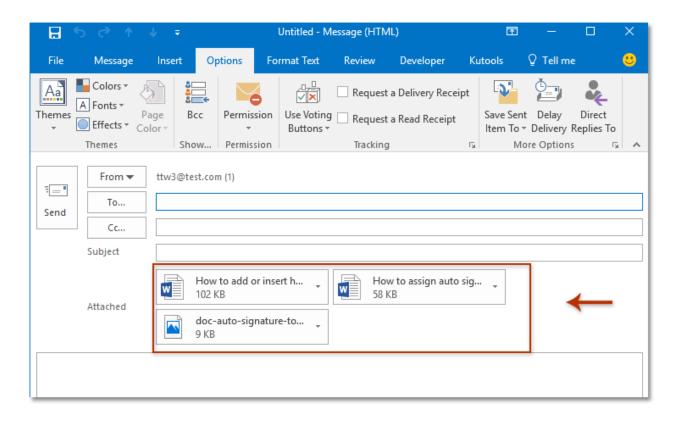




#### Sharing content has improved

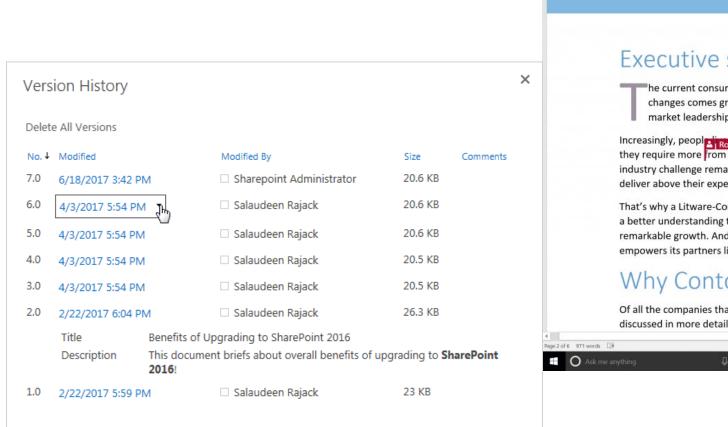


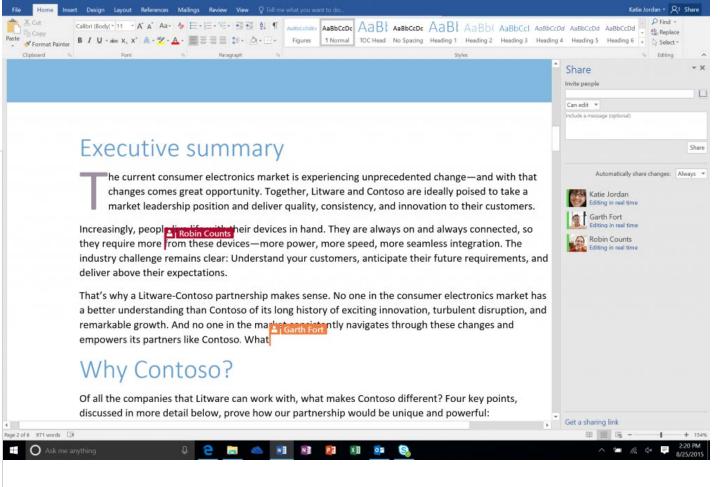




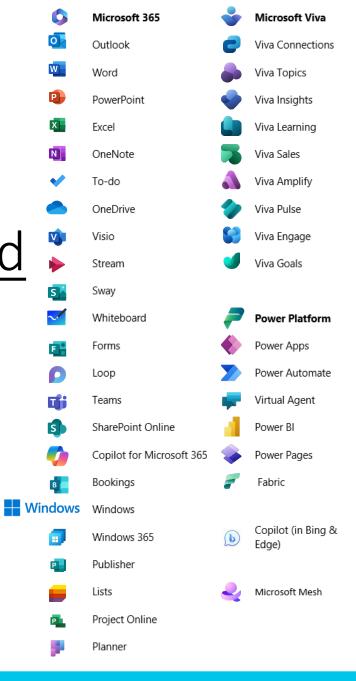
## Working concurrently has improved

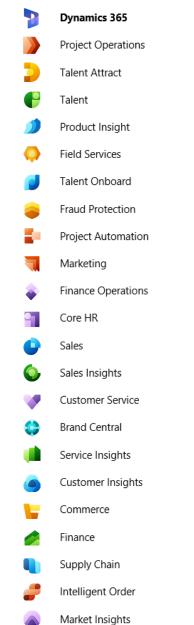






# A tool for every job has proliferated





Customer Voice



Guides

Layout

Import Tool

Microsoft Azure

Microsoft Entra

Azure Active Directory

Microsoft Defender

Microsoft Intune

GitHub

Azure DevOps

Visual Studio

LinkedIn

.NET

M

Voice Assistant

Remote Assist

Product Visualize

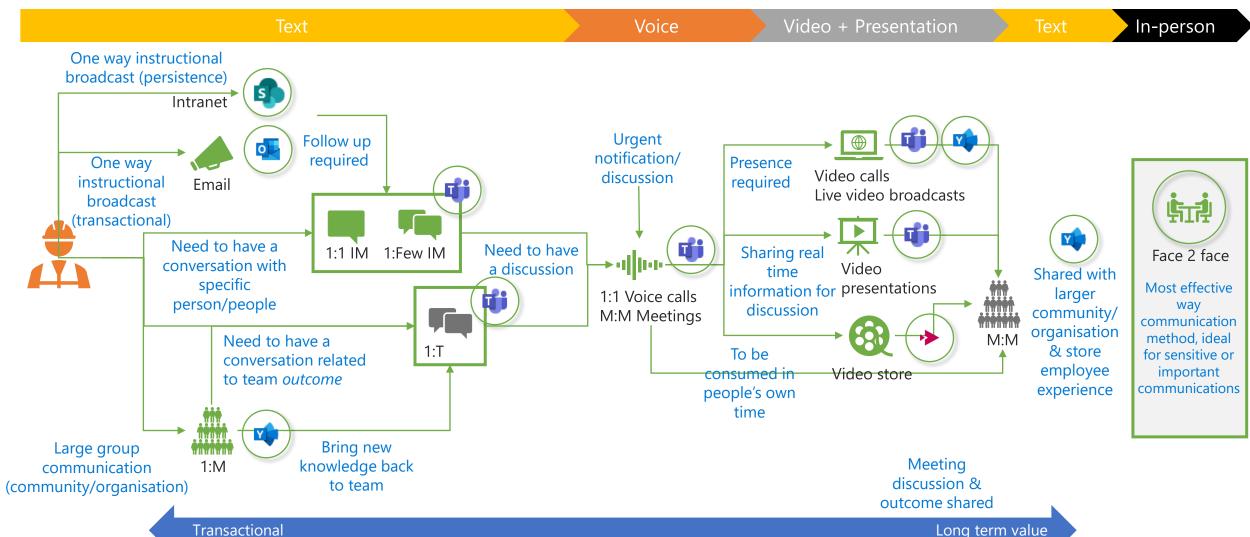
### And the tools have improved





#### But the right tool can change on context





## So how do we focus our efforts effectively?

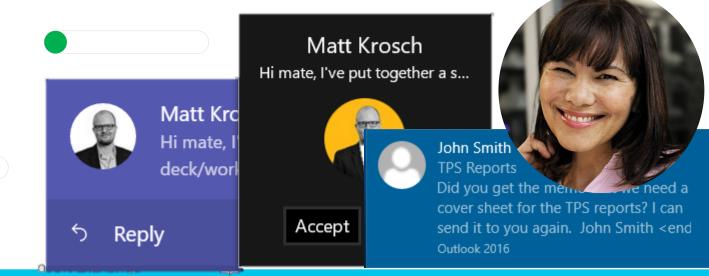
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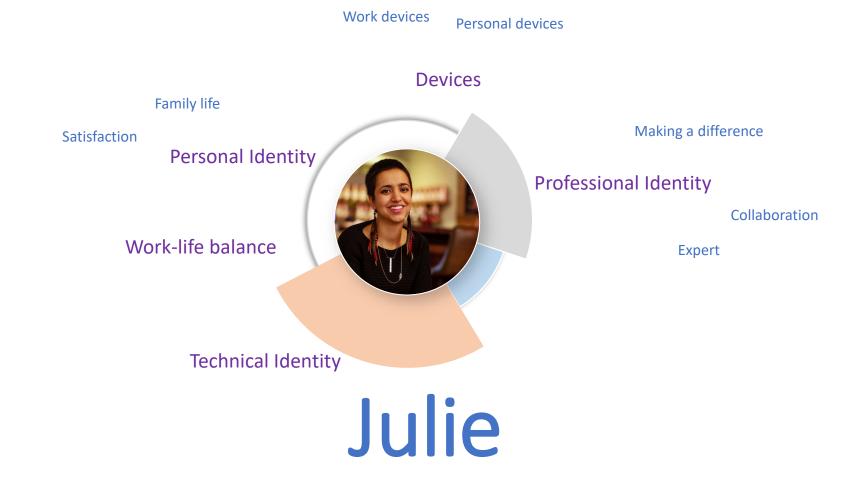






#### How do we balance our commitments?





## Effective communication is everyone's job!





#### Are you using the right tool?

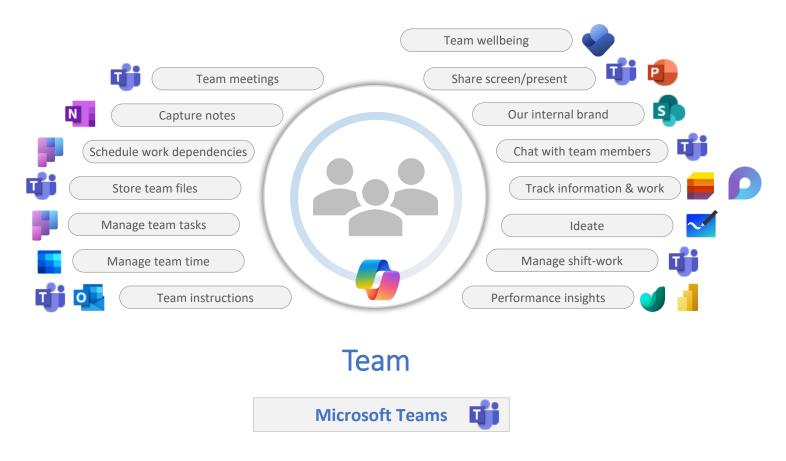




Individual: A single person, as distinguished from a group.

#### Are you effectively working in a Team?

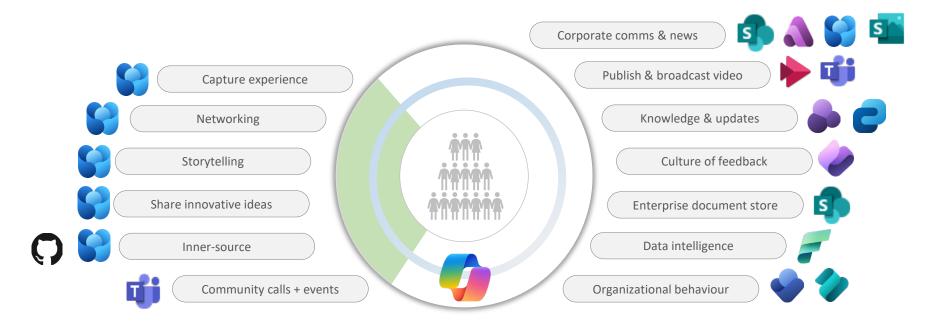




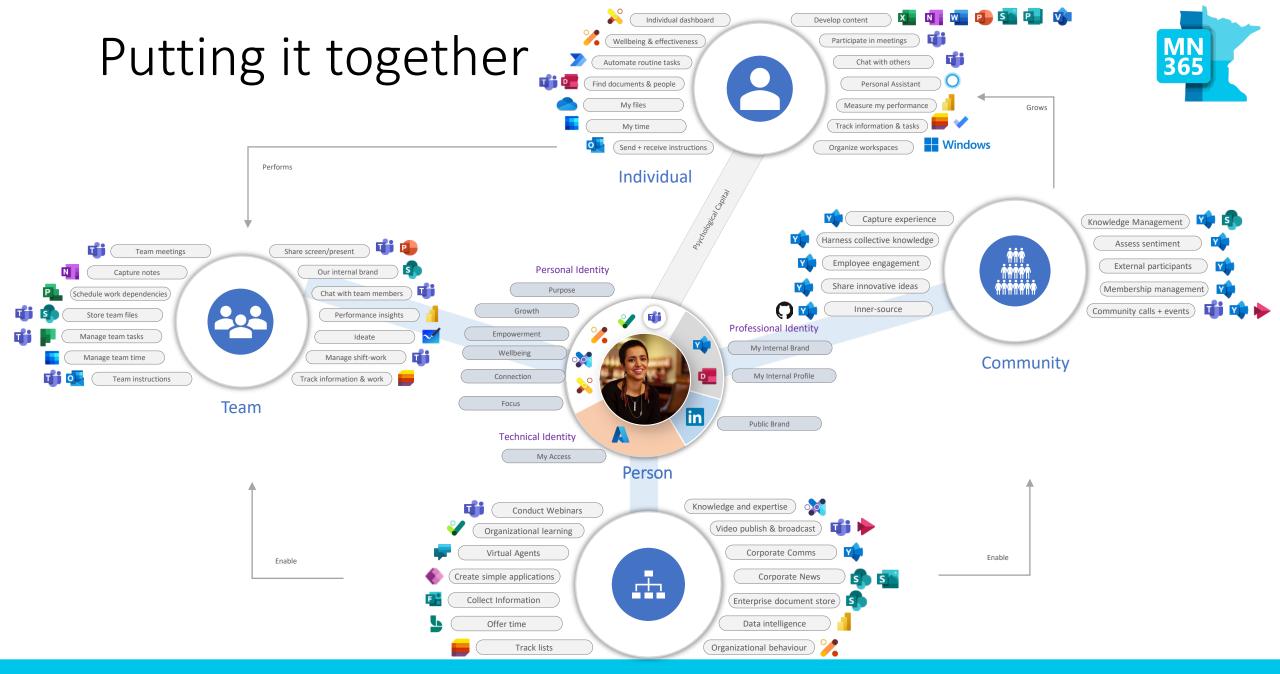
Team: A group of individuals with **interdependent activities** that work together towards a **common outcome**.

## Are you effectively working across your Org? 👑





Community / Organization



#### So where has Collaboration evolved to?



- Commoditized tools and defined frameworks
- Real-time interaction from anywhere, anytime

Have they helped us effectively collaborate.... and what's the next evolution?

Al to the rescue!



## Modern Collaboration

Where are we now

#### We're just one step away





Until the day comes where we have perfect harmony between technology and humanity, we as humans must understand how & when to effectively use the tools at our disposal.

- Corey Buzzell

#### What stops us from leveraging technology?





#### **Rapid Advancements:**

• Rapid pace of evolvement, and by the time we fully understand and integrate one set of technologies, new ones have emerged<sup>1</sup>.

#### **Resource Limitations:**

• Time, money, or expertise

#### **Changing Needs:**

• <u>Businesses</u> and <u>individuals</u> change over time, which can lead to some <u>technologies</u> becoming obsolete.

#### **Complexity:**

• <u>Technologies that require specialized knowledge to use effectively, limiting their utilization to a small group of experts<sup>2</sup>.</u>

#### **Cultural Factors:**

 <u>Cultural and organizational resistance can hinder the adoption and full</u> utilization<sup>2</sup>

#### **Balance:**

• An ideal utilization rate (around 75%) that fosters getting the most value plus allowing for growth and flexibility<sup>3</sup>.

#### How technology closes the gap with Al





# Enhancing Decision-Making

Al systems can analyze vast amounts of data to identify patterns and insights, aiding humans in making informed decisions.



#### Automate Tasks

By automating routine and repetitive tasks, AI allows humans to focus on more complex and creative work.



#### Personalization

Al can tailor
experiences and
services to individual
preferences,
improving user
satisfaction and
efficiency.

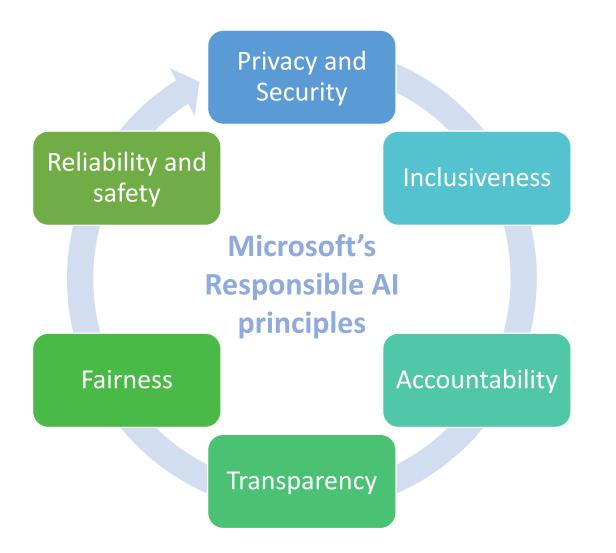


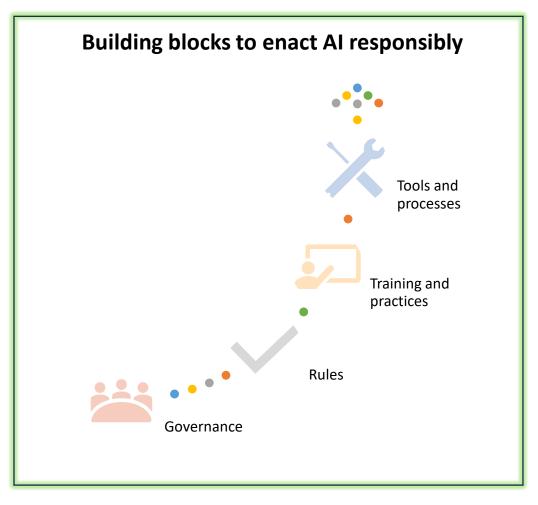
# **Collaborative Intelligence**

Al and humans can work together, leveraging the strengths of both to achieve outcomes that neither could alone.

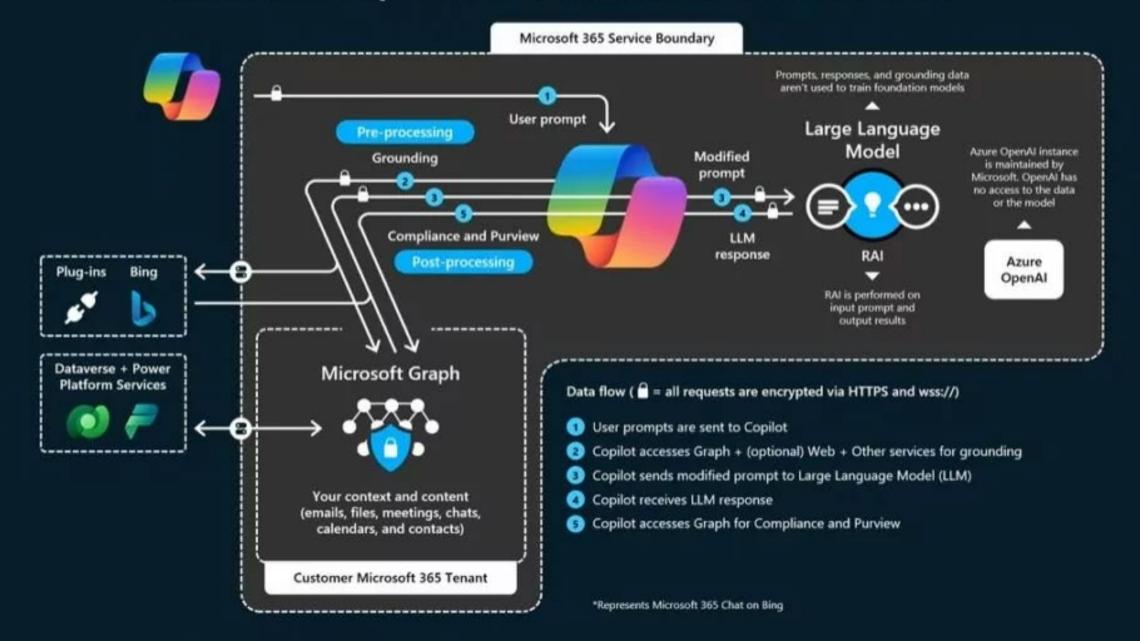
#### How do we use Al responsibly?







#### Microsoft Copilot for Microsoft 365 architecture



### Choosing Al scenarios for different needs





#### Commodity

GitHub Copilot

Microsoft Copilot

Windows 11 Copilot

Office 365 Copilot

Security Copilot

Azure Copilot

**SaaS Products** 



#### **Custom**

Align with a "Job to Be Done"

Competitive advantage

Where accuracy matters

Must have ROI

Must have a sponsor

Must have data

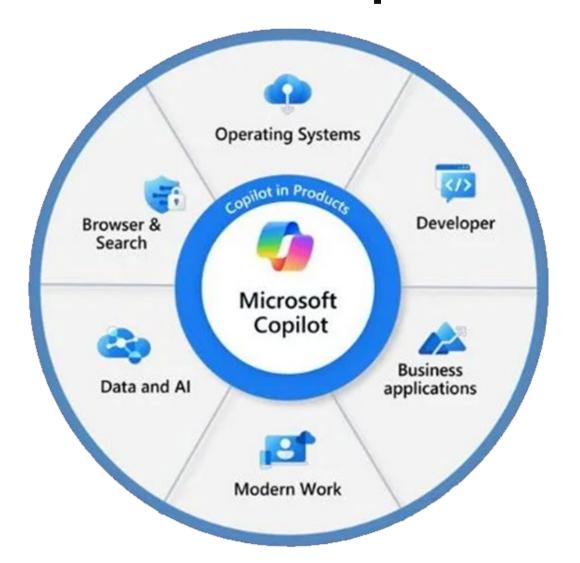
How can you make Al real in your business?

There are use cases that are very focused on direct revenue production and direct operational savings. These fall in **custom** Al scenarios.

Take autocorrect for example: it's a drastic time savings and me writing emails is going to be that times 100 in terms of our ability to produce one of our colleagues like to say never produce a draft again. These fall in **commodity** Al scenarios.

## There's a **Copilot** for everything!





Microsoft has recognized in each of their products there are efficiencies that can be gained **by applying AI** natively and thru plugins.

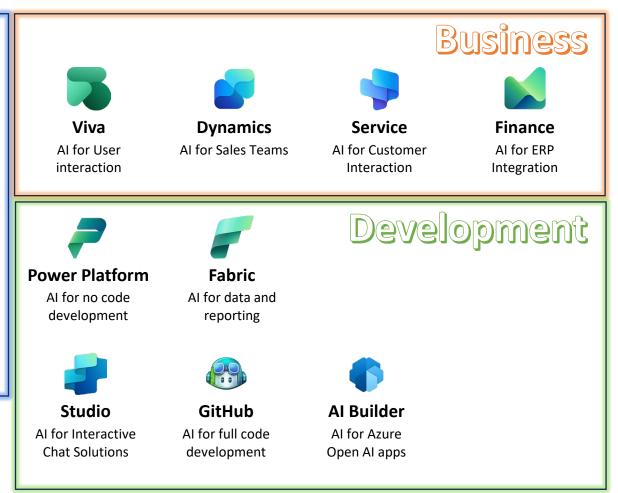
Thinking and talking about **both custom** and commodity AI in each of these domains helps position AI for success in using the right tool and drive business value in each scenario.

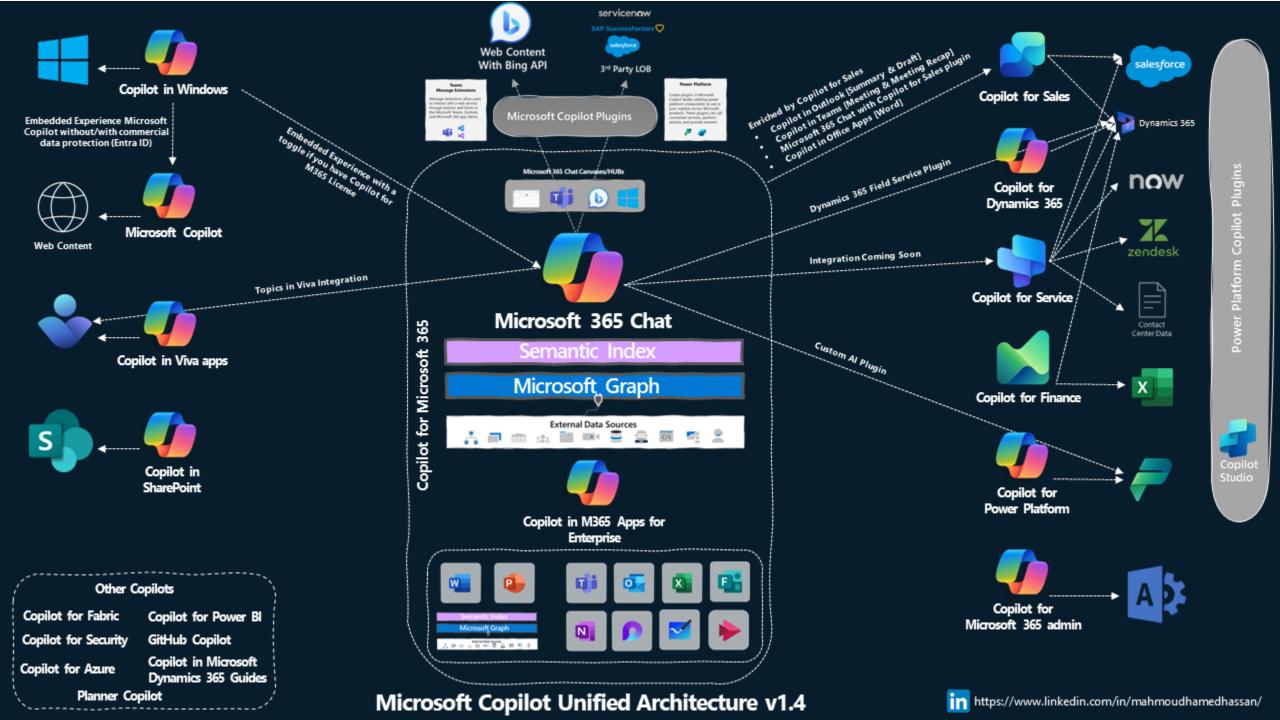
# The **Copilot** family





As you look to apply AI to your workforce, think about the **personas** / **skills** in your workforce that can benefit from its use



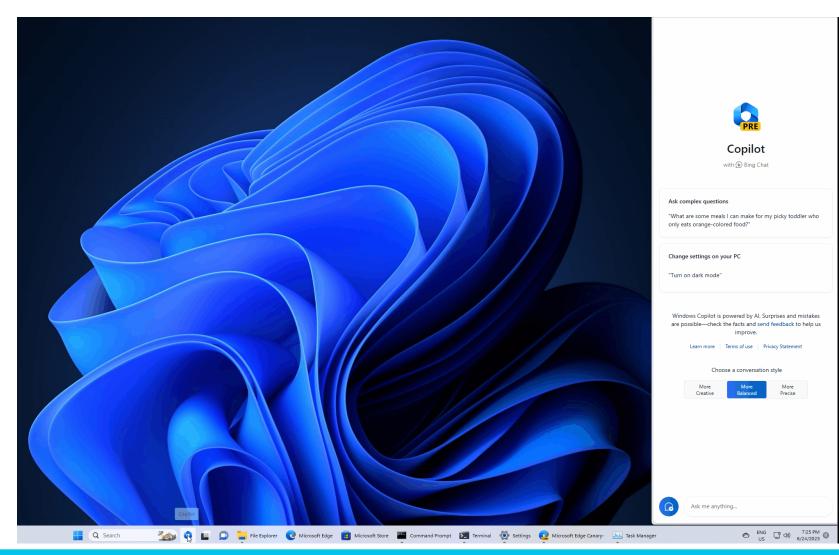


### Copilot for Windows



#### Key use cases:

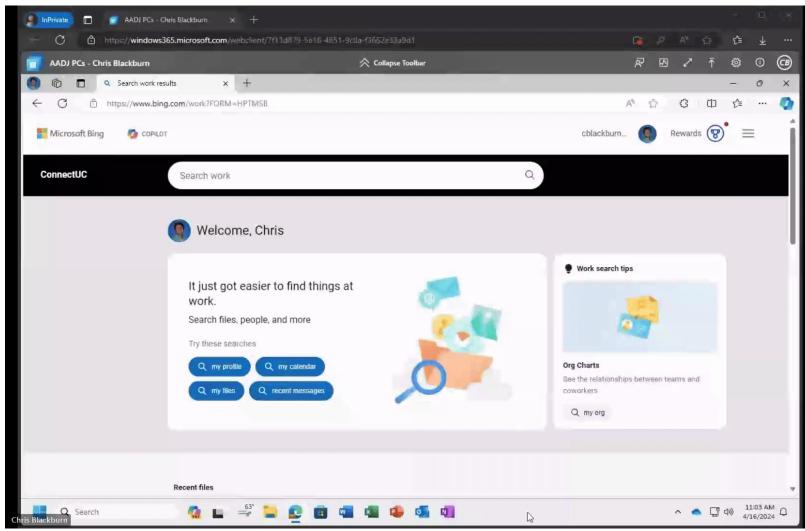
- Rapid search for public information
- Creative generation of graphics
- Voice, Text & Image Interaction
- Navigation in Apps & Features



### Copilot for Edge



- Rapid search for public information
- Creative generation of graphics



### Copilot for Microsoft 365\*

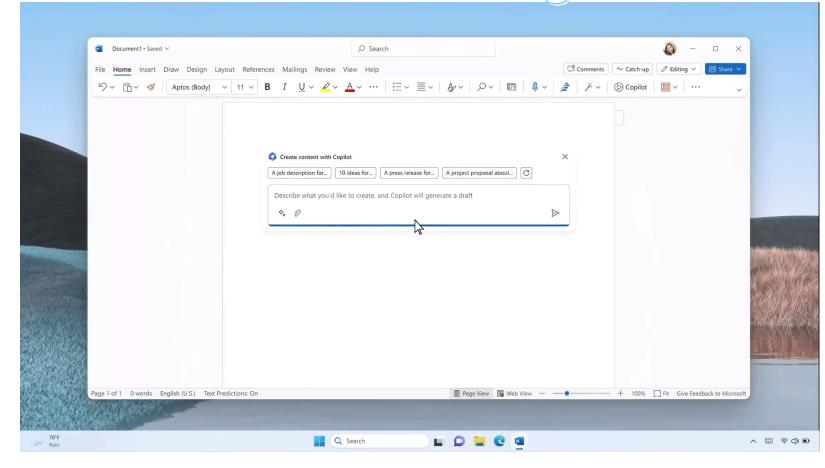


#### Key use cases:

- Automated Data Analysis
- Efficient Email Management
- Improved document creation

\*Includes the Microsoft 365 Apps for Enterprise

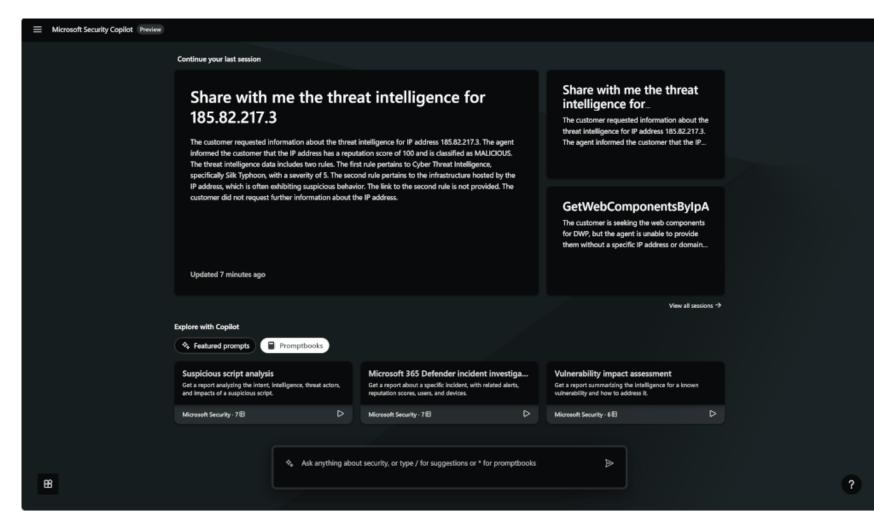
### Never Create a Draft Again



### Copilot for Security



- Efficient and automated threat intelligence and response
- Incident management insights
- Security response based on client / partner knowledge base or custom plugin



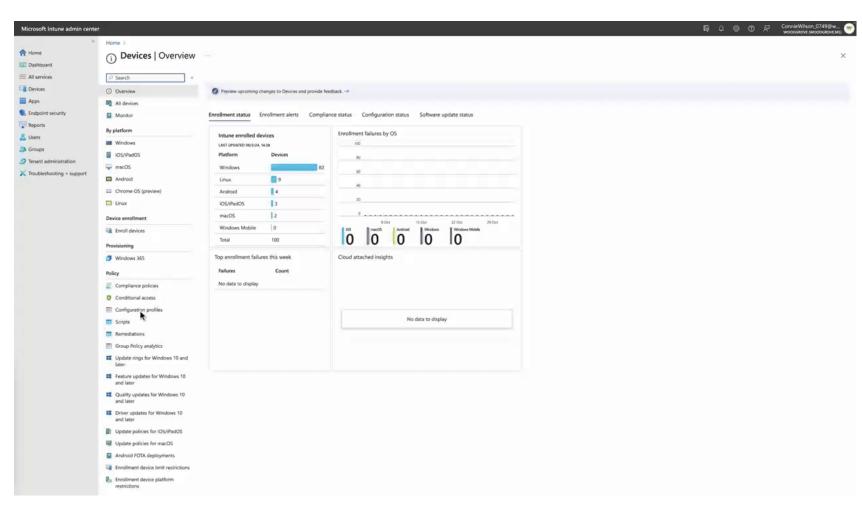
### Copilot for Intune\*



#### Key use cases:

- Tailored device insights for organizational needs
- Quick analysis of endpoint errors
- Natural language guidance for configuring policies

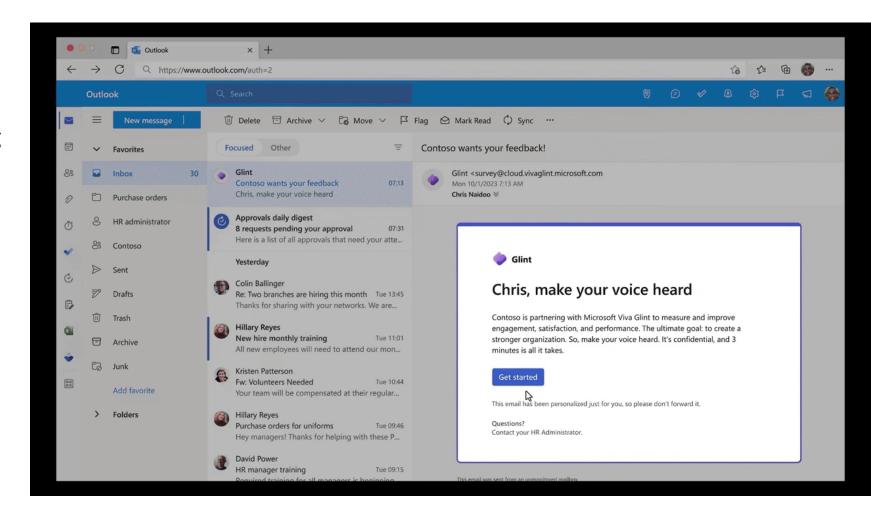
\*Copilot for Security is a requirement!



### Copilot for Viva



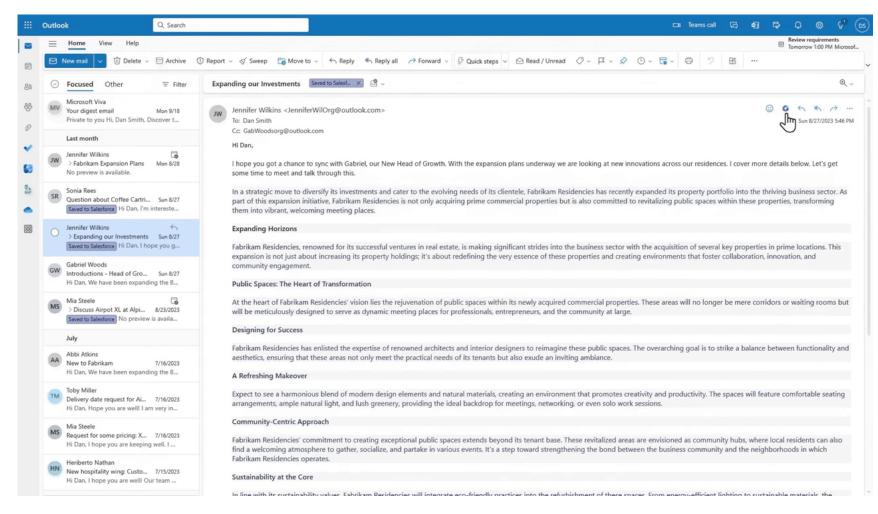
- Al-powered employee engagement for navigating work/life
- Al-powered insights for aiding HR decision-making processes
- Automatically summarize goals
- Automate collection of OKRs



### Copilot for Sales



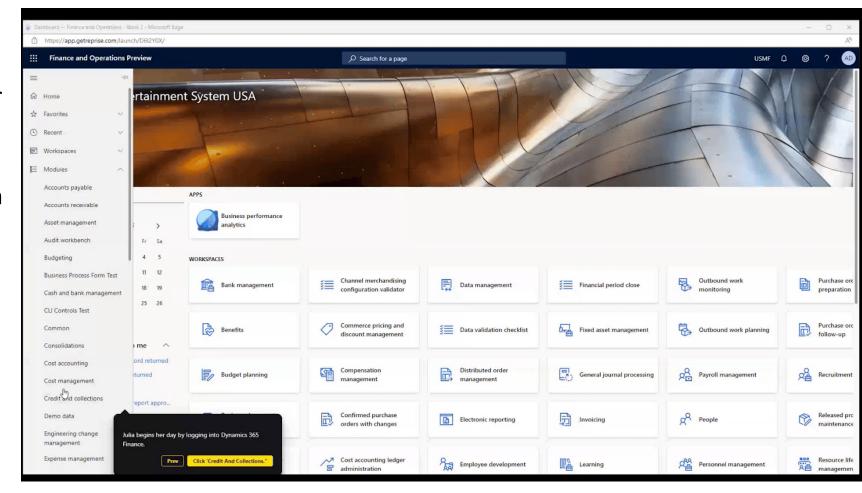
- Streamline processes to work and close deals
- Personalize customer interactions quicker
- Spend less time on meeting prep & emails
- Reinvest time into work task than admin tasks



### Copilot for Finance



- Quickly review data sets for anomalies, risks and unmatched values in Excel
- Simplifies the reconciliation process in Excel
- Provides a complete summary of relevant customer account details
- Turn raw data in Excel into presentation-ready visuals and reports



### Copilot for Service



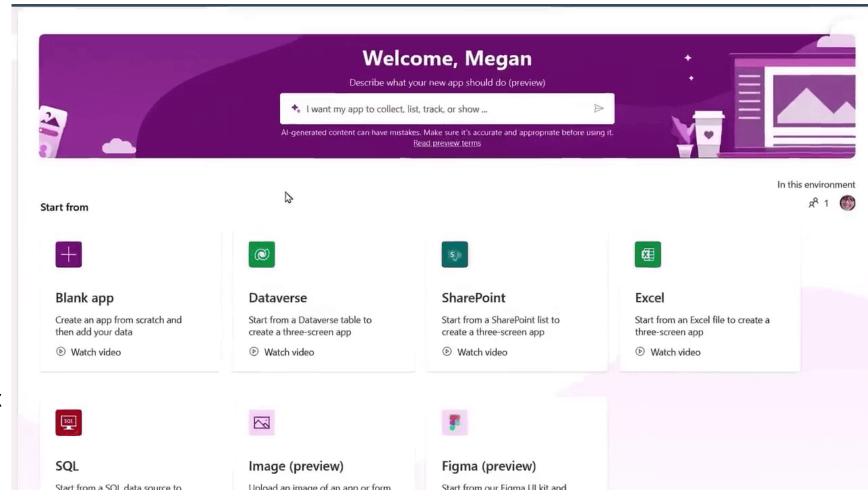
- Al integration with CRM platforms like ServiceNow and Salesforce
- Empower your support team with a generative Al infused agent.



### Copilot in Power Platform



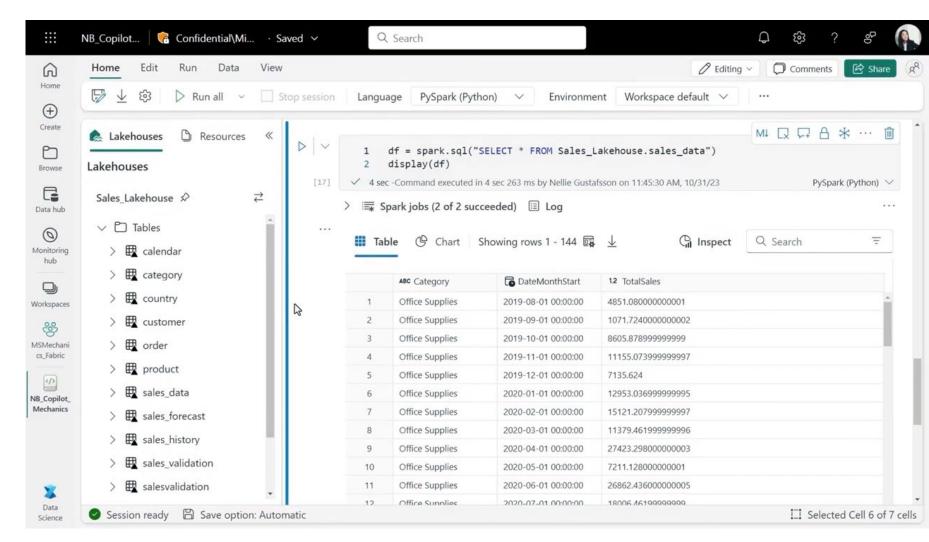
- Automatic creation of flows and low code application
- Build low code apps more efficiently with intelligent suggestions
- Streamlined tasks like notifications, syncing files, collecting data
- Perform multiple complex automations across platforms



### Copilot for Fabric



- Speed up data prep and integration using generative AI and natural language
- Build machine learning model for predictive insights quickly
- Generate PowerBI reports quickly using natural language



### Copilot Studio



- Create FAQ chatbots from multiple sources without writing a single line of code.
- Expedite app development and integration with data sources

### Github Copilot

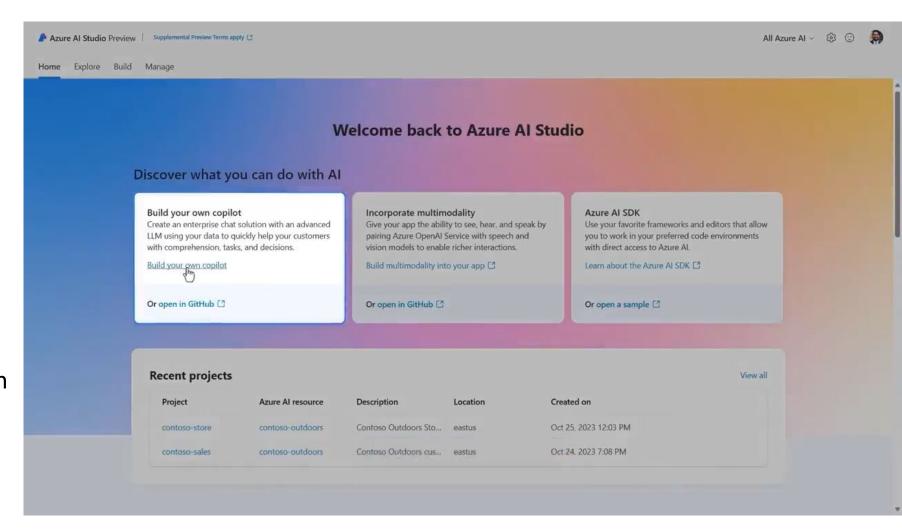


- Intelligent code suggestions as you type
- Correction of coding syntax and running terminal commands in real-time
- Generate automated pull request summaries
- Generate commit message generation for changes made

### Azure OpenAl Builder



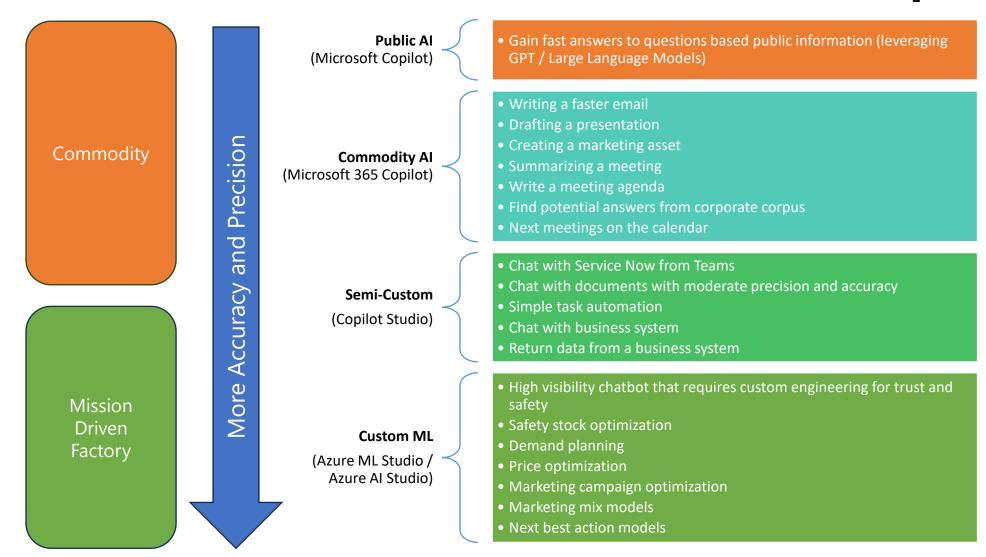
- Full code development for building LLM-based applications
- Multi-modality support to build image, text, speech & video apps
- Leverage vector database (Azure AI Search) for LLM creation



### But how do you pick the right Copilot?







Uses Al Capabilities in Products

Configures Pre-Built Al Elements

Builds Highly **Functioning** Al Models

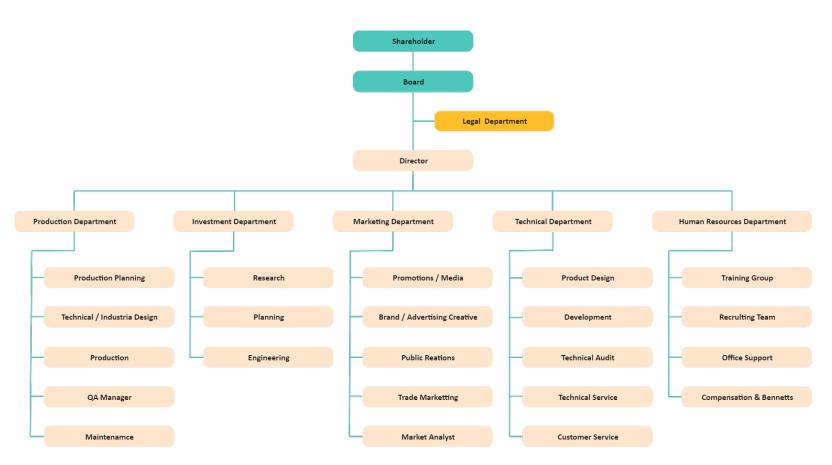


## The Future of Collaboration

Where technology and our workforce are headed

### What personas power your organization?





Most organizations have a common executive leadership structure ("C-Suite") that drive decisions that the organization makes.

Underneath the C-Suite are **personas** that help the business operate, and most of these functions are similar across all types of business (finance, sales, marketing, etc).

Beyond these common **personas**, you find industry-specific ones in verticals like manufacturing, finance, healthcare, etc.

Think about every person that power the mission of your business and how they will be enabled by Al.

### What pains do your personas feel?



#### Define job functions

Start by reviewing your organization's **personas (department)** and all the **jobs (title)** functions your teams hold.

Persona	Job	
Finance	Investment analysis	
Finance	Expense Manager	
Sales	Account Executive	
Sales	Product Management	
Sales	Lead Management	
HR	Recruitment and hiring	
Marketing	Create marketing campaign	
IT	Help desk support	

#### **Identify the Pain Points**

Next, Be think about the **challenges in each of those personas.** What are some of the **pain points** you encounter when completing your job?

Persona	Job	Challenges/pain points
Finance	Investment analysis	Overload of resources and not sure which one to leverage
Finance	Expense Manager	Reconciling expenses, downloading reports, review aging, contacting users
Sales	Account Executive	Creating Content & Agendas, Generating Solution Ideas, Building Sales Presentations
Sales	Product Management	Identify unique parts in market niche, identify growth potential, select areas of interest and scale back on non-productive areas
Sales	Lead Management	Connectivity with marketing and sales activities, identifying potential customers with biggest growth possibilities
HR	Recruitment and hiring	The need to copy and paste information from one application into another application
Marketing	Create marketing campaign	After meeting, no clear assignment of owners to tasks
IT	Help desk support	Flexibility to quickly obtain skills when needed

## Build your solutions based on your personas



As someone in	I want to	I'll know this	Solution
<b>+</b> †	<b>V</b>	is successful when	T.
Customer Experience	Customer service call summaries into CSR	Call summarize are captured with minimal	Microsoft 365 Copilot
	system	typing above 95%	
Customer Experience	Follow-up capture	Call actions are exist in call summaries above	Microsoft 365 Copilot
		95%	
HR	Create job description	80% of job description is created by copilot	Microsoft 365 Copilot
HR	Resume screening	Map appropriate resumes and/or experience	Microsoft 365 Copilot
HR	Candidate screening notes and recording	Record interviews and capture key notes	Microsoft 365 Copilot
			Teams Premium
IT + Legal	Analysis of legal documents for examples of	Legal analysts review documents for specific	Microsoft 365 Copilot
	language	legal language	
IT/Enterprise Apps	Develop code faster	Code development done faster	GitHub Copilot
IT/Enterprise Apps	Develop safe code	Code is developed from trusted repositories	GitHub Copilot
IT/Enterprise Apps	Code across platforms	Code is developed accurately	GitHub Copilot
Marketing	Building marketing campaign content	Create marketing content drafts that are 80%	Microsoft 365 Copilot
		completed	
Marketing	Competitor or marketing research	Gather research regarding competitors or	Microsoft 365 Copilot
		market trends	
Marketing	Keeping content up to date	Content generation	Microsoft 365 Copilot

### Define the Technology

When you understand the capabilities of all the Copilots, you can select the right solution for the job. Based on the level of skilling, don't be surprised if it can be vary!

### Establish #Quality #PromptEngineering



Provide clear instructions
Consider desired completion format with keywords, symbols, or tags
Offer context
Start with zero-shot vs (ZSL) few-shot learning (FSL)
Try rearranging your prompt
Vary history length
Identify Drift & Engineering
Optimize few-shot selection
Use reasoning thru chain-of-thought.
Instruct LLMs to rephrase questions

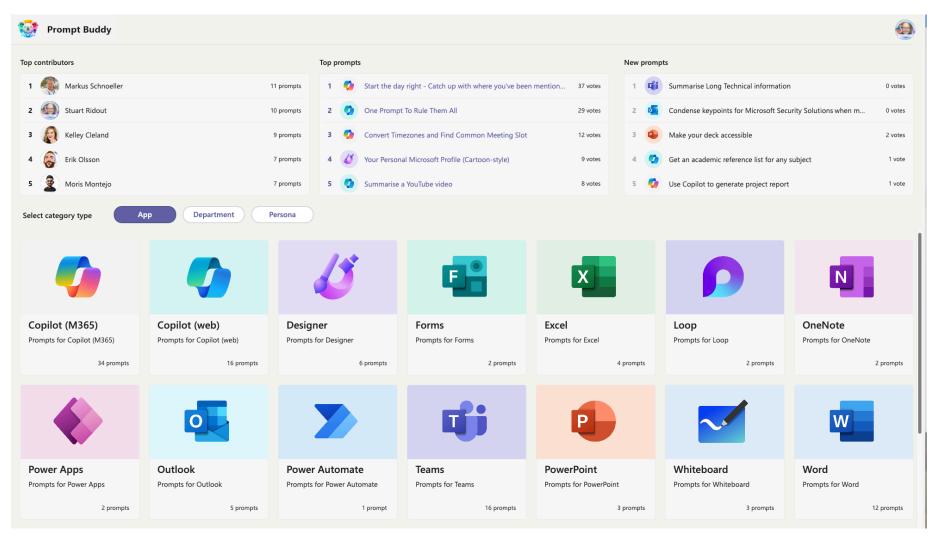
- •Be specific on what you want the model to generate, such as the expected format, length, and tone of the completion.
- •Instruct the LLM to look for context provided in a certain format, which can help with more complex prompt templating
- •Provide some context about the application, the domain, and the user's intention to help the model to generate more relevant / coherent outputs.
- •Zero shot means data without training on that specific task.
- Few shot means it gets to see a sample problem and answer before the real task, ect.
- •Order of the elements in your prompt can affect the model's attention and influence.
- Experiment with different arrangements of your prompt to see how the model responds
- •Length of the history included in the prompt can generate natural and consistent responses
- •Complexity and the coherence of the conversation
- •Topic modeling, Sentiment analysis, & Repetition detection
- •You can train or fine-tune semantic similarity models on your data to select more relevant few-shot samples.
- •Chain-of-thoughts enables LLMs to decompose multi-step problems into intermediate steps.
- Enables the LLMs to solve complex reasoning problems that are not solvable with standard prompting methods.
- •Reframe questions for LLM reasoning
- Provide suggestions
- •Compose with other methods to improve reasoning performance and provide a friendly chat experience.

### Empower #PromptEngineering in your Org



- Create a space in Microsoft Teams to share and discover favorite Al prompts.
- Preloaded with Microsoft Copilot & add your own!

https://github.co m/stuartridout/p romptbuddy







Copilot (available in Microsoft Edge & Bing)

Al powered secure search for the enterprise.

- Copilot in Microsoft 365 Combine the power of AI with your work in Microsoft 365, assisting people to be more productive.
  - Microsoft 365 Chat Combine the power of AI with your work data and apps to help you unleash creativity, unlock productivity and uplevel skills.
  - Copilot in Teams

    Have more effective meetings, cat up on chats, and bring everything together in teams.
  - Copilot in Outlook
    Start emails quickly, generate a summary, and catch up on long emails easily.
- Copilot in Windows

  Find the information and ideas you need to power your ingenuity. Get answers fast and ask follow-up questions to develop your ideas.

- Copilot in Word

  Start a draft, add to an existing document, rewrite text, generate a summary, or chat with Copilot.
- Copilot in Loop Plan, brainstorm, create and collaborate easier to stay in sync.
- Copilot in PowerPoint
  Create a new presentation, organise and summarize presentations, and more.
- Copilot in Excel

  Go deeper with data, identify insights, generate formulas, and more.
- Copilot in OneNote
  Summarize your notes, create a to-do list, design a plan, and chat with Copilot.
- Security Copilot

  Builds on the latest in large language models and harnesses

  Microsoft's security expertise and global threat intelligence to
  help security teams outpace their adversaries.
- Take advantage of next-generation AI to accelerate this new performance equation, where engagement and productivity lead to better business outcomes and success.





Copilot in Microsoft 365

Combine the power of AI with your work in Microsoft 365, assisting people to be more productive.

- Copilot in Whiteboard
  Creating, organizing, and understanding ideas has never been easier.
- Copilot in Teams

  Have more effective meetings, cat up on chats, and bring everything together in teams.
- Copilot in Loop

  Plan, brainstorm, create and collaborate easier to stay in sync.
- Copilot in OneNote
  Summarize your notes, create a to-do list, design a plan, and chat with Copilot.
- Copilot in Power BI
  Combine advanced generative AI with your data and helps everyone uncover and share insights faster.
- Copilot Studio
  Conversational AI platform that lets users create and customize copilots using a graphical interface or natural language

- PowerPlatform Copilot
  Describe what you need in plain English.
  - Copilot in Power Apps

    Build an app, including the data behind it, just by describing what you need through multiple steps of conversation.
  - Copilot in Virtual Agents

    Let's you create and iterate on topics by describing what you want and having AI build it for you, significantly decreasing the time it takes to create and update bot topics.
  - Copilot in PowerAutomate

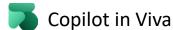
    Stays with you in your flow building journey and helps you build, set up, and run an automation on your behalf through a chat experience.
  - Copilot in Power Pages
    Simplifies creating forms, incorporating text, embedding chatbots, and other tasks with a user-friendly, conversational interface that doesn't require years of coding experience.
- GitHub Copilot

  Offers autocomplete-style suggestions as you code.



### Copilot empowers your organization





Take advantage of next-generation AI to accelerate this new performance equation, where engagement and productivity lead to better business outcomes and success

- Copilot in Power BI (Fabric) Combines advanced generative AI with your data to help everyone uncover and share insights faster
- Copilot in Microsoft 365 Combine the power of AI with your work in Microsoft 365, assisting people to be more productive.
- Azure OpenAl Builder Quickly develop generative AI experiences with a diverse set of prebuilt and curated models from OpenAI, Meta and beyond.

### Copilot in Dynamics 365

Allow everyone to spend more time on the best parts of their jobs and less time on mundane tasks.

Copilot in Customer Service

Revolutionize agent productivity and customer experience across different engagement channels.

- Sales Copilot Empowers sellers with sales intelligence that helps them deeply understand their customers for faster deal closure.
- Finance Copilot

Empowers sellers with sales intelligence that helps them deeply understand their customers for faster deal closure.

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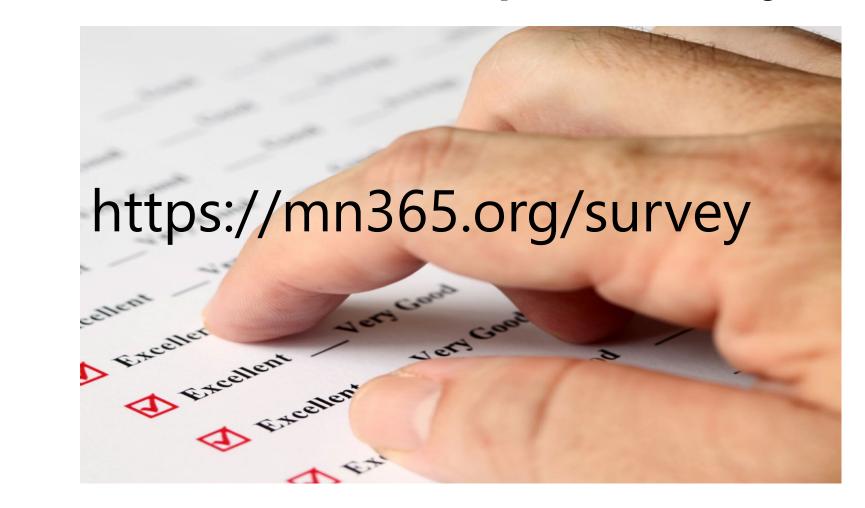








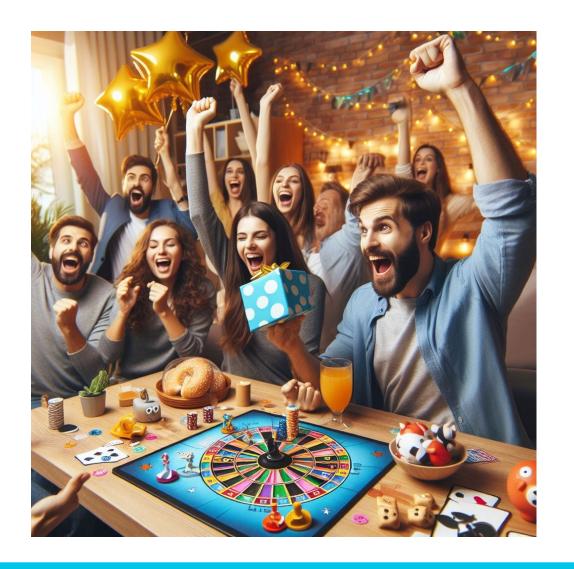
# Workshop Survey



### Let's play the Al Game!



- Count how many times you think I've used AI in this presentation
- The winner gets a prize!
- The total is: 15





## Thank You