



# Welcome to the MN M365 Spring Workshop Day 2025!

Please help us drive event awareness by tweeting and posting  
about your experience at the Workshop:

@M365MN #M365WorkshopDay

Please join us following the sessions for Happy Hour... Admin Ales,  
Workshop Wine, and more!

Thank you for your participation!

**CUT THROUGH THE HYPE**

## **REAL WORLD APPLICATIONS OF MS COPILOT**



# Agenda

- **Part I**

- Lab Login
- Prompting: shifting the focus
- Role-based prompt tips
- Role-based use-cases

- **Break**

- **Part II**

- Panel discussion



# AI Panel



**Nina Adams**

Consulting Practice Director &  
365 Consultant  
Mytech Partners



**Tony Oman**

Principal – Business  
Valuation & Transaction  
Advisory Services



**Stephanie Kingslien**

Marketing Director  
Mytech Partners



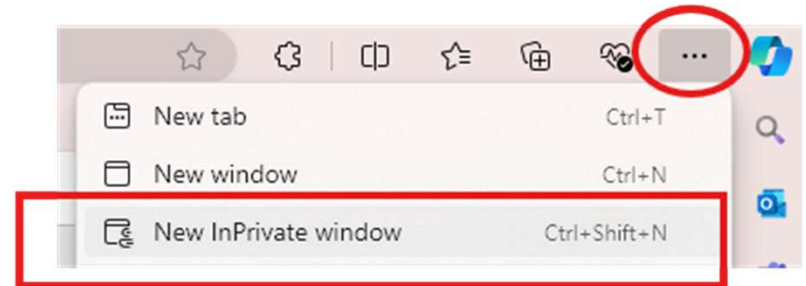
**Nathan Austin**

VP of Business Development  
Mytech Partners



# Lab Login Instructions

▶ 1. Open Edge > Top right ... > Click 'New InPrivate window'



▶ Type in 'www.office.com' > Click 'Sign in'





Alias Name	Username / email	Last Name starts with...
Adele Vance	<a href="mailto:adelev@365demo.fun">adelev@365demo.fun</a>	A – B
Allan Deyoung	<a href="mailto:alland@365demo.fun">alland@365demo.fun</a>	C – D
Diego Siciliani	<a href="mailto:diegos@365demo.fun">diegos@365demo.fun</a>	E - F
Irvin Sayers	<a href="mailto:irvins@365demo.fun">irvins@365demo.fun</a>	G - H
Johanna Lorenz	<a href="mailto:johannal@365demo.fun">johannal@365demo.fun</a>	I - K
Lee Gu	<a href="mailto:leeg@365demo.fun">leeg@365demo.fun</a>	L - M
Lidia Holloway	<a href="mailto:lidiah@365demo.fun">lidiah@365demo.fun</a>	N - O
Lynne Robbins	<a href="mailto:lynner@365demo.fun">lynner@365demo.fun</a>	P - R
Megan Bowen	<a href="mailto:meganb@365demo.fun">meganb@365demo.fun</a>	S - T
Miriam Graham	<a href="mailto:miriamg@365demo.fun">miriamg@365demo.fun</a>	U - W
Nestor Wilke	<a href="mailto:nestorw@365demo.fun">nestorw@365demo.fun</a>	X - Z

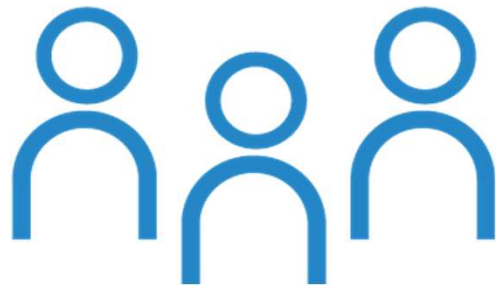
**Password: !365isfun!**





# Copilot Prompts

Moving from app-based to  
role-based prompts



**There are many  
different roles**



**You wear many  
different hats!**





# Copilot wears many hats too!





# Role-based prompt



## ROLE

- You are a Sales Manager / Cyber Security Expert etc.

## TASK

- List 5 reasons to adopt Copilot

## FORMAT

- Put it in a table format



# Prompt Example - Sales

**Role:** Salesperson

**Task:** 5 reasons why I need Copilot

**Format:** Table format

*"You are a salesperson. Please give me a list of 5 reasons why I need Copilot in my small business. Do it in a table format."*

Reason	Description
1. Enhanced Productivity	Copilot automates repetitive tasks, allowing your team to focus on more strategic activities. This boosts overall productivity and efficiency.
2. Improved Customer Engagement	With Copilot, you can provide personalized and timely responses to customer inquiries, enhancing customer satisfaction and loyalty.
3. Data-Driven Insights	Copilot analyzes your business data to provide actionable insights, helping you make informed decisions and stay ahead of the competition.
4. Cost Savings	By automating tasks and streamlining processes, Copilot reduces operational costs, allowing you to allocate resources more effectively.
5. Scalability	As your business grows, Copilot can easily scale with you, ensuring that your operations remain smooth and efficient without the need for significant additional investment.



# Prompt Example – Security Expert

**Role:** Cyber Security Expert

**Task:** 5 reasons why I need Copilot

**Format:** Table format

*“You are a Cyber Security Expert. Please give me a list of 5 reasons why I need Copilot in my small business. Do it in a table format.”*

Reason	Description
1. Threat Detection	Copilot can continuously monitor your systems for unusual activities and potential threats, providing real-time alerts to help you respond quickly.
2. Data Protection	With advanced encryption and security protocols, Copilot ensures that your sensitive business data is protected from unauthorized access and breaches.
3. Compliance	Copilot helps you stay compliant with industry regulations by automating security checks and maintaining detailed logs of all activities.
4. Employee Training	Copilot can provide ongoing cybersecurity training and awareness programs for your employees, reducing the risk of human error and phishing attacks.
5. Incident Response	In the event of a security breach, Copilot can assist in quickly identifying the source, containing the threat, and initiating recovery procedures to minimize damage.

Same prompt, different 'Role'



# Let's try!

Use-cases for IT, Sales,  
HR, Marketing, Finance  
etc..



# ◆ ◆ ◆ Technical Meetings, Training & Client Resources

**USE: MS Teams > Meeting Chats > “Technical Meeting – 365 Dynamic Groups”**

- Write a Q&A document based on this meeting. Use non-technical language. The output is for use by our Sales Team during their meetings with clients.
- Our Sales team needs to send an email to our clients highlighting the benefits of 365 dynamic groups. Write a short, enthusiastic email based on this meeting that our Sales folks can use.
- Write a how-to guide in non-technical language based on this meeting.
- Compile a Sales pitch deck based on this meeting to highlight the benefits of Dynamic Groups to clients.
- Compile a training slide deck for PowerPoint.
- Translate into Spanish.



# Meetings and Sales Resources

**USE: MS Teams > Meeting Chats > “Mytech Client Discovery Call”**

**I need to write a Scope of Work based on the meeting.**

- Write an executive summary.
- What business problem is the client looking to resolve
- What recommendations did I make
- Outline the various consulting phases I detailed in the meeting.
- Compile a follow-up email to the client expressing thanks for meeting with us and providing a brief summary of the meeting and next steps.





# IT Administration/Governance

## IT Governance – *Use 'IT Governance data examples' in Edge*

*I am a 365 consultant and my client has 365 governance concerns. We have extracted some 365 reports from the 365 Admin center. I need to write a comprehensive, detailed report using non-technical language highlighting key trends in the data and identifying potential issues we need to review but also providing recommendations to the client moving forward. Provide ample explanations to clearly explain key data trends and give practical examples on how these issues can be mitigated. Clearly define for each category why these data trends are important for governance. Use the following Excel document as source material: {URL}*

- *Add an executive summary*
- *Add a section on implementation steps*
- *Visualize the data on the 'Teams Usage' tab showing the 'Team Name' and number of 'Active Users' by team. Create a pie chart.*
- *Add the pie chart to the report under the 'Teams Usage' heading.*
- *Provide the Word document.*





# IT Administration/Governance

## Governance reports in Excel (*Use 'Governance data examples' in Excel*)

- **SharePoint Sites (ADV ANALYSIS):**
  - *I need to identify SharePoint sites for clean up. Use 'last activity date' to identify sites with no usage in 2025. Also show the number of 'files' for each site.*
  - Create a bar chart to visualize the number of files for each site.
- **Teams Usage**
  - *I need to identify teams that have not shown any activity in 2025 so that they can be identified for archive. Summarize the data to show the team name and activity date. Sort from oldest activity date to most recent activity date.*
- **DSPM for AI – ADV ANALYSIS:**
  - *Summarize Activity type by user (columns) and by app (by rows) |*
  - *Visualize the total count of activities for each app and highlight users that have accessed sensitive resources.*

**\*\*\*COPILOT IN ADMIN CENTERS**







# Reports, Playbooks, Policies

## Compare Multiple Reports -

- Summarize quarterly reports into 1 annual report (OneDrive or Edge)

## Create playbooks

- I am a cyber security consultant. Compile a comprehensive playbook that we can provide to clients when a business email compromise takes place. Include role players like forensic investigators, cyber insurance carrier, lawyers etc. Add a timeline for each step.
- Convert the playbook into an action plan with duties, a timeline, dependencies, responsibilities, due dates, etc., and convert it to Excel.

## Create Policies (Security, AI, HR etc.)

- Write a 2-page policy around 'Copilot Acceptable Use'. Include that Copilot is not meant to replace our current policies around the approval of documents but that all documents should follow the normal approval processes in place. Make the tone professional but still understandable for all users across the organization.





# HR & Training Activities


## Interviews

- *I am hiring for a Microsoft 365 consultant. Compile a list of interview questions for my first round of interviews. For the second round of interviews, I'd like applicants to solve a case study related to 365. Compile a sample case study to test their knowledge of setting up Teams and channels according to best practices.*
- *Any tips for evaluating answers?*
- *Can you create a template to be used as a scoring system? Show an example I can use during my interview process and export the scoring matrix to Excel.*

## Job Descriptions

- *I am the manager of a consulting practice and need to write a detailed job description / role alignment card so that we can hire a junior security consultant. Include certifications necessary for a junior security consultant role and map out a pathway for future certs. Include role information, key responsibilities, skills & qualifications, and people skills required for the role.*
- *Certs required*
- *KPIs for this role (monthly / quarterly)*

## Training - **Use the 'Train-the-Trainer outline'**

- *Create a PowerPoint presentation to be used during training sessions.*
- 



# IT Budgets / Finance

## Budget Analysis (Use 'Budget vs actual consulting')

- *Visualize the revenue trend in the data. Highlight seasonal trends.*
- *Why does revenue dip in April?*
- *Based on 2024 data, forecast revenue and expenses for 2025. Break it down by revenue and expense type.*
- **Formula:** *Look at the 'total budget' and 'total actual' columns. Calculate the % variance between the two.*

## Contract Analysis (Use Sample Vendor Contract')

- *What is the commitment and monthly fee?*
- *What are the T&Cs?*
- *Who is responsible for insurance coverage?*

## Client Profitability (Use 'Client Profitability')

- *What is the average gross profit margin by industry over the 3 years by industry. Sort from highest to lowest and visualize the data.*
- *We need to focus on top 3 clients by industry based on Monthly Recurring revenue. Show with a visualization which clients we should be focused on.*





# Sales & Marketing

## Sales / RFPs

- Answer this RFP based on the attached file and [www.mytech.com](http://www.mytech.com).

## Marketing

### SEO:

- Based on [www.mytech.com](http://www.mytech.com), what SEO key words should we try to rank for?
- Can you give me some keyword competitiveness and search volume data?
- Create a content strategy around these keywords

### ANALYZING LEAD DATA

**(IN EDGE):** Sample Weekly Marketing Lead Data.xlsx Based on attached Excel file and our YouTube channel ([https://www.youtube.com/channel/UCI1ZOoqTwnWqA\\_w4IJ6ilxA](https://www.youtube.com/channel/UCI1ZOoqTwnWqA_w4IJ6ilxA)) – write social media marketing strategy to increase YouTube subscribers. Give practical examples and make recommendations.

### PROSPECTING

- Based on Mytech Partner's LinkedIn page, what business insights can you give me?
- Create a pitch deck
- Based on the above, create 3 different email options pitching our services to Mytech.
- Yes please create a personalized email to Nathan Austin at Mytech.
- Build a cold calling script based on the above.





# SharePoint & Agents

## SharePoint News & Pages

- SharePoint site > New Page > reference 'SharePoint News Post'
  - Use in-line Copilot to rewrite paragraphs (similar to Word)
- Use in conjunction with 'Design Ideas' to help with layout (similar to Designer in PPT)

## Copilot Agents – HR Agent example

- Customize Copilot by creating your own agent
  - In Edge
  - In SharePoint

## ANALYST & RESEARCHER AGENTS







# **M365 SPRING WORKSHOP**

Panel Discussion on AI

May 2025




# Business Problem?

- Valuation reports are long technical documents
- The contents of the documents are largely driven by professional standards
- Like every company, every valuation report is unique
- Technical writing means these engagements eat up significant time and overall capacity of a valuation analyst
- Put simply, these engagements are very difficult to scale as a professional service
- Added to this is a skills gap – finance, accounting, economic undergraduate programs typically don't focus on technical writing so many analysts lack technical writing expertise
- Can AI help solve this problem?





# Olsen Thielen's Approach

- We built a Private ChatGPT interface
  - Basically, an interface that is connected to and utilizes the ChatGPT LLM
  - But data within the prompt is not fed into the public LLM model - this allows OT to utilize the power of ChatGPT, without the risk of sharing client confidential data
  - This private interface also allows for more sophisticated, multi-step, data intensive, prompts
  - More sophisticated prompts allows for meaningful results (the better the prompt, the better the result – garbage in, garbage out)
- 



# Does it Work?

- Yes! But like any new tool, we need to get better at using it
- People are resistant to change the way they do things – this has been no different in our roll out of this tool internally
- Today, our tool doesn't learn from our inputs – eventually I'd love to feed it years of reports and valuation models; and learns from that input to further refine the output





SHARE YOUR USE-CASES

# AI PANEL DISCUSSION

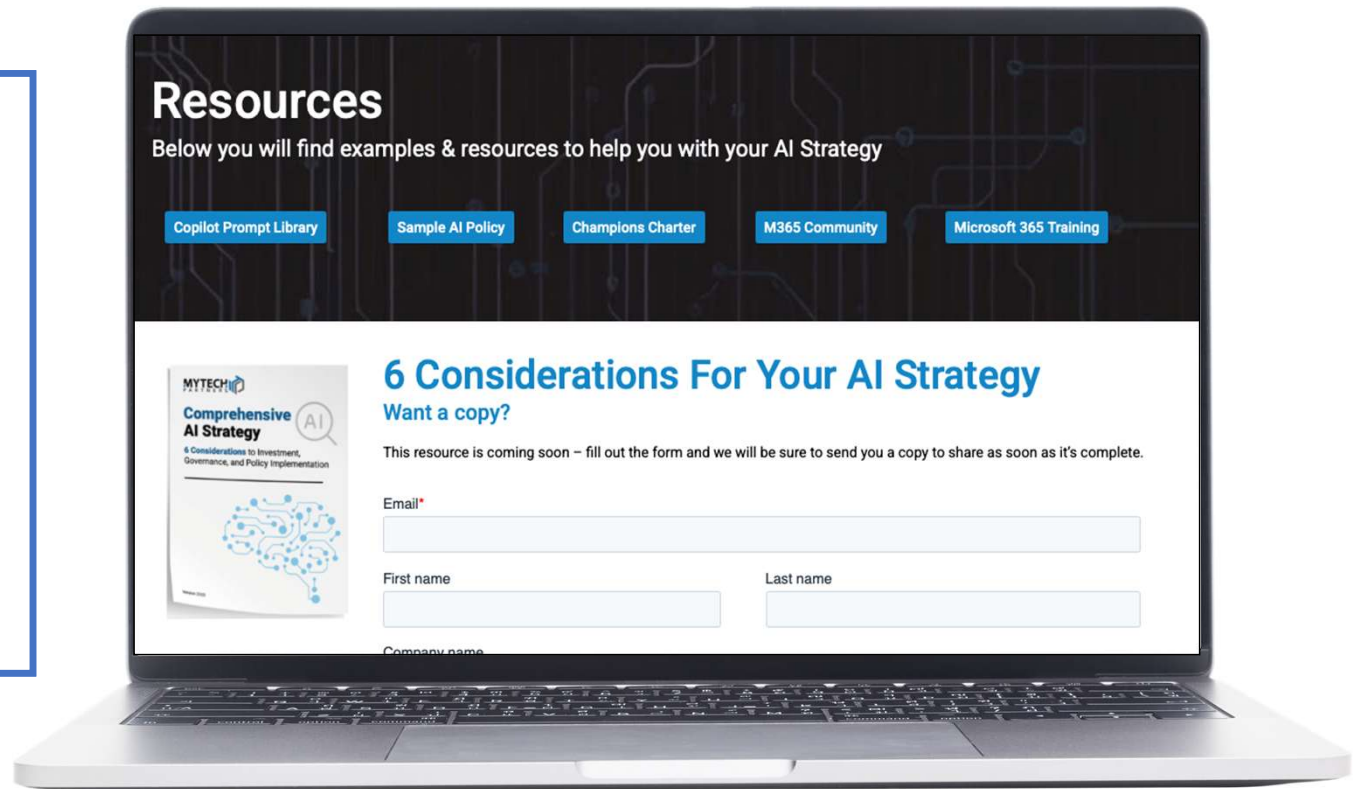




**Questions?**



# For Resources and More



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Microsoft

Stop by the Booths for “Vendor Bingo” to win prizes!



PLATINUM (Registration, Breakfast, Lunch & Happy Hour)



**EMERGENT**  
SOFTWARE



GOLD



**Jabra** GN



# WORKSHOP SURVEY

<https://mn365.org/survey>

