

Microsoft Copilot Deep-Dive Hands-on Bootcamp for CPAs



Presented By
John H. Higgins, CPA.CITP
Rochester, Michigan

Learning Objectives



- Recognize the benefits of using Microsoft Copilot
- Differentiate the multitude of features available within Microsoft Copilot
- Identify practical applications for Microsoft Copilot in accounting, finance and tax

John H. Higgins, CPA.CITP

Strategic Technology Advisor



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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

- [Generative AI Key Concepts](#)
- [Microsoft Copilot Tour](#)
- [Using Copilot Inside Microsoft 365 Apps](#)
- [Advanced Features Review](#)
- [Wrap-up](#)
- [Appendix: Accounting / Tax / Finance Case Studies](#)

GENERATIVE AI KEY CONCEPTS



A Simple Generative AI demo with RAG (Retrieval Augmented Generation)



Prompt with RAG

NVIDIA 2025 Fin...

Calculate the Nvidia 2025 Current Ratio

Copilot

Coding and executing >

Below is the calculation of NVIDIA's Fiscal 2025 Current Ratio, using the audited balance sheet data you provided.

NVIDIA Fiscal 2025 Current Ratio Calculation

Definition

- Current Ratio = Current Assets ÷ Current Liabilities
- This ratio measures short-term liquidity and the company's ability to meet obligations due within one year.

Output

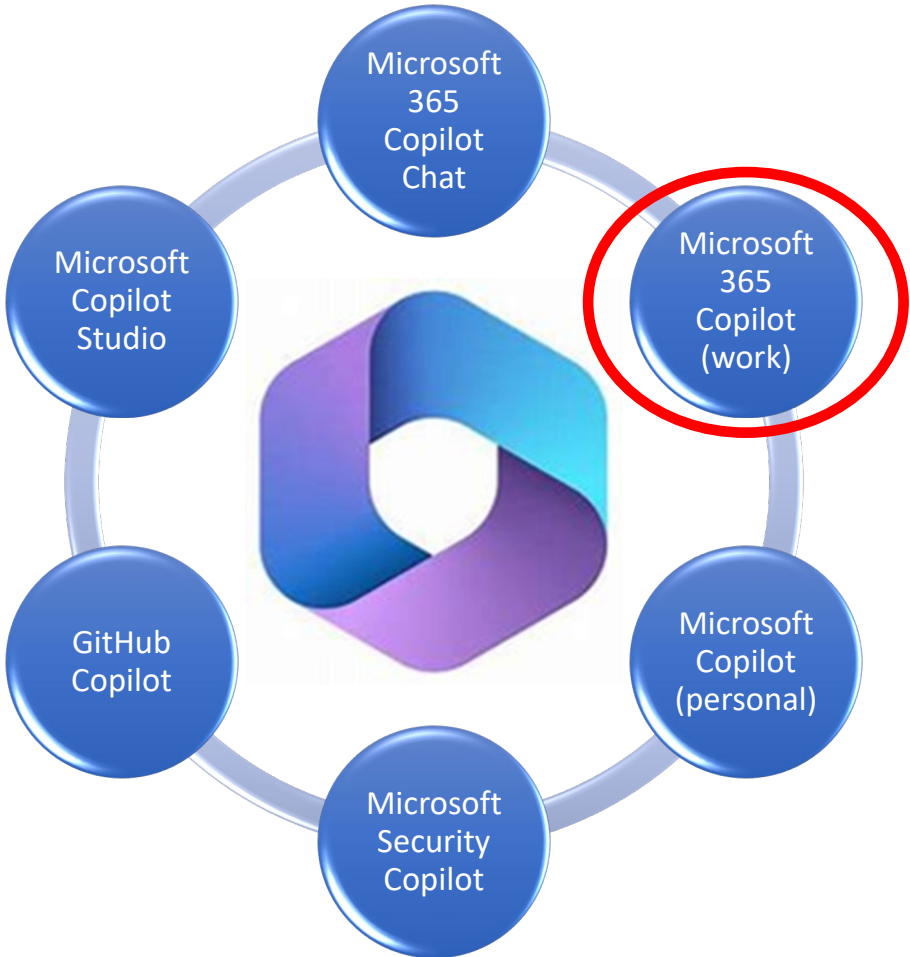
Approximately 90 **tokens** in total (359 characters / 4 characters per token)

Context window

Key Generative AI Terms

- ***Context Window*** – container for a chat session with capacity limitations
- ***Token*** – smallest unit of information an AI model can process. Unit of measure for AI activity
- ***RAG (Retrieval Augmented Generation)*** – Information external to the prompt to supplement the model in answering the prompt.

MICROSOFT COPILOT TOUR



Copilots Explained



Things to Know About Copilot Ecosystem

Copilot is ChatGPT technology embedded into Microsoft applications

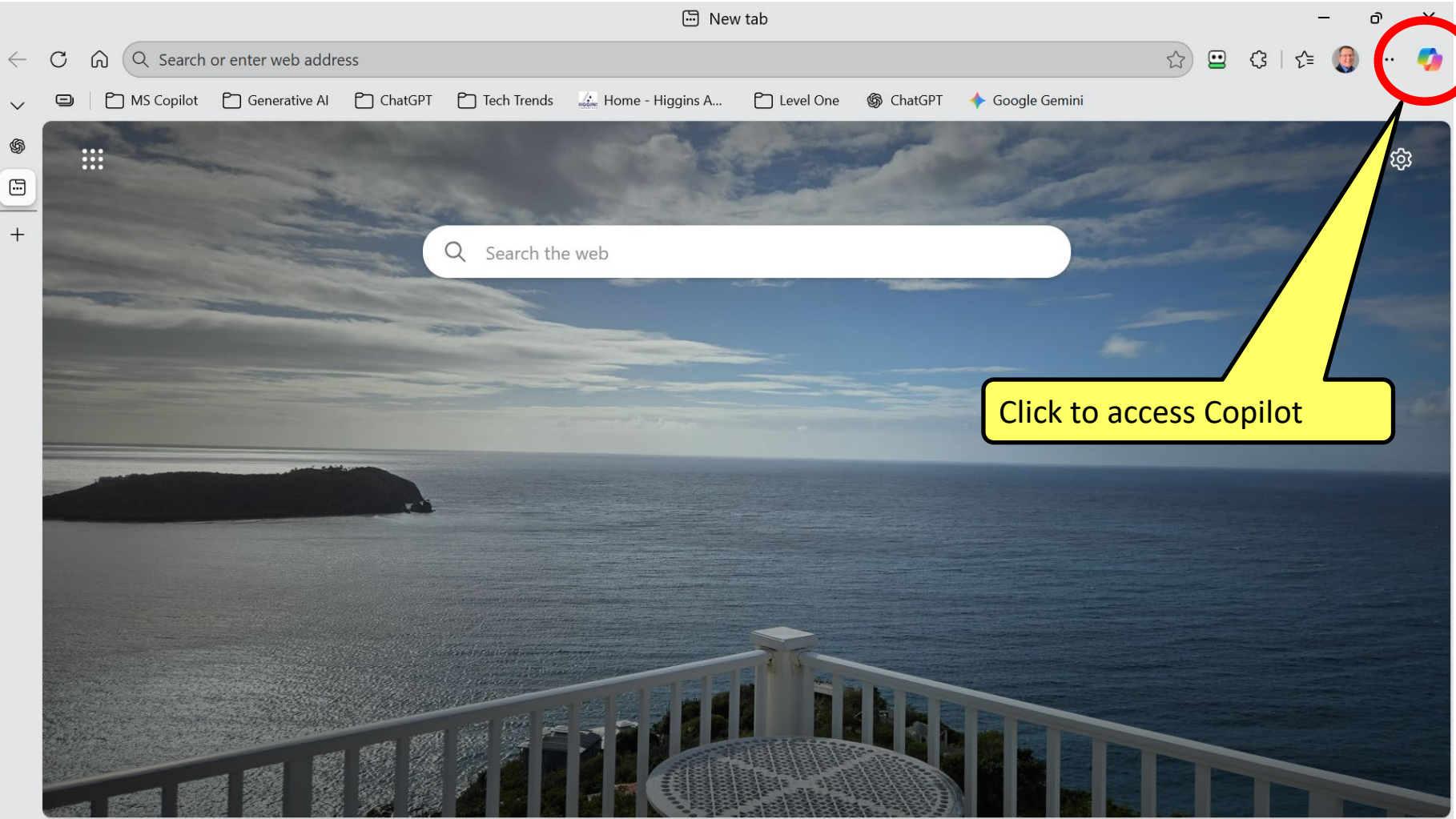
There are multiple Microsoft Copilot products

Microsoft 365 Copilot is grounded in your M365 data and the web

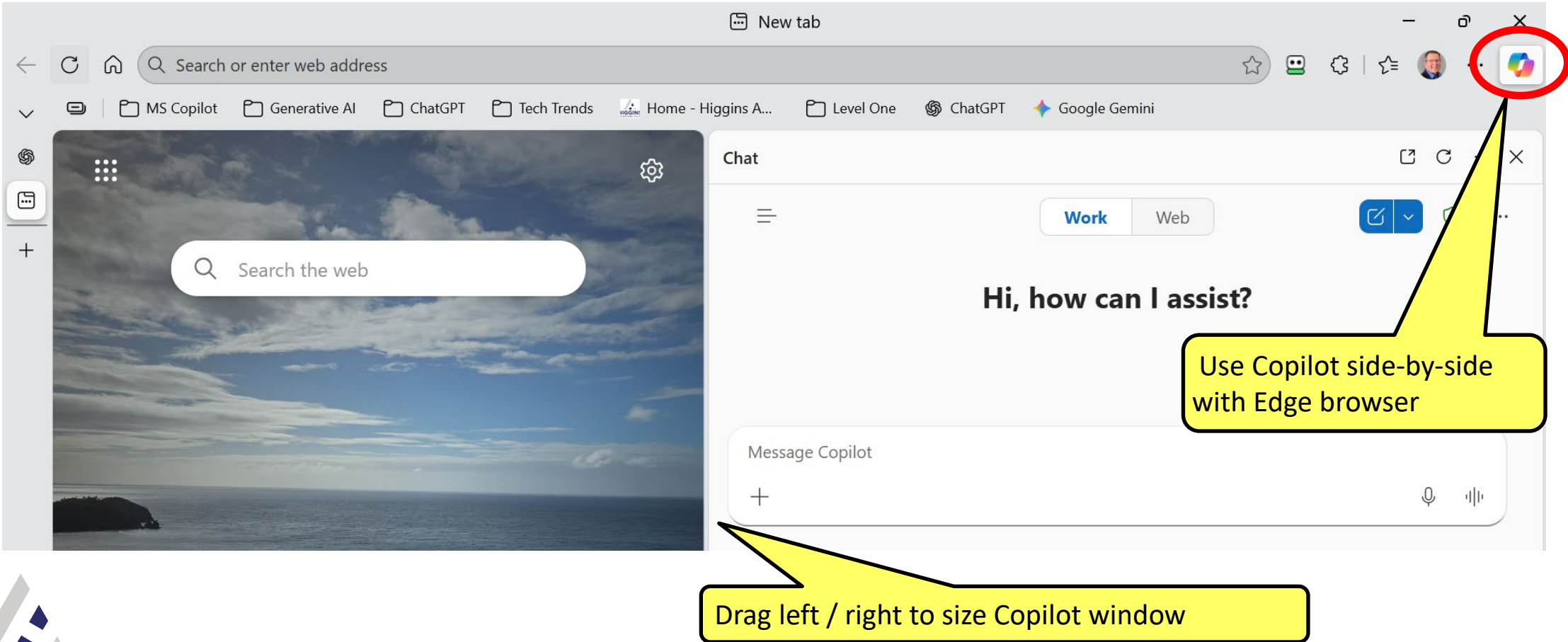
Microsoft Enterprise Data Protection secures your data privacy in Copilot

Accessing Microsoft 365 Copilot

<https://m365.cloud.microsoft/>



Accessing Microsoft 365 Copilot



Microsoft 365 Copilot Interface

The screenshot shows the Microsoft 365 Copilot interface with several callout boxes:

- Enterprise Data Protection status indicator:** A yellow callout box pointing to a shield icon in the top right corner.
- Toggle "Work" to use M365 data as RAG:** A yellow callout box pointing to a red circle around the "Work" and "Web" toggle buttons.
- Model Selector:** A yellow callout box pointing to a dropdown menu labeled "Auto" with a blue icon.
- New or temporary chat:** A yellow callout box pointing to a blue icon with a plus sign.
- Click to open Copilot home page:** A yellow callout box pointing to a small icon in the top left corner.
- Click to add RAG and access agents:** A yellow callout box pointing to a plus sign icon in the message input area.
- Microsoft suggested prompts:** A yellow callout box pointing to three suggested prompts: "Help me prepare for 30 Minute Meeting", "List key points from Standard Speaking Agreement.docx", and "What should be on my radar from emails last...".
- Click audio input / output:** A yellow callout box pointing to a microphone icon in the message input area.

Microsoft 365 Copilot Interface

The screenshot shows the Microsoft 365 Copilot interface. At the top, there are tabs for 'Work' and 'Web'. A yellow callout box labeled 'Additional Features' points to a three-dot menu icon in the top right corner. This menu is open, showing options: 'Recent pages', 'Send feedback', 'Scheduled Prompts', and 'Settings'. A yellow callout box labeled 'Schedule selected prompts to execute on a recurring schedule' points to the 'Scheduled Prompts' option. Another yellow callout box labeled 'Access advanced settings' points to the 'Settings' option. Below the menu, there is a 'Message Copilot' input field with a plus sign. A yellow callout box labeled 'Available in "Work" model only. Toggle to have Copilot query the web to help generate the prompt response.' points to a 'Web search' toggle switch in the settings menu, which is currently turned on. Below the input field, there are several prompt cards: 'Help me Meeting', 'Rewrite file to emphasize actionable insights for target...', 'Who is person?', and 'Analyze this text and make suggestions on how to improve...'.



Microsoft 365 Copilot Web Example

Chat | M365 Copilot

https://m365.cloud.microsoft/chat/?auth=2

Work Web

We are looking to fill a new position in our accounting firm for a "Microsoft 365 Copilot Champion." the primary purpose of this role is to help the entire firm utilize the power of Microsoft Copilot to increase productivity, provide innovative services and improve client satisfaction. This is intended to be an entry level position filled by someone who has a strong aptitude for AI technology.

Create a job description for this position.

Create a LinkedIn job posting Draft an interview guide for this role

Message Copilot

Tools

AI-generated content may be incorrect

Microsoft 365 Copilot – Chat Actions

The screenshot shows a Copilot chat window with a list of suggestions and a toolbar. Callouts point to specific features:

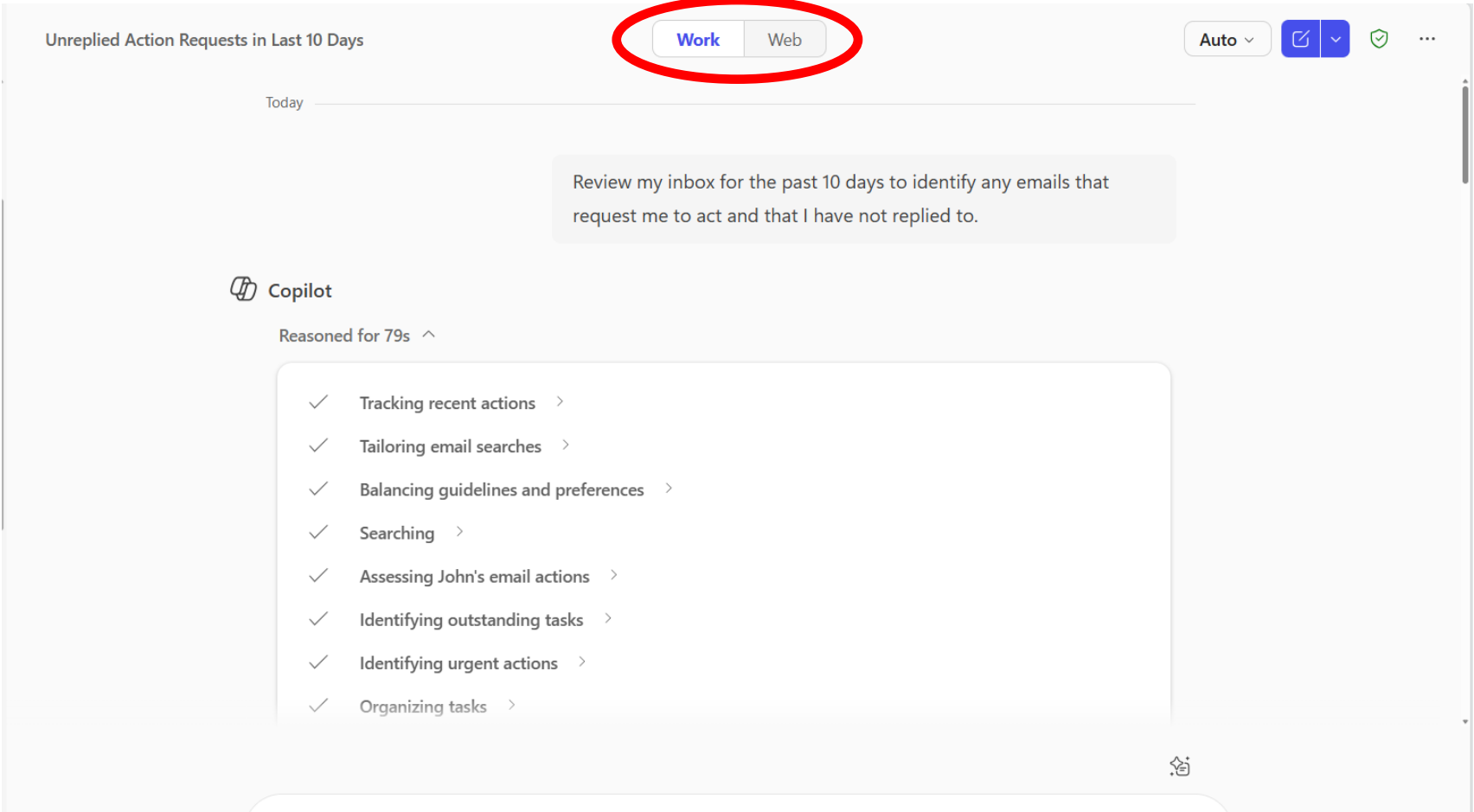
- Additional Copilot action suggestions:** Points to the list of suggestions starting with "If you would like, I can also:".
- Copy generated output:** Points to the copy icon in the toolbar.
- Provide feedback on quality of generated output:** Points to the thumbs up and thumbs down icons in the toolbar.
- Setup prompt schedule:** Points to the clock icon in the toolbar.
- Add to Copilot "page":** Points to the plus icon in the toolbar.
- Create link to share prompt and output. Internal only**: Points to the share icon in the toolbar.

The suggestions list includes:

- Tailor this description for campus recruiting
- Adjust it for U.S. or Canadian labor compliance language
- Create an interview guide or skills assessment for candidates
- Rewrite this for LinkedIn or Indeed posting formats

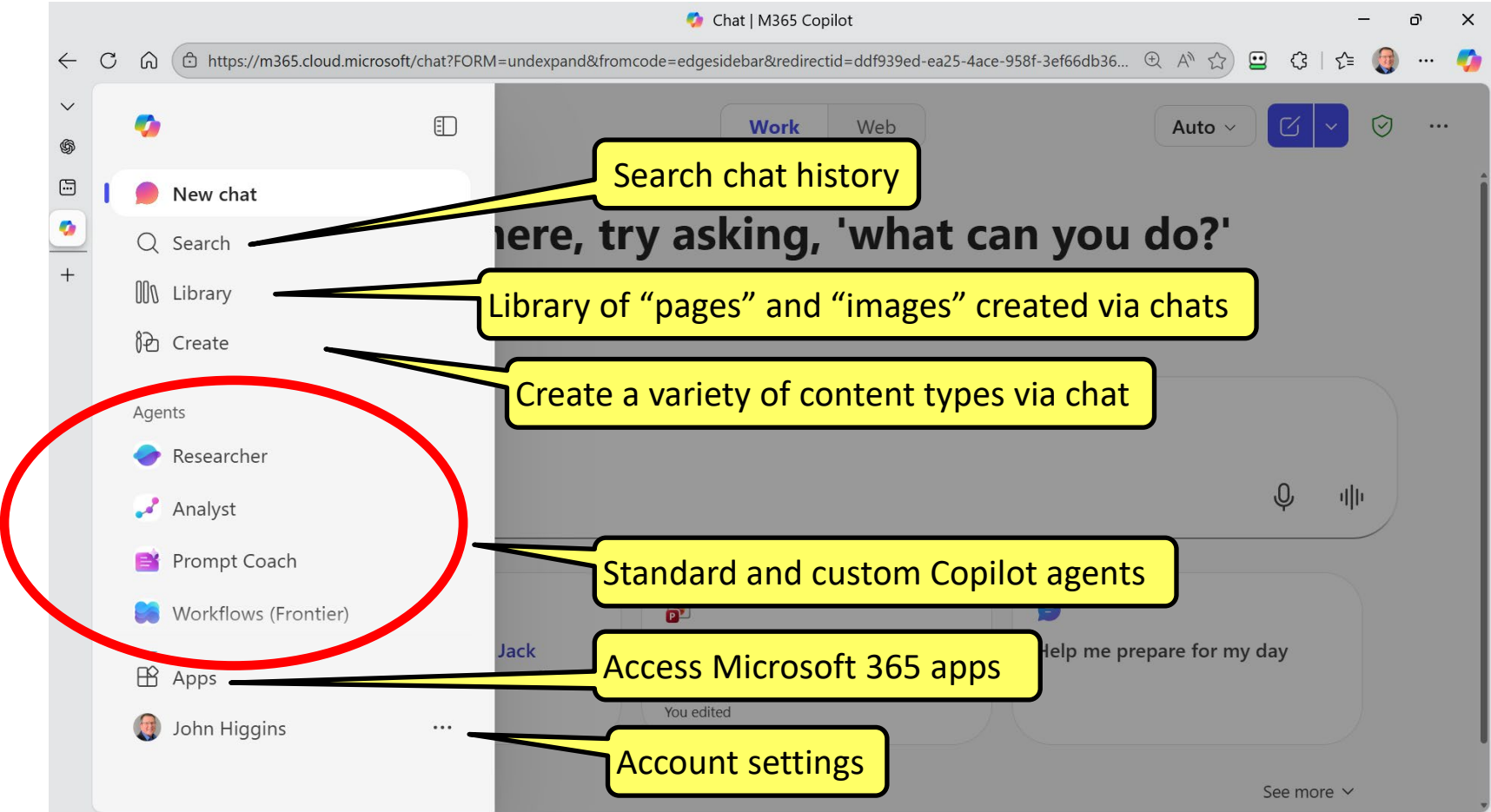
The toolbar contains icons for copy, thumbs up, thumbs down, share, clock, plus, and a menu icon. The right sidebar shows buttons for "Create a LinkedIn job post version", "Draft interview questions for this role", and "Design a skills test for candidates". The bottom of the chat window has a "Message Copilot" input field with a plus icon and a microphone icon.

Microsoft 365 Copilot Work Example

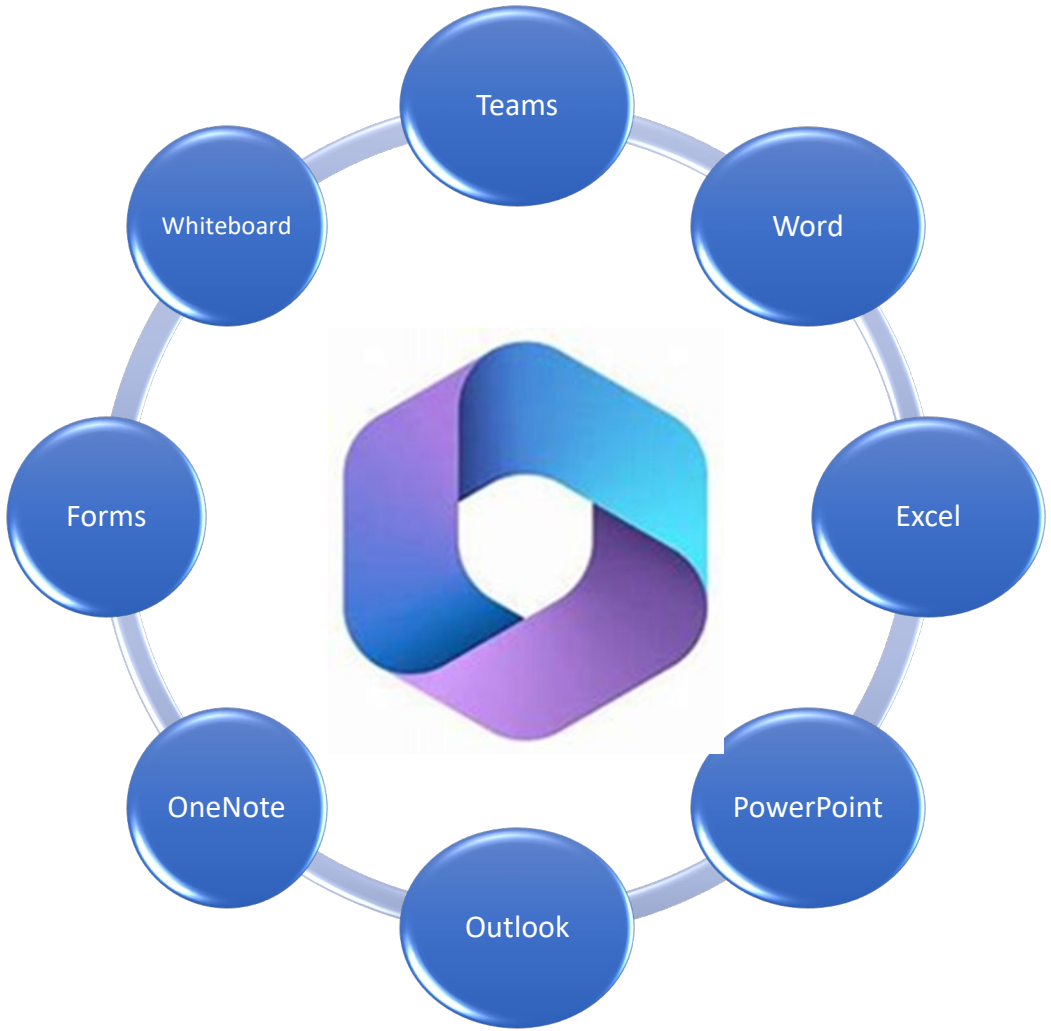


Microsoft 365 Copilot Home Page

<https://m365.cloud.microsoft/>



Using Copilot Inside Microsoft 365 Apps

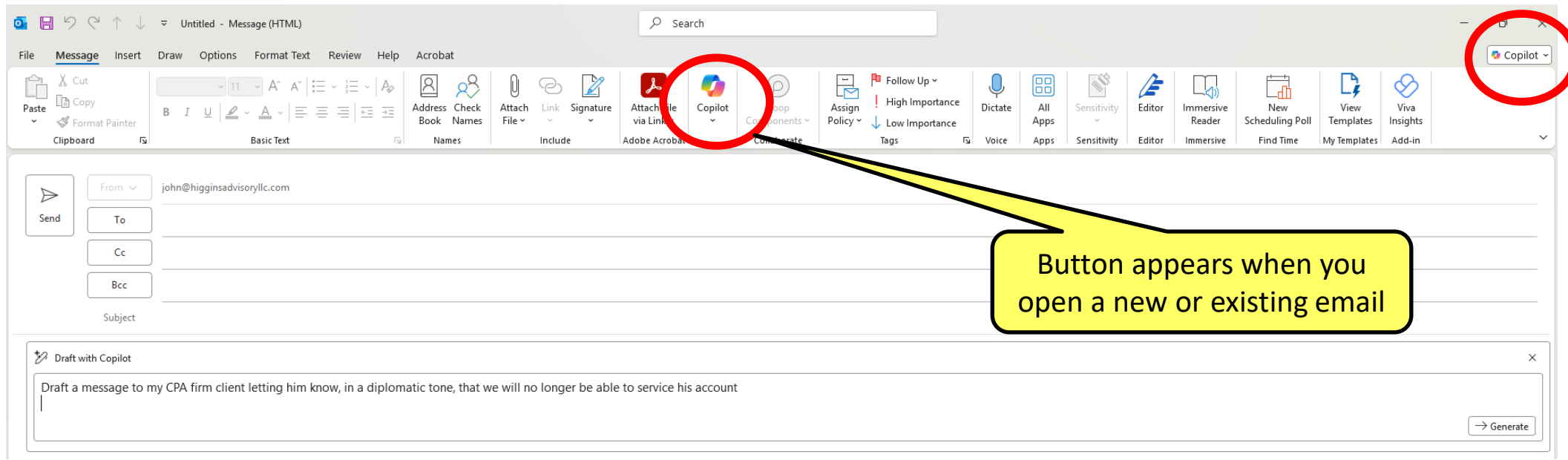




Copilot for Outlook

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

Copilot for Outlook – Compose an Email



Prompt: "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."

Copilot for Outlook – Reply to an Email



The screenshot shows the Outlook 'Message' ribbon with the Copilot icon circled in red. The 'Copilot' dropdown menu is also circled in red. Below the ribbon, the email header shows 'From: john@higginsadvisoryllc.com' and 'Subject: RE: 60 minutes'. The main body of the email contains a generated reply: 'Hi Linda, Thank you so much for sending over the link to the 60 Minutes story on Claude! I really appreciate you sharing it with me. Anything you'd like to change?'. A yellow callout box with the text 'Generate reply email' points to the generated text. At the bottom of the email body, there are buttons for 'Keep', 'Discard', 'Regenerate', and 'Adjust'. A small disclaimer 'AI-generated content may be incorrect' is visible on the right side of the email body.

Prompt: "Thank you for sending."

Copilot for Outlook – Summarize an Email



Re: [TaxDome] Invitation to collaborate on our Firm Forward Newsletter - Message (HTML)

File Message Help Acrobat

Ignore Block Delete Archive Report Reply Reply All Forward Meeting IM More Share to Teams All Apps To Manager Done Team Email Reply & Delete Create New Move Rules Send to OneNote Actions Assign Policy Mark Unread Categorize Follow Up Find Related Select Read Aloud Immersive Reader Translate Zoom Reply with Scheduling Poll Viva Insights

Re: [TaxDome] Invitation to collaborate on our Firm Forward Newsletter

Summary by Copilot

Hailee (Thu Ha) Nguyen invited you to contribute insights for the Firm Forward Newsletter, outlining a timeline for input, review, and publication, and requested your consent to use your input in other content and to create an author page for you.

You agreed to participate, received and answered a list of questions, and provided your bio and headshot as requested.

The timeline was revised, with your input due Jan 19, draft review on Jan 28, and newsletter release on Feb 13; you were asked to provide feedback on the draft by Feb 4, which you confirmed as satisfactory.

The newsletter is scheduled to be published next week, and Hailee (Thu Ha) Nguyen will notify you when it goes live.

AI-generated content may be incorrect

Hailee (Thu Ha) Nguyen <hnguyen@taxdome.com>
To John Higgins

Follow up. Start by Tuesday, February 3, 2026. Due by Tuesday, February 3, 2026.
If there are problems with how this message is displayed, click here to view it in a web browser.
This message is part of a tracked conversation. Click here to find all related messages or to open the original flagged message.

Hi John,

Thanks a lot for your feedback.

The newsletter will be published next week and I'll let you know when it's live.

Thank you so much. Have a great week!

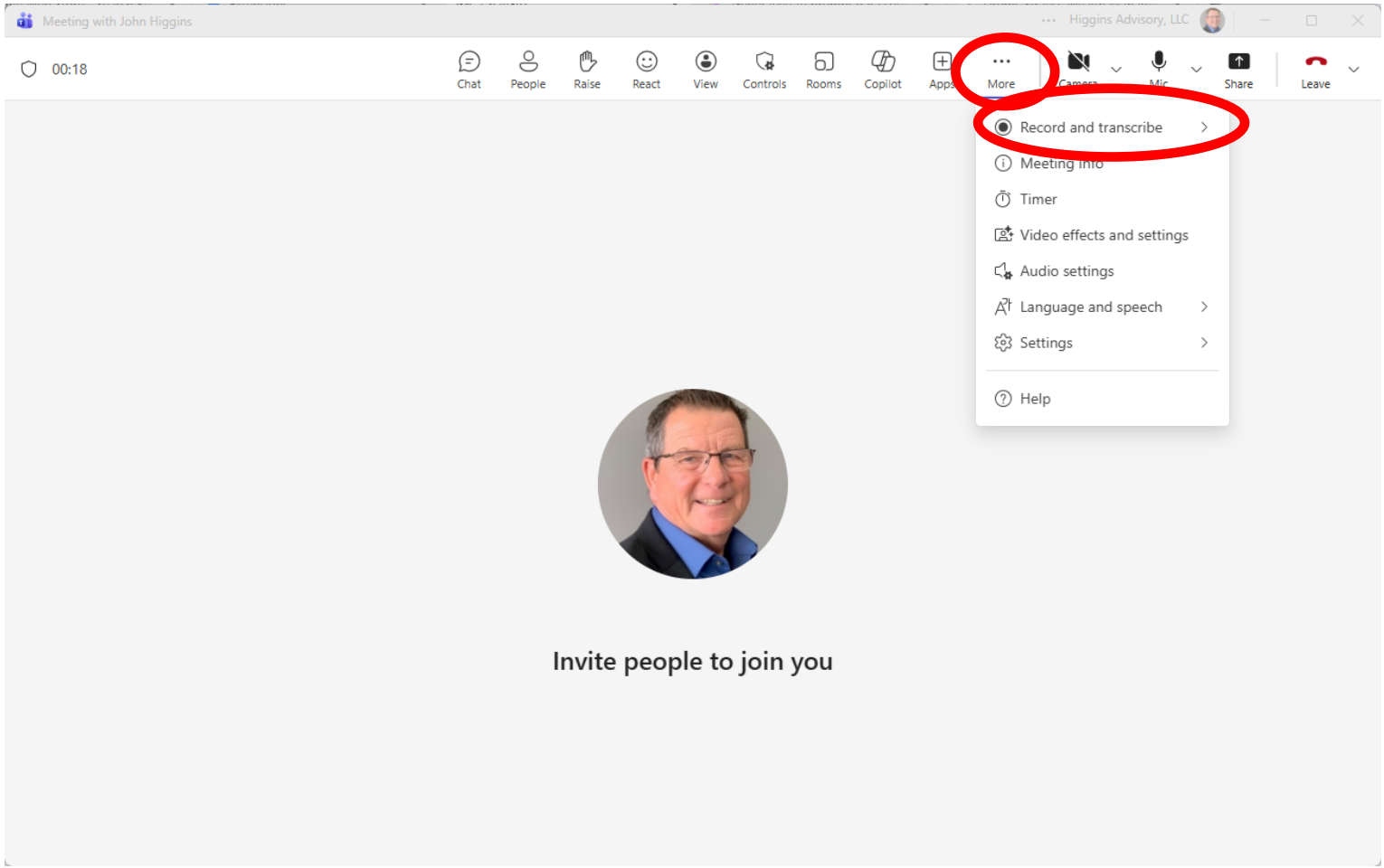
Summarize an email

Copilot for Teams



- Summarize meetings in real time
- Summarize chat conversations for main points, action items and decisions

Copilot for Teams Meetings via Recording





Copilot for Teams Meetings via Transcript

The screenshot shows a Microsoft Teams meeting window titled "Meeting with John Higgins". The top toolbar includes icons for Chat, People, Raise, React, View, Controls, Room, Copilot (circled in red), Apps, More, Camera, Mic, Share, and Leave. A notification box in the center of the screen, also circled in red, reads: "Transcription has started. Started by you. Let everyone know they're being included. [Privacy policy](#)". Below the notification is a circular profile picture of a man and the text "Invite people to join you". On the right side, the Copilot sidebar is open, displaying the following content:

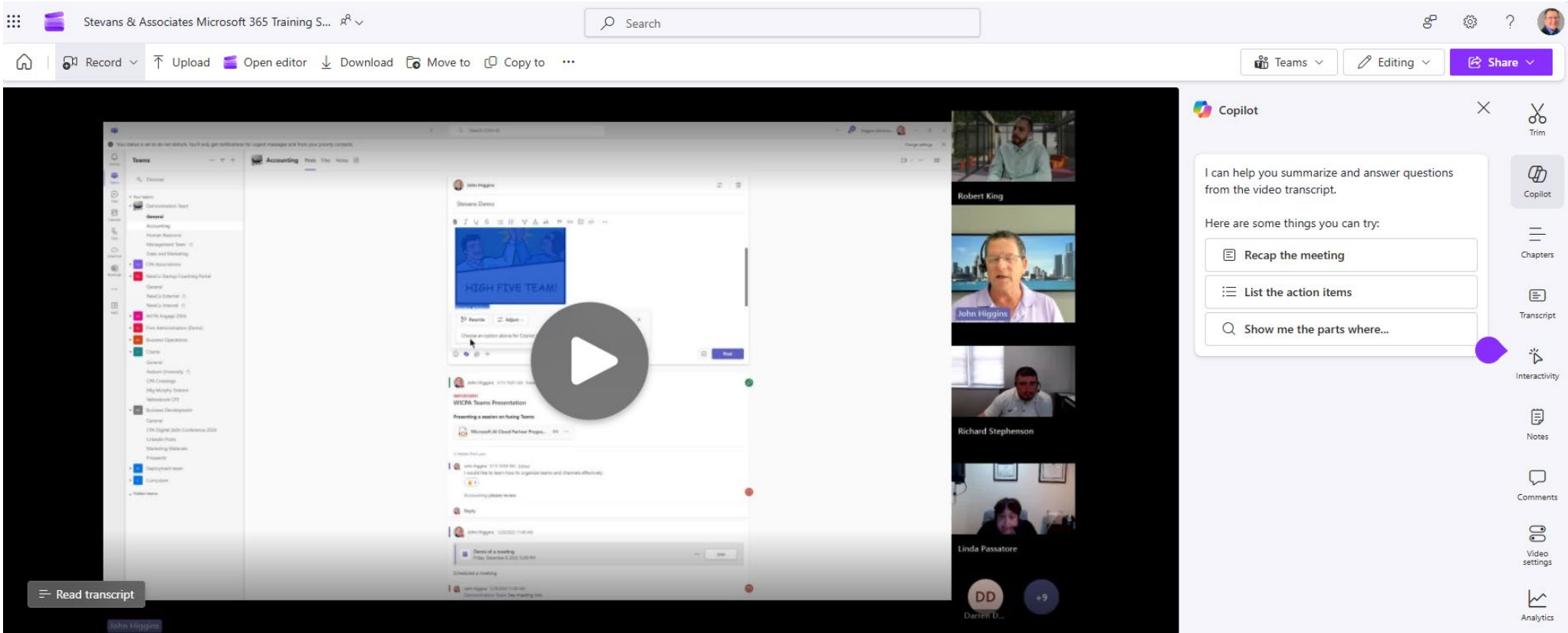
- Let AI handle the busywork**
Copilot can generate notes, list tasks, and much more-so you don't have to.
- Check the facts**
A response could be inaccurate or incomplete. Share feedback to help Copilot improve.
- It's your Copilot**
Other people in the meeting can't see this conversation.

Below this is a "Prompt suggestions" section with buttons for:

- Recap meeting so far
- List action items
- List main ideas we discussed
- Generate meeting notes
- Highlights from meeting chat

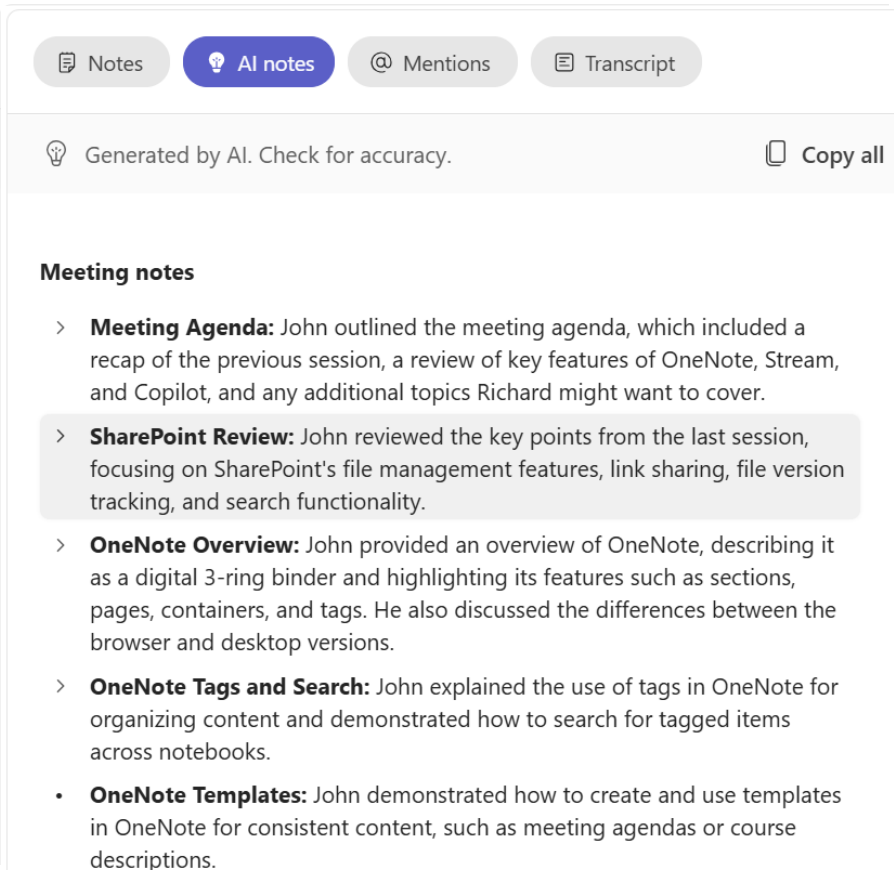
At the bottom of the sidebar, there is a "View prompts" link and a text input field with the placeholder "Ask me anything about this meeting" and a send button.

Recap Teams Meetings in Clipchamp



[Shared with explicit permission from the client]

Copilot for Teams Meetings Recap



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

- > **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



- Create first draft of documents
- Rewrite an existing document
- Format a document
- Research from within existing document
- Summarize a document

Copilot for Word - Draft a New Document



The screenshot shows the Microsoft Word interface. The ribbon is set to 'Home'. The document content includes a title 'The Nature of Quantum Computing' and several paragraphs of text. A red circle highlights the 'Editor Copilot' icon in the top right corner of the ribbon. Another red circle highlights an 'Edit prompt' box at the bottom of the document, which contains the text: 'Draft a 300 word article on the nature of Quantum computing. Explain what it is and what the implications are. Write the article at the 10th grade reading level in a professional tone targeted towards an audience of CPAs and CFOs'. The prompt box also shows a character count '231 / 400000' and a blue arrow icon.



Copilot for Word – Summarize a Document

The screenshot shows the Microsoft Word interface with the 'Summary' pane open. The ribbon includes 'Editor', 'Copilot', and 'Document Cloud' icons, which are circled in red. The 'Summary' pane displays a generated summary of the document content.

Summary:

The document outlines a full-day workshop agenda from 9:00 a.m. to 4:30 p.m., beginning with introductions and an overview of three key growth journeys for firms: Practice Growth, Practice Model, and Digital Firm. The Practice Growth session focuses on attracting clients, sales and marketing, and client referrals; the Practice Model session covers service offerings, team alignment, and business models; and the Digital Firm session addresses technology tools, system integration, and data-driven decisions. The day concludes with integration, action planning, and closing reflections to unify strategies and set priorities for the next 90 days [1] [2].

Document Content:

Full-Day Workshop Agenda (9:00 a.m. – 4:30 p.m.)

Welcome, Framing & Introductions

9:00 – 9:15 a.m.

- Set expectations for the day
- Overview of the three journeys
- Quick poll: Where is your firm strongest today

Section 1: Practice Growth Journey

9:15 – 11:00 a.m.

Accelerate Your Firm's Growth with Confidence

Core Topics

- Identifying and attracting ideal clients
- Building a repeatable sales and marketing engine
- Creating a client experience that drives referrals

Section 2: Practice Model Journey

11:15 a.m. – 12:15 p.m.

Design a Practice That Works for You

Core Topics

- Clarifying service offerings and pricing
- Aligning team structure with firm goals
- Building a business model that supports lifestyle and scale

12:30 p.m.

Lunch

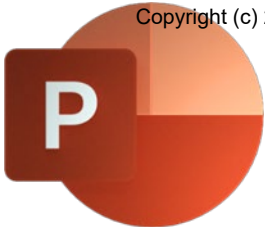
Section 3: Digital Firm Journey

1:15 – 3:15 p.m.

Leverage Technology to Streamline and Scale



Copilot for PowerPoint



AutoSave On Blockchain Technology.pptx • Last Modified: 11/12/2024

File Home Insert Draw Design Transitions Animations Slide Show Record Review View Add-ins Help Conferences i/o Acrobat

Clipboard Slides Font Paragraph Drawing Editing Adobe Acrobat Voice Sensitivity Add-ins

Designer Copilot Document Cloud Adobe

1 Blockchain Technology: What Every CPA Should Know

2 Learning Objectives

3 John H. Higgins, CPA.CITP

4 Presentation Outline

5 Blockchain is a revolutionary way to validate, record and preserve information digitally

6 Features of Blockchain Technology

7 The Blockchain Ledger

8 Attributes of Blockchain Technology

Slide 1 of 40 Accessibility: Investigate

Notes

Record Presentations Share

Find and Replace Replace Fonts Select

Create PDF and Share link Create PDF and Share via Outlook

Dictate Sensitivity

Designer Copilot Document Cloud Adobe

Copilot Your everyday AI companion

Extract key information Summarize this presentation

Stay on track Summarize actions items from this presentation

Add an agenda Add an agenda slide

Coach me Tell me best practices for [creating a persuasive presentation]

Ask me anything about this presentation

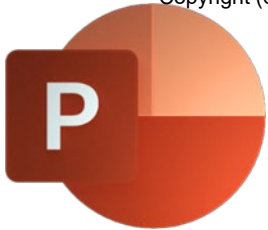


Copilot for PowerPoint



- 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 PowerPoint



Today

Quantum Comp...

Create a PowerPoint slide presentation on this document [Quantum Computing Article.docx](#). Add images.

Copilot

The generated "Quantum_Computing_for_CPAs_and_CFOs 1.pptx" file was saved to OneDrive.

Coding and executing >

I created a complete PowerPoint slide presentation based on [Quantum Computing Article.docx](#), structured for CPAs and CFOs and written at an appropriate professional, 10th-grade reading level. The presentation includes clear slide titles, concise bullet points, and simple visual elements to support learning.

What I delivered

- A ready-to-use PowerPoint file summarizing the full article content:
 - Basics of quantum computing
 - How quantum computing differs from classical computing
 - Business and financial applications
 - Data security implications
 - Why it matters to CPAs and CFOs
 - Key takeaways

Copilot for Excel



- Recommend data formatted as a table
- Analyze table data and create complex formulas
- Generate charts and graphs
- Create pivot tables
- Create macros

Copilot for Excel



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The screenshot shows the Microsoft Excel interface with the 'Copilot' icon in the ribbon highlighted by a red circle. A context menu is open over the Copilot icon, displaying the following options:

- Search the menus
- Cut
- Copy
- Paste Options:
 - Paste
 - Paste Special...
 - Refresh
- Copilot Suggestions
 - Show me interesting insights
 - Explain this formula
 - Suggest a formula column
 - Suggest conditional formatting
 - Summarize using PivotTable or chart
 - Teach Me Something About Excel
- Insert
- Delete
- Select
- Clear Contents
- Quick Analysis
- Sort
- Filter
- Table
- Get Data from Table/Range...
- New Comment
- New Note
- Format Cells...
- Pick From Drop-down List...
- Link
 - Open Hyperlink
 - Link to this Range
 - Show Changes

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 LXu	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	33150	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	

[Works best with data formatted as a table]



Sample Prompts:

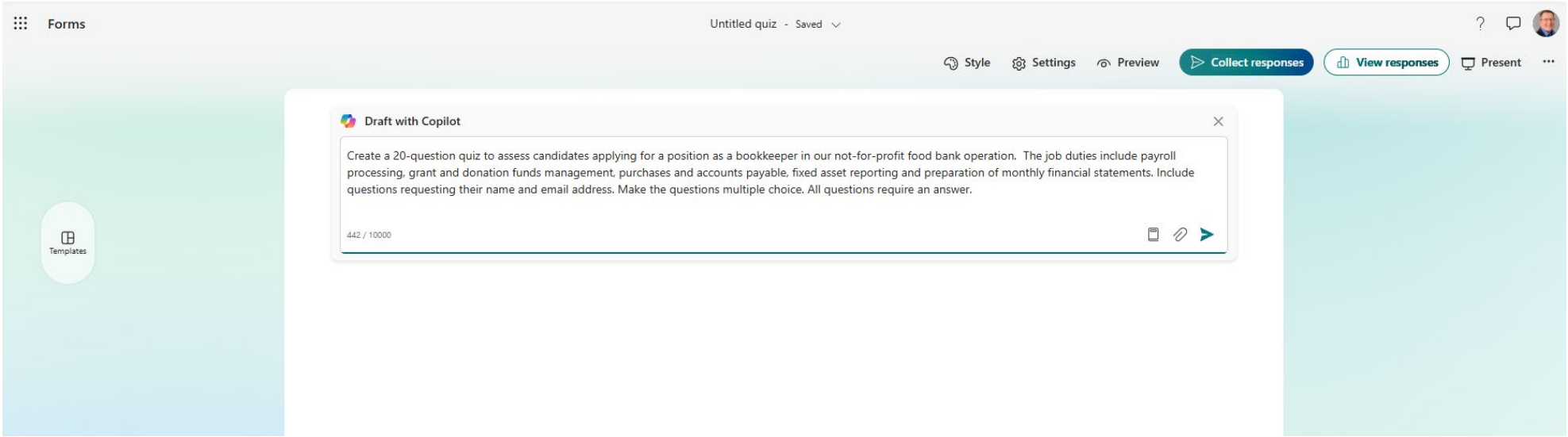
“Bifurcate the Customer Name into first, middle and last”

“Add a column for 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



Create a 20-question quiz to assess candidates applying for a position as a bookkeeper in our not-for-profit food bank . . .

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.

Prompt "Create a project plan for a financial audit"

MICROSOFT COPILOT ADVANCED FEATURES REVIEW



ChatGPT Advanced Features

- ✓ Prompt Coach / Prompt Gallery
- ✓ Model Options
- ✓ Scheduled Prompts
- ✓ Notebooks
- ✓ Agents
- ✓ Account Settings

Copilot Prompt Coach

M365 Copilot

Search

Chat

Agents

- Researcher
- Analyst
- Prompt Coach**

All agents

Create agent

Conversations

- Preparing Effective Interviews...
- Summary of Actionable Email...
- Gross Margin Calculation fro...
- Bifurcate the account name a...

John Higgins

Prompt Coach

Message Copilot

+ [Microphone] [Send]

- Prompt Generation**
Help me generate a prompt to be used in Copilot.
- Analyze Prompt**
Analyze my prompt and provide feedback on how I could impro...
- Prompt Compliance**
Evaluate if my prompt is compliant and following the...

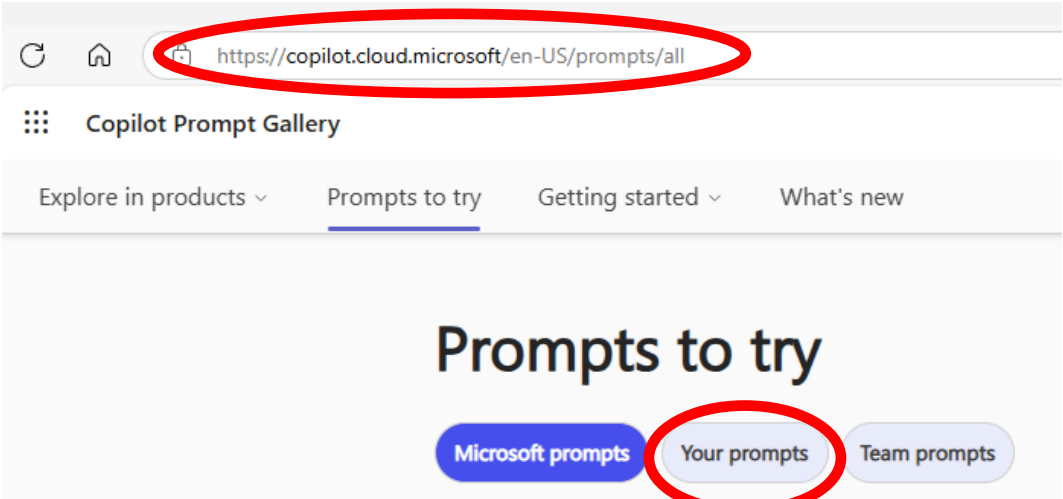
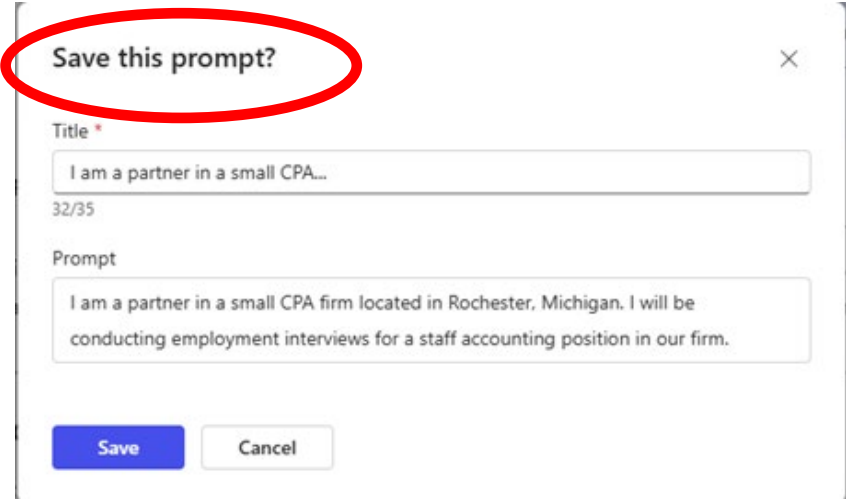
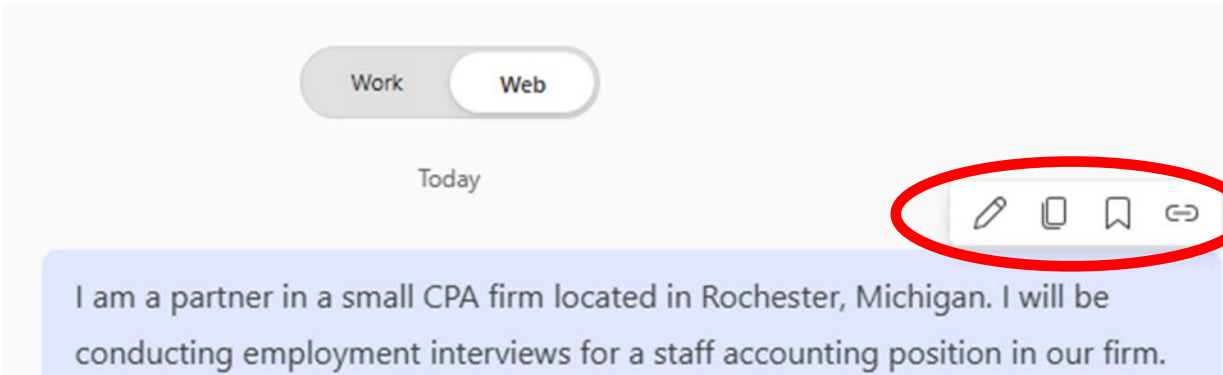
See more ▾

Need help?

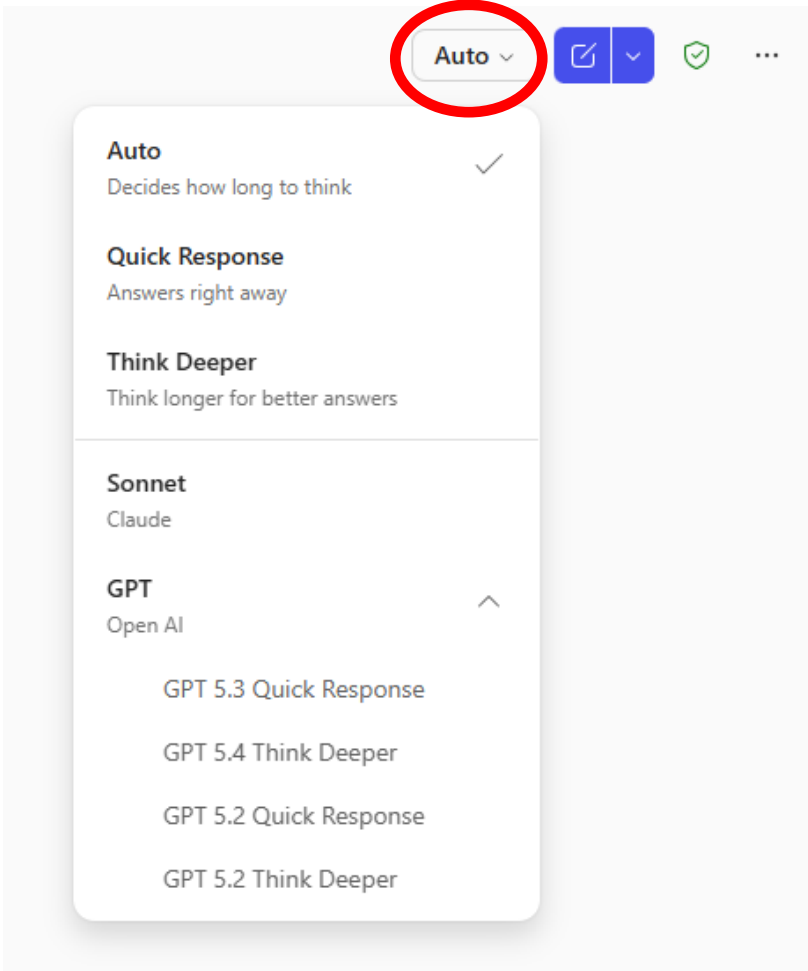
Prompt Gallery

The screenshot shows the 'Copilot Prompt Gallery' interface. At the top, there are three tabs: 'Suggested' (highlighted in blue), 'Your prompts', and 'Team prompts'. Below the tabs are three filter dropdowns: 'Task', 'Job type', and 'Copilot agent'. The main area displays a grid of prompt cards. Three yellow callout boxes with black outlines point to specific cards: 'Microsoft suggested prompts gallery' points to the first card, 'Your personal saved prompts gallery' points to the second card, and 'Teams saved prompts gallery' points to the third card. The fourth card is partially visible on the right.

Storing Your Copilot Prompts

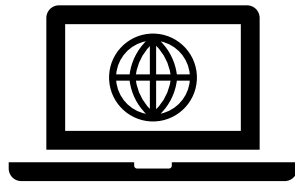


Copilot Model Options

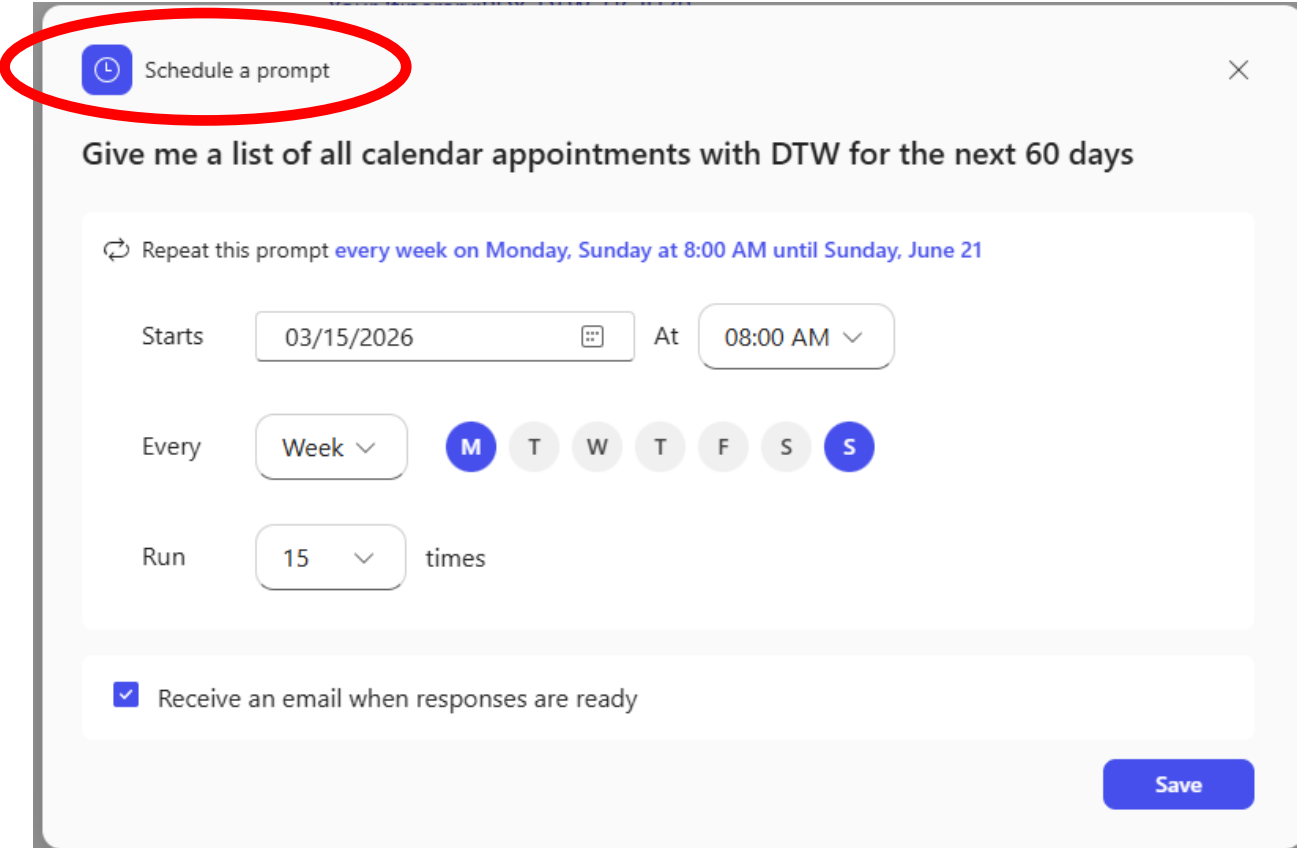
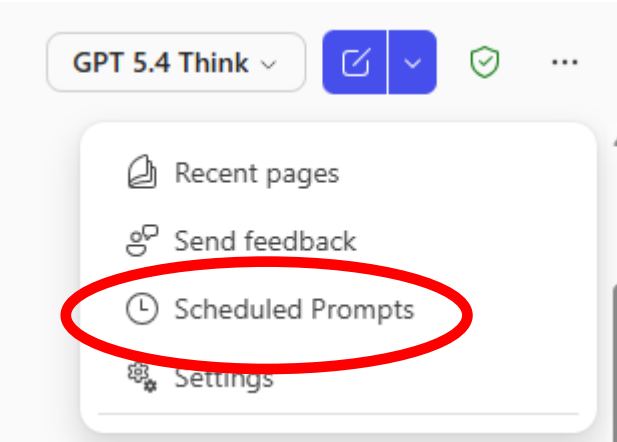


“Think Deeper” Prompt

- You are an expert U.S. tax advisor. I am a CPA tax practitioner. Explain to me, in a bulleted list, the important changes the HR1 (One Big Beautiful Bill) made to depreciation and Section 179 rules and reporting.



Scheduled Prompts



Microsoft 365 Copilot Notebooks

- A special container for related content; documents, chats and more.
- Chats are grounded exclusively in notebook content.
- Collaborate with others by sharing your notebook.
- Designed for AI application at a project level

Microsoft 365 Copilot Notebooks

The screenshot displays the Microsoft 365 Copilot Notebooks interface. On the left, a sidebar shows 'Created content' and 'References' for a notebook titled '2026 AI Course S...'. A callout 'Notebook members' points to the top right of the sidebar. The main content area shows a 'Summary' of AI fundamentals for CPAs, with a callout 'Notebook specific generated content' pointing to the text. Below the summary, 'Key Insights' are listed, with a callout 'Notebook specific referenced files / content' pointing to a list of references including 'AI Series Value Proposition', 'Microsoft Copilot Deep Dive H...', 'Microsoft Copilot Deep Dive O...', 'ChatGPT Deep-Dive Hands-on...', '2026 Higgins Advisory Catalog - D...', 'ChatGPT Deep Dive', 'AI Revolution in 2026', 'Microsoft Copilot Deep Dive', and 'AI 101 for CPAs'. On the right, a 'Copilot' chat window is open, showing a prompt 'Provide a count of the number of slides in each PPT file' and a response with a table of slide counts. A callout 'Notebook chat history' points to the chat window header, and another callout 'Chats grounded in notebook content' points to the chat messages.

Notebook members

Notebook chat history

Notebook specific generated content

Notebook specific referenced files / content

Chats grounded in notebook content

File Name	Slide Count
AI 101 for CPAs.pptx	86 slides
Microsoft Copilot Deep Dive.pptx	86 slides
AI Revolution in 2026.pptx	84 slides
ChatGPT Deep Dive.pptx	49 slides

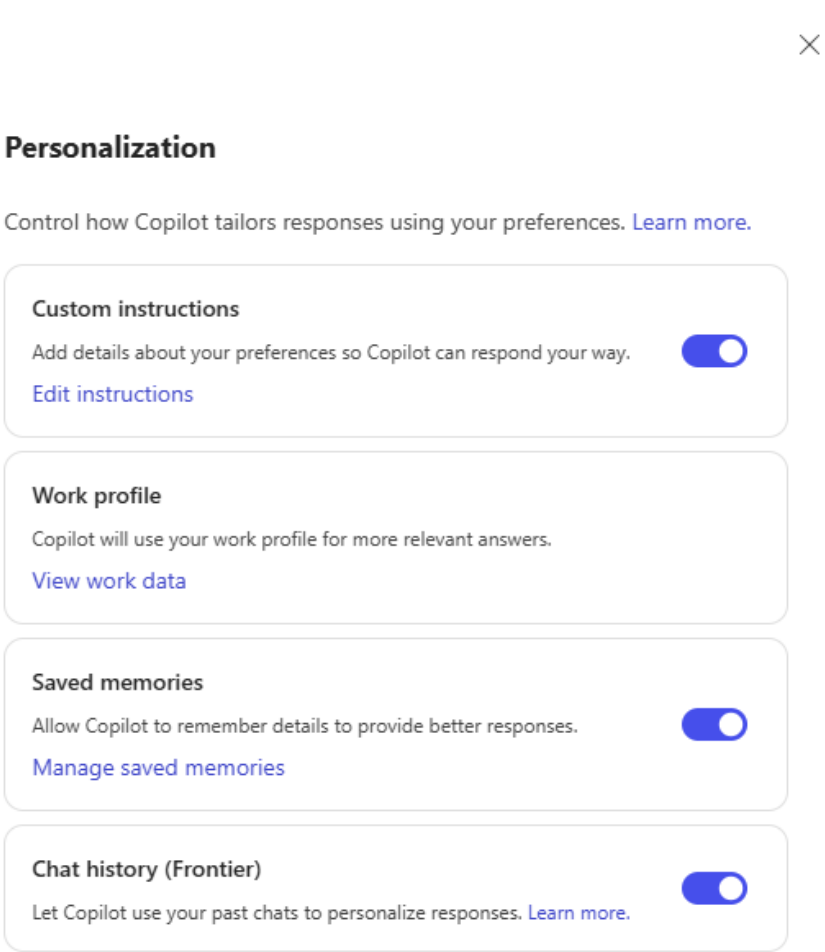
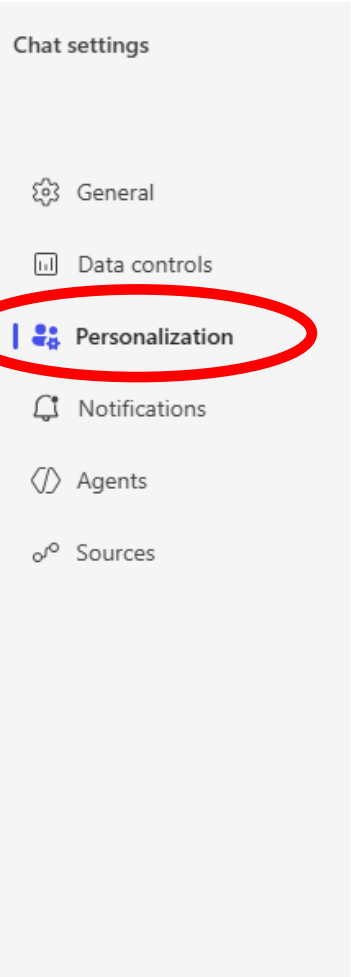
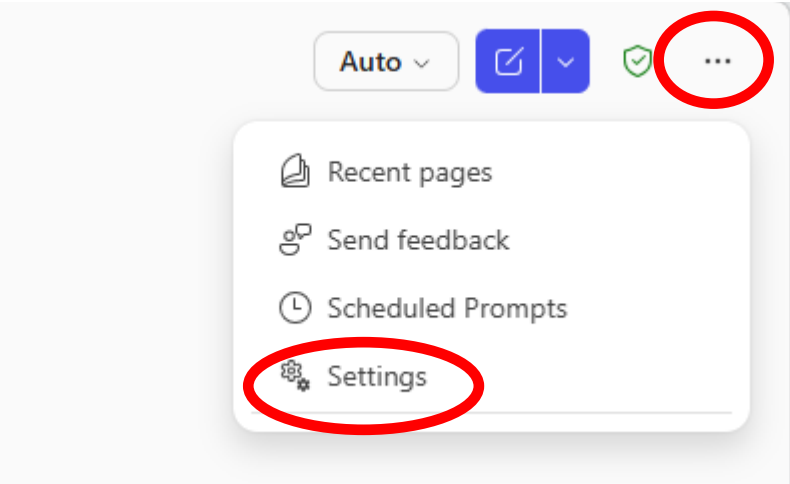
Copilot Agents

- Automated tasks / processes
- Pre-built by Microsoft or custom by you
- Range from simple to complex
- Requires some technical skills
- Present a new service opportunity for CPAs

Copilot Agents

The screenshot shows the Microsoft Copilot Agent Builder interface. On the left is a sidebar with navigation options: New chat, Search, Library, Create, Agents, and Notebooks. The 'Agents' section is circled in red and contains: Researcher, Analyst, Prompt Coach, Excel, Email Actions Required, New agent, and All agents. The main area is titled 'Agent Builder > Email Actions Required' and shows configuration options for 'Describe' and 'Configure'. It includes sections for 'Details' (Name: Email Actions Required, Description: Daily process to review my inbox...), 'Instructions' (Review my Outlook inbox...), and 'Knowledge' (Choose the sources your agent will use to generate responses). A yellow callout bubble labeled 'Agent instructions' points to the 'Instructions' section. On the right is a preview of the agent's chat interface, showing the agent's name 'Email Actions Required' and its description. At the bottom, there is a text input field 'Type your message' and a send button.

Copilot Personalization



Copilot Personalization – Custom Instructions

Custom Instructions

Add details you want Copilot to know about you and specify how you would like it to format its responses.

Add your own custom instructions or choose from the suggestions

I am a CPA specializing in serving as a strategic technology advisor to the accounting profession.

I focus on developing and delivering educational programs for CPAs and CFOs focused understanding and applying emerging technologies.

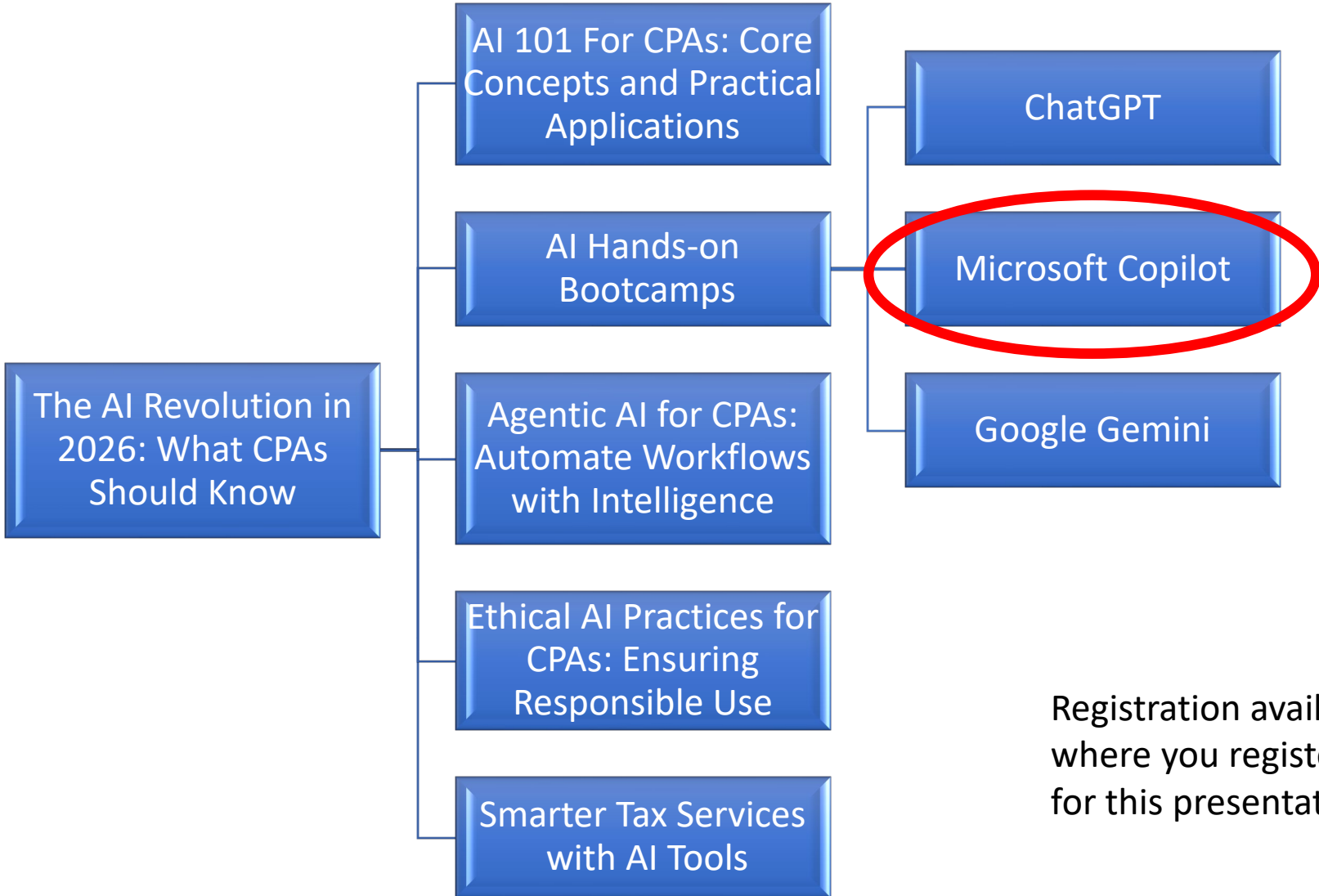
Custom instructions applied to all chats unless “turned off”

- + Give honest feedback
- + Use clear and simple language
- + Prioritize my manager
- + Highlight decisions in meeting notes
- + Focus on internal sources
- + Use bullet points for summaries

WRAP-UP



2026 Higgins Advisory AI Curriculum



Registration available where you registered for this presentation

In Summary

- Copilot's primary feature is its direct integration with Microsoft 365 apps and data
- Explore the case study examples provided
- Use Copilot as much as possible to develop your skills at leveraging the power of generative AI
- ***Build you knowledge, build your value!***

Questions ?



Thank you!!!

Let's connect on LinkedIn 



APPENDIX: ACCOUNTING / TAX / FINANCE

CASE STUDIES



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
 - ***“Provide suggestions for improving this prompt to leverage your capabilities”***
- Create a prompt library for consistency
- Review / iterate / verify responses
- Use “Custom Instructions” and “Copilot Memory”

Case Study 1: Tax Research

- Scenario: You are asked by a client to explain the tax treatment of cryptocurrency staking rewards.

Case Study 1: Tax Research



Prompt example

Prompt:

- Act as a professional tax advisor.
- The audience is a non-financial taxpayer.
- Prepare a summary explanation of the tax treatment of cryptocurrency staking.
- Keep the tone professional, less than 500 words, in a bulleted list, in memo format, provide citations, write at the 10th grade level.

Case Study 2: Communications / Content Generation

- Scenario: You need to present the highlights of the University of Notre Dame's FY2025 financial statements to the Board of Trustees.

Case Study 2: Communications / Content Generation



Prompt example

Prompt:

- Act as a professional communications coach to accounting and finance professionals.
- The audience is the Board of Trustees of the University of Notre Dame. They are a combination of clergy and lay people. They may or may not be financial reporting savvy.
- Prepare a timed outline for a 45-minute presentation on the FY 2025 audited financial statements.
- Keep the tone professional. Format in a bulleted list. Suggest potential charts and graphs to enhance the presentation. Compose at the undergraduate college reading level.
- The FY 2025 Audited financial statements are added as RAG.

Case Study 3: Document Analysis

- Scenario: Analyze the terms of an office lease agreement for your client or company and provide an opinion on the quality, or lack thereof, of the lease agreement.

Case Study 3: Document Analysis



Prompt example

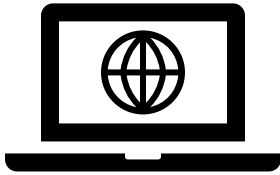
Prompt:

- Act as a legal expert specializing in commercial real estate agreements.
- The audience is a potential lessee of a commercial office. Assume the lessee is not versed in the legalities of a lease agreement.
- Prepare a summarized analysis of the lease agreement to identify any lease terms that are detrimental to the lessee, as well as any missing terms that should be added to the agreement. Include an executive summary with your opinion of the quality of the lease from the perspective of the lessee.
- Keep the tone professional. Format in a bulleted list. Compose at the 10th grade reading level.
- An actual lease agreement will be added as RAG.

Case Study 4: Data Analysis

- Scenario: Analyze the annual reports of four major AI technology companies to understand the financial strengths and weaknesses of them comparatively.

Case Study 4: Data Analysis



Prompt example

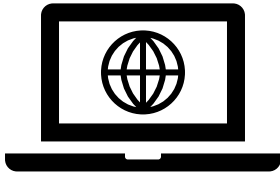
Prompt:

- Act as an expert financial analyst.
- The audience is a professional financial advisor who advises clients on financial planning and wealth management issues.
- Analyze the annual reports of these four AI technology leaders and provide a comparative analysis of financial strengths and weaknesses of each of them relative to the others. Include an executive summary of each company's financial performance and position.
- Keep the tone professional. Format as comparative tables. Create charts and graphs as appropriate. Compose at the 10th grade reading level. Provide definitions of any complex financial terms or metrics.
- Actual annual report files will be added as RAG.

Case Study 5: Workflow Automation

- Scenario: Create an agent to provide an executive summary of a specified industry to prepare the CPA business advisor to be conversant with the management team of a business in the specified industry.

Case Study 5: Workflow Automation



Prompt example

Prompt:

- Act as an expert industry research assistant.
- The audience is a CPA business advisor who will be meeting with the management team of a business within the specified industry.
- Provide a macro level executive summary to prepare the CPA business advisor to meet with company representatives. Prompt the user for key information related to the industry. Use industry resources to inform on the key aspects of operating a business within the industry.
- Keep the tone professional. Format with bullet points, tables and charts, as appropriate. Create charts and graphs as appropriate. Compose at the 10th grade reading level. Provide definitions of any nomenclature related to the industry as well as key financial metrics.

Case Study 6: Innovation / Brainstorming

- Scenario: Develop the framework for a strategic planning retreat for a 50 person CPA firm to develop an effective and responsible AI adoption plan for the firm.

Case Study 6: Innovation / Brainstorming



Prompt example

Prompt:

- Act as a strategic planning facilitator for accounting and advisory firms.
- The audience is the leadership team of a 50 person CPA firm responsible for designing an effective AI adoption planning retreat for the firm.
- Develop a comprehensive plan for a one-day retreat with the goal of having a comprehensive framework for the firm to adopt an AI implementation plan that is effective, efficient and safe. Create a timed agenda, define the methodology for capturing thoughts and ideas and organizing them into a manageable format that facilitates synthesizing them into actionable initiatives. Define specific deliverable outcomes for the event.
- Keep the tone professional. Format as a timed agenda for the event. Identify the specific roles and responsibilities. Develop a series of thought-provoking questions to encourage input and feedback from all participants. Recommend documentation procedures.