

Microsoft 365 Copilot — Customer Quick Reference

The Big Idea

Stop asking "what can AI do?" — it can do almost anything, and the next version will be better than this one. Start asking "how does AI change MY job?" Don't put AI in your toolbox. Make AI the room your work happens in. Bring every email, document, problem, and first draft to Copilot by default — see what you make together.

What Copilot IS — and IS NOT

| IS | IS NOT |
|---|---|
| Microsoft's AI orchestration layer across M365 + Dynamics | A search engine — it synthesises, doesn't list |
| Lives in YOUR tenant, behind YOUR security perimeter | A public chatbot — prompts stay in tenant |
| Three surfaces: Chat, In-app, Studio (agents) | Autonomous — it drafts, you verify |
| Generates v1; the human clicks send on v2 | A replacement for BI, ERP reporting, or your people |

Security in 4 Lines

Permission boundary. Copilot only sees what the user already has permission to see. No master key.

Tenant boundary. Prompts, responses, and grounding data stay inside M365.

No model training. Microsoft does not use your interactions to train foundation models.

Oversharing reality. Copilot exposes pre-existing oversharing — clean it up as part of rollout, don't delay.

Your 6 Daily Drivers

1. RAAC. Role / Action / Audience / Context. AUDIENCE is the highest-leverage word — repeat it three different ways in the prompt.

2. Prompt Coach. Built-in Copilot agent (All Agents → Prompt Coach → Open). Use it to rewrite your prompts; first 2 weeks, run every prompt through it.

3. Memory. Settings → Personalization → ON. Save tone, format, role, even pet peeves. Save personas ("Direct Analyst" / "Client Ready") and invoke by name.

4. Enterprise Search. Click Search in Copilot Chat. One console for SharePoint, OneDrive, email, Teams, calendar — with source links. 90% of the time the synthesis IS the answer.

5. Critique. AI defaults to agreement. Force adversarial: "List 3 biggest weaknesses, then rewrite." Or "That was a 6/10. Write the 10/10."

6. Excel: Orient. First prompt on any new spreadsheet: "Help me orient and understand this workbook." Then use the "Think Deeper" model for files.

Three Demo Prompts You Can Reuse Today

VARIANCE COMMENTARY You are a senior FP&A analyst supporting a CFO at a PE-backed mid-market industrial company. Identify the top 3 most material variances for Q1 2026 by dollar impact, explain what's driving each based on what you can see in the data, and draft commentary for our PE-board reporting package. Audience: CFO and PE-board. Use the P&L Summary, P&L by Cost Centre, and Monthly Detail sheets. Format: 3 bullets, under 150 words.

AR COLLECTION SUMMARY You are a senior credit and collections analyst at a mid-market B2B industrial company. For invoices over 60 days outstanding owed by our top-tier customers (Strategic + Major), build me a per-customer summary showing total exposure, oldest invoice, and a one-line synthesis of what we've already tried — pulled from the Last Action / Notes column. Audience: my credit committee meeting tomorrow.

TOP-5 AT-RISK ACCOUNTS You are a senior account health analyst. Identify our top 5 at-risk customer accounts based on (a) open service cases — especially high-priority ones, and (b) outstanding receivables. For each, explain in 2-3 sentences specifically why it's at risk. Rank them in priority order. Audience: weekly customer-health standup — CRO, CFO, Head of CS.

Follow-up that adds value to ANY of the above: "Now create a new tab in this workbook and surface your analysis there."

Top Q&A from the Live Session

Q: Different writing styles per role? A: Yes — save personas in Copilot's memory (lighter-weight) or build named agents in Copilot Studio (heavier-weight). Start with personas.

Q: No Personalization showing up? A: You're likely on the free Copilot Chat tier. Memory is a paid-tier (M365 Copilot) feature.

Q: Does Enterprise Search hit the web? A: No - inward by definition. Use the Web/Work toggle at the top of Copilot Chat for web queries.

Q: Will AI replace our ERP / CRM? A: No. ERP is deterministic; AI is probabilistic. AI gets data in and pulls insight out — the core engine stays.

Q: Are we halfway through AI evolution? A: Not even 10%. AI is now improving the next generation of AI. The pace accelerates from here.

The Endeavor4 AI Journey — Four Pillars

Pillar 1 — AI Readiness & Executive Activation. C-level engagement, roadmap, opportunity register.

Pillar 2 — AI Foundations Training & Quick Wins. Capability building and the first measurable wins.

Pillar 3 — Data Readiness & Infrastructure. SharePoint reorg, data migration, AI-ready data estate.

Pillar 4 — Agent Build, Deploy & Manage (AAM). Production agents as a managed service.

"You can't break it. Ask Copilot itself."

Contact Endeavor4 to take the next step in your AI Journey

<https://www.endeavor4solutions.com/ai/ai-copilot/>