

COPILOT MASTERING SESSION

Leading with Copilot

A working session for CEO, CBO, CFO & MD on applying Microsoft Copilot to executive decisions, documents, and internal capability building.

90 MINUTES · FUNDAMENTALS → LIVE DEMO → CUSTOM AGENTS → Q&A

Session Agenda

90 minutes, four parts

01

Copilot Fundamentals

Core strengths & enterprise capabilities

20 MIN

02

Live Demonstration

Structured document creation & problem-solving

20 MIN

03

Deep Dive

Building custom Copilot agents

25 MIN

04

Hands-On Q&A

Practical implementation guidance for your org

15 MIN

Why This Matters for Leadership

AI capability is becoming a leadership skill, not just an IT investment.



Speed of Execution

Compress hours of drafting, research, and analysis into minutes — without lowering the bar.



Judgment at Scale

Push structured, well-reasoned thinking down to every team, not just your best analysts.



Competitive Edge

Organizations that build internal AI fluency now compound that advantage every quarter.

PART 1

Copilot Fundamentals

Core strengths and enterprise capabilities

20 MIN

01

Core Strengths

What makes Copilot different as a thinking partner



Grounded in Your Content

Reasons over your own emails, meetings, and files via Microsoft Graph — not a blank model.



Multimodal Across Formats

Slides, spreadsheets, transcripts, and images all feed the same conversation.



Native Inside Your Tools

Works directly in Word, Excel, PowerPoint, Outlook, and Teams — no new app to learn.



Enterprise-Grade Trust

Respects your existing permissions — Copilot only ever sees what you can already see.

How Copilot Organizes Your Work

The four building blocks inside Microsoft 365 Copilot



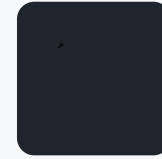
Copilot Chat

A single conversational entry point across your work, files, and mail.



In-App Copilot

The same assistant embedded directly in Word, Excel, PowerPoint, Outlook, and Teams.



Agents (Copilot Studio)

Packaged, reusable capability for a recurring task — the basis of Part 3.



Graph Grounding & Connectors

Links Copilot to your calendar, mail, files, and business systems.

Enterprise Capabilities

What makes Copilot deployable inside a real organization



Security & Compliance

Permission-aware by design, with Purview and EU Data Boundary controls for regulated data.



Systems Integration

Connects to business systems via Graph connectors, plugins, and Power Platform actions.



Deployment Everywhere

Teams, Outlook, Office apps, web, mobile, and Windows — meet people where they already work.

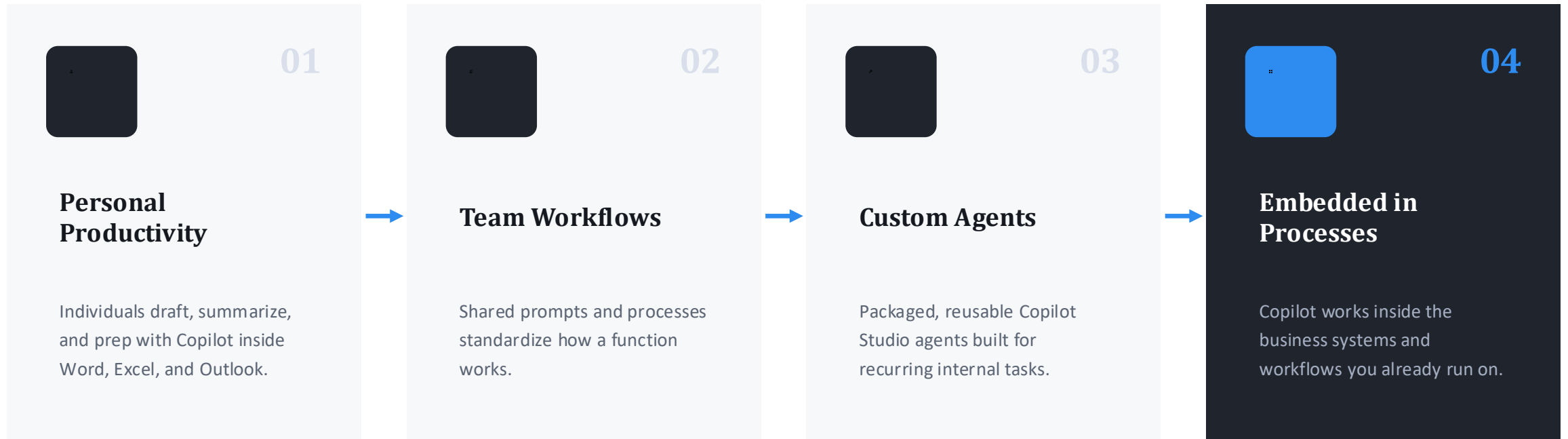


Licensing & Scale

Per-user Microsoft 365 Copilot licensing that scales from a pilot team to the full tenant.

Where Copilot Fits in Your Organization

A natural adoption path — most organizations move left to right



How Copilot Actually Works: Three Layers

Microsoft's own architecture for Copilot — worth knowing before you evaluate any output

1



Foundation Models

The large language model that does the reasoning, drafting, and summarizing.

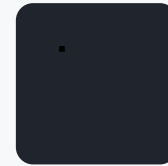
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Microsoft Graph

Grounds every response in your calendar, mail, files, and Teams chats — the reason answers feel specific to you.

3



Microsoft 365 Apps

The surface — Word, Excel, PowerPoint, Outlook, Teams — where the answer actually shows up.

PART 2

Live Demonstration

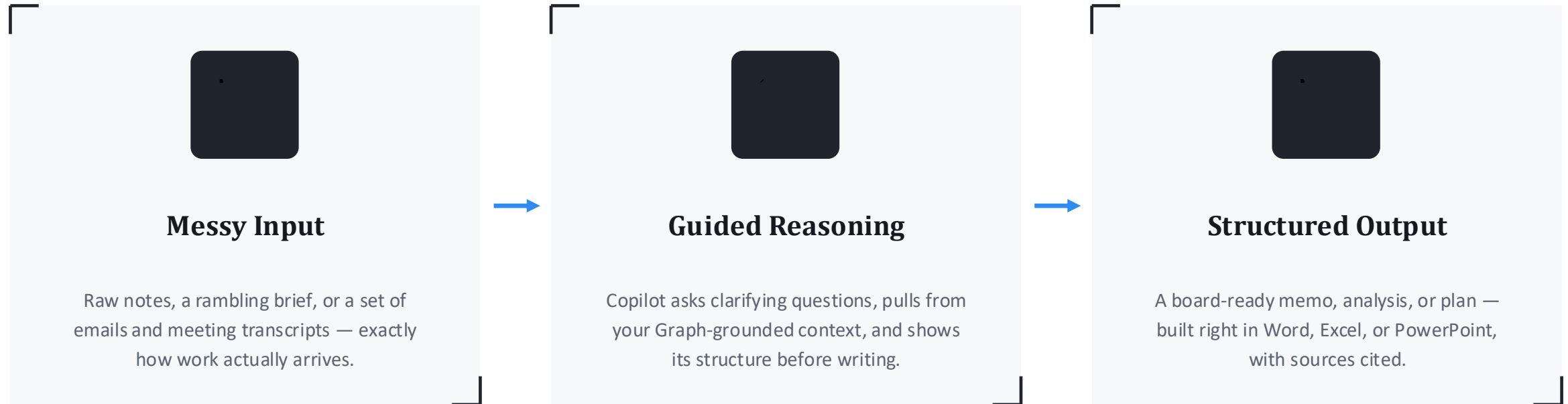
Structured document creation and problem-solving

20 MIN

02

Demo Walkthrough

From a messy business problem to a decision-ready document, live



Live in the room: the exact document type is chosen with the audience — an exec memo, a financial or operational analysis, or a problem you bring.

What to Watch For

The habits that separate a good answer from a usable one



Judgment Calls

Where Copilot makes an assumption, it should say so explicitly instead of guessing silently.



Iteration in Real Time

A follow-up instruction reshapes the document instantly — no starting over.



Structure & Clarity

Output is organized the way an executive reads: headline first, detail on demand.



Cited Sources

Watch for the reference links back to the actual email, file, or meeting an answer drew from.

PART 3

Building Custom Copilot Agents

Turning one-off prompts into reusable capability

25 MIN

03

What Is an "Agent"?

Packaged expertise Copilot Studio can reuse on demand



DEFINITION

An agent is a named, reusable Copilot Studio build — instructions, knowledge sources, and actions — that tells Copilot exactly how your organization wants a recurring task done, every time, the same way.



THE ANALOGY

Think of it as onboarding a sharp new hire with a playbook: the context they need, the format you expect, and the checks that keep their work on-brand and accurate — built once, used indefinitely.

Anatomy of an Agent

Four building blocks inside Copilot Studio, combined once and reused forever

01



Instructions

The step-by-step logic and conversation flow — what to do, and what "good" looks like.

02



Knowledge Sources

SharePoint sites, files, and Graph connectors the agent is allowed to search.

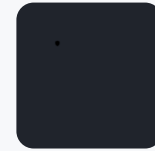
03



Actions

Power Automate flows and connectors the agent can call to actually do something.

04

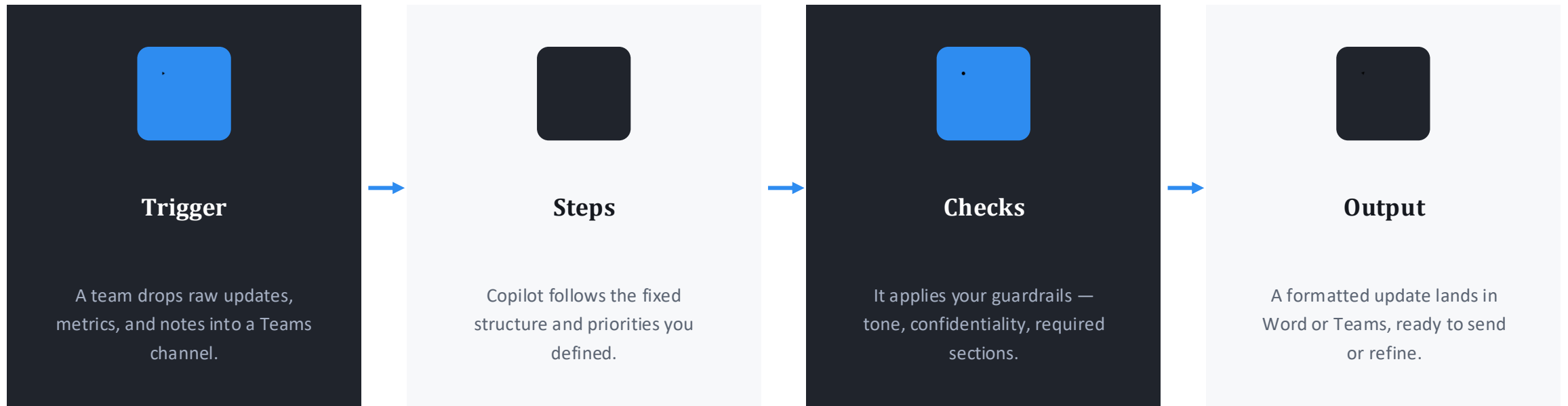


Guardrails

Topics the agent should decline, and when it hands off to a human.

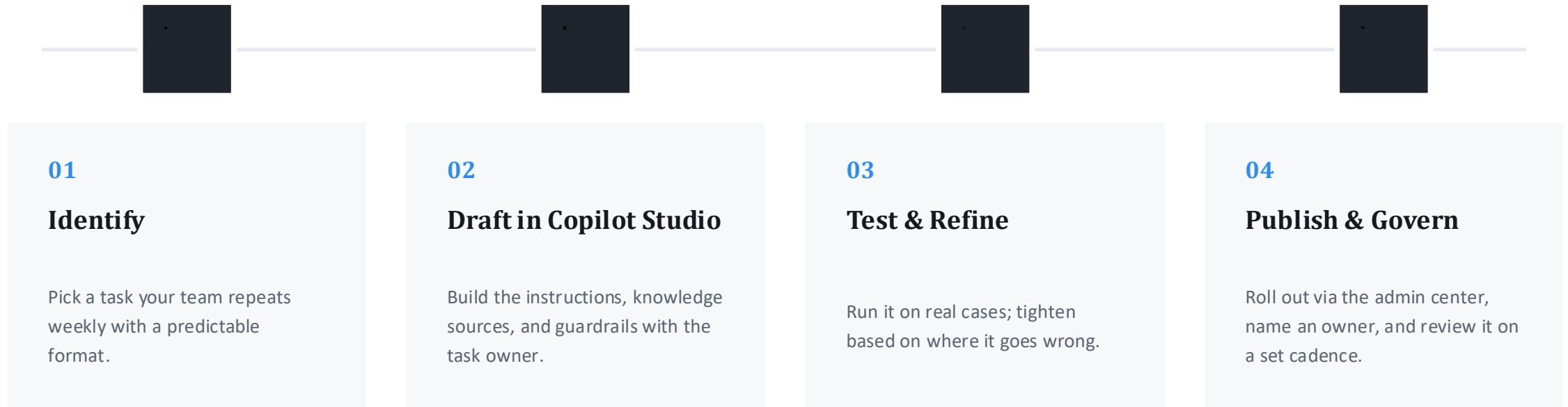
A Generic Agent in Action

Example: a "weekly leadership update" agent, once built



Your Build Roadmap

How an agent goes from idea to standard practice



PART 4

Hands-On Q&A

Practical implementation guidance for your organization

15 MIN

04

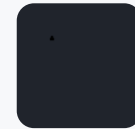
Bring Your Questions

Four lenses to frame practical implementation questions



Use-Case Fit

Which of your recurring tasks are the highest-value place to start?



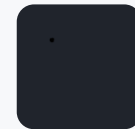
Data & Security

What can and can't be shared, and how is that enforced?



Change Management

How do you get a skeptical team to actually adopt this?



ROI & Measurement

What does success look like in 30 / 90 / 180 days?

Leading with Copilot, Starting Monday



Use it yourself first

Fluency at the top sets the standard for adoption below it.



Pick one agent to build

Choose one recurring task from today and commit an owner.



Keep the conversation open

Route questions and use cases back to your implementation contact.

Thank you.