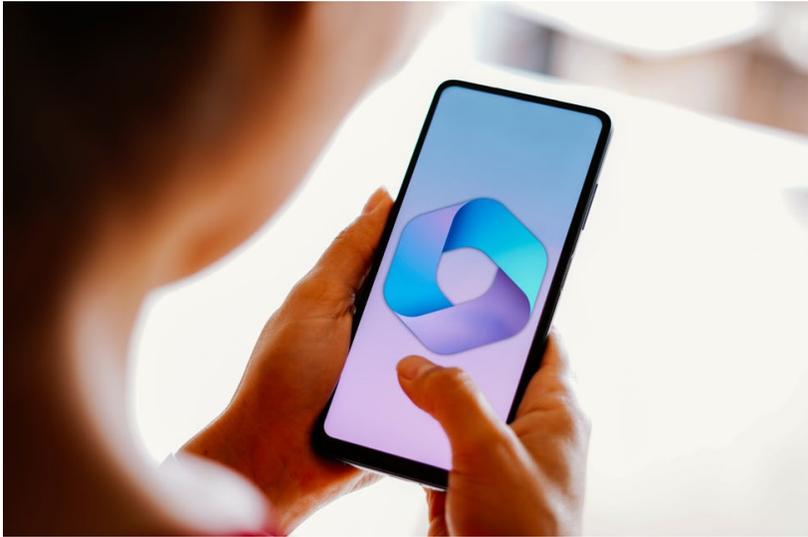


Mastering the Power of Microsoft Copilot



Set your browser to
HIGGINS.CNF.IO
For interactive polling
and Q & A

John H. Higgins, CPA.CITP
Higgins Advisory, LLC
Rochester, Michigan

Learning Goals



- Identify ways you can put the AI features of Microsoft 365 Copilot to work today.
- Recognize the range of AI features that Microsoft 365 Copilot has to offer.

Set your browser to
HIGGINS.CNF.IO
For interactive polling
and Q & A

John H. Higgins, CPA.CITP

Strategic Technology Advisor



john@higginsadvisoryllc.com



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Nationally recognized thought leader, advisor, author and speaker on CPA technology
- Strategic technology advisor to the profession w/ 35+ years of experience
- Founded and sold two CPA technology advisory startups
- Former National Mid-market Technology Partner - BDO
- CPA Practice advisor Top 25 Thought Leader for the CPA profession
- AICPA Business & Industry Hall of Fame Inductee
- Past Chair of the Michigan Association of CPAs
- Passionate advocate for the CPA profession!

Presentation Outline

- [Microsoft Copilot Ecosystem Overview](#)
- [Copilot Prompting](#)
- [Copilot Integrating Copilot Into Your Workflows](#)
- [Practical Copilot Applications for CPAs](#)
- [Preparing Your Firm For Copilot](#)
- [Wrap-up](#)

MICROSOFT COPILOT ECOSYSTEM OVERVIEW





Things to Know About Copilot Ecosystem

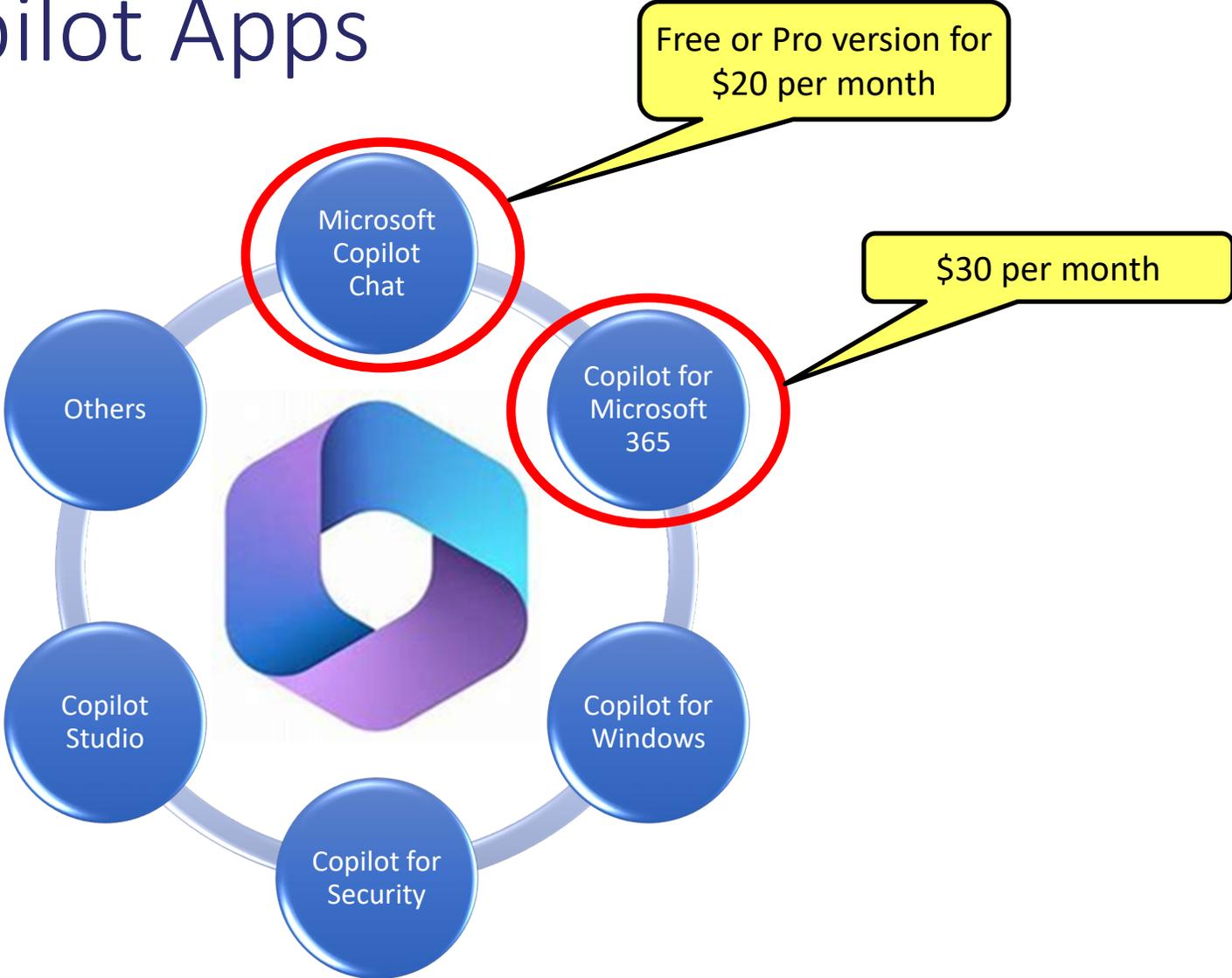
Copilot is ChatGPT technology embedded into Microsoft applications

There are multiple Copilot products

Copilot for Microsoft 365 connects to your M365 data

Microsoft [Enterprise Data Protection](#) secures your data privacy in Copilot

Microsoft Copilot Apps

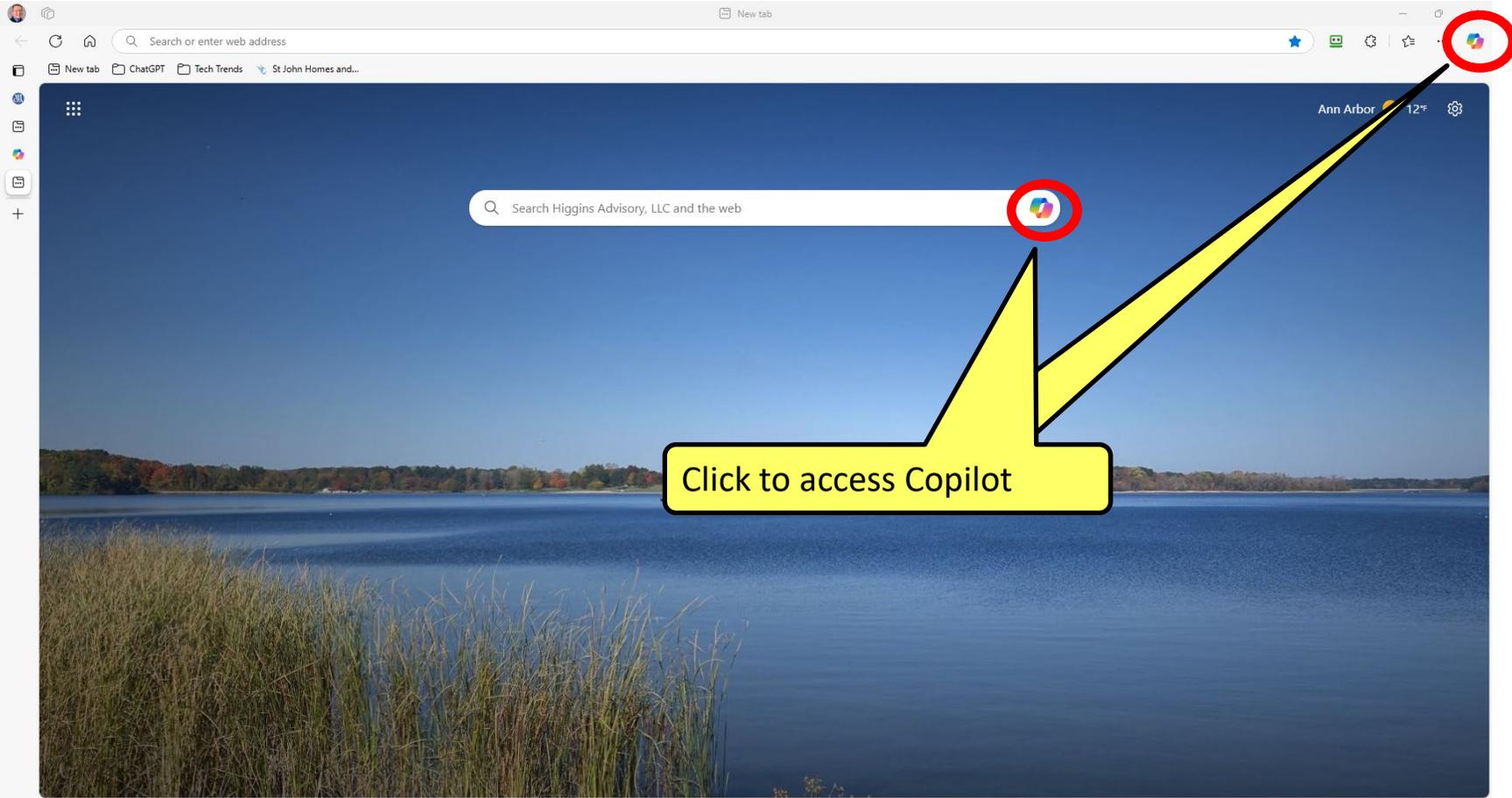


Microsoft Copilot Chat

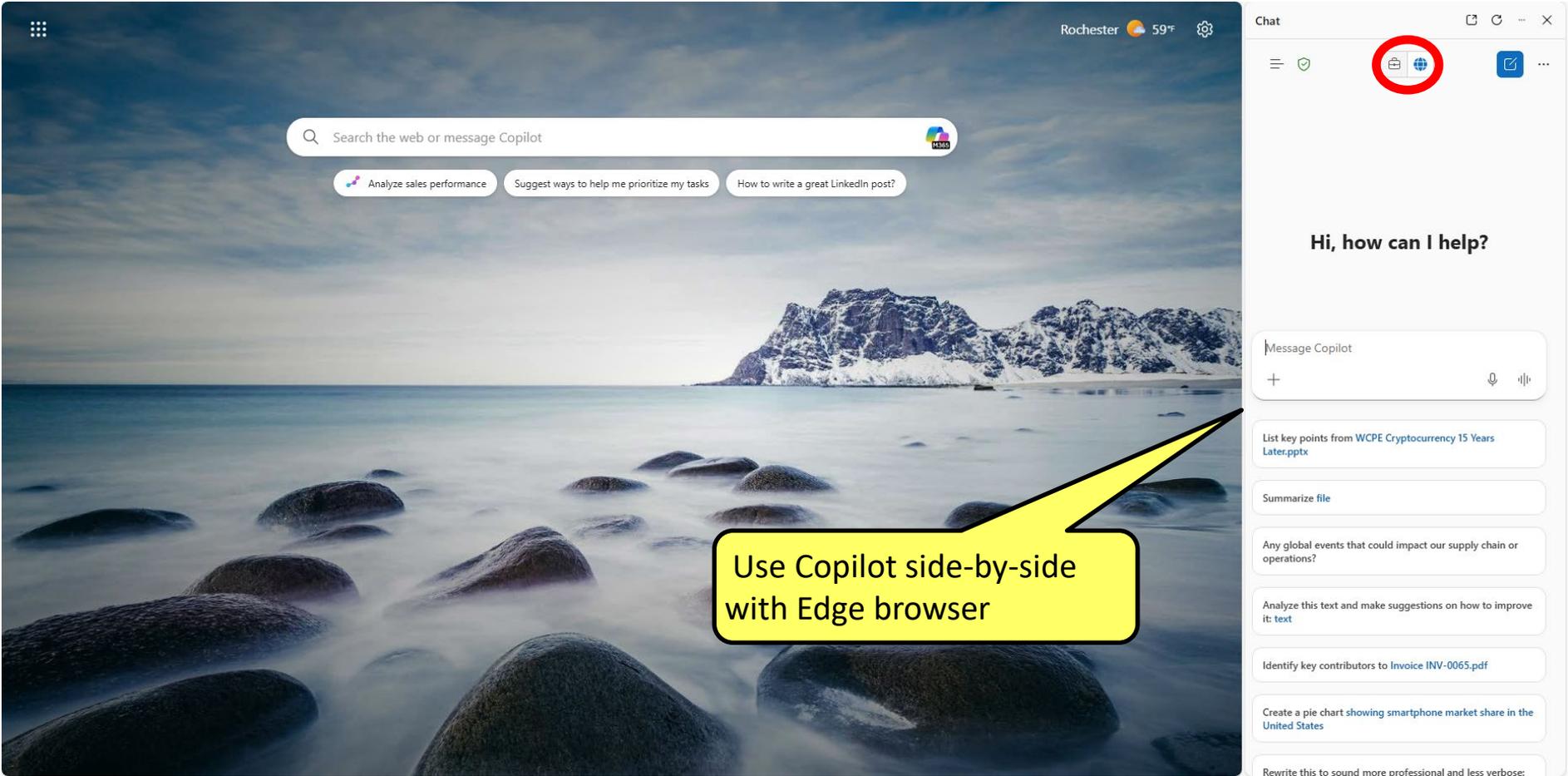


- Free version vs. Copilot Pro \$20 per month
- **Not** integrated with Microsoft 365 apps / data
- Prompt with text, voice and images
- Pro supports RAG (retrieval augmented generation)
- All purpose LLM (Large Language Model)
- Web grounding (access current data via web)
- [Enterprise Data Protection](#) with Microsoft Entra ID

Accessing Copilot Chat



Accessing Copilot Chat



Use Copilot side-by-side with Edge browser

Microsoft 365 Copilot Screen

The screenshot shows the Microsoft 365 Copilot interface. On the left is a sidebar with navigation options like 'Search', 'Chat', 'Agents', and 'Conversations'. The main area displays a chat window with a message from Copilot: 'Hi John, try asking me what's next on your calendar'. Below the message is a 'Message Copilot' input field with a 'Tools' icon. Underneath are three 'Suggested prompts' cards. On the right, there is a settings menu with options like 'Recent pages', 'Scheduled prompts', and 'Web search'. A red circle highlights the 'Work' and 'Web' toggle buttons. Several yellow callout boxes provide additional information: 'Toggle to use M365 data as RAG' points to the toggle buttons; 'Option to access web data' points to the 'Web search' option in the settings; 'Enterprise Data Protection' points to a shield icon in the settings; 'Chat history' points to the 'Conversations' section in the sidebar; and 'Prompt data is not used for LLM training' points to the chat input area.



Copilot Microsoft 365 Web Example

Work **Web**

Today

I am a partner in a small CPA firm located in Rochester, Michigan. I will be conducting employment interviews for a staff accounting position in our firm. Primary responsibilities will include individual and business tax return preparation and monthly client accounting services. We are challenged with competing with regional and national CPA firms to recruit new staff, primarily due to compensation.

What questions should I be asking you to help me prepare for and conduct these interviews so that I get the most qualified candidate and entice him or her to join our firm?

Copilot

To help you prepare for and conduct interviews that attract and identify the most qualified candidates for your staff accounting position, here are key areas where I can assist. You can ask questions in these categories to get tailored guidance:

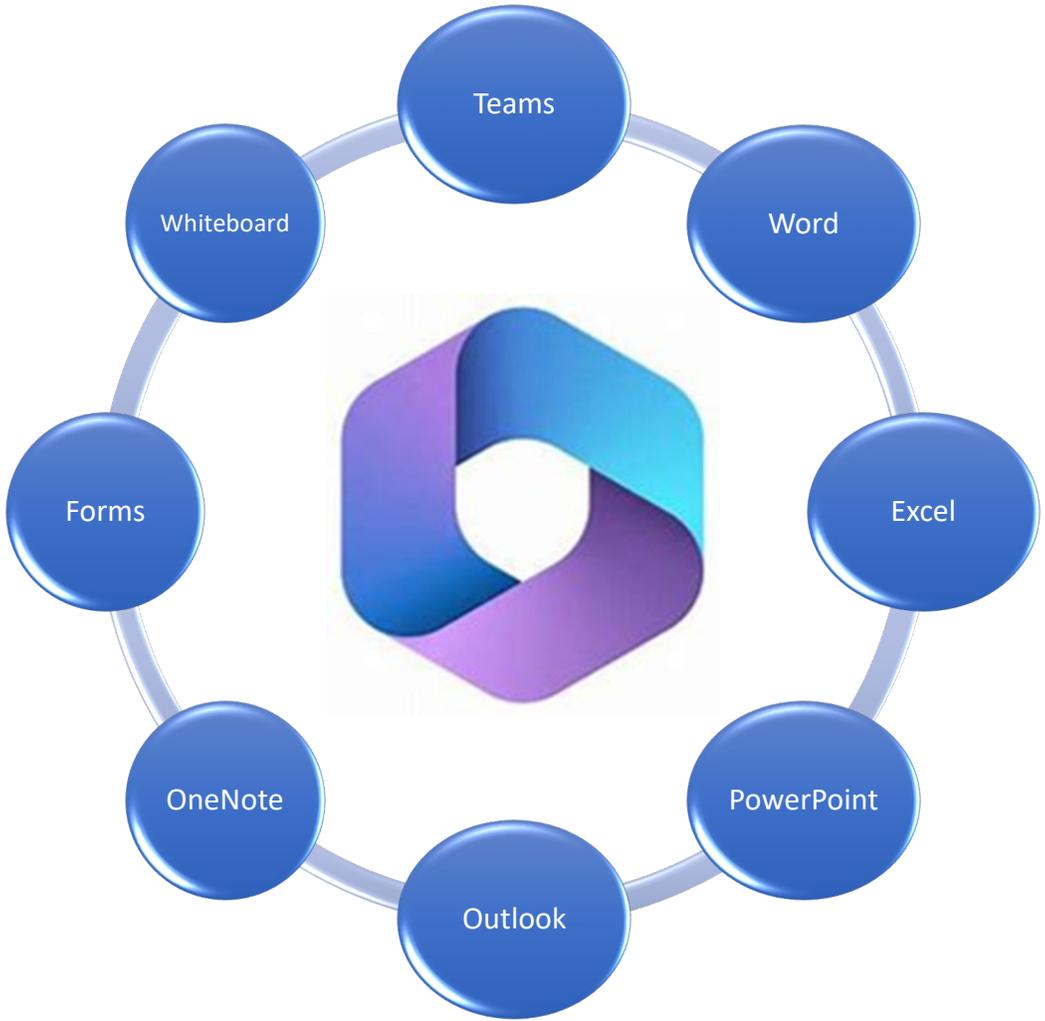
1. Interview Strategy and Structure

Ask me:

- What is an effective structure for a 60-minute accounting staff interview?
- How can I assess both technical skills and cultural fit in one interview?



MICROSOFT 365 COPILOT





Copilot Microsoft 365 Work Example

Work Web

Review my Outlook inbox for any emails received in the 10 days that require me to take action

Copilot ⓘ

Here is a review of emails from the past **10 days** that require your attention:

Immediate Responses

- [OSCPA - Speaking Opportunity - Tomorrow - Accounting Show](#)
Action: Confirm if you can present a **virtual session on Automation and AI** tomorrow (Oct 22, 3:30–4:45 PM EST). This is a last-minute request due to a speaker cancellation. OSCP - Speaking Op...
- [FW: 10/24 webinar](#)
Action: Provide **access link, materials, and NASBA review form** for Friday's course. There are **12 registrants** waiting for details. FW: 10/24 webinar
- [HAJHMMC2 - Attendee Question](#)
Action: Respond to an attendee's question from your recent webinar:
 "Since AI is a learning tool, what does it do with incorrect data that is out there?"
 Reply All to include the attendee. HAJHMMC2 - Attend...

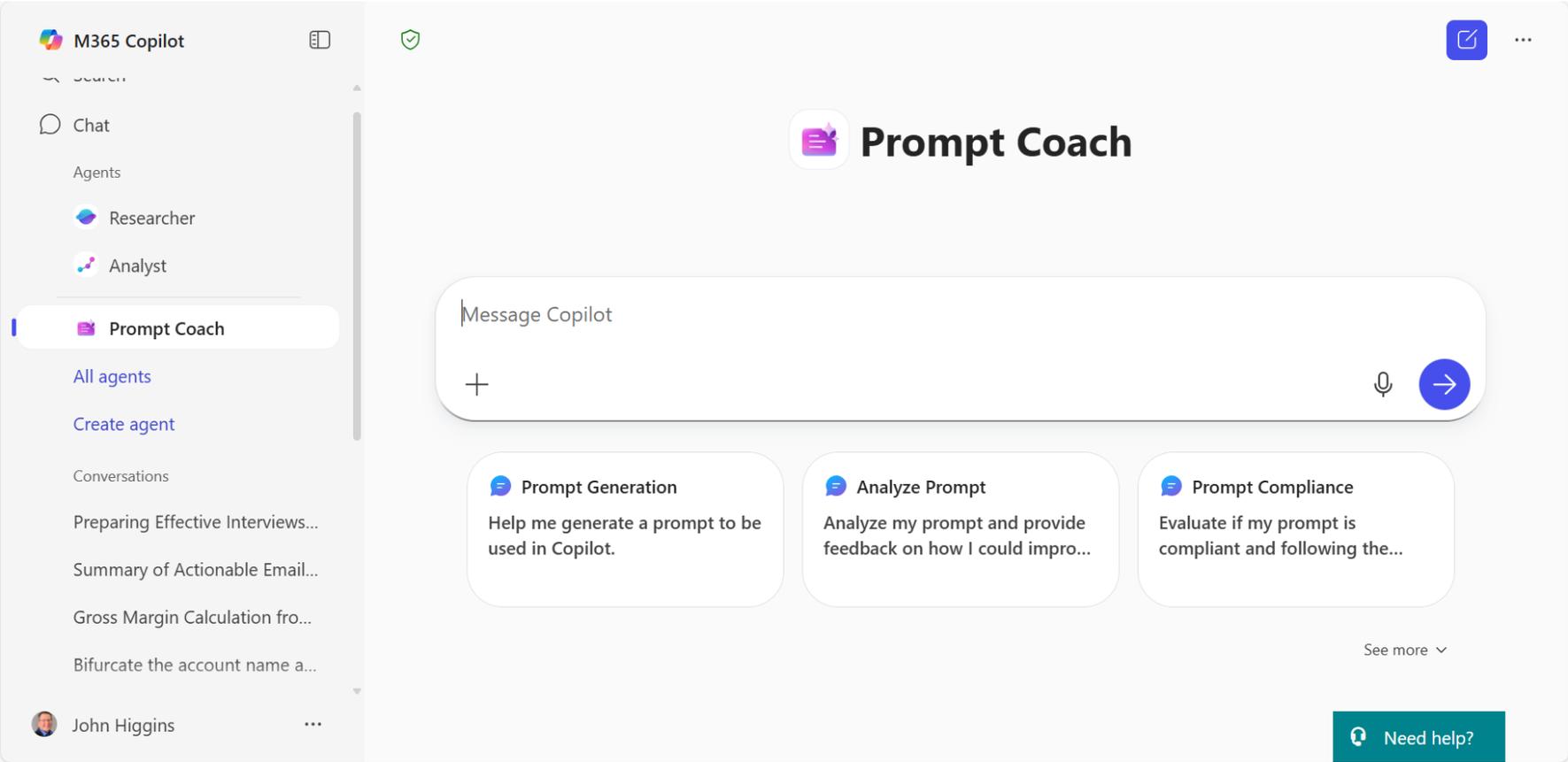
COPILOT PROMPTING . . .



Prompt Engineering Best Practices

- Know what you want to accomplish
- Clarity / background / context / output format / example
- Ask the AI to help you optimize your prompt
- Create a prompt library for consistency
- Appoint a “prompt champion”
- Review / iterate / verify responses

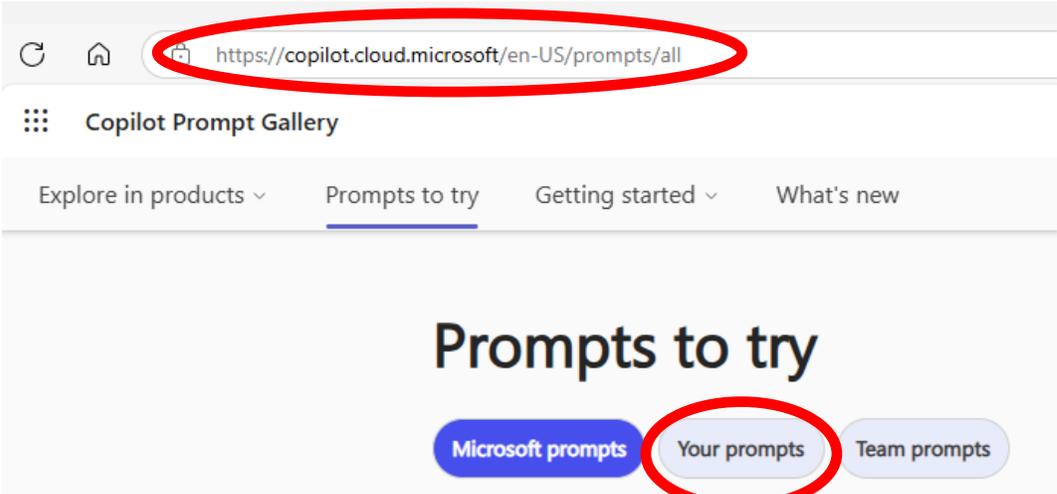
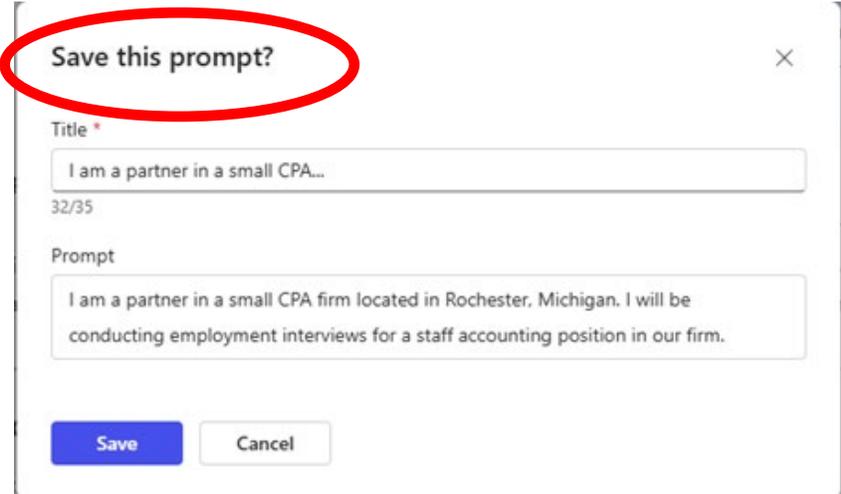
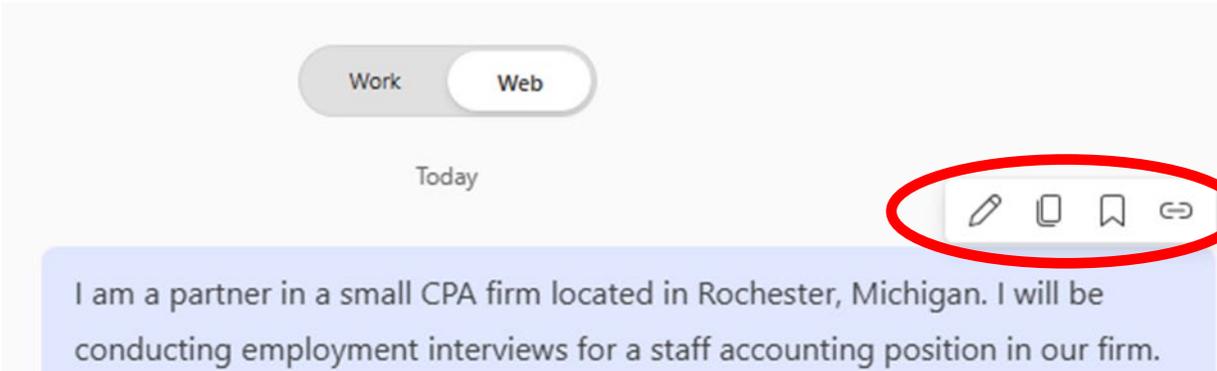
Copilot Prompt Coach



Prompt Sources & Libraries

- Prompt examples
<https://copilot.cloud.microsoft/en-us/prompts>
- Store prompts within Copilot

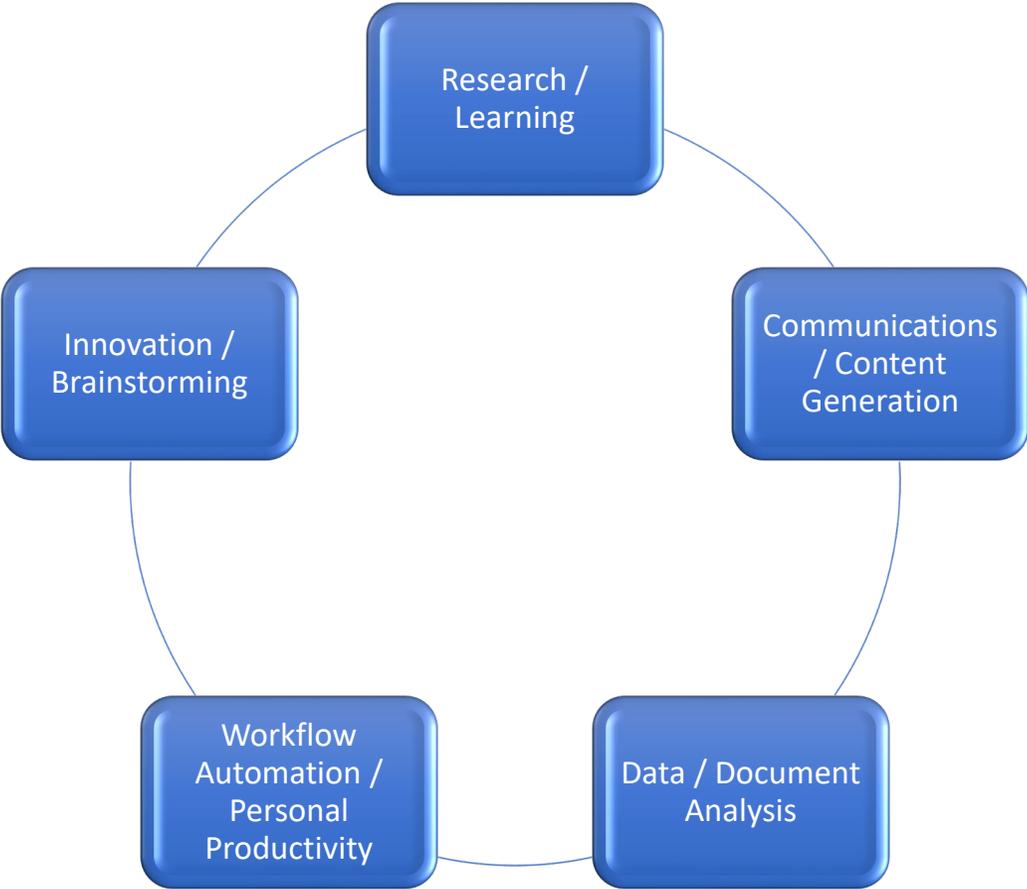
Storing Your Copilot Prompts



PRACTICAL COPILOT APPLICATIONS FOR CPAs



Generative AI Applications for CPAs





Copilot for Outlook

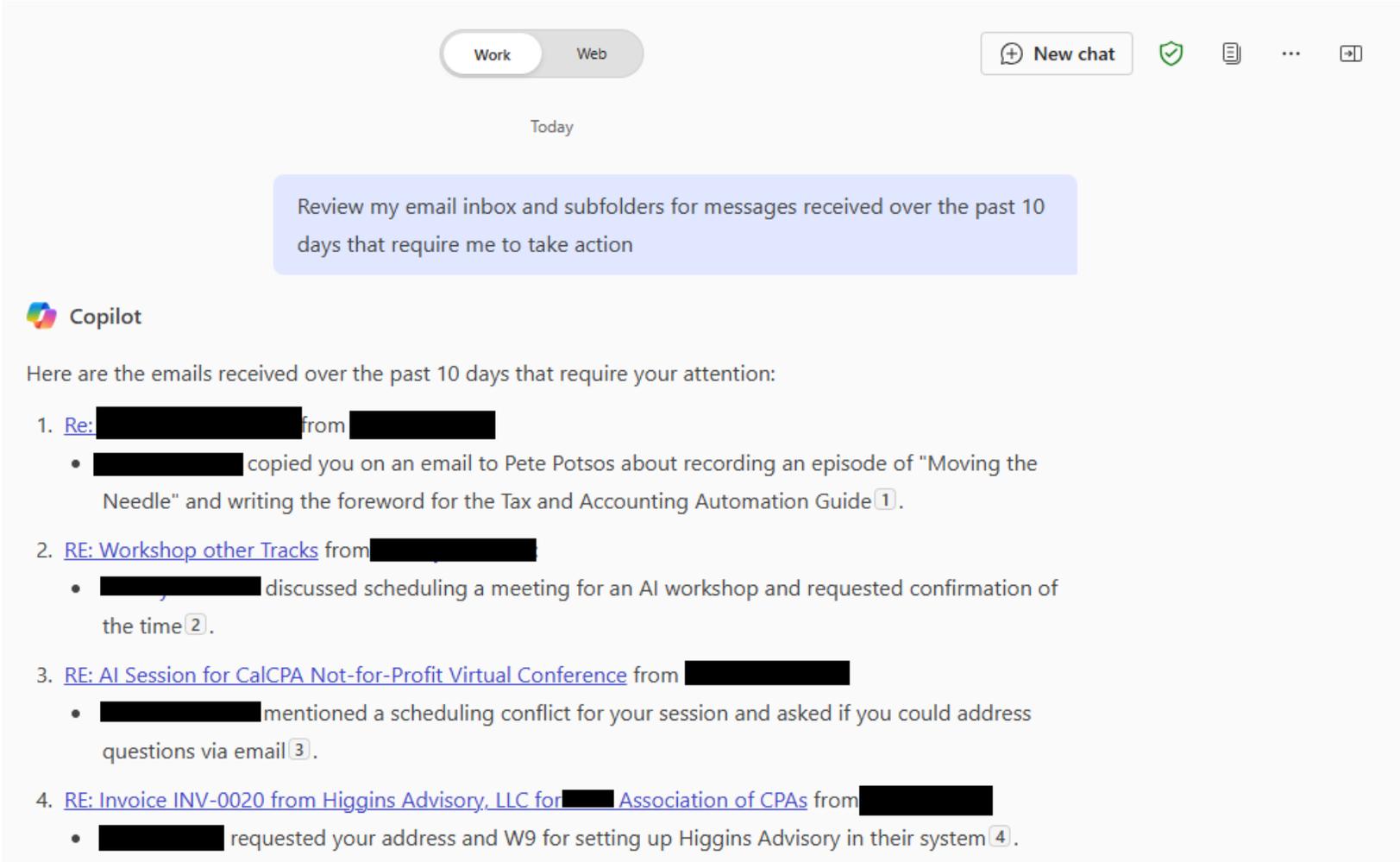
- Compose new email messages
- Compose email replies
- Analyze / summarize email messages

Copilot for Outlook



The screenshot displays the Outlook 'Message' ribbon with the Copilot icon circled in red. A dropdown menu for Copilot shows 'Draft with Copilot' and 'Coaching by Copilot'. Below the ribbon, the email header shows a message from john@higginsadvisoryllc.com to Marko Vulic. The 'Coaching by Copilot' panel is open, showing three coaching options: 'Tone' (More professional language), 'Reader Sentiment' (Show appreciation explicitly), and 'Clarity' (Provide specific details). A yellow callout box labeled 'Content coaching options' points to the coaching panel.

Analyze Email Communications



The screenshot shows a chat window with tabs for 'Work' and 'Web'. A 'New chat' button is visible. The chat history shows a user prompt: 'Review my email inbox and subfolders for messages received over the past 10 days that require me to take action'. The Copilot response lists four email items:

Today

Review my email inbox and subfolders for messages received over the past 10 days that require me to take action

 Copilot

Here are the emails received over the past 10 days that require your attention:

1. [Re: \[REDACTED\]](#) from [REDACTED]
 - [REDACTED] copied you on an email to Pete Potsos about recording an episode of "Moving the Needle" and writing the foreword for the Tax and Accounting Automation Guide ¹.
2. [RE: Workshop other Tracks](#) from [REDACTED]
 - [REDACTED] discussed scheduling a meeting for an AI workshop and requested confirmation of the time ².
3. [RE: AI Session for CalCPA Not-for-Profit Virtual Conference](#) from [REDACTED]
 - [REDACTED] mentioned a scheduling conflict for your session and asked if you could address questions via email ³.
4. [RE: Invoice INV-0020 from Higgins Advisory, LLC for \[REDACTED\] Association of CPAs](#) from [REDACTED]
 - [REDACTED] requested your address and W9 for setting up Higgins Advisory in their system ⁴.

Compose Email Messages

<  Rewrite with Copilot

Draft a message to my CPA firm client letting him know, in a diplomatic tone, that we will no longer be able to service his account.

< 2 of 2 >  Draft an message to my CPA firm client lettin...

AI-generated content may be incorrect   

Dear [Client's Name],

I hope this message finds you well. I am writing to inform you about an important update regarding the services we provide for your account. After careful consideration, we have decided that we will no longer be able to service your account moving forward.

Please know that this decision was not made lightly, and it is based on several factors that we believe are in the best interest of both parties. We have thoroughly evaluated our current workload and resources, and unfortunately, we are unable to continue supporting your account in a manner that meets our standards of excellence.

We understand that this may come as a surprise, and we sincerely apologize for any inconvenience this may cause. Our priority is to ensure a smooth transition for you, and we are more than willing to assist in any way possible during this period. If you need recommendations for other CPA firms or assistance with transferring your files and information, please do not hesitate to reach out to us.

Thank you for your understanding and cooperation. We have greatly valued the opportunity to work with you, and we wish you all the best in your future endeavors. Please let us know how we can support you during this transition.

Anything you'd like to change? 

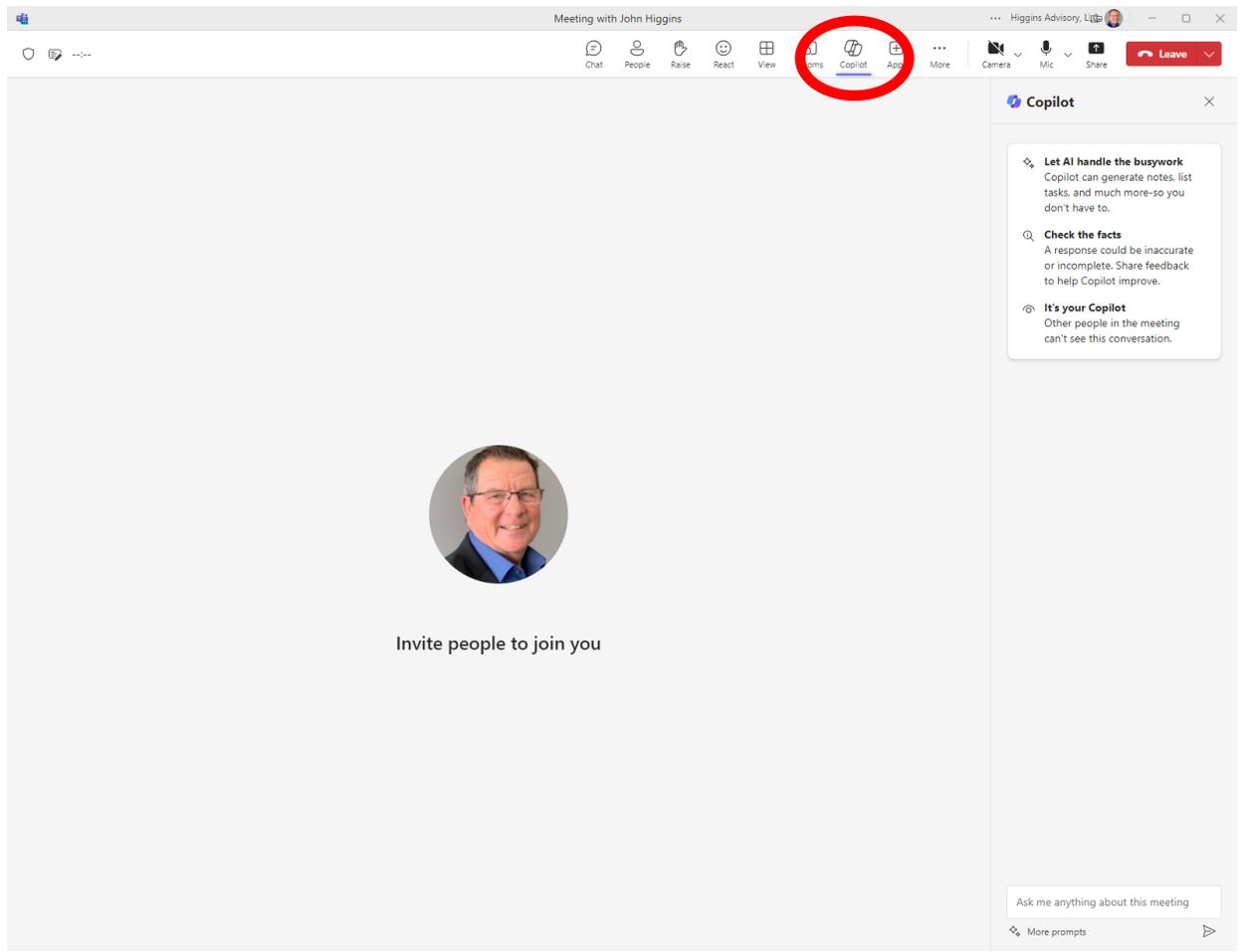
-  Keep
-  Discard
-  Regenerate
-  Adjust

Copilot for Teams

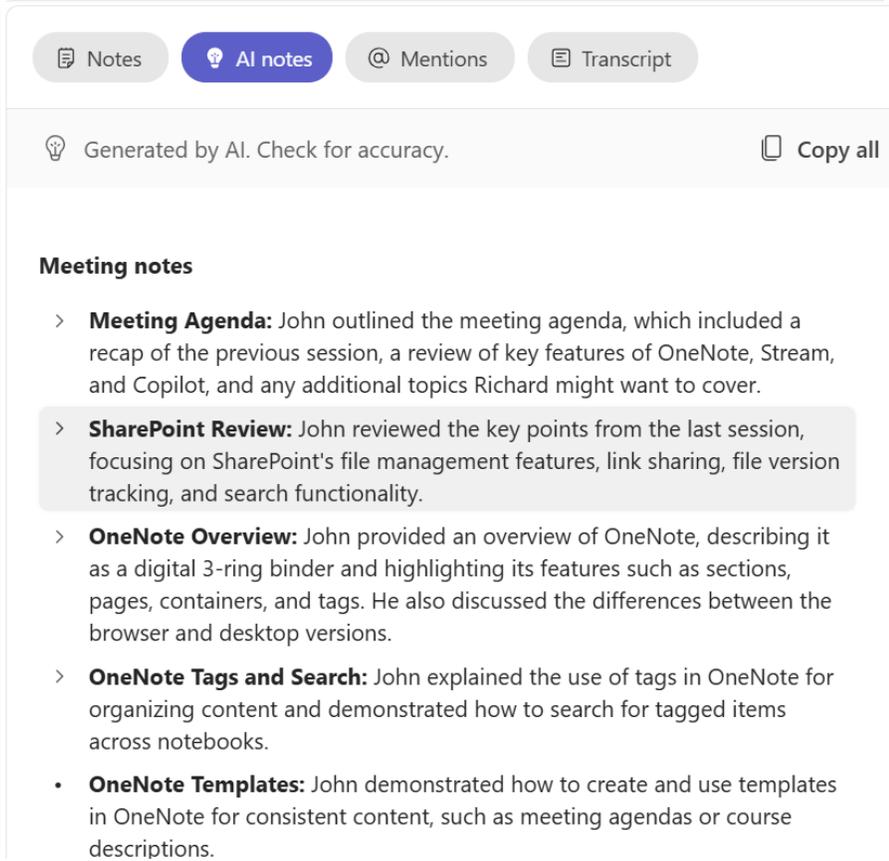


- Summarize meeting or call data in real time
- Summarize chat conversations for main points, action items and decisions
- Summarize data across all Teams data; emails, documents, notes, contacts and more

Copilot for Teams Meetings



Copilot for Teams Meetings



The screenshot shows the Microsoft Teams Copilot interface. At the top, there are four tabs: 'Notes', 'AI notes' (which is selected and highlighted in blue), 'Mentions', and 'Transcript'. Below the tabs, there is a light gray bar with a lightbulb icon and the text 'Generated by AI. Check for accuracy.' and a 'Copy all' button. The main content area is titled 'Meeting notes' and contains a list of meeting notes:

- > **Meeting Agenda:** John outlined the meeting agenda, which included a recap of the previous session, a review of key features of OneNote, Stream, and Copilot, and any additional topics Richard might want to cover.
- > **SharePoint Review:** John reviewed the key points from the last session, focusing on SharePoint's file management features, link sharing, file version tracking, and search functionality.
- > **OneNote Overview:** John provided an overview of OneNote, describing it as a digital 3-ring binder and highlighting its features such as sections, pages, containers, and tags. He also discussed the differences between the browser and desktop versions.
- > **OneNote Tags and Search:** John explained the use of tags in OneNote for organizing content and demonstrated how to search for tagged items across notebooks.
- **OneNote Templates:** John demonstrated how to create and use templates in OneNote for consistent content, such as meeting agendas or course descriptions.

Follow-up tasks

- **Copilot Feature:** Post information in the Teams channel about the current status and functionality of the bookmark feature in Teams. (John)
- **Copilot Feature:** Check and confirm the availability of the bookmark feature in Teams and update the team accordingly. (John)
- **Copilot Access:** Ensure that the Copilot button is enabled for all team members in the Edge browser and provide necessary instructions for access. (Richard)
- **Copilot Training:** Offer training sessions or resources for team members interested in learning more about Copilot for Office 365 and its applications. (Richard)
- **Power BI Training:** Identify a team member to become the expert in Power BI and provide them with necessary training resources. (Lisa)

Recap Teams Meetings Example (cont'd)

Did we review the Planner app in the meeting

Copilot 3/22 1:28 PM

The Planner app was mentioned briefly in the context of tasks and to-do lists. It was noted that tasks assigned in the Planner app would show up in the To Do app, allowing for centralized task management across different 365 applications. However, there was no detailed review or demonstration of the Planner app itself. 1

AI-generated content may be incorrect

Does it seem like the attendees were understanding the concepts presented

Copilot 3/22 1:29 PM

Based on the meeting transcript, attendees engaged actively with the concepts presented, asking relevant questions and providing feedback. For example, Richard and Lisa discussed the possibility of flagging discussion threads in Teams, and Mary Rae MacKay shared a screenshot to assist with understanding a feature. Additionally, Richard offered to help anyone interested in learning more about Copilot for Office 365, indicating a proactive approach to understanding and utilizing the tools discussed. 1 2 3

AI-generated content may be incorrect

Did I discuss OneDrive security

Copilot 3/22 5:14 PM

Yes, OneDrive security was discussed briefly. John mentioned that OneDrive stores files that only the user has access to unless they share specific files or folders with others. This ensures privacy and control over the stored content. 1 2

AI-generated content may be incorrect

Ask me anything about this meeting

More prompts

Copilot for Word



The screenshot displays the Microsoft Word application window. The title bar shows the document name 'ChatGPT and CPAs A Perfect Partnership.docx' and the last modified date 'January 5'. The ribbon includes tabs for File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Help, and Acrobat. The Copilot icon is circled in red in the top right corner of the ribbon. The Copilot sidebar on the right is titled 'Copilot' and 'Your everyday AI companion'. It lists several AI-powered actions: 'Understand' (Summarize this doc), 'Create an image' (Generate an image of [description]), 'Find specific information' (What does the document say about [roles and responsibilities?]), and 'Write more confidently' (How can I more concisely describe [time management?]). At the bottom of the sidebar, there is a search bar with the text 'Ask me anything about this doc' and a 'Microphone Disabled' indicator. The main document area shows a document with the Higgins Advisory, LLC logo at the top left, followed by the title 'ChatGPT and CPAs: A Perfect Partnership'. The text discusses the evolution of spreadsheet software from VisiCalc to Excel and the impact of generative AI tools like ChatGPT on CPAs. A diagram at the bottom of the document shows a green box labeled 'Research / Learning' connected to two other boxes.

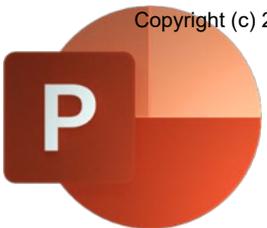


Copilot for Word



- Create first draft of documents
- Rewrite an existing document
- Transform text into table format
- Research from within existing document
- Summarize a document

Copilot for PowerPoint



The screenshot shows the Microsoft PowerPoint application window. The title bar indicates the file is 'Blockchain Technology.pptx' and was last modified on 11/12/2024. The ribbon is set to the 'Home' tab, showing options for Clipboard, Slides, Font, Paragraph, Drawing, Editing, and Adobe Acrobat. The Copilot sidebar is open on the right side, featuring the Copilot logo and the text 'Your everyday AI companion'. It lists several AI-powered actions: 'Extract key information' (Summarize this presentation), 'Stay on track' (Summarize actions items from this presentation), 'Add an agenda' (Add an agenda slide), and 'Coach me' (Tell me best practices for [creating a persuasive presentation]). A search bar at the bottom of the sidebar prompts the user to 'Ask me anything about this presentation'. The main slide area displays a presentation titled 'Blockchain Technology: What Every CPA Should Know' by John H. Higgins, CPA.CITP, from Rochester, Michigan. The slide includes a blue chain graphic and the Higgins Advisory, LLC logo. The slide number '1' is visible in the top left corner of the slide area.

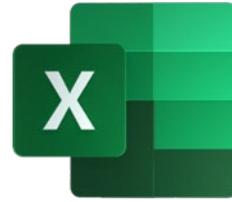




Copilot for PowerPoint

- Create new presentation slide deck w/ images
- Summarize an existing presentation
- Reorganize an existing presentation
- Integrate your company's branding into a presentation

Copilot for Excel



- Works only with data formatted as a table
- Maximum spreadsheet size is 2 million cells
- Analyze table data and create complex formulas
- Generate charts and graphs
- Create pivot tables
- Create macros

Analyze Excel Spreadsheets Example

	A	B	C	D	G	H	I	J	K	L	M	N	O	P	Q
1	Cust#	Customer Name	Location	Region	Product Name	Product Category	Order date	Order Quantity	Unit Price	Total Product Cost	Sales Amount	Tax Amt	Freight	Size	Color
2	35560	Kelli L Xu	110	Germany	Classic Vest, L	Vests	11/8/2011	1	63.50	23.75	63.5	5.08	1.59	L	
3	22760	Donald Chandra	120	United Kingdom	Classic Vest, L	Vests	8/31/2011	1	63.50	23.75	63.5	5.08	1.59	L	
4	20560	Dale Shen	100	France	Classic Vest, L	Vests	3/17/2011	1	63.50	23.75	63.5	5.08	1.59	L	
5	44870	Preston Rodriguez	160	Northwest	Classic Vest, L	Vests	12/19/2010	1	63.50	23.75	63.5	5.08	1.59	L	
6	18630	Christian A Thomas	160	Northwest	Classic Vest, L	Vests	11/6/2010	1	63.50	23.75	63.5	5.08	1.59	L	
7	33130	Jose J Hall	130	Canada	Classic Vest, L	Vests	10/22/2010	1	63.50	23.75	63.5	5.08	1.59	L	
8	21080	Darrell Goel	100	France	Classic Vest, M	Vests	12/5/2011	1	63.50	23.75	63.5	5.08	1.59	M	

Only works with data formatted as a table

Sample Prompts:

“Bifurcate the Customer Name”

“Calculate gross margin”

“Create a pivot table to analyze gross profit by product category and country”

“Create a pie chart of vest sales by country”



Copilot for Forms



A screenshot of the Microsoft Forms web interface. The top navigation bar includes 'Forms', 'Untitled quiz - Saved', and buttons for 'Style', 'Settings', 'Preview', 'Collect responses', 'View responses', and 'Present'. A 'Draft with Copilot' dialog box is open in the center, containing the text: 'Create a 20-question quiz to assess candidates applying for a position as a bookkeeper in our not-for-profit food bank operation. The job duties include payroll processing, grant and donation funds management, purchases and accounts payable, fixed asset reporting and preparation of monthly financial statements. Include questions requesting their name and email address. Make the questions multiple choice. All questions require an answer.' The dialog also shows a character count '442 / 10000' and icons for copy, edit, and submit.

Copilot for Planner



Planner

My plans > **Webinar Demonstration** | Preview | Goals | Grid | **Board** | Reports | Charts | Whiteboard | SharePoint

Project Manager is an AI agent that can help you plan and execute your projects. [Learn more](#)

Filter by keyword

All incomplete tasks

- Enter a task name
- Set bucket
- Finish
- Assign to
- Create client profile
- Client Onboarding
- Send welcome email
- Client Onboarding
- Schedule onboarding call
- Client Onboarding
- Draft engagement letter
- Client Onboarding
- Send engagement letter for

Assign to Project Manager | Needs your input | Ready for review

Project Manager agent Private

- Create**
Add tasks for [drafting a product vision]
- Understand**
Give me a status report for this plan [that includes progress, highlights, and risks]
- Edit**
Add a subtask to [task to follow up with the team]
- Ask**
What are some ways to [increase revenue for a restaurant chain?]

Chat history

Add a task to draft a status mail

Create buckets for team roles

Add a goal to increase revenue by 10%

Start chatting or use / to ask about files or people.

+ New plan

Getting Started: 10 Suggestions to Try With Copilot

- Teams: Recap a meeting. *Draft an email with notes and action items from [meeting].*
- Outlook: get caught up on a long email. Click on the Summarize icon.
- Outlook: personalize an email tone and length. *Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.*
- Word: end writer's block. *Generate 3 ways to say [detail].*
- Word: revise a rough draft. Rewrite with Copilot.
- Copilot: summarize a document. *Give me a bulleted list of key point from [file].*
- Copilot: topic/project insights and analysis. *Tell me what new about [topic] organized by emails, chats, and files.*
- Copilot: idea generation. *Suggest 10 compelling [taglines][ideas][examples] based on file.*
- Copilot: research topics. *What did [person name] say about [topic].*
- Copilot: translate a message. *Translate the [following text] [attached document] into [language name]*



Copilot Studio

- Microsoft's new Agentic AI
- Generative AI generates, Agentic AI acts
- Automates actions in your Microsoft ecosystem
- No code, low code and developer editions
- Early in its life cycle
- Stay tuned, It should be a “game changer”

Preparing Your Firm for Copilot

- ✓ Get your Microsoft 365 data governance managed – Who has access to what
- ✓ Store files in SharePoint and OneDrive
- ✓ Use Teams & Channels vs. Chats
- ✓ Use Teams Meetings vs. Zoom
- ✓ Educate your staff on Generative AI & Copilot

WRAP-UP



In Summary

- The Copilot ecosystem adds significant capabilities to Microsoft 365 to increase your productivity
- We are in the first generation of Copilot, expect substantial advancements
- Most importantly, Copilot protects the security and privacy of your company data while it is being used with generative AI
- Get started today!