

AI for Microsoft 365

A practical field guide to using Microsoft Copilot and AI tools across your M365 environment — with the insider knowledge most guides leave out.

PAGE 1 OF 2 — WHAT IT IS & WHAT IT CAN DO

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"Copilot is already in your tools. Most people use 10% of what's available — and the 90% they're missing can genuinely change how they work."

70%

of Copilot users say it saves meaningful time every week

29 min

average time saved per meeting with AI summaries

4x

faster first draft creation vs. starting from scratch

WHERE COPILOT LIVES IN YOUR M365 SUITE



Outlook

Draft replies, summarize long threads, and coach your tone. Works on emails you've received — not just ones you're writing.



Teams

Live meeting transcripts, post-meeting summaries, and "catch me up" on any chat thread — even ones you weren't in.



Word

Generate full drafts, rewrite for a specific audience, compare document versions, and extract structured summaries.



Excel

Ask questions in plain English. Copilot builds formulas, flags anomalies in your data, and generates chart recommendations.



PowerPoint

Convert a Word doc or prompt into a full deck with slides, speaker notes, and design themes applied automatically.



Microsoft 365 Chat

A unified AI assistant that searches across your email, files, chats, and calendar to answer questions about your own work.

WHAT COPILOT ACTUALLY HAS ACCESS TO

KEY FACT This is the piece most people misunderstand. Copilot only surfaces content *you personally* have permission to see — your emails, files, meetings, and chats via Microsoft Graph. It won't pull a colleague's private files or HR documents you don't have access to. Your prompts are **not used to train Microsoft's AI models**, and data stays within your M365 tenant. Treat prompts like emails: don't paste in passwords, sensitive PII, or confidential client data.

THE PROMPT QUALITY GAP — WHY MOST PEOPLE GET BAD RESULTS

- 1 Vague prompts produce vague output.** "Write an email" gives you something generic. "Write a professional but warm follow-up to a client who hasn't responded in two weeks, referencing our network security proposal" gives you something usable.
- 2 Tell it your role and audience.** Prefixing with "I'm a project manager writing for a non-technical executive team" dramatically improves relevance, vocabulary, and structure.
- 3 Iterate, don't restart.** The follow-up prompt is often where the value is. "Make it shorter." "Add a clear call to action." "Rewrite the second paragraph to be more assertive." You're directing — not hoping.

The Insider Playbook

Advanced techniques, hidden features, and the strategic moves that separate Copilot power users from everyone else.

HIDDEN GEMS — THINGS MOST USERS NEVER DISCOVER

TEAMS **Ask Copilot about meetings you didn't attend.** Open any meeting with a transcript and ask: "What decisions were made and what do I need to do?" Full briefing, no recording required.

OUTLOOK **Copilot coaches your tone before you send.** Click "Coaching by Copilot" after drafting — it analyzes tone, clarity, and reader sentiment, and suggests rewrites. Invaluable before high-stakes emails.

WORD **Reference other files while writing.** Type "/" in the Copilot panel to pull in content from another document, email, or meeting — synthesize multiple source docs into one proposal automatically.

EXCEL **Copilot spots what you didn't think to look for.** Ask "Are there unusual patterns or outliers in this data?" It flags anomalies proactively — not just answering questions you already had.

M365 CHAT **"Catch me up on [person]'s recent activity."** Ask about a colleague's recent emails and files you're shared on — powerful for onboarding to a project fast without a lengthy handoff.

COPY-PASTE PROMPT TEMPLATES THAT ACTUALLY WORK

EMAIL *"Write a [tone] email to [audience] about [topic]. The goal is to [outcome]. Keep it under [X] sentences."*

MEETING *"Summarize this meeting. List: key decisions, open questions, and action items with owners."*

DOCUMENT *"Draft a [document type] based on [reference]. Write for [audience]. Tone: [formal/conversational]. Lead with the most important point."*

ANALYSIS *"Analyze this data: what's working, what's a concern, and what's the one thing I should act on first."*

STRATEGIC CONSIDERATIONS FOR TEAMS & LEADERS

LICENSING REALITY

Copilot for M365 is a separate add-on (~\$30/user/month). Not all M365 plans include it. Confirm with your admin what's active in your tenant before building workflows that depend on it.

COPILLOT STUDIO

Teams with development resources can build custom Copilot agents trained on your own data, policies, or knowledge base using Copilot Studio. This is where real competitive differentiation starts.

GOVERNANCE FIRST

Before rolling out Copilot broadly, audit your permissions model. Overshared files and misconfigured SharePoint sites become AI-surfaceable. Copilot amplifies your existing data governance — good or bad.

MEASURE THE ROI

Use the Copilot Dashboard in the M365 Admin Center to track adoption and usage patterns. Without metrics, you can't build the case for expansion — or identify who needs more training.

TDG TAKE **The Ducats Group perspective:** The organizations winning with AI aren't the ones with the most tools — they're the ones who've built deliberate habits around them. Start with one high-friction task in your week and use Copilot to solve it. Once it works, teach someone else. That's how transformation actually happens.