Maximising Efficiency with Microsoft 365 Copilot:
A Comprehensive Guide

Copilot

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Microsoft 365 Copilot is front and centre of Microsoft's renewed push to make workplaces and workforces more productive and efficient. Whether in-person, remote, or a mixture of the two, there is a heap of new functionality at your disposal when you subscribe to Copilot.

In this guide, we run through what Microsoft 365 Copilot actually is, the core features ready to use today, and look at how different industries can use them.

We reference data provided by Microsoft in both real-world samples of early users and data models created using Microsoft's comprehensive understanding of its user base. When referring to "Copilot" throughout this eBook, we refer to Microsoft 365 Copilot; not to be confused with Microsoft Security Copilot or any other variation.

About Opus

Opus is a leading Microsoft Cloud Solutions partner and Managed Service Provider.

We were one of the top 100 SMB global Microsoft Partners invited to attend the exclusive Copilot preview from Thomas Abel, the Director of Microsoft 365, in Majorca back in May 2023. We use Copilot as a business and help enterprises across varying industries with implementation and adoption.

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What is Microsoft 365 Copilot?

Microsoft 365 Copilot is an add-on AI assistant complementary to the Microsoft 365 suite. You can add Copilot to any existing user with an eligible license. Not to be confused with the free version of Copilot, still accessible via Bing and Windows, Microsoft 365 Copilot is the only AI assistant available inside apps like Word, PowerPoint, and Excel.

When Microsoft bought a $10bn, 49% stake in OpenAI, the company behind ChatGPT, it unlocked the possibility to embed prompt-style queries to all its productivity applications (Word, PowerPoint, Excel, Teams, Outlook, etc.).

Using real language "prompts", like you would in Chat GPT, Copilot users can now ask any Microsoft tool to help them out with a query, design idea, or data analysis. Once you have the license, the Copilot companion appears in the top sidebar across the Microsoft application stack. Here, you can upload documents for data analysis, extraction, and visualisation. It's also possible to create summaries of inbound communications and even ask Copilot to create email responses and generate proposals off the back of meetings.

You can also use Copilot standalone as a high level app to get an overview of your workflows, to-do lists, and meetings. By using back-end artificial intelligence combined with front-end user input, Copilot can now assist any user with creation, delegation, and administration that usually eats up precious time in the workday.

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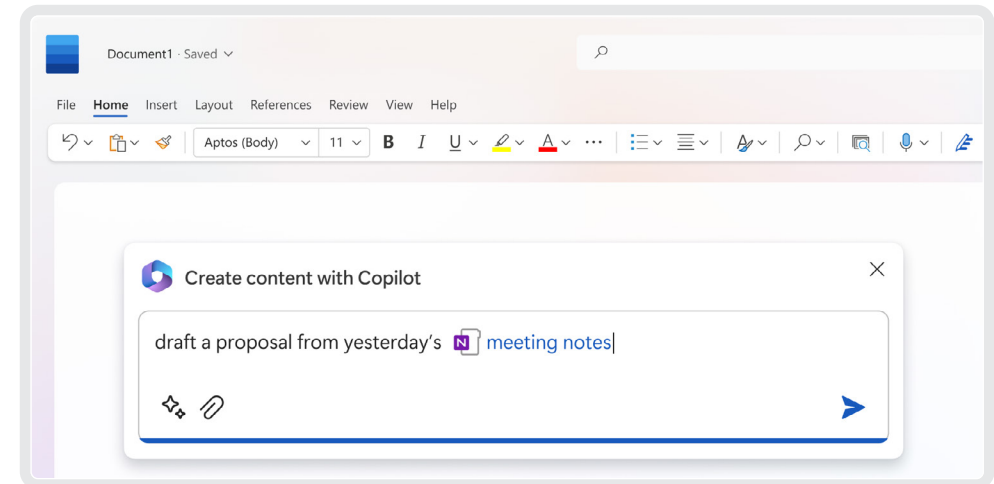
Microsoft 365 Copilot

Why Microsoft 365 Copilot now?

Microsoft's Work Trend Index Annual Report (Will AI Fix Work?) revealed some showstopping statistics:

64%
of employees say that they don't have enough time or energy to do their job.

57%
of employee time is spent in meetings, emails, and chat.

43%
of employee time is spent creating spreadsheets, documents, and presentations.

As a result of these findings, Microsoft drew some conclusions, backed by its own data. It hypothesises that employees without the time and energy to conduct their job well are:

2.5x
more likely to say they don't have enough focus time.

2.5x
more likely to say they struggle searching for information or data.

2x
more likely to say they struggle with too many meetings.

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Copilot
Key Features

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Microsoft Teams

1 - Meeting summaries

The headliner in the Copilot feature list is real-time meeting summaries that generate dates, names, and key points during calls. If a task has been assigned to you (or anybody), a task list appears with action items.

As soon as a Teams meeting starts, a real-time transcript starts generating so participants (those in attendance or absent) can choose to catch up on meeting notes after the meeting, extract key points from the Copilot summary, review shared content (like PowerPoint presentations), and ask questions to get specific insights.

Copilot allows you to get the full meeting context even when you don't attend the full meeting.

To get sent meeting summaries, make sure you "Follow" a meeting when you're not in attendance and your Copilot makes sure you have everything you need. When you join a meeting, you automatically follow it and get access to the meeting notes and action items generated.

Every time you miss a meeting but have opted to follow it, you'll get a notification when your meeting recap is ready.

You can even ask questions about why decisions were made. Copilot summarises responses from meeting attendees to provide rationale behind why your colleagues make certain decisions.

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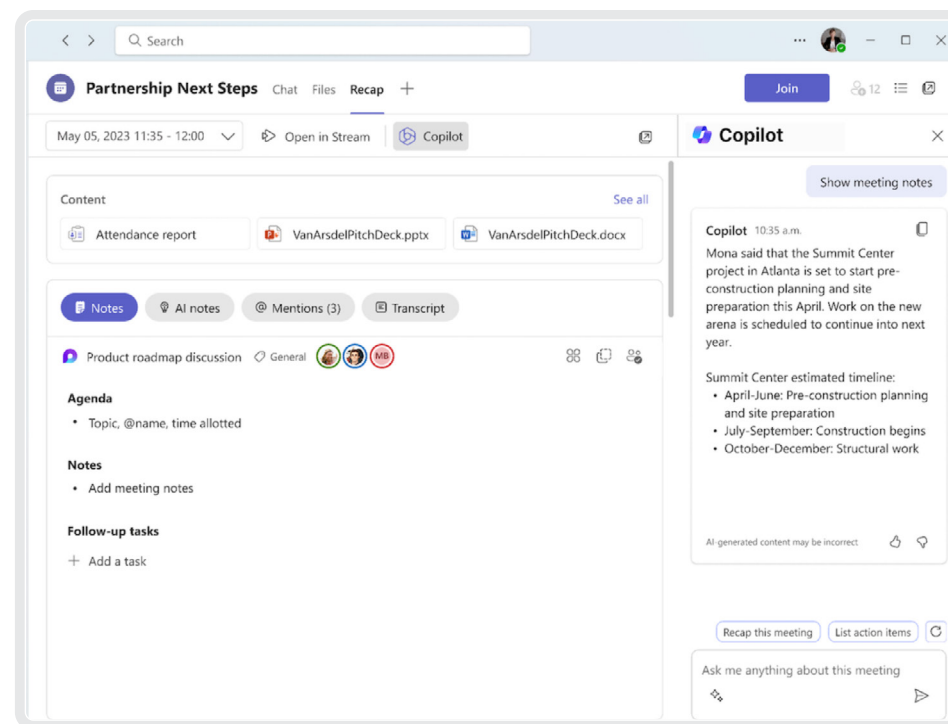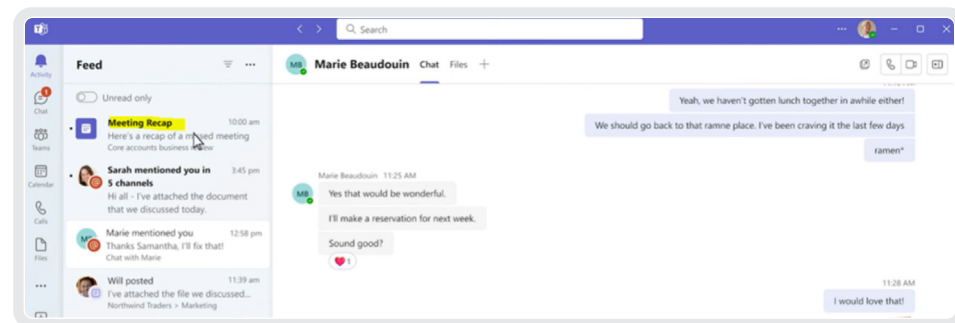
Microsoft Teams

2 - Chat summaries

Inside chat messages, you get similar functionality. Recognising that chats can become overwhelming, Copilot pulls out key points from conversations you may have missed, like when you arrive late or choose to skip a meeting.

For example, if you're catching up on a group chat that significantly moved a project along while you were working on something else, Copilot saves you from needing to read every single message by providing detailed, contextual summaries.
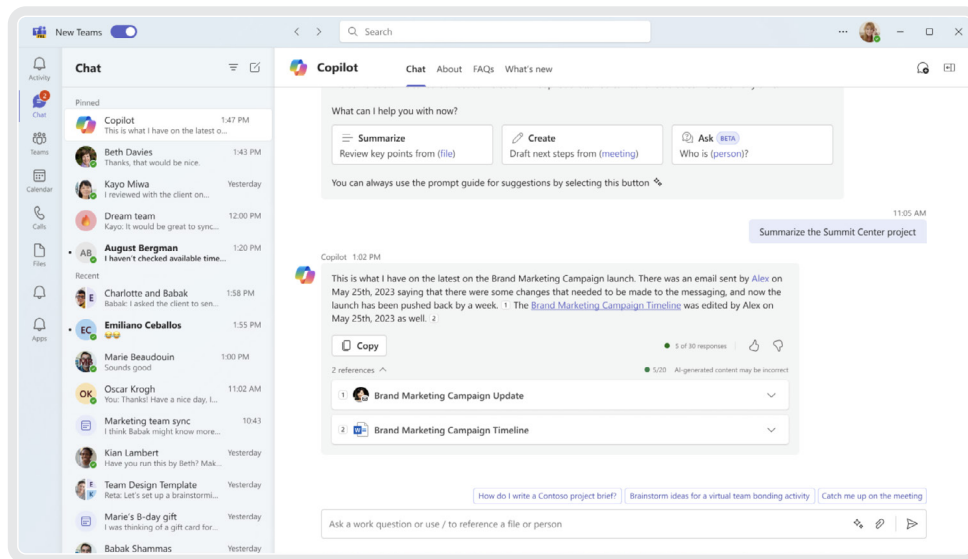
**Are there any action items for me?**

Did any agenda items cause friction?

How did [person] react to [agenda item]?

What got missed from the agenda and needs following up?

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Microsoft PowerPoint

1 - Input-based presentation creation

If you have a file full of information, there's no longer a need to spend time duplicating it in the form of a PowerPoint file. Instead, you can upload the file to Copilot and ask it to create a draft presentation with a suggested design style. If you don't like the style, simply ask CoPilot for another suggestion.
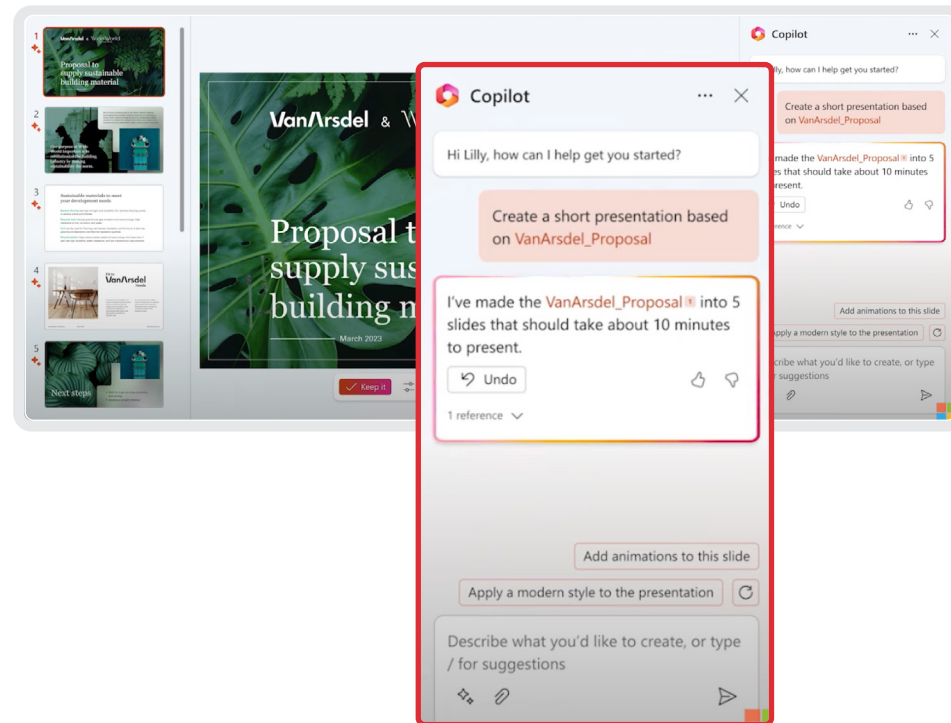
2 - Automatic formatting

When formatting a presentation, it can be a serious time suck. Moving objects to fit into new templates and figuring out what words can be omitted so your deck looks credible is one of the most agitating tasks there is.
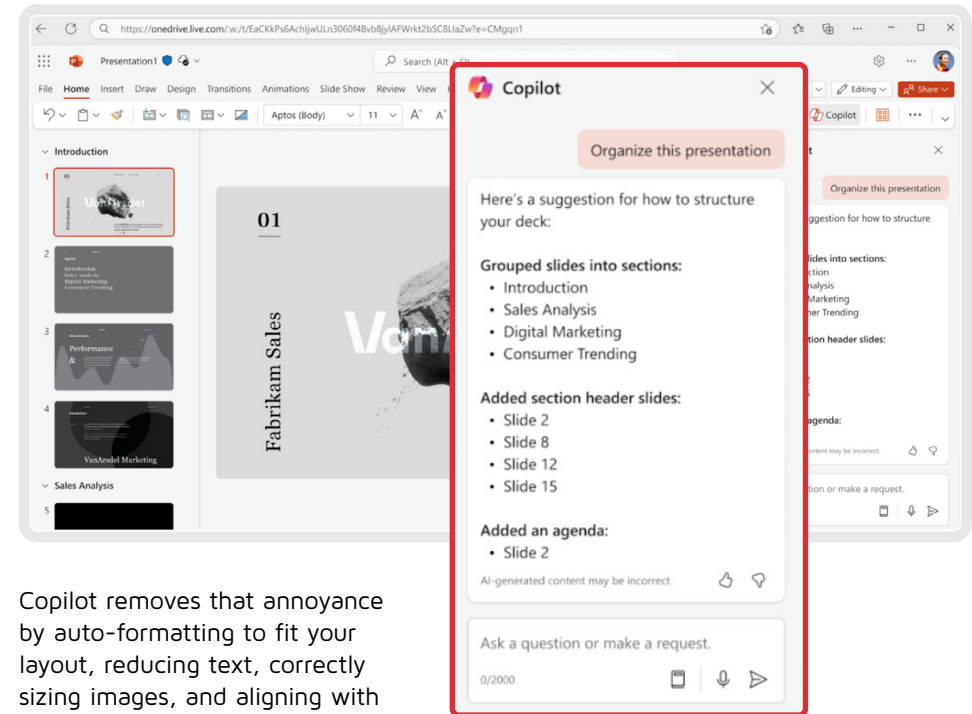
Copilot removes that annoyance by auto-formatting to fit your layout, reducing text, correctly sizing images, and aligning with existing content and animations.

Microsoft PowerPoint

3 - Suggested speaker notes

Creating a presentation is one thing. But what about adding speaker notes?
In most cases, your PowerPoint is going to be presented to a group of people.
So you need to be armed with an impactful script.

Copilot can generate these too. All you need to do is ask.
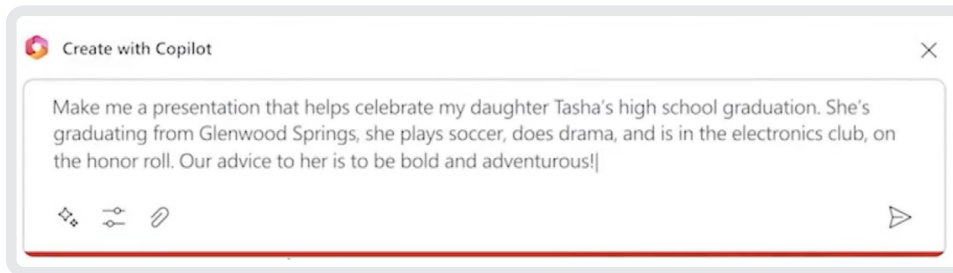
4 - Presentation summaries

At the other end of the spectrum, if you receive a large presentation but are short on time, you can ask Copilot to summarise the key points. This gives you a bulleted list of takeaways and action items you can digest in your restricted time.
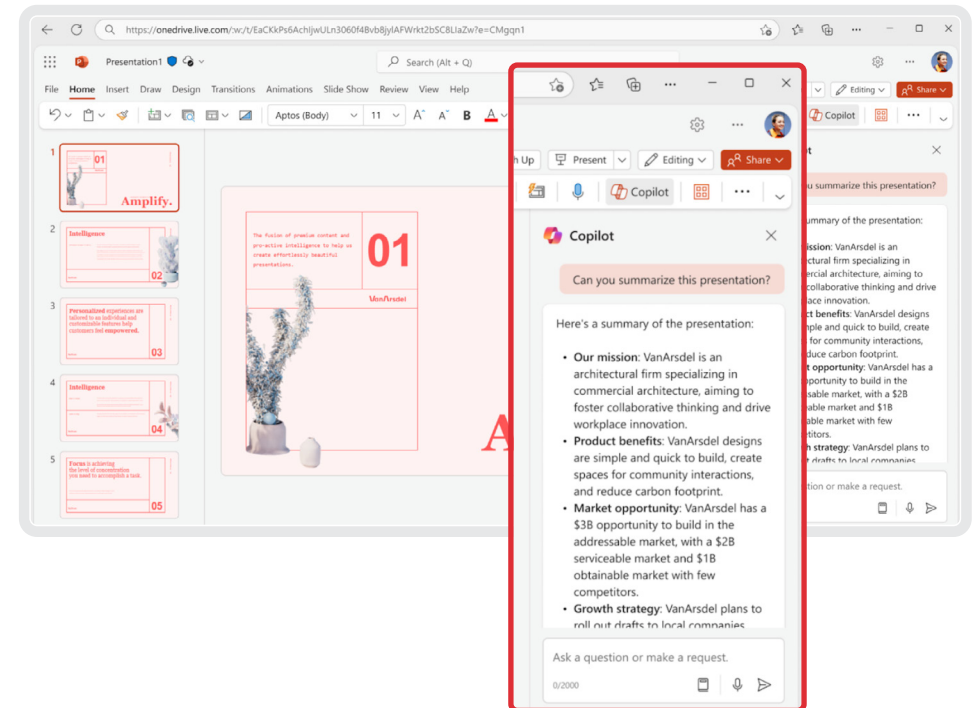
Microsoft Word

1 - Image generation and formatting

If you're tasked with creating presentations or graphics, but are more comfortable with creating a Word document, starting from a blank canvas is a serious blocker.

When Microsoft added a new tool to its 365 suite, the tool named Designer enabled users to create graphics suitable for almost any medium.

With Copilot in Word, you can now ask Designer to generate images without the time and pain of formatting around the document you're working on.
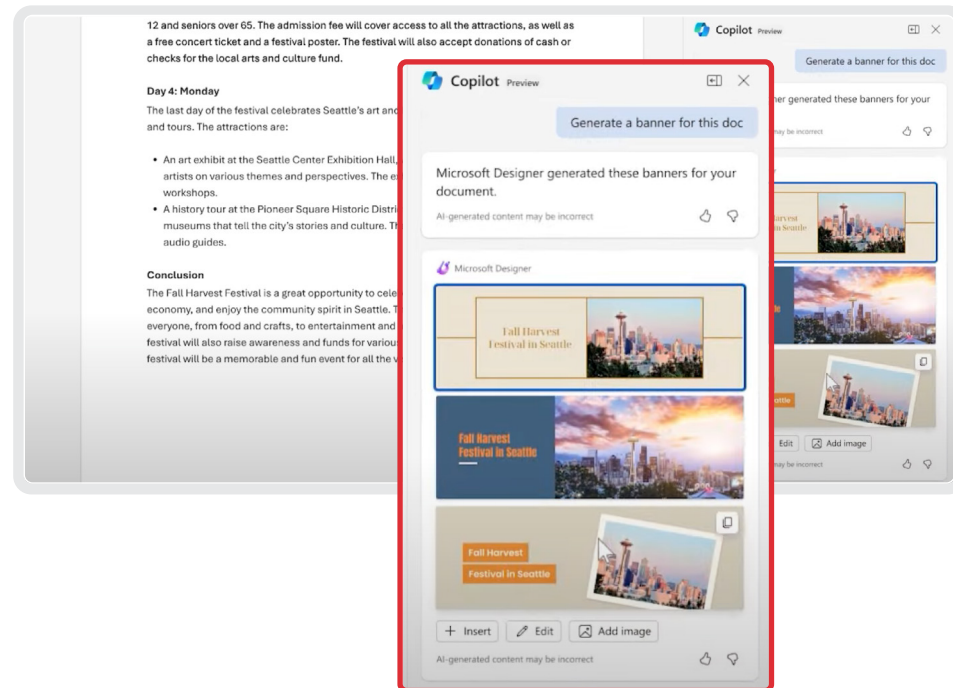
2 - Automated editing

When editing documents, you can ask Copilot to suggest better options for your suggested audience or specific tone of voice.

For example, if you draft a business proposal for a CIO of a manufacturing firm, Copilot can make suggestions that will resonate better.
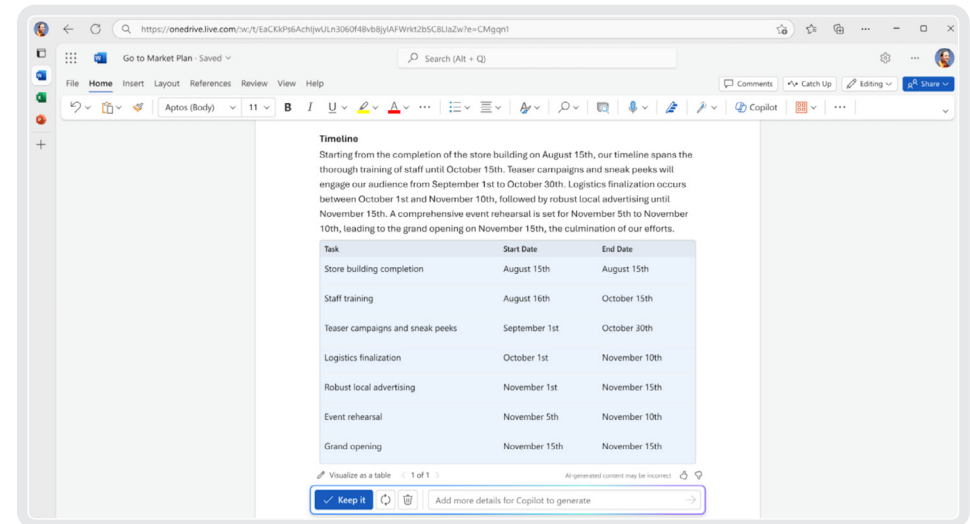
Inconsistencies in flow, formality, and tone can be highlighted by asking a single prompt. You can choose to either have them highlighted or applied straight away.

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Microsoft Word

3 - Document creation

When employees are provided with an outline or structure to work from, Copilot can now fill in the gaps, providing a first draft using both internal and external sources (if integrated).
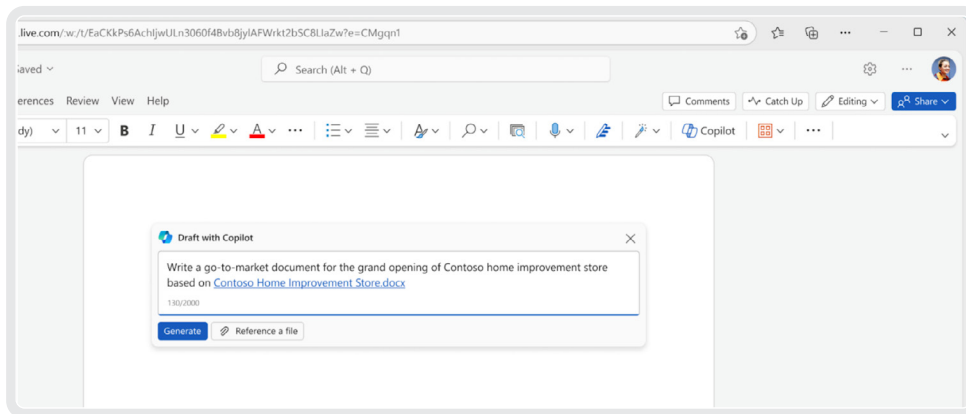
You can choose to tweak the document yourself or use prompts to help Copilot get you to as near a final product as possible.

Microsoft Excel

1 - Data interpretation

For employees using Excel, but without formal accounting training, working with complex formulas and creating graphs off the back of data doesn't come naturally.

To get to the desired outcome, they can now ask "what if?" questions and write prompts that provide instant graphs and trend analysis. Instead of spending hours interpreting data, Copilot provides concise summaries with suggestions to change or improve the data.

2 - Data visualisation and presentation

You can even ask Copilot to help with formatting to make your data and tables more presentable. Using the sidebar module, you can have a conversation with Copilot to make tables, graphs, and data more presentable to different audiences.

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Microsoft Outlook

1 - Email summaries

With one of the largest losses of productivity cited as too much time in emails (as much as 6 hours per day), Copilot brings a welcome relief to your inbox.

For long and wordy emails, you can get automated email summaries to extract the most important elements. This is especially useful when out of the office and catching up on email on your mobile.
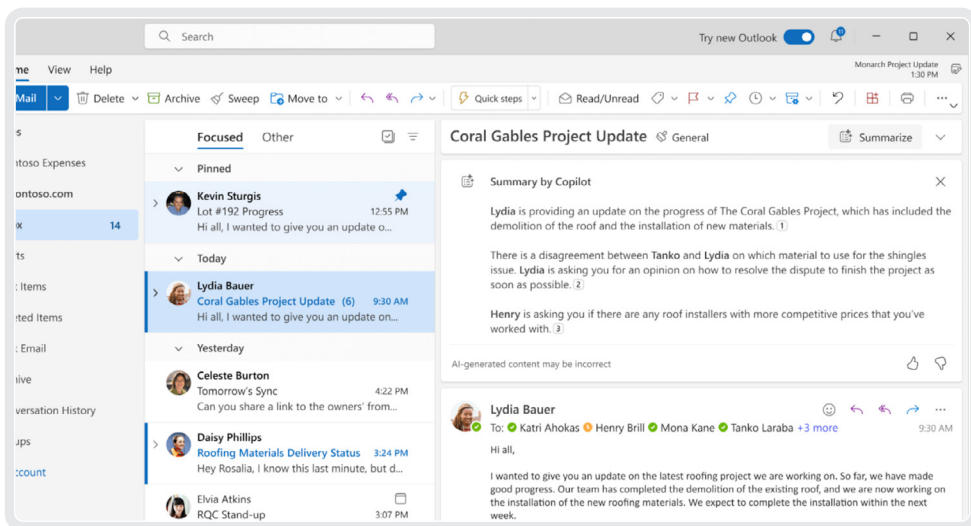
2 - Catch-up prioritisation

If you've been away for a while, Copilot can prioritise emails based on time and sentiment.

For example, if you've been asked to create something with a looming deadline, you don't want it buried under less important emails that aren't time-bound.
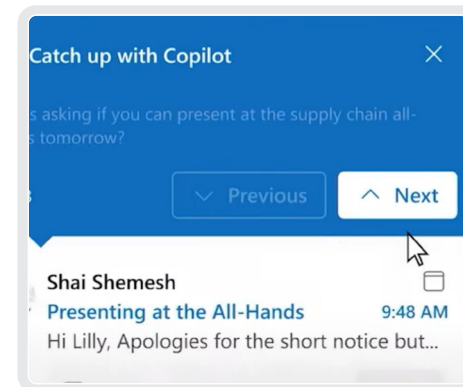
3 - Draft email responses

When responding to emails, you can ask Copilot to draft a response with the click of a button. If you're not happy with the draft, ask for changes in text length and/or writing style.

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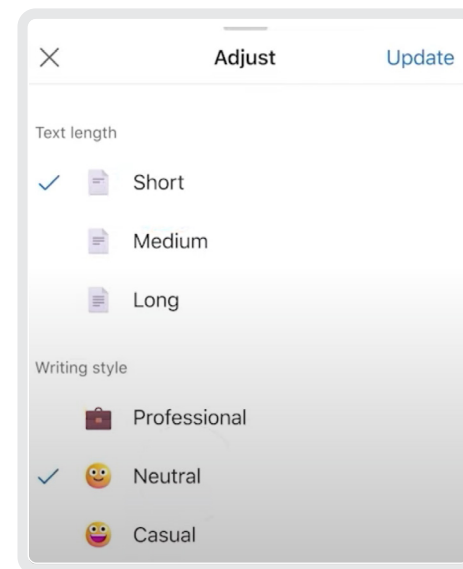
Business benefits

The goal of Copilot is to reduce mundane tasks through automation. Thus, freeing up humans to allocate time to value-adding tasks that can't be completed by machines.

When you enable staff members to work autonomously, expect your business to benefit in these five major areas.

These are all examples of generic business benefits, applicable to all executives, managers, and individual contributors. While all important to reach maximum productivity, there are features we can look at in specific industries.

In the next section, we look at specific use cases (and their benefits) for businesses in the finance, recruitment, professional services, and eLearning sectors.

Business process improvements

Cross-reference data for validity and speed up document creation, change management, and mass communication.

Cost reduction

Both the cost per task and productivity per employee. By speeding up the time taken to complete various tasks, you're increasing the output per unit of time.

Employee wellbeing

With more time and energy, employees feel a sense of achievement, rather than just going through the motions.

Talent retention

As employees start to enjoy their job more, they feel they're contributing and are less likely to seek employment elsewhere.

Empower less experienced staff

Lower barrier to entry for tasks like document creation, presentation formatting, and data interpretation.

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Example
use cases

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Financial services

Whether you're creating business projections or managing invoice queries, there's a host of functionality for financial services companies to benefit from:

Summarise deal info:	Discovery of financial info:	Verification of revenue projections:	Refine deal analysis based on negotiations:	Respond to invoicing questions:	Simplified reporting and easy-to-spot trends:
Get one-click summaries of order value, products ordered, etc.	Save time searching disparate systems and integrate into the app you're working in.	Cross-reference against other real and modelled sources.	Pull from conversations to update value, profit margin, etc.	Manage customer queries without needing to search historical invoices.	Automatically turn Excel data into graphs and get insights based on prompts asked.

Microsoft suggested ROI

468%

Microsoft suggested Productivity Gain

$176

per user per month

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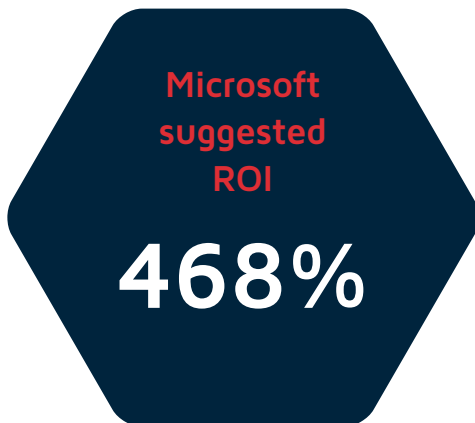
Recruitment

Create job descriptions:	Extract skills, experience, and qualifications from CVs:	Generate interview questions:	Summarise contributions from group or one-to-one interviews:	Draft custom offer letters:	Create training materials:
Enter your desired role and responsibilities and have ChatGPT write your first draft.	Filter and sort without lifting a finger.	Enter the type of role and seniority and ChatGPT will provide a first draft	In Teams meetings, create meeting summaries to send to decision-makers.	Combine job descriptions, interview questions, and standard working procedures to write your first draft.	Pull from historical onboarding documentation to create new resources.

Microsoft suggested ROI

399%

Microsoft suggested Productivity Gain

$155

per user per month

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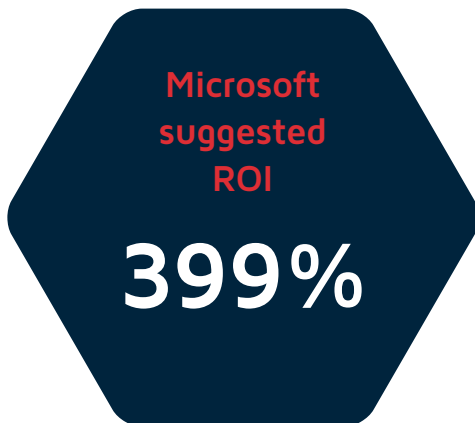
Professional Services

Write proposals based on requirements:	Summarise action items from kick off meetings:	Create adoption materials:	Summarise incidents and proposed remedies:	Revise procedures and change management documents:	Draft emails to send updated documentation:	Search for solutions to specific error codes:
Create first drafts of sales proposals, project plans, and acceptance criteria.	Delegate follow-up tasks and assign responsibilities based on previous conversations.	Pull from meeting summaries and documentation to create resources.	Scan tickets and meetings to understand issues and find solutions without time-consuming investigation.	Update a policy once and duplicate across other instances.	Have Outlook create your email based on the attachment.	Cross-reference databases for troubleshooting and support documentation creation.

Microsoft suggested ROI

394%

Microsoft suggested Productivity Gain

$153

per user per month

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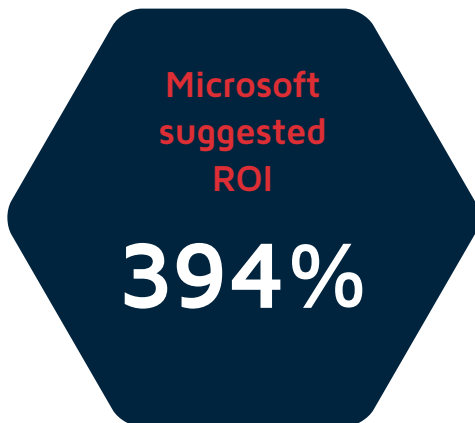
eLearning

Find spread information:	Create meaningful content from various sources:	Analyse and compare data from quizzes and exams:	Create action items following training courses:	Delegate tasks:	Provide arguments to defend a thesis:
Combine data and insights from multiple resources into a single document.	Turn pooled information into valuable resources.	Find bottlenecks, barriers, and anomalies in learning behaviour.	Use meeting summaries to suggest how to make courses better.	Assign ownership and plan next steps following meetings and planning.	Write a counterargument using AI-generated and data-driven insight.

Microsoft suggested ROI

717%

Microsoft suggested Productivity Gain

$254

per user per month

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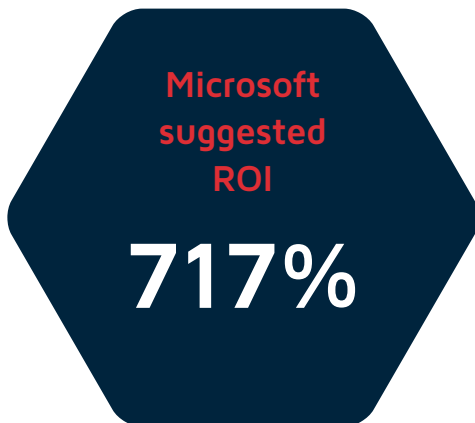
Manufacturing

Speed up employee training:	Trust new staff with data:	Increase visibility and traceability of supply chain data:	Simplify data management and analysis:	Generate instant data visualisation:	Instant scaling:
New employees onboard faster without the need to learn every system to create an end product. E.g. A Word document can now incorporate complex designs without spending a week learning how to create bespoke graphics or design models.	Remove the barrier to information by providing an integrated data source into frequently used apps.	Copilot scans internal resources and shares relevant data.	Import data from connected resources without the need for transfer or interpretation.	With immediate analysis and design, present vast amounts of manufacturing data in simple graphs and charts.	Flex up and down design and analysis efforts when the market demands it.

Microsoft suggested ROI

393%

Microsoft suggested Productivity Gain

$181

per user per month

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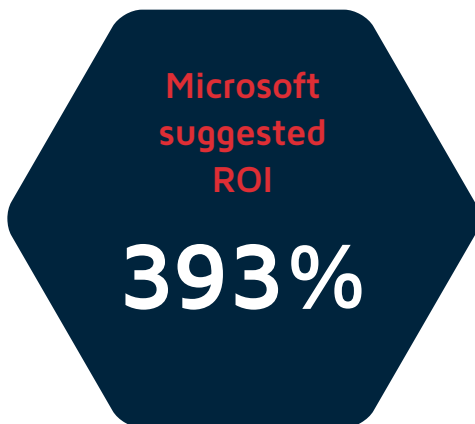
Licensing
overview

Licensing overview

The cost for Microsoft 365 Copilot is £296.40 per user per year. This cost is additional to your existing Microsoft 365 licensing, which may include plans like Business Standard, Premium, E3, or E5.

> **Note: You don't need to license every single user in your organisation. Only assign a Copilot license to those users who will benefit the most.**

To access Copilot, you must also use Entra ID (formerly Azure Active Directory) as well as adopted modern cloud services from Microsoft.

Return on investment
While Copilot licensing is simple, the bigger question is about what you are getting in return.

The ROI conversation around Copilot is about saving time and making employees, managers, and executives more efficient and productive.

By "fixing" meetings, automating information search, and removing the blocker to first draft creation, Copilot stands to save hours of time per month and boost personal productivity by at least £100 per month.

When compared to the cost of around £25 per user month, the benefits present a 400% return on investment.

$$ROI = \frac{£100 \text{ per month}}{£25 \text{ per month}} = 400\%$$

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How Opus
can help you

How Opus can help you

While the benefits of Copilot are obvious, planning for implementation and adoption is never straightforward with any technology introduction. A white glove approach from a vendor who's been there and done it plays a crucial part in getting it right the first time and for a long time.

Copilot is dependent on you having a strong environment when it comes to compliance, permissions, zero-trust security, data classifications, and labeling to ensure the appropriate access of information is granted and adhered to. Failure here could lead to exposure of information to parties without relevant permission or need.

For example, you don't want sales teams asking Copilot to report on everyone's commission last month. Likewise, a finance controller who has access to most financial data, probably shouldn't have access to the CEO's bonus calculation.

There is inherent danger in not being ready. Yet, there are so many tangible benefits of making the leap. Understanding strict data controls and the importance of Azure Information Protection products, along with other security and compliance services, is essential and will support you in preparing for Copilot.

As a Microsoft-accredited partner, Opus provides a highly-skilled, vendor-trained pre-sales and product engineering department to ensure all our Microsoft customers are getting the most from their licenses.

If you're ready to increase your productivity and want to further explore the ROI of Copilot, speak to one of our trusted Microsoft advisors to discuss your licensing ahead of your renewal.