

# RefineM



 MS 365 Copilot

*AI Copilot Demo: Tailored Agents, Workflow Automation & Multi Channel Deployment*

Date : March 19, 2026

Visit us at <https://RefineM.com>  
Email at [Contact@RefineM.com](mailto:Contact@RefineM.com)



## About RefineM

- RefineM is a project management and Agile consulting and training company based in Springfield, Missouri and Cary, North Carolina, serving customers across North America, and globally.
- Our mission is to help organizations turn their project management capability into a competitive advantage.
- We provide consulting, training, and products, utilizing Waterfall, Agile and Hybrid methods to optimize project management across different industries/domains.



*NK Shrivastava founded RefineM in 2011, fulfilling a long-held dream to create a project management firm focused on driving business results.*

RefineM

# Audience Pulse Check: Your Experience with Microsoft 365 Copilot

A BEGINNER-FRIENDLY GUIDE

- ***What takes up most of your time during a typical workday?***  
*(Emails, meetings, reporting, data analysis, presentations)*
  
- ***Have you personally used Microsoft 365 Copilot in any of the Working apps?***  
*(Word / Excel / PowerPoint / Outlook / Teams / Not yet used)*
  
- ***How confident are you in writing effective prompts for Copilot?***  
*(Not confident / Somewhat confident / Very confident)*

# MS 365 Copilot in Action: Enhancing Productivity

A BEGINNER-FRIENDLY GUIDE

- ***Introduction- Copilot & Copilot Ecosystem***
- ***Importance for Business Leaders***
- ***MS 365 Copilot- Components***
- ***MS 365 Copilot in MS Apps***
- ***MS 365-Prompt Engineering***
- ***MS 365 Copilot Studio-Overview***
- ***Best Practices***
- ***Q&A***

*Microsoft Copilot is your AI-powered work assistant, built directly into the tools you already use every day — like Word, Excel, PowerPoint, Outlook, Teams, and Windows.*

## It helps you.

Understand and summarize information

Create content (documents, presentations, emails)

Analyze data and generate insights

Automate tasks and workflows

Make better, faster decisions

Copilot transforms natural language into real actions inside Microsoft 365.

## The Three Layers of the Copilot Ecosystem:

1

**Microsoft 365 Copilot  
(For End Users)**

2

**Copilot Studio (For  
Makers & Business  
Designers)**

3

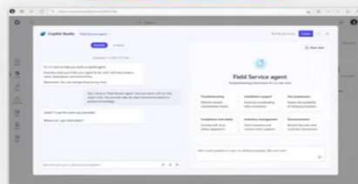
**Copilot Studio + Azure  
AI Foundry (For  
Developers &  
Engineering Teams)**

No code



Pro code

For End Users



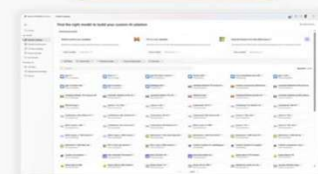
Agent builder

For Makers



Copilot Studio

For Developers



Copilot Studio + Azure AI

- Summarize yesterday's body-shop defect log into 5 bullet points.
- Create a root-cause analysis draft for welding line downtime.
- Convert this supplier invoice CSV into a clean table and highlight mismatches.
- Generate a risk summary for this production change request.
- Draft a 5-slide deck on EV battery health monitoring based on this research note.

- *Executives face increasing information overload*
- *Need faster insights and better decisions*
- *Copilot automates routine work and enhances clarity*
- *Natural language → Actions, summaries, insights*



## You can access Copilot through:

App	What Copilot Helps With
Word	Drafts reports, summaries, proposals
Excel	Data analysis, insights, charts
PowerPoint	Instantly creates slide decks
Outlook	Summaries, replies, schedule insights
Teams	Meeting recaps & action items

# Microsoft Copilot: The Art of Prompt Engineering

A BEGINNER-FRIENDLY GUIDE

✔ Do's	✘ Don'ts
Be <b>specific and clear</b> (e.g., "Summarize this 10-page report into 5 bullet points")	Give <b>vague instructions</b> (e.g., "Make this better")
Provide <b>context</b> so Copilot understands the task	<b>Overload in one prompt</b> with too many instructions
Use <b>step-by-step instructions</b> for complex tasks	Assume Copilot knows <b>internal acronyms/policies</b> without context
Experiment, refine, and <b>iterate prompts</b>	Include <b>sensitive/confidential info</b> in prompts
Leverage <b>templates &amp; examples</b> as a starting point	Rely on prompts that are <b>outcome-agnostic</b> or <b>unclear</b>

App	 Do's	 Don'ts
Word	<ol style="list-style-type: none"> <li>1. "Summarize this 12-page document into 5 bullet points highlighting key recommendations."</li> <li>2. "Rewrite this email draft in a professional tone suitable for executives."</li> <li>3. "Generate a table of contents for this report with clear headings."</li> </ol>	<ol style="list-style-type: none"> <li>1. "Make this better."</li> <li>2. "Summarize this." (no context or scope)</li> <li>3. "Write an email." (too vague, no audience or purpose)</li> </ol>
Excel	<ol style="list-style-type: none"> <li>1. "Analyze last quarter's sales data and highlight the top 3 performing products by region."</li> <li>2. "Create a pivot table summarizing revenue by customer segment."</li> <li>3. "Generate a chart showing monthly expenses trend for 2025."</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>"Show me insights." (too broad)</b></li> <li>2. <b>"Fix this spreadsheet." (no specific outcome)</b></li> <li>3. <b>"Analyze sales." (unclear which metrics or period)</b></li> </ol>
Copilot Web / Chat	<ol style="list-style-type: none"> <li>1. "Draft a summary email of today's team meeting, highlighting action items."</li> <li>2. "Create a 1-page report on market trends using this dataset."</li> <li>3. "Generate a list of questions to ask a client about project requirements."</li> </ol>	<ol style="list-style-type: none"> <li>1. "Do something useful." (too vague)</li> <li>2. "Make a report." (no data, no scope)</li> <li>3. "Give insights." (unclear what kind of insights or for whom)</li> </ol>

# MS 365 Copilot Studio

A BEGINNER-FRIENDLY GUIDE

Feature / Aspect	Microsoft 365 Copilot	Microsoft 365 Copilot Studio
<b>Purpose</b>	<i>Acts as an AI assistant inside Microsoft 365 apps to help <b>create, summarize, and analyze content.</b></i>	Tool for admins or power users to customize, train, and deploy AI workflows for the organization.
<b>Target Users</b>	End users who work in <b>Word, Excel, PowerPoint, Outlook, Teams, etc.</b>	<b>Power Users or IT teams</b> managing AI at an organizational level.
<b>Customization</b>	Minimal setup— <b>ready-to-use AI</b> assistance.	Minimal customization—create <b>custom prompts, templates, and workflows.</b>
<b>Integration Scope</b>	Works <b>inside Microsoft 365 apps</b> for tasks like summarizing emails, generating presentations, analyzing Excel data.	Connects to <b>internal company data and apps</b> to build <b>organization-specific AI solutions.</b>
<b>Example Use Cases</b>	<ul style="list-style-type: none"> <li>- Summarize long emails</li> <li>- Draft presentations from Word docs</li> <li>- Analyze sales trends in Excel</li> </ul>	<ul style="list-style-type: none"> <li>- Automate weekly team reports</li> <li>- Build standardized document templates</li> <li>- Train AI with internal data governance rules</li> </ul>

# Quiz

Go to [menti.com](https://www.menti.com) to answer



**Top 2 Winners get free access (100% discount) to one of RefineM's products of their choice**

1. One hour of AI strategy consulting (\$200)
2. One hour of Data strategy consulting (\$200)
3. Essential Gear for Project Managers toolkit (\$89)
4. PDU Bundle - 2 months (\$98)
5. Self-Paced Online Course (\$100 each)
  - Agile Fundamentals, or
  - Project Management Fundamentals

## Claiming Your PDU

<b>PDU Claim Code</b>	3990OETZKV
<b>Activity Name</b>	<i>“The AI-Powered Workday: Master Microsoft Copilot 365 Across Your Favorite Apps”</i>
<b>Provider</b>	“RefineM LLC”
<b>Date Started/Completed</b>	March 19, 2026
<b>Contact Person</b>	NK Shrivastava
<b>Contact Phone</b>	(417) 763-6762
<b>Contact Email</b>	<a href="mailto:Trainings@RefineM.com">Trainings@RefineM.com</a>
<b>PDU</b> s	1.00 Ways of Working.

**Please claim your PDU by end of June 2026.  
Claim code will expire after June 30.**

## Questions?

**NK Shrivastava**, MBA, PMP, RMP, ACP, CSP, SPC4

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*Contact us at [Trainings@RefineM.com](mailto:Trainings@RefineM.com) if you would like this or other webinars delivered to your team/organization*

- ***Microsoft 365 Personal and Family Plans***
- ***Microsoft 365 Business Plans***
- ***Microsoft 365 Enterprise Plans***



*For more information, visit the  
Microsoft Website*

- ***Real-Time Meeting Recaps:*** Provides instant summaries during a meeting (for late joiners) and comprehensive recaps after the meeting, including key decisions, open questions, and who said what.
- ***Generate Action Items:*** Automatically analyzes meeting transcripts to identify, document, and assign follow-up tasks and action items, enhancing accountability.
- ***Chat & Channel Catch-Up:*** Quickly summarizes long chat threads or channel conversations to help users catch up on missed discussions, decisions, and outcomes instantly.
- ***Draft and Rephrase Messages:*** Assists in composing messages by rewriting drafts, adjusting the tone (e.g., professional, informal), and refining the length for clear, effective communication.
- ***Answer In-Meeting Questions:*** Users can ask Copilot questions in the meeting side panel to synthesize information from the live discussion and shared content in real-time.

- ***Draft with Prompts: Generate first drafts, outlines, or full sections of a document instantly from a simple natural language request.***
- ***Summarize Documents: Quickly condense lengthy documents into concise summaries, bullet points, or executive overviews.***
- ***Rewrite and Refine: Easily adjust the tone (e.g., formal, casual, concise) or rewrite selected text for improved clarity and impact.***
- ***Transform Content: Convert unstructured text, like lists or notes, directly into structured tables for better data visualization.***
- ***Integrate and Reference: Use existing files (Word, PowerPoint, emails) as grounding data to ensure new content is relevant and accurate.***

- ***Generate Formulas & Columns:*** Automatically suggest and create complex formulas or entirely new columns (e.g., calculations, custom formatting) based on a natural language prompt.
- ***Analyze and Visualize Data:*** Instantly generate key insights, summaries, trends, and outliers from your tables, and suggest relevant charts or PivotTables for visualization.
- ***Clean and Organize Data:*** Use prompts to quickly clean data by removing duplicates, splitting text into different columns, sorting, filtering, or applying conditional formatting.
- ***"What-If" Modeling:*** Explore different business scenarios by asking Copilot "what-if" questions about changes in your data to see the potential impact on outcomes.
- ***Understand Formulas (Explain):*** Select any existing formula and ask Copilot to break down and explain its purpose and function in plain language.

- ***GEmail Thread Summarization: Instantly condense long, complex email conversations into concise bulleted summaries, highlighting key decisions, action items, and unanswered questions.***
- ***AI-Powered Email Drafting: Generates full email responses or new messages from simple natural language prompts, pulling context from other documents or emails as needed.***
- ***Communication Coaching: Provides real-time feedback and suggestions on drafted emails to improve tone, sentiment, and clarity before sending, helping maintain professional communication standards.***
- ***Automated Scheduling: Facilitates scheduling meetings or blocking out focus time directly through chat prompts, coordinating availability for up to two other people.***
- ***Inbox Prioritization: Systematically reviews incoming emails and flags messages with high priority, helping users quickly identify and focus on the most critical communications.***

- ***Draft Generation: Creates entire presentation drafts from a simple prompt or an existing document (Word, PDF).***
- ***Text Refinement: Instantly condenses, rewrites, and adjusts the tone of text on slides for clarity and impact.***
- ***Design & Layout: Suggests professional designs, image placements, and reorganizes slides into logical sections.***
- ***Speaker Notes: Automatically generates a first draft of speaker notes for each slide to assist with delivery.***
- ***Presentation Summaries: Provides concise overviews of long decks or answers questions based on presentation content***