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Mastering Microsoft Copilot for CPAs



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

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

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Learning Objectives



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

Set your browser to

HIGGINS.CNF.IO

For interactive polling and Q & A

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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!

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Presentation Outline



- Generative AI Key Concepts
- Microsoft Copilot Fundamentals
- Using Copilot Inside Microsoft 365 Apps
- Prompt Design Best Practices
- Advanced Features Review
- Wrap-up
- Appendix: Accounting / Tax / Finance Case Studies

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Live Content Slide

When playing as a slideshow, this slide will display live content

Poll: What is your experience with Microsoft Copilot?

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GENERATIVE AI KEY CONCEPTS

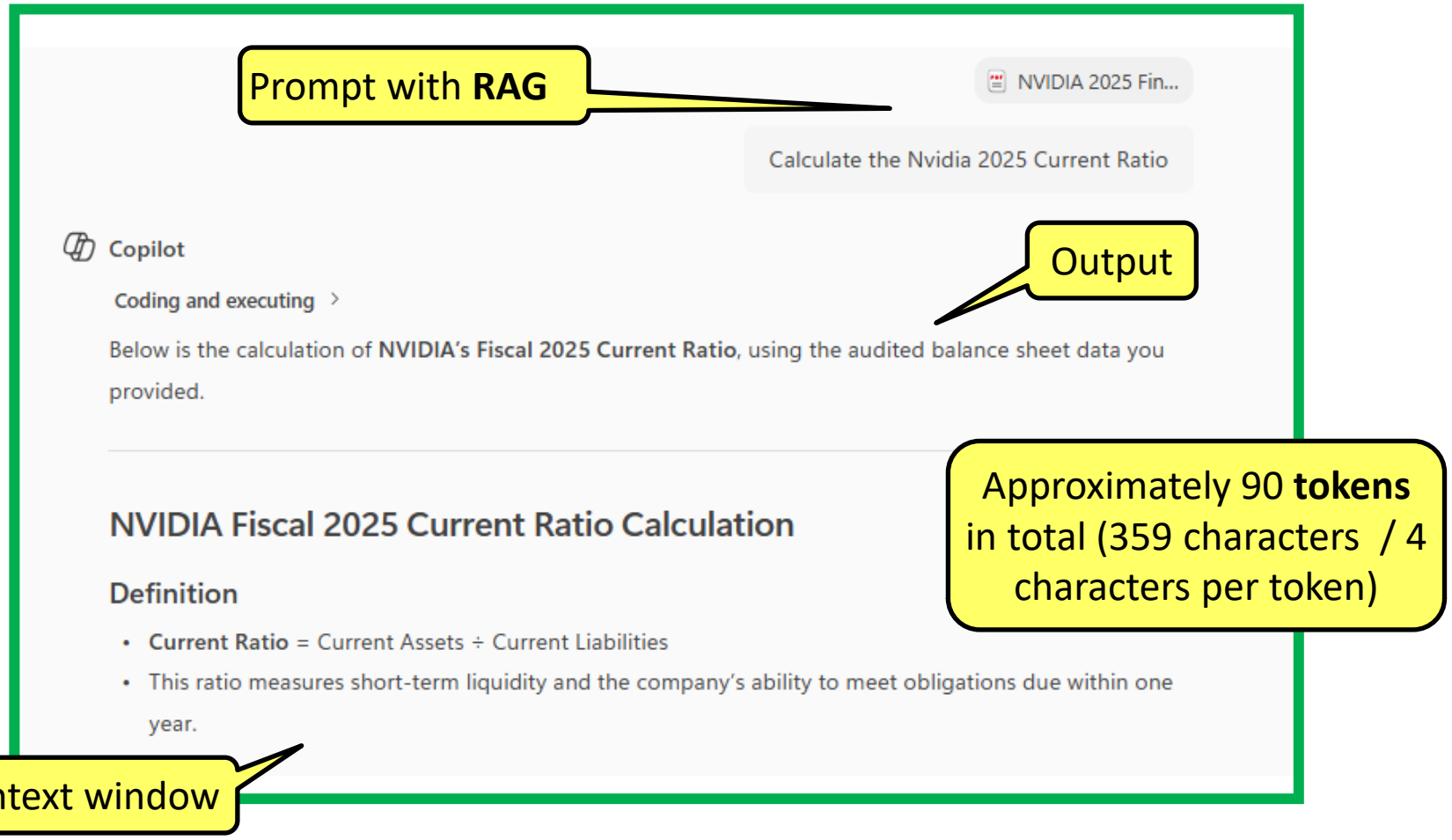


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A Simple Generative AI demo with RAG (Retrieval Augmented Generation)





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Key Generative AI Terms

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

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Live Content Slide

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Poll: Which Microsoft 365 apps do you use? (check all that apply)

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COPILOT'S ROLE IN THE MICROSOFT 365 ECOSYSTEM



Copilot

Copilot generative AI is "grounded" in all your M365 data

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Things to Know About Copilot Ecosystem



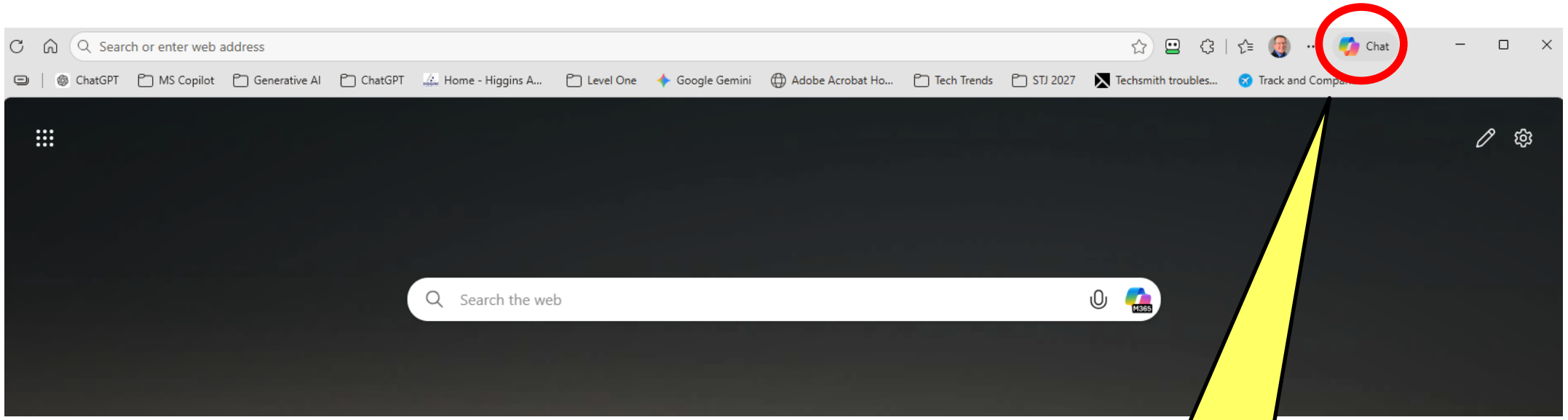
- Copilot is ChatGPT technology embedded into Microsoft applications
- There are multiple Microsoft Copilot products
- Microsoft 365 Copilot is grounded in your M365 data and the web (RAG)
- Microsoft Enterprise Data Protection secures your data privacy in Copilot

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Accessing Microsoft 365 Copilot

https://m365.cloud.microsoft/



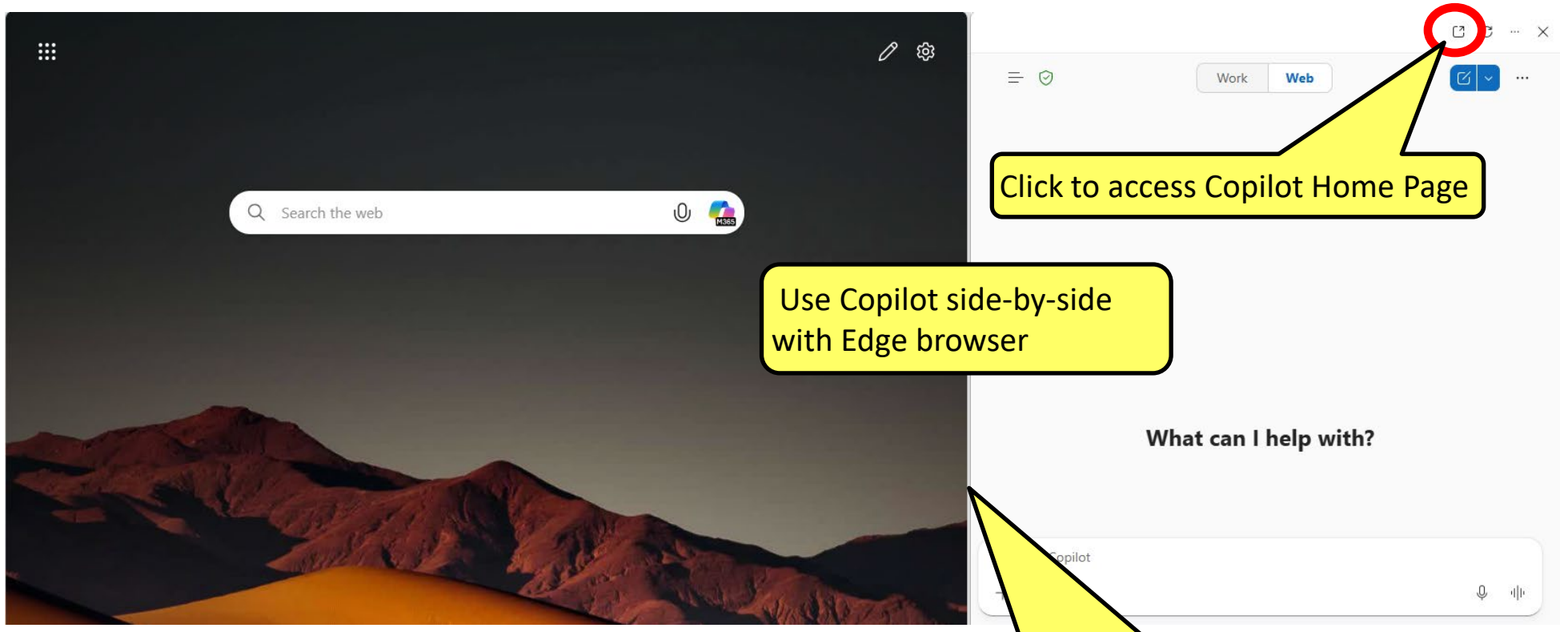
Recommend downloading the Copilot Desktop app as well

Click to access Copilot

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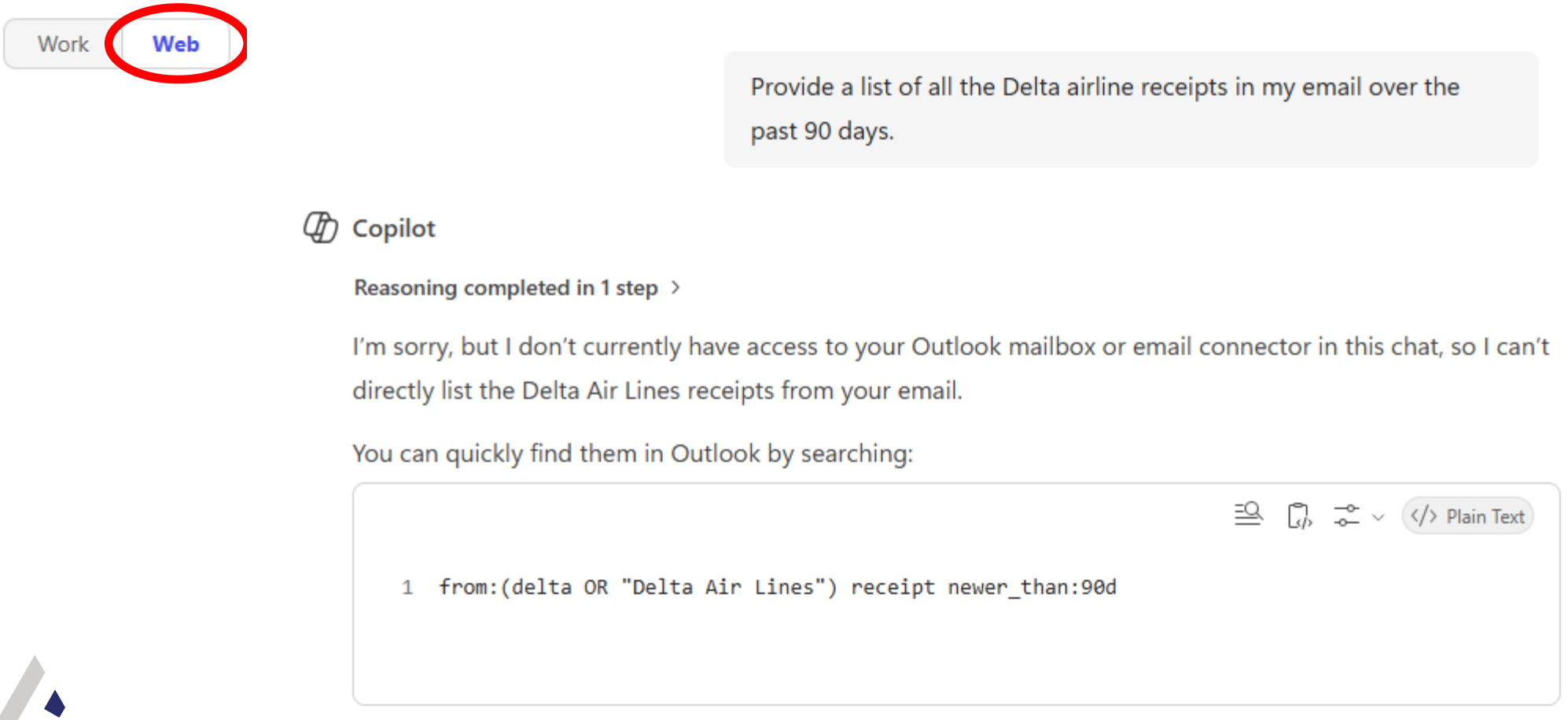
Accessing Microsoft 365 Copilot



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Microsoft 365 Copilot **Web** Example



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Microsoft 365 Copilot **Work** Example

Work | Web

Provide a list of all the Delta airline receipts in my email over the past 90 days.

Copilot

Reasoning completed in 2 steps >

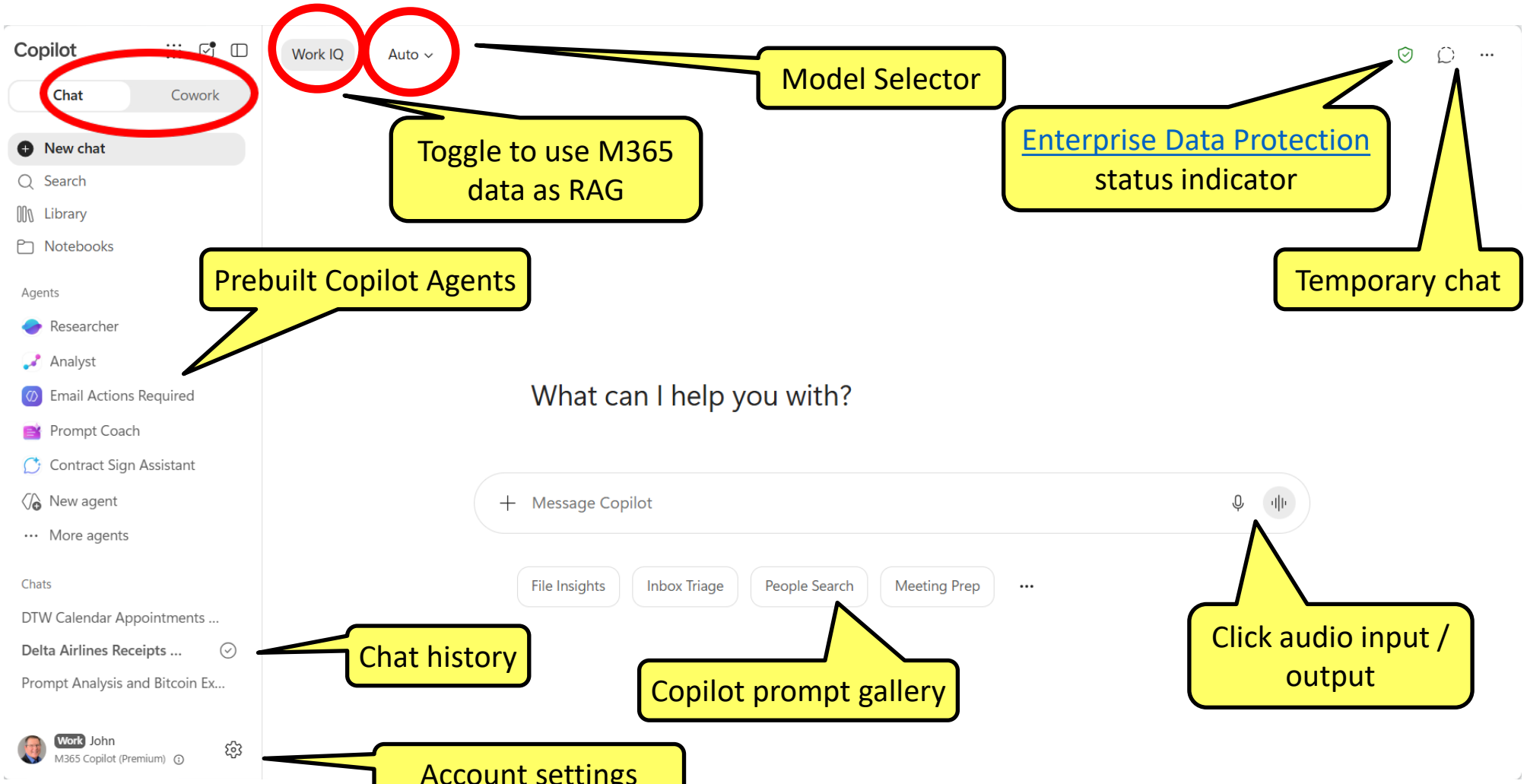
I found multiple Delta receipt emails in your mailbox from the past 90 days. The search returned receipt emails that were forwarded to Expensify, TripIt, and reimbursement recipients, along with the original Delta receipt content. The most relevant Delta flight receipts are:

Trip Date	Ticket Issue Date	Route	Amount
May 6–7, 2026	Apr 6, 2026	Detroit ↔ Indianapolis	$547 FW: Your Flight Receip...
May 27–28, 2026	Apr 16, 2026	Detroit ↔ Des Moines	$706 FW: Your Flight Receip...
Jun 7–11, 2026	Apr 6, 2026	Detroit ↔ Las Vegas	$718 FW: Your Flight Receip...
Jun 7, 2026 (one-way)	Apr 16, 2026	Detroit → Las Vegas	$378 FW: Your Flight Re... +1
Jun 10, 2026	Apr 16, 2026	Fargo → Detroit	$318 FW: Your Flight Receip...
Jun 22–25, 2026	May 17, 2026	Detroit ↔ Baltimore	$797 FW: Your Flight Receip...
Aug 11–14, 2026	May 17, 2026	Detroit ↔ Roanoke	$596 Fw: Your Flight Receip...
Oct 19–20, 2026	May 26, 2026	Detroit ↔ Burlington, VT	$677 FW: Your Flight Receip...

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Microsoft 365 Copilot Interface



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Case Study #1

- Toggle “Work IQ” or “Work” OFF
- Prompt

  Provide a list of any emails I have received in the past 24 hours that I have not responded to.

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Case Study #2

- Toggle “Work IQ” or “Work” ON
- Prompt

  Provide a list of any emails I have received in the past 24 hours that I have not responded to.

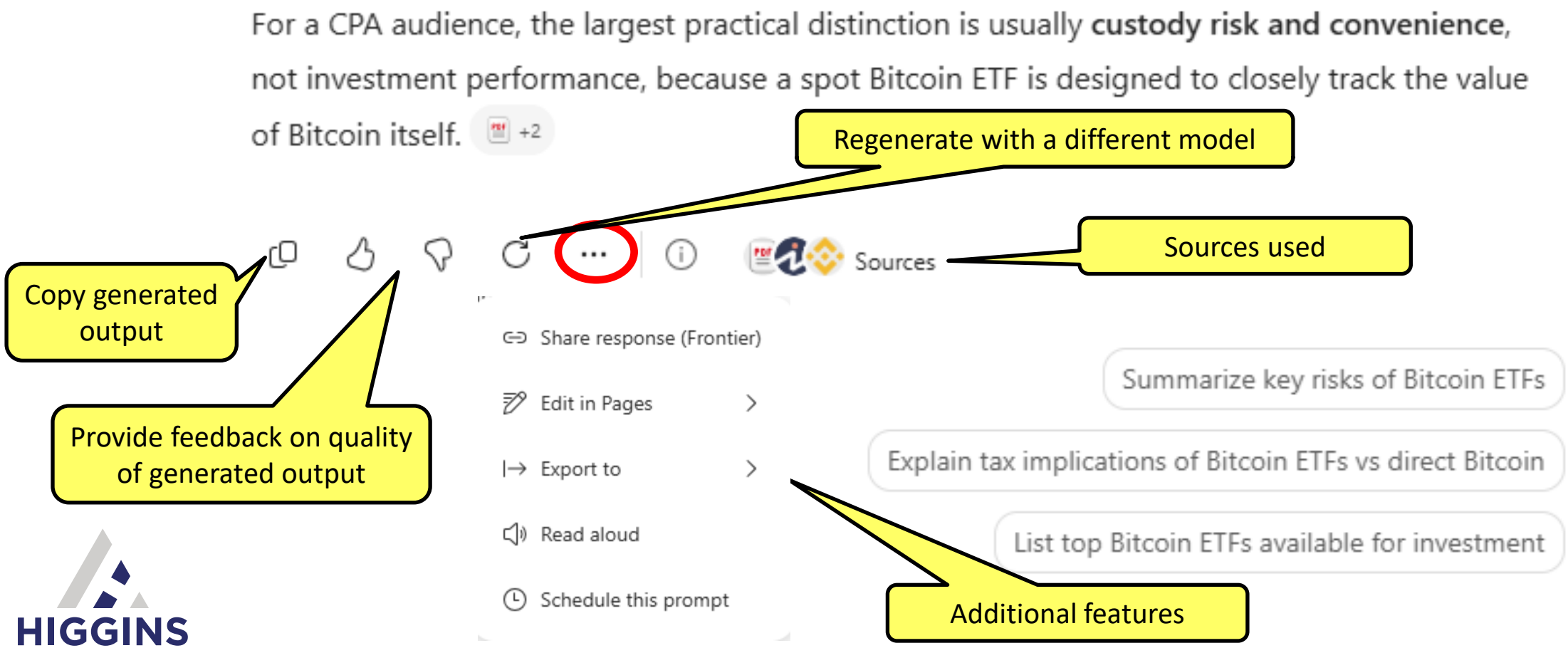
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Case Study #3

- Toggle “Work IQ” OFF
- Prompt
  Explain to me what a Bitcoin ETF is and how it differs from purchasing Bitcoin through an exchange.

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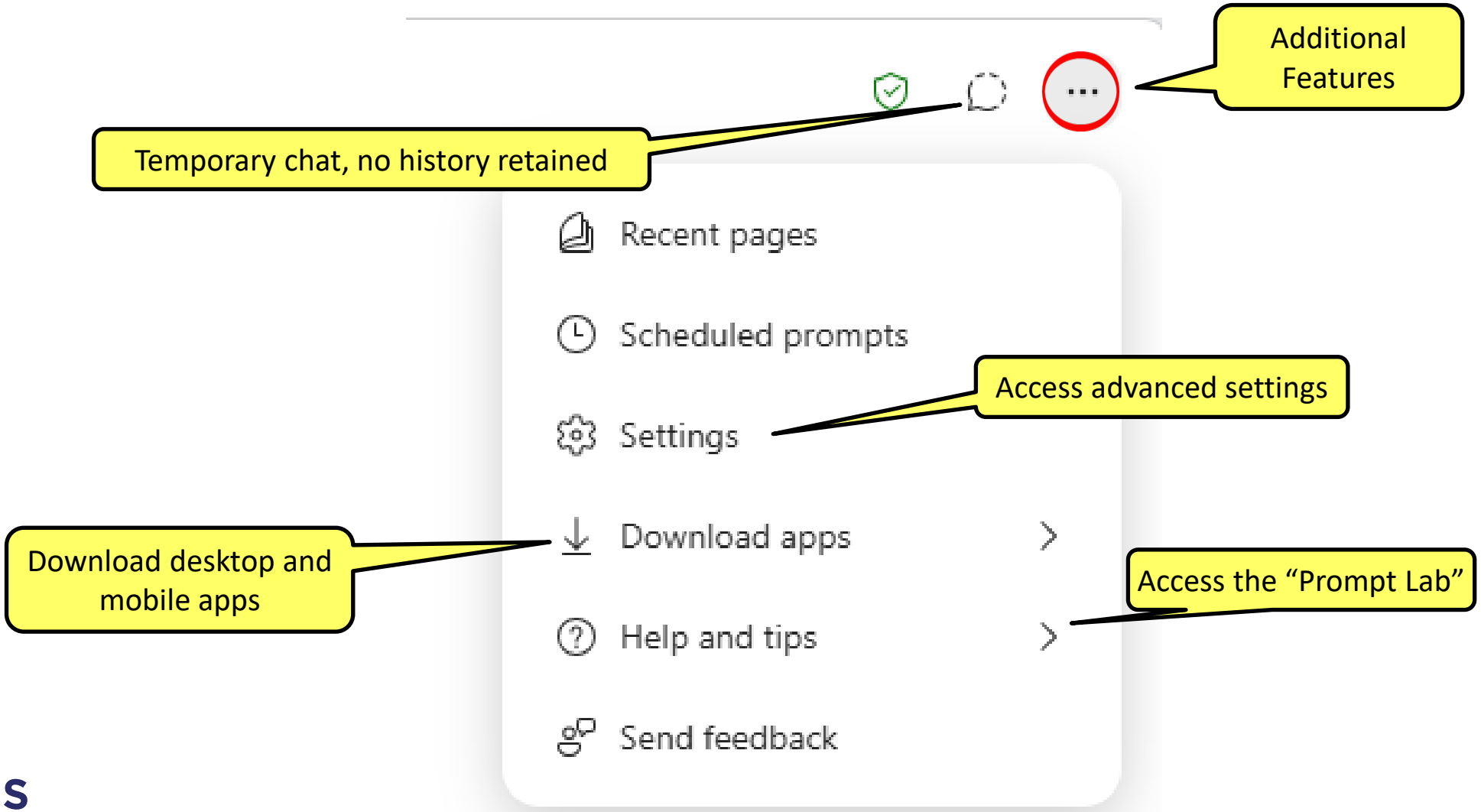
Microsoft 365 Copilot – Chat Actions



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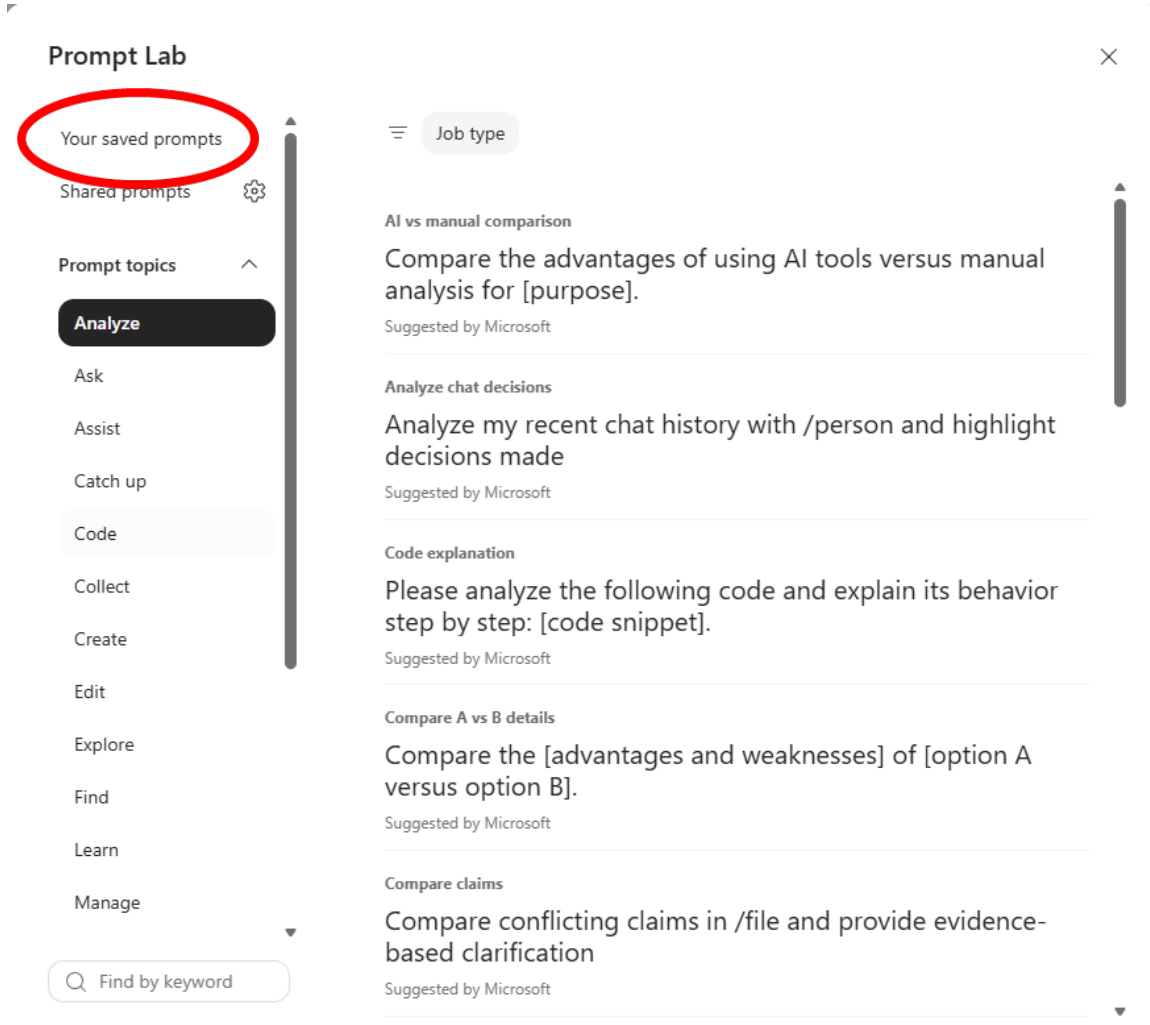
Microsoft Copilot Chat Additional Features



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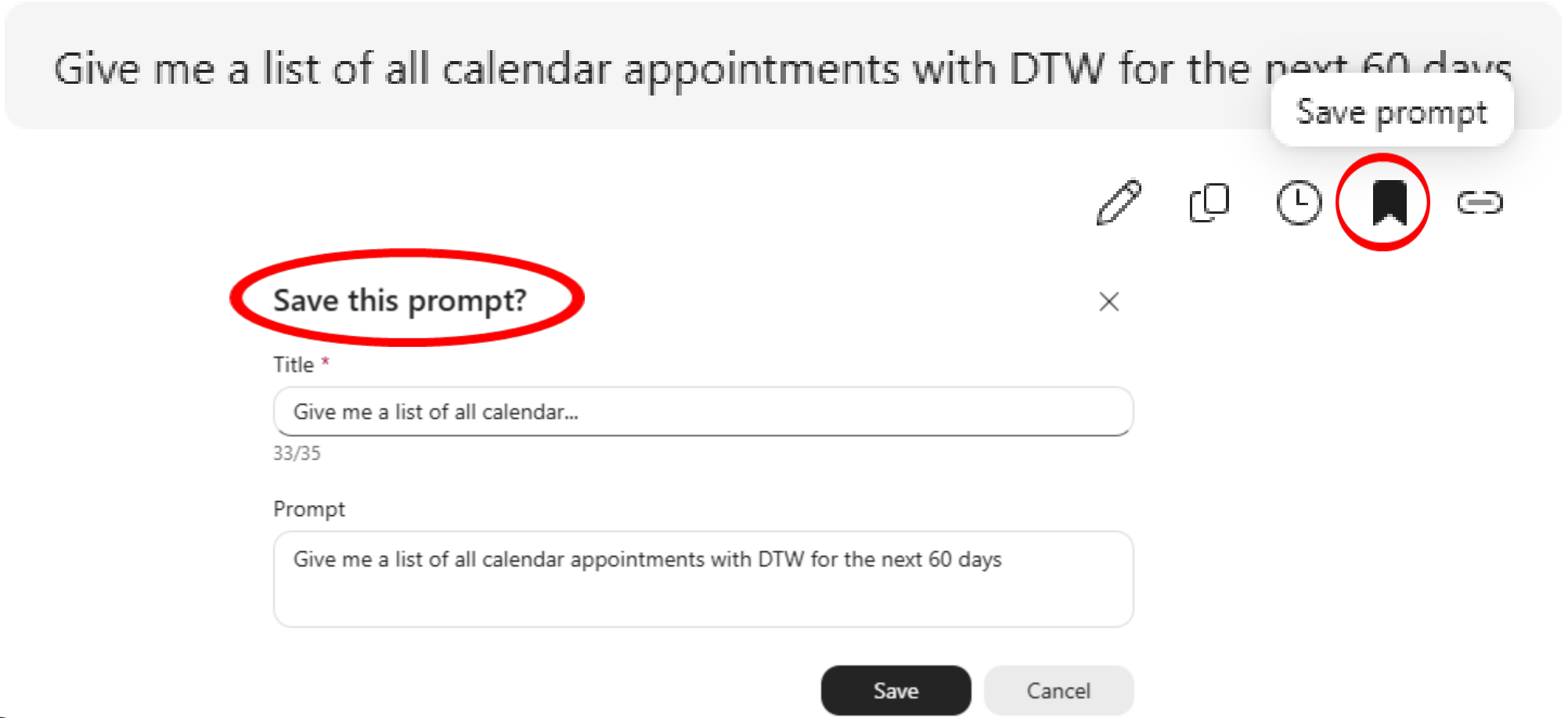
Microsoft Copilot Prompt Lab



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Save Prompts to the Library



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Using Copilot Inside Microsoft 365 Apps



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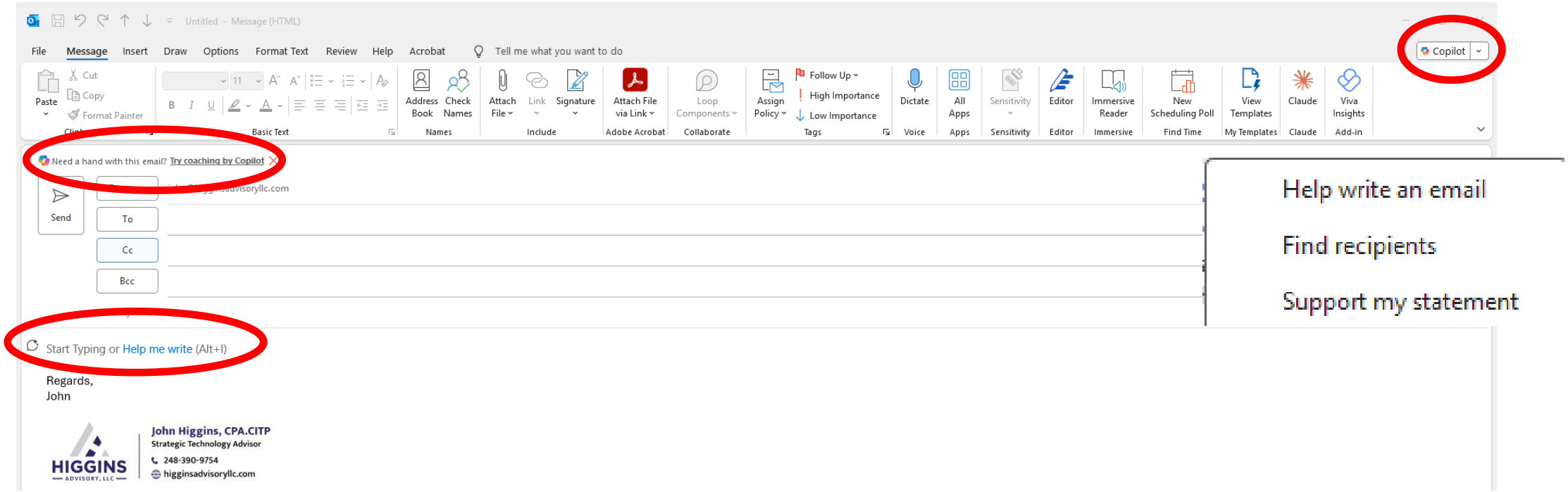
Copilot for Outlook



- Compose new email messages
- Compose email replies
- Analyze / summarize email messages
- Prioritize email messages in the Inbox

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Copilot for Outlook – Compose an Email



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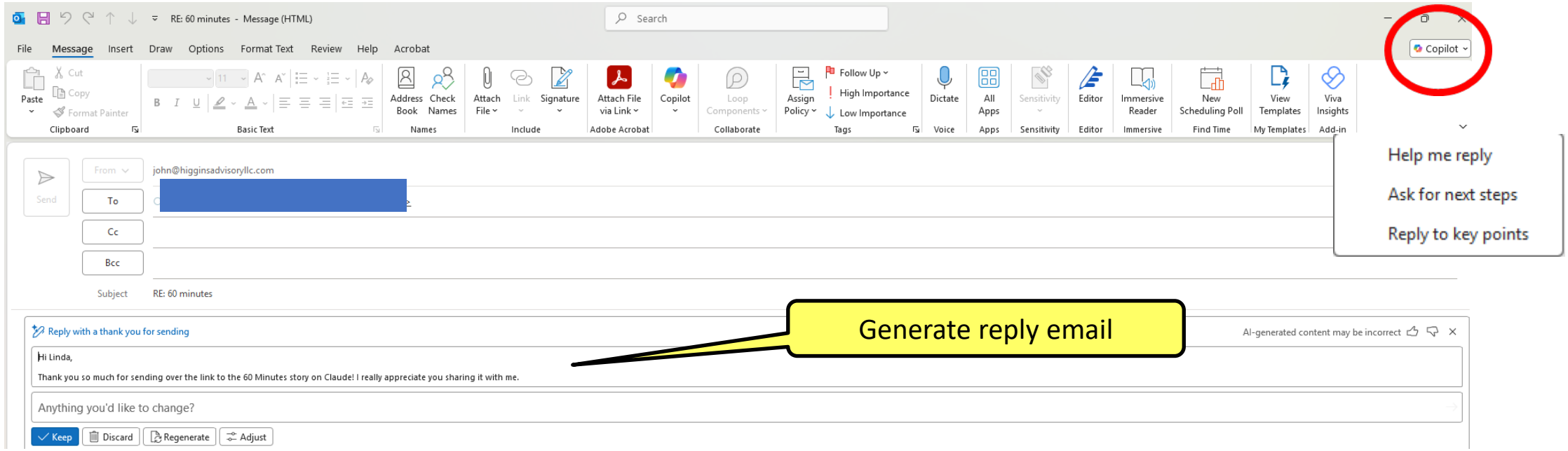
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Case Study #4

- Open a new Outlook email message
- Choose “Help me write”
- Prompt
  Create an email to my boss asking for a meeting to discuss increasing my compensation.

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Copilot for Outlook – Reply to an Email



Prompt: *"Thank you for sending."*

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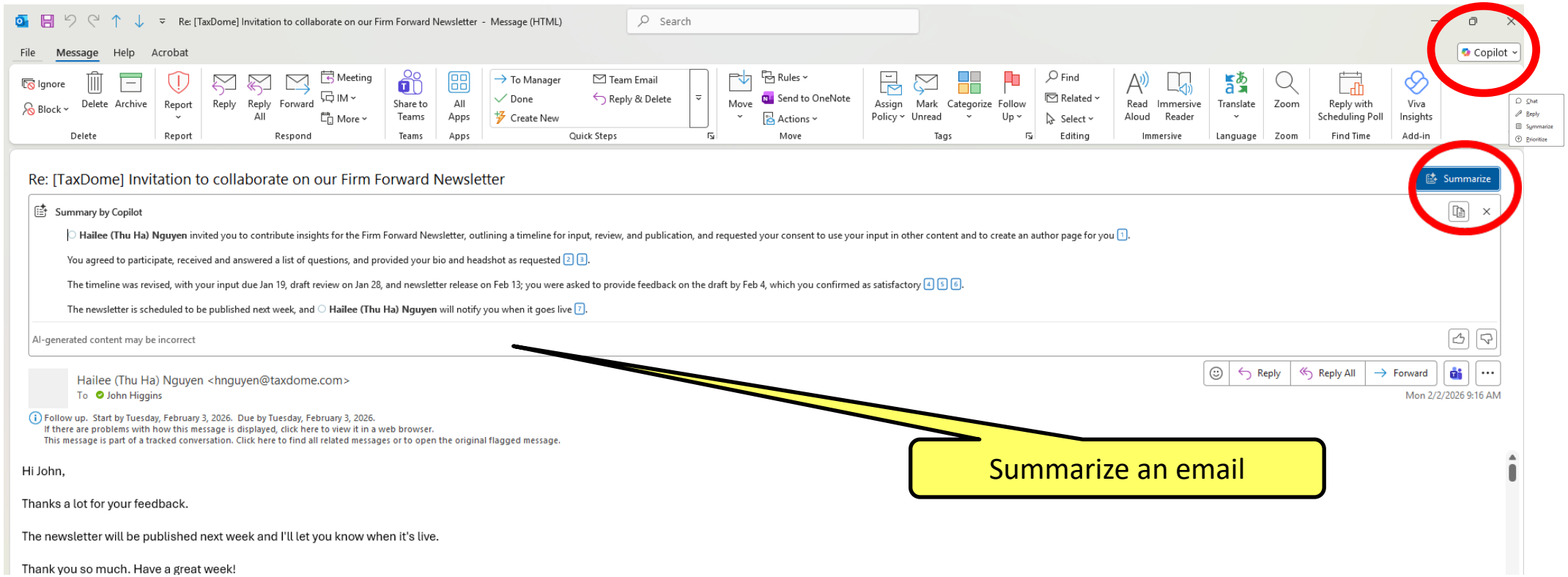
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Case Study #5

- Open any email message in your inbox
- Choose “Help me write”
- Prompt
  Thank you for sending, I will follow up

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Copilot for Outlook – Summarize an Email



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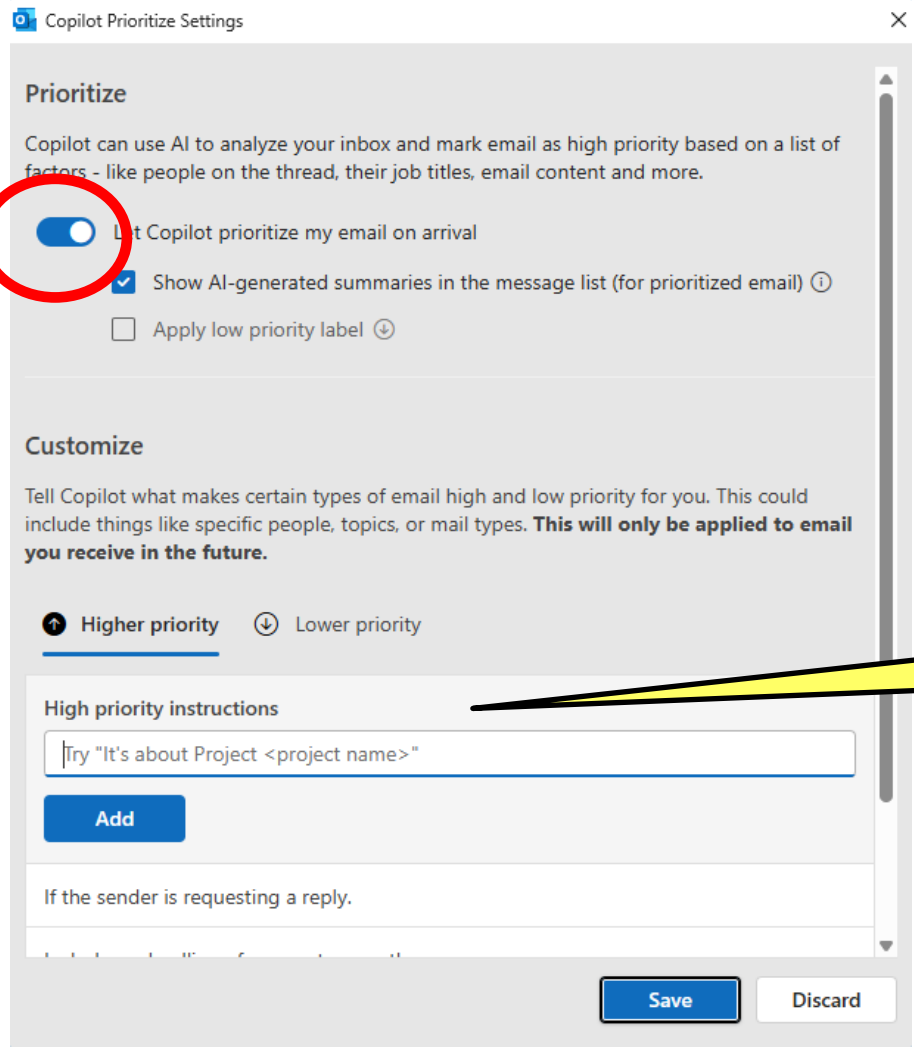
Case Study #6

- Open an email message with a lengthy thread
- Choose “List email takeaways”

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Copilot for Outlook – Prioritize Email





Establish rules for prioritization

Note: Only works with "New" Outlook

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Sample Outlook Email Prompts

- *List all my emails from the past 10 days that appear to have a "to do" action item for me.*
- *List all my emails from [insert name] in the past X days*
- *List any appointments for the next 60 days that are out of town*
- *Schedule a 1-hour meeting with my team tomorrow*

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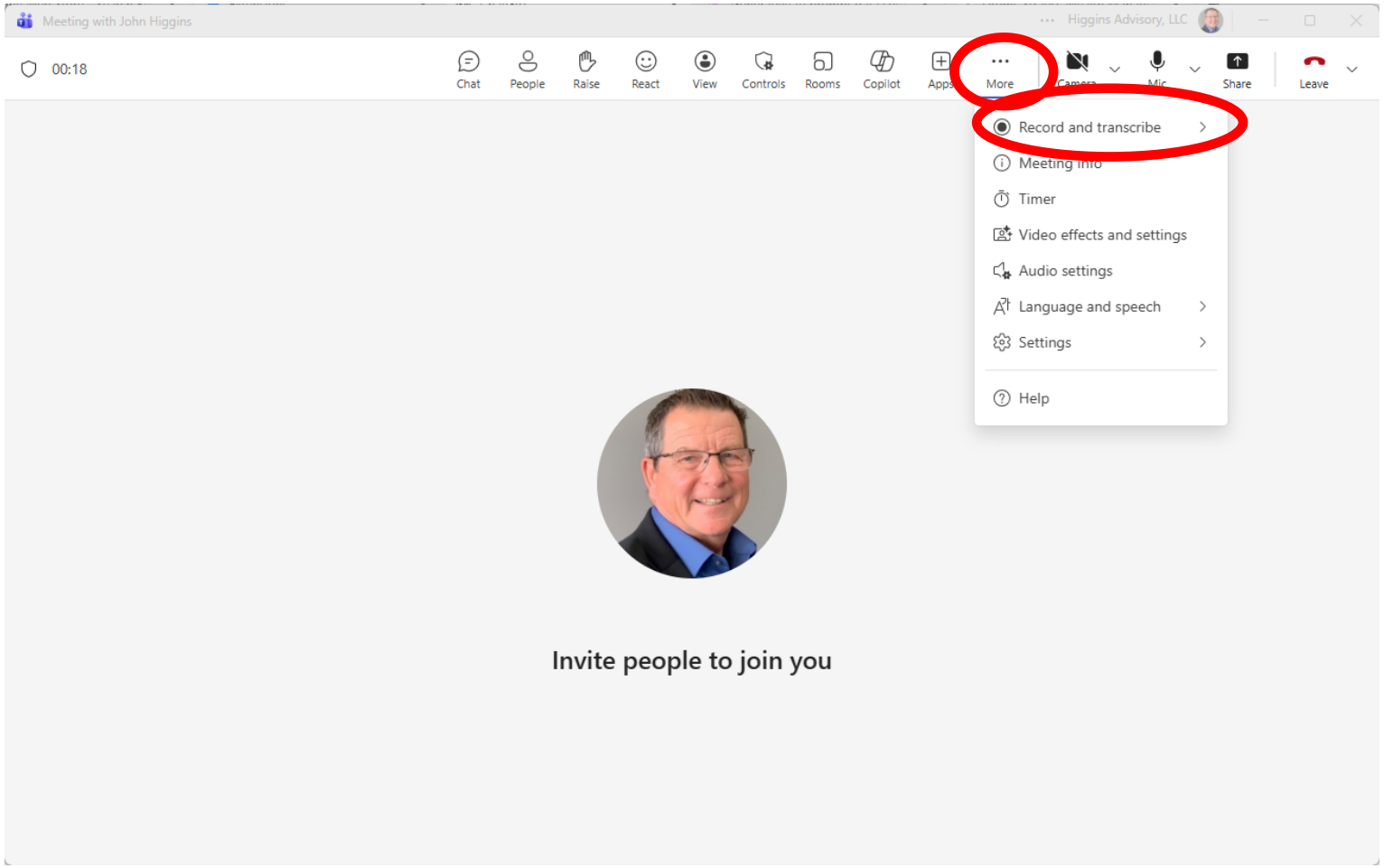
Copilot for Teams



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

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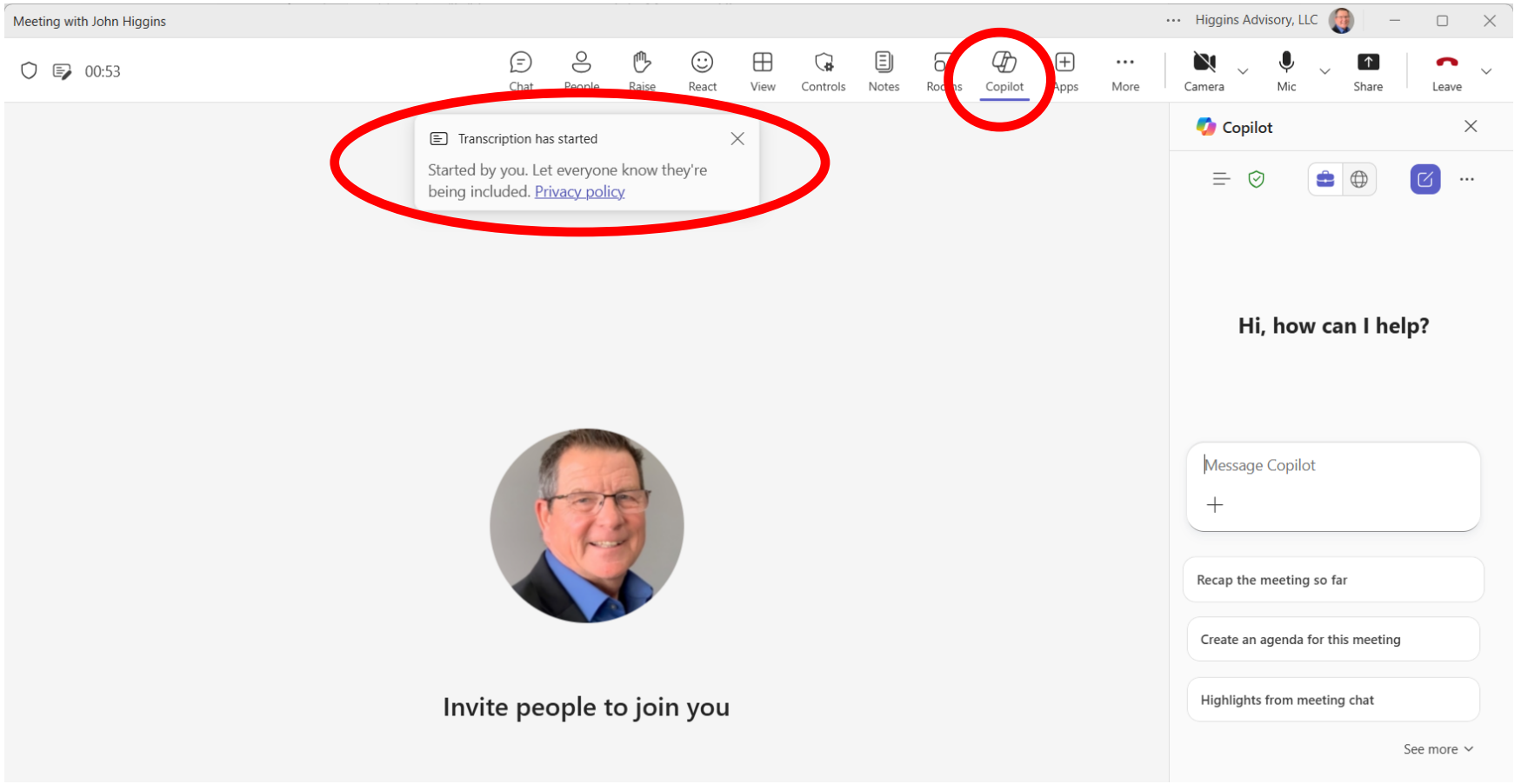
Copilot for Teams Meetings via Recording



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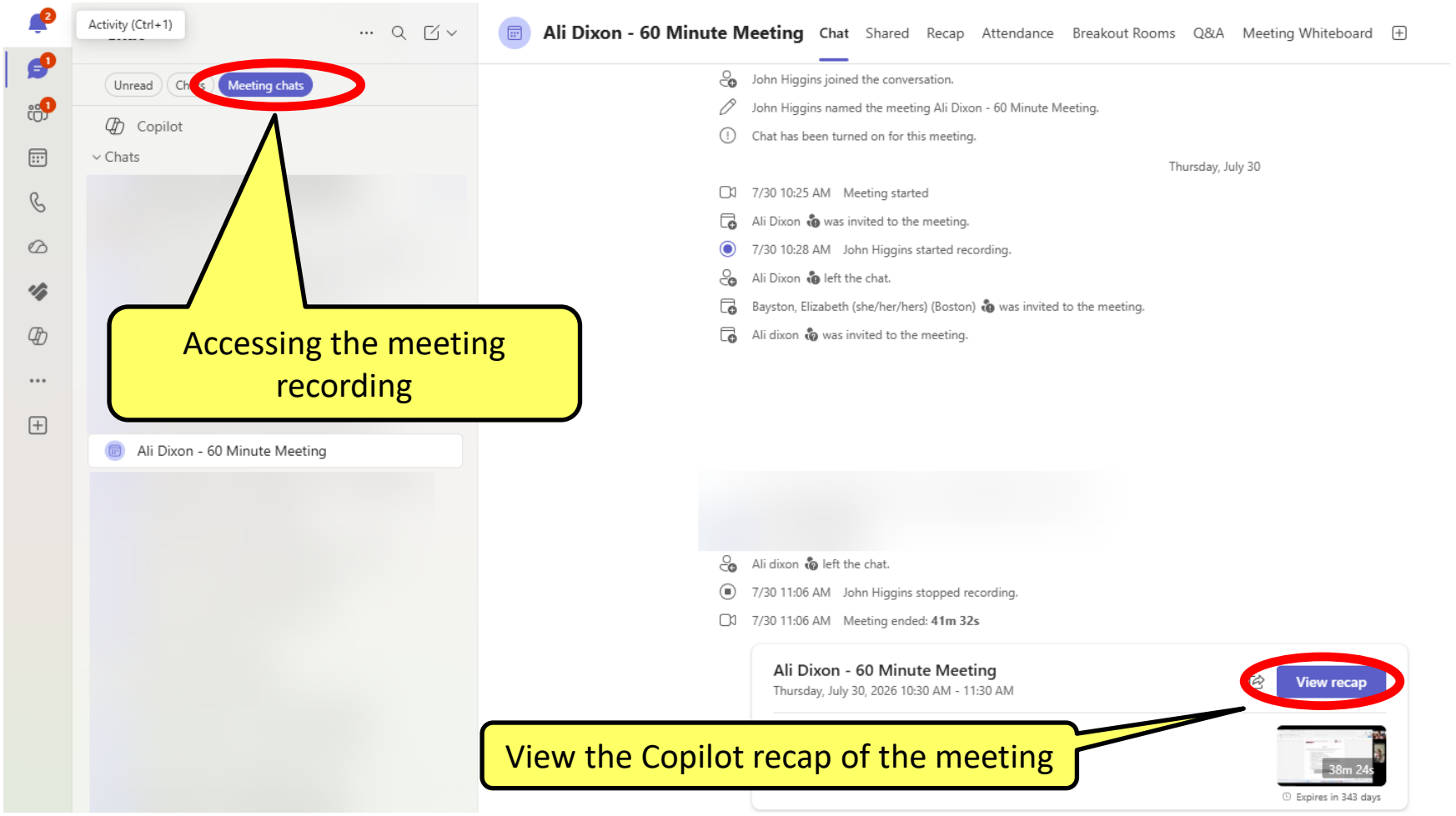
Copilot for Teams Meetings via Transcript



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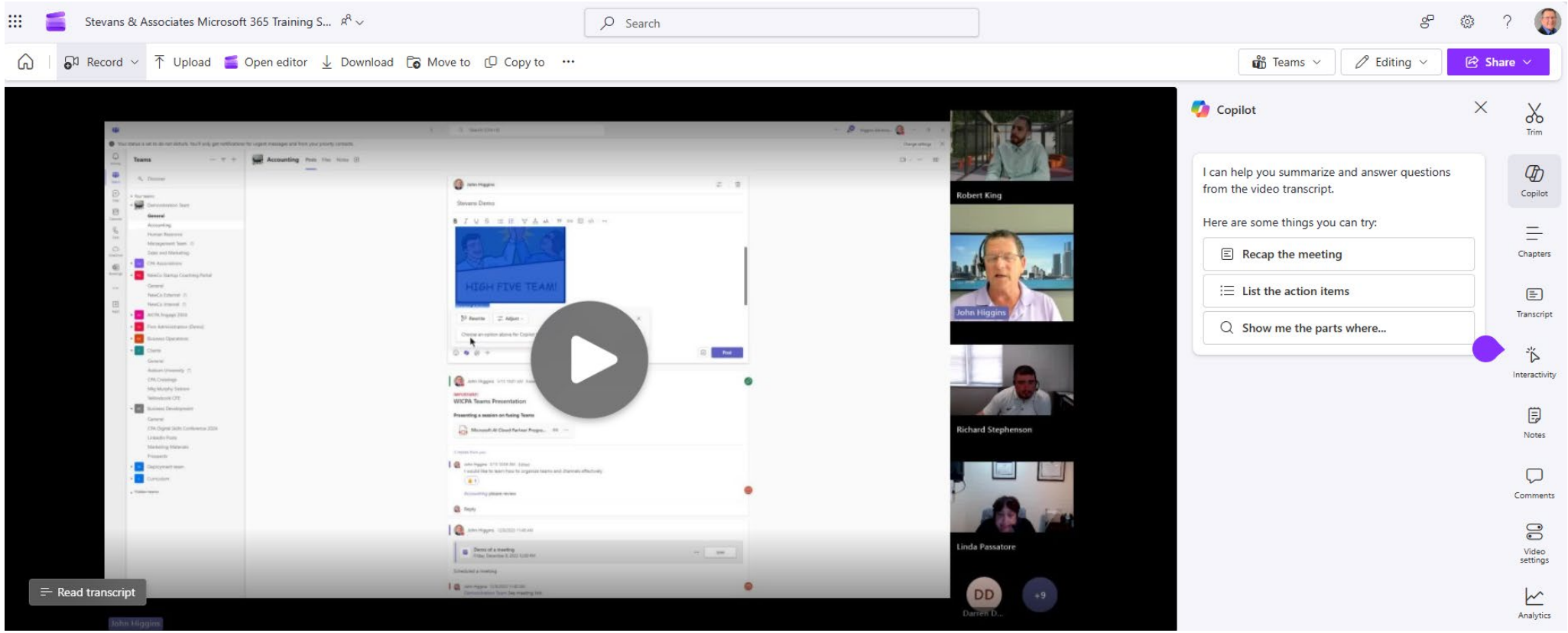
Accessing Teams Meeting Recordings



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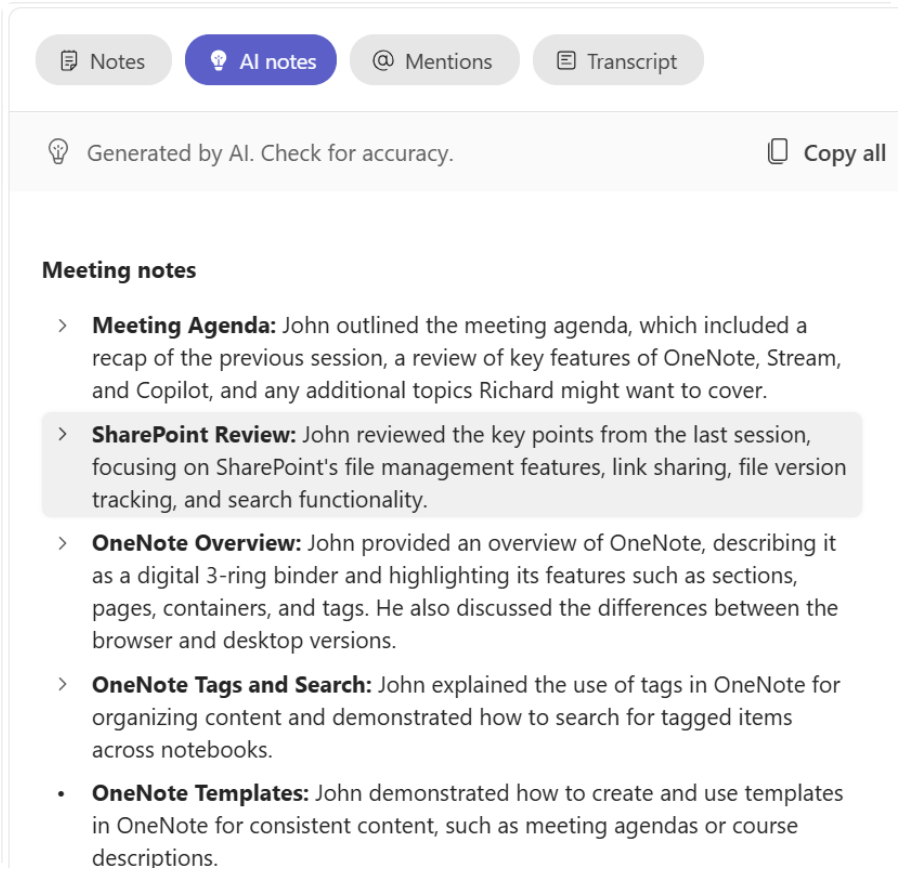
Recap Teams Meetings in Clipchamp



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Copilot for Teams Meetings Recap



Follow-up tasks

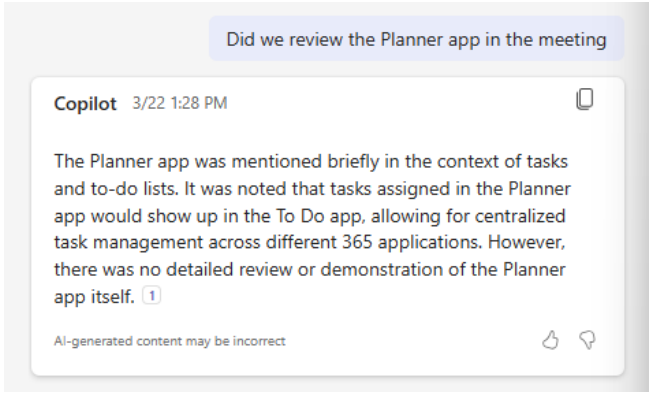
- **Copilot Feature:** Post information in the Teams channel about the current status and functionality of the bookmark feature in Teams. (John)
- **Copilot Feature:** Check and confirm the availability of the bookmark feature in Teams and update the team accordingly. (John)
- **Copilot Access:** Ensure 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)

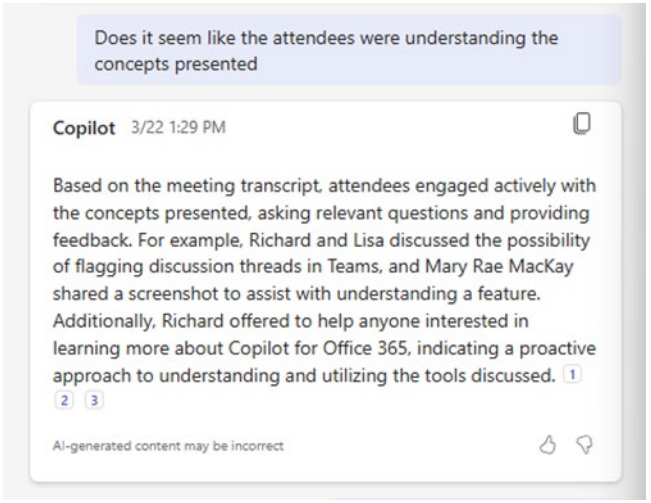
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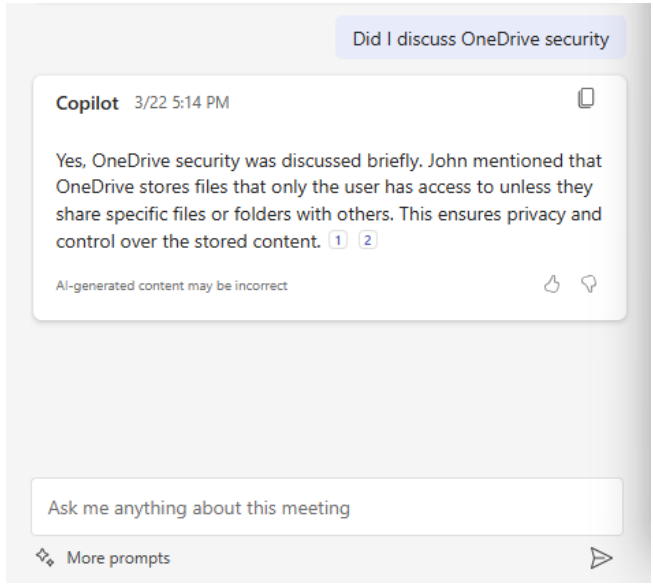
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Recap Teams Meetings Example (cont'd)







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Summarize a Teams Post Thread



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Copilot for Word

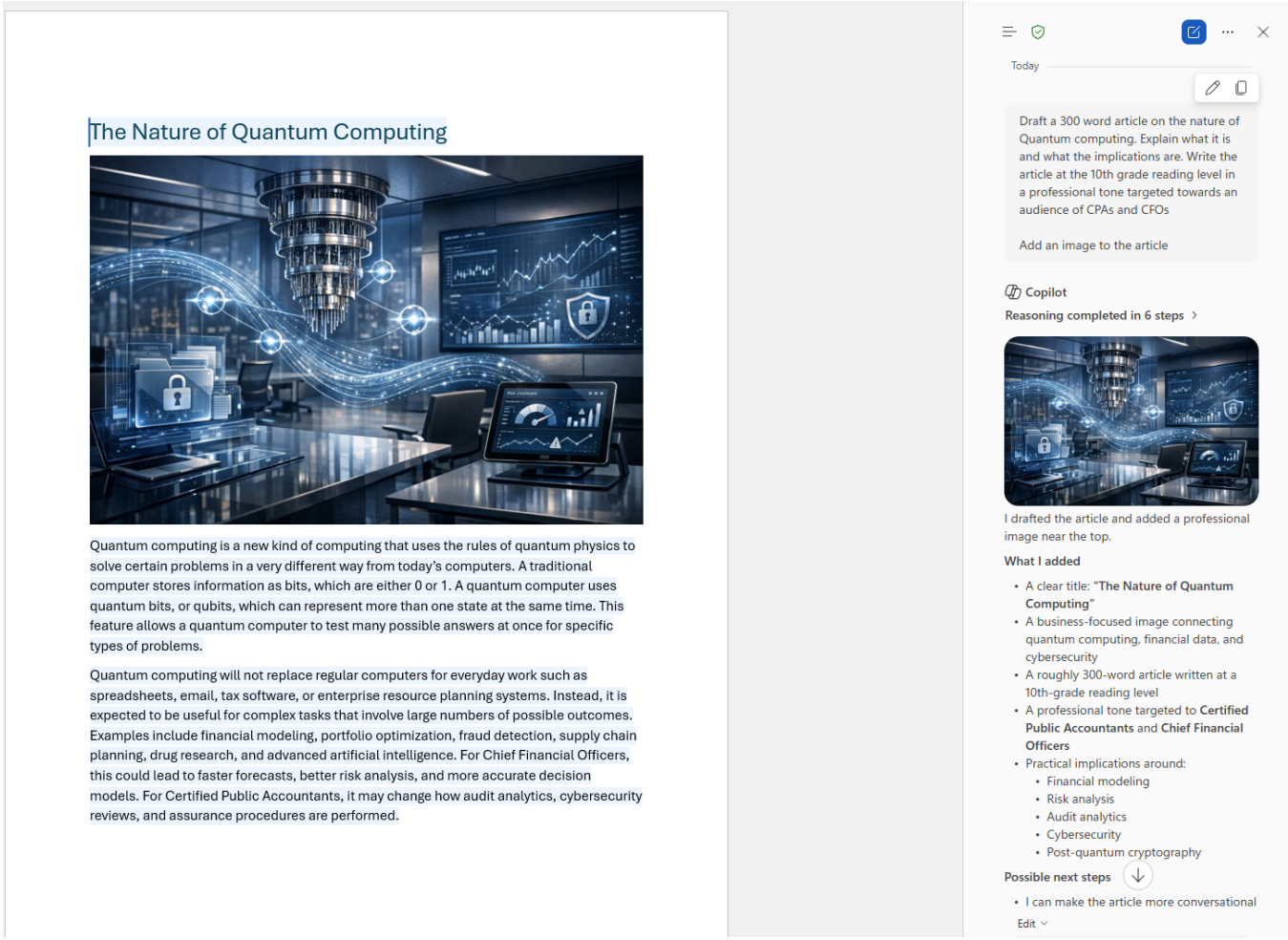


- Create first draft of documents
- Rewrite an existing document
- Format a document
- Research from within existing document
- Summarize a document

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Copilot for Word - Draft a New Document

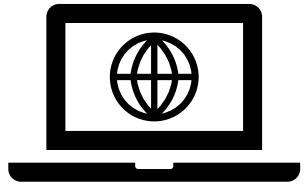
Link to article



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Case Study #7

- Create a new document in Word
- Choose Copilot
- Prompt
  1. *Write a 300-word article on cryptocurrency taxation in British Columbia Canada that will be understandable by someone who is a casual cryptocurrency trader.*
  2. *Create an image to add to the article*
  3. *Insert the image between the title and the body of the text*

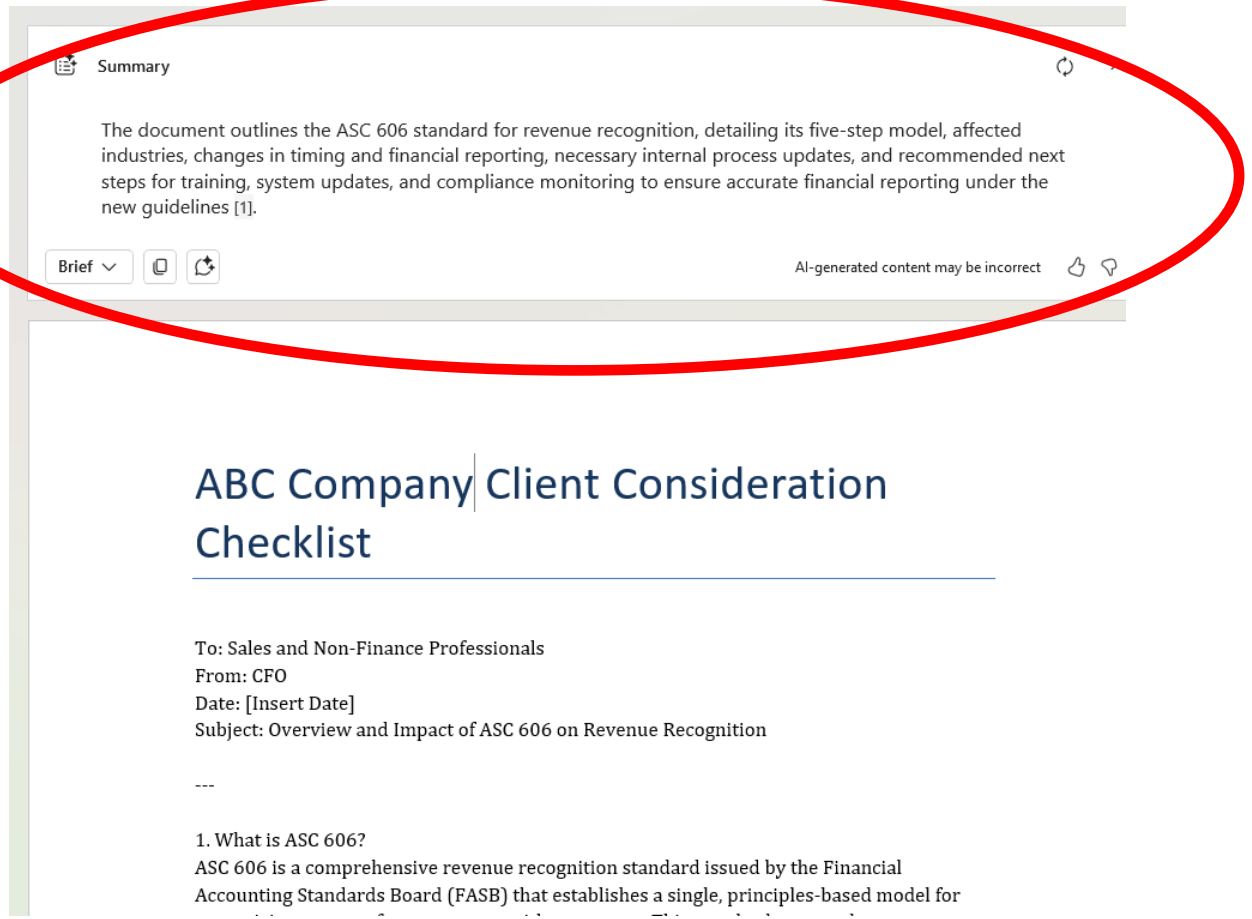


Sample File

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Copilot for Word – Summarize a Document

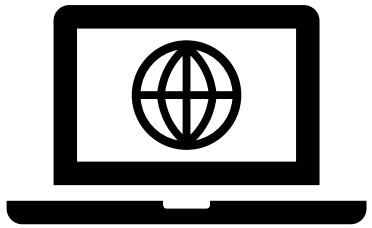


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Case Study #8

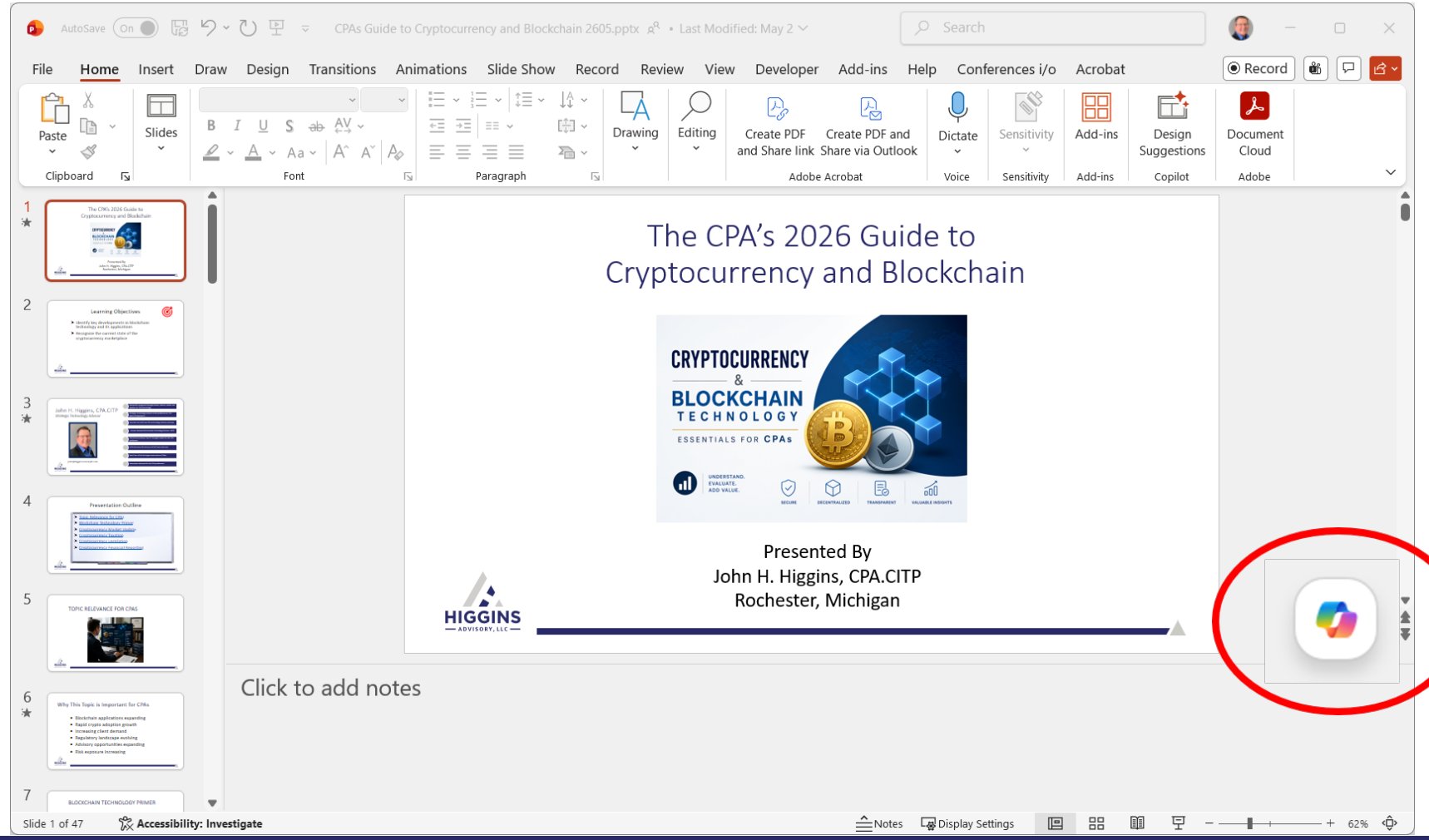
- Open ASC 606 Word document
- Choose “Generate” summary



Sample File

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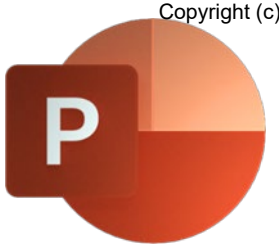
Copilot for PowerPoint



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Copilot for PowerPoint



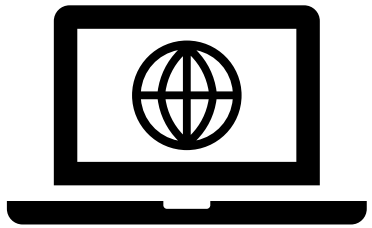
- Create new presentation slide deck w/ images
- Summarize an existing presentation
- Reorganize an existing presentation
- Integrate your company’s branding into a presentation

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Case Study #9

- Open PowerPoint
- Create a new PPT file using a template
- Prompt

  1. *Create a slide deck using this design template for this file ASC_606_Memo.docx*
  2. *Add an image to each slide*

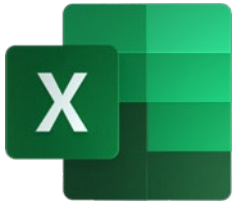


Sample File

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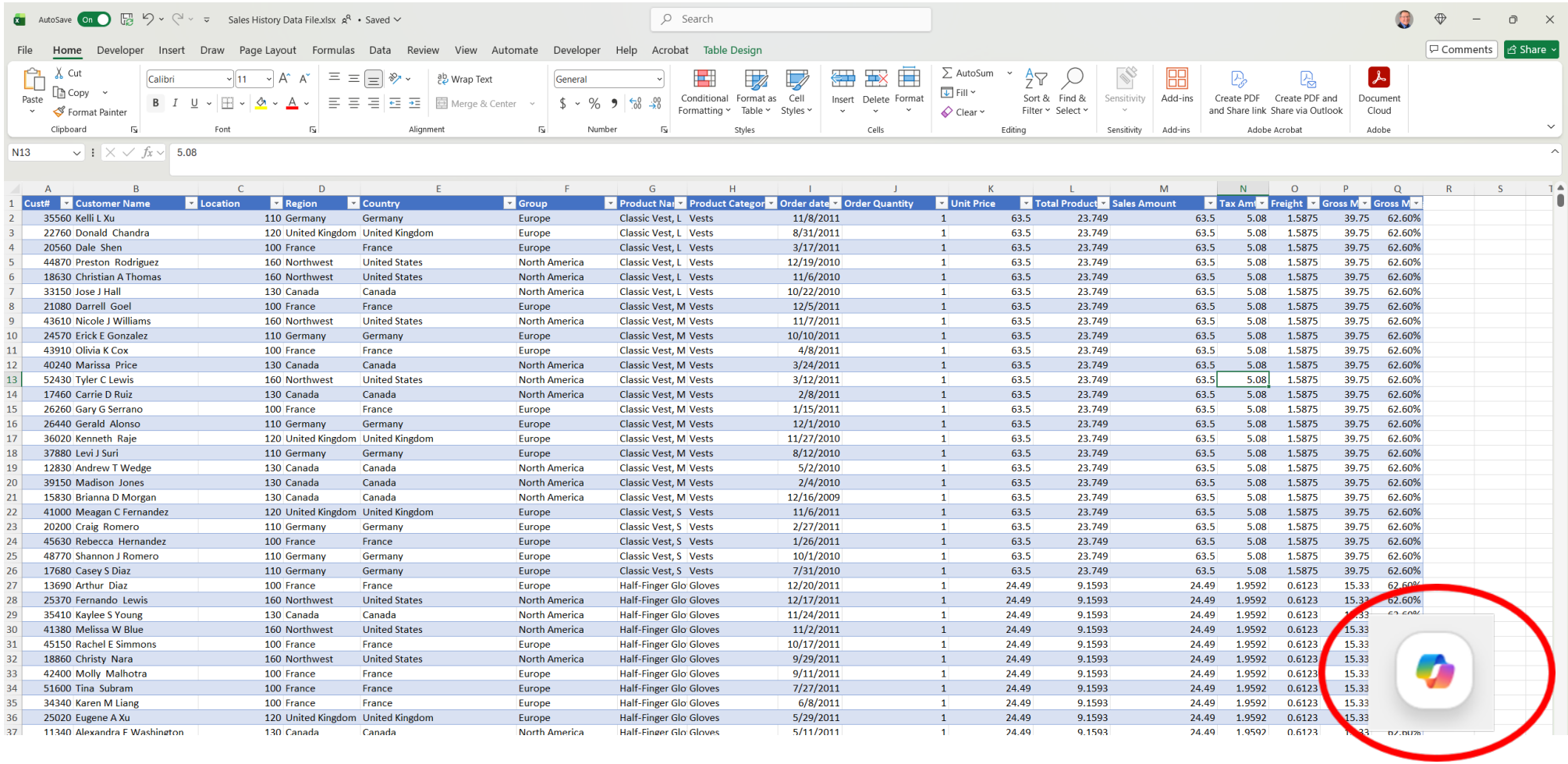
Copilot for Excel



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

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Copilot for Excel

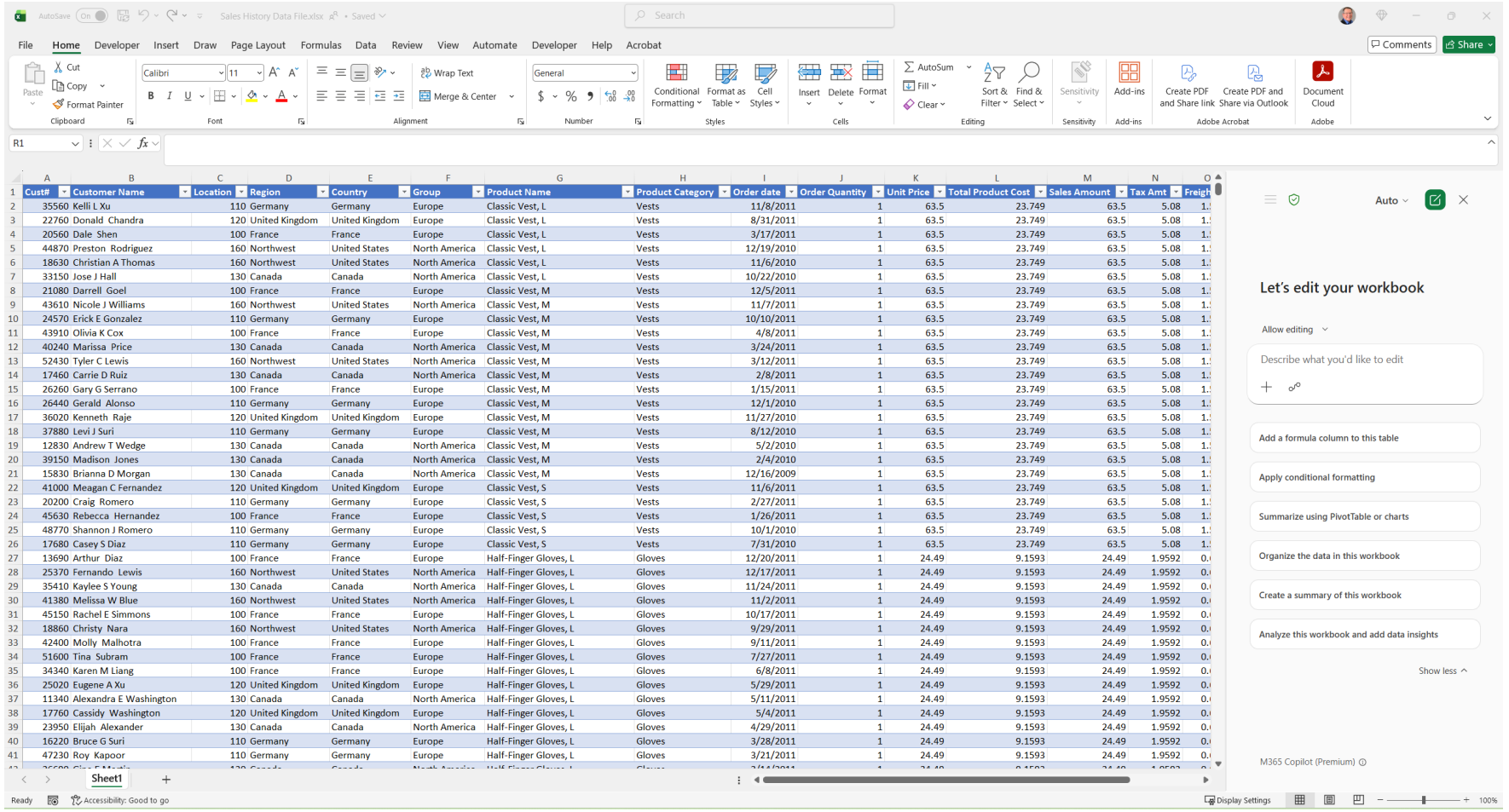


Cust#	Customer Name	Location	Region	Country	Group	Product Na	Product Categor	Order date	Order Quantity	Unit Price	Total Product	Sales Amount	Tax Am	Freight	Gross M	Gross M
35560	Kelli L Xu	110	Germany	Germany	Europe	Classic Vest, L	Vests	11/8/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
22760	Donald Chandra	120	United Kingdom	United Kingdom	Europe	Classic Vest, L	Vests	8/31/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
20560	Dale Shen	100	France	France	Europe	Classic Vest, L	Vests	3/17/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
44870	Preston Rodriguez	160	Northwest	United States	North America	Classic Vest, L	Vests	12/19/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
18630	Christian A Thomas	160	Northwest	United States	North America	Classic Vest, L	Vests	11/6/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
33150	Jose J Hall	130	Canada	Canada	North America	Classic Vest, L	Vests	10/22/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
21080	Darrell Goel	100	France	France	Europe	Classic Vest, M	Vests	12/5/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
43610	Nicole J Williams	160	Northwest	United States	North America	Classic Vest, M	Vests	11/7/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
24570	Erick E Gonzalez	110	Germany	Germany	Europe	Classic Vest, M	Vests	10/10/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
43910	Olivia K Cox	100	France	France	Europe	Classic Vest, M	Vests	4/8/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
40240	Marissa Price	130	Canada	Canada	North America	Classic Vest, M	Vests	3/24/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
52430	Tyler C Lewis	160	Northwest	United States	North America	Classic Vest, M	Vests	3/12/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
17460	Carrie D Ruiz	130	Canada	Canada	North America	Classic Vest, M	Vests	2/8/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
26260	Gary G Serrano	100	France	France	Europe	Classic Vest, M	Vests	1/15/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
26440	Gerald Alonso	110	Germany	Germany	Europe	Classic Vest, M	Vests	12/1/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
36020	Kenneth Raje	120	United Kingdom	United Kingdom	Europe	Classic Vest, M	Vests	11/27/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
37880	Levi J Suri	110	Germany	Germany	Europe	Classic Vest, M	Vests	8/12/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
12830	Andrew T Wedge	130	Canada	Canada	North America	Classic Vest, M	Vests	5/2/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
39150	Madison Jones	130	Canada	Canada	North America	Classic Vest, M	Vests	2/4/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
15830	Brianna D Morgan	130	Canada	Canada	North America	Classic Vest, M	Vests	12/16/2009	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
41000	Meagan C Fernandez	120	United Kingdom	United Kingdom	Europe	Classic Vest, S	Vests	11/6/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
20200	Craig Romero	110	Germany	Germany	Europe	Classic Vest, S	Vests	2/27/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
45630	Rebecca Hernandez	100	France	France	Europe	Classic Vest, S	Vests	1/26/2011	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
48770	Shannon J Romero	110	Germany	Germany	Europe	Classic Vest, S	Vests	10/1/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
17680	Casey S Diaz	110	Germany	Germany	Europe	Classic Vest, S	Vests	7/31/2010	1	63.5	23.749	63.5	5.08	1.5875	39.75	62.60%
13690	Arthur Diaz	100	France	France	Europe	Half-Finger Glo	Gloves	12/20/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
25370	Fernando Lewis	160	Northwest	United States	North America	Half-Finger Glo	Gloves	12/17/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
35410	Kaylee S Young	130	Canada	Canada	North America	Half-Finger Glo	Gloves	11/24/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
41380	Melissa W Blue	160	Northwest	United States	North America	Half-Finger Glo	Gloves	11/2/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
45150	Rachel E Simmons	100	France	France	Europe	Half-Finger Glo	Gloves	10/17/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
18860	Christy Nara	160	Northwest	United States	North America	Half-Finger Glo	Gloves	9/29/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
42400	Molly Malhotra	100	France	France	Europe	Half-Finger Glo	Gloves	9/11/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
51600	Tina Subram	100	France	France	Europe	Half-Finger Glo	Gloves	7/27/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
34340	Karen M Liang	100	France	France	Europe	Half-Finger Glo	Gloves	6/8/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
25020	Eugene A Xu	120	United Kingdom	United Kingdom	Europe	Half-Finger Glo	Gloves	5/29/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%
11340	Alexandra E Washington	130	Canada	Canada	North America	Half-Finger Glo	Gloves	5/11/2011	1	24.49	9.1593	24.49	1.9592	0.6123	15.33	62.60%

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Copilot for Excel



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Analyze Excel Spreadsheets Example

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
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	
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	
20560	Dale Shen	100	France	Classic Vest, L	Vests	3/17/2011	1	63.50	23.75	63.5	5.08	1.59	L	
44870	Preston Rodriguez	160	Northwest	Classic Vest, L	Vests	12/19/2010	1	63.50	23.75	63.5	5.08	1.59	L	
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	
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	
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 File

Sample Prompts:

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

“Add a column for gross margin”

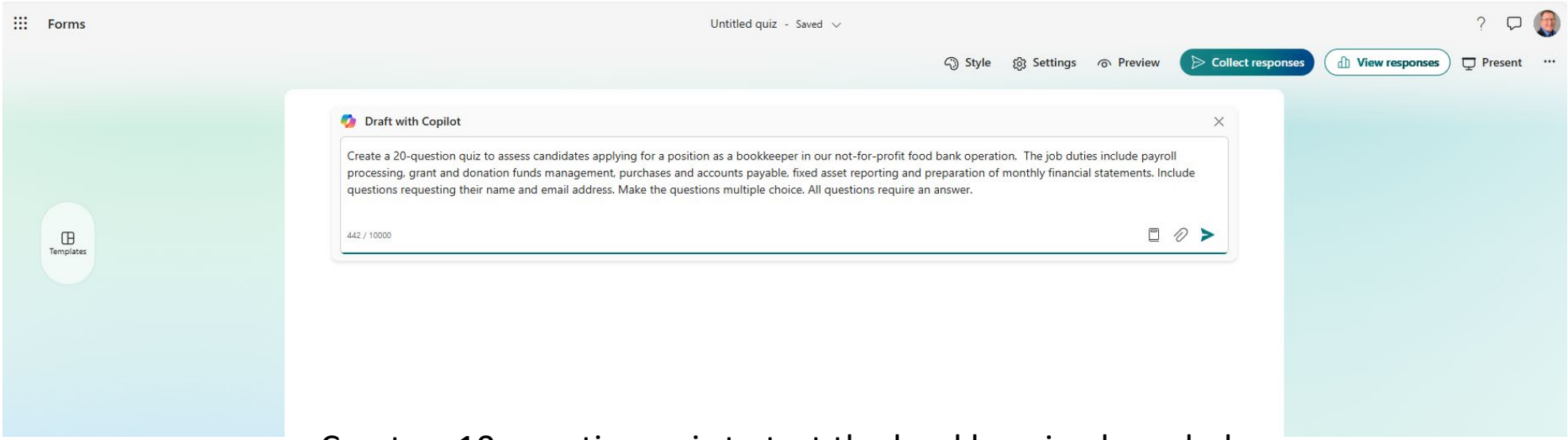
“Create a pivot table to analyze gross profit by product category and country”

“Create a pie chart of vest sales by country”

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Copilot for Forms

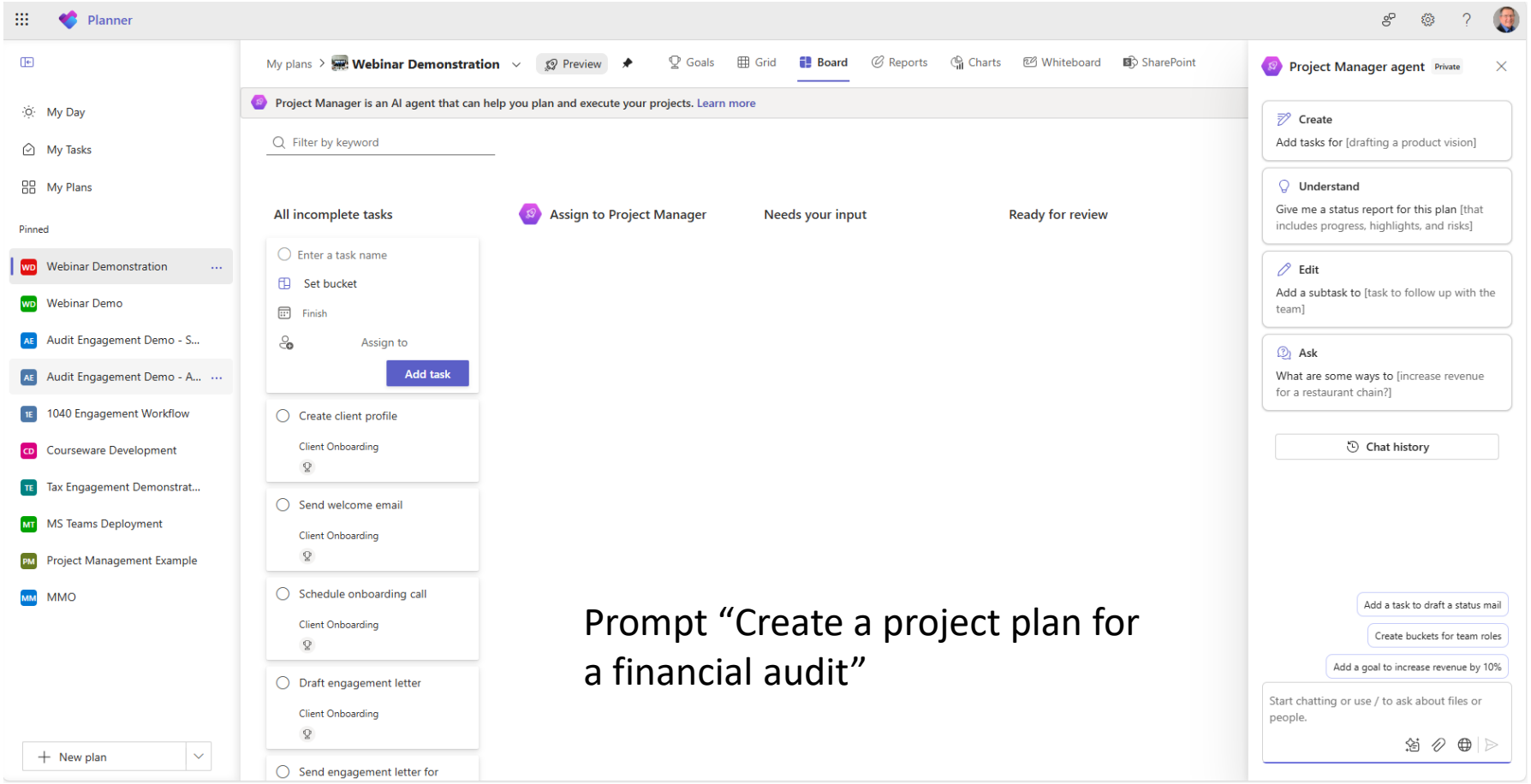


Create a 10-question quiz to test the bookkeeping knowledge of a person applying for a job as an entry level bookkeeper. Require them to enter their first and last name. Mix up the correct answers randomly.

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Copilot for Planner



Prompt “Create a project plan for a financial audit”

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PROMPT BEST PRACTICES



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Prompt Design Best Practices

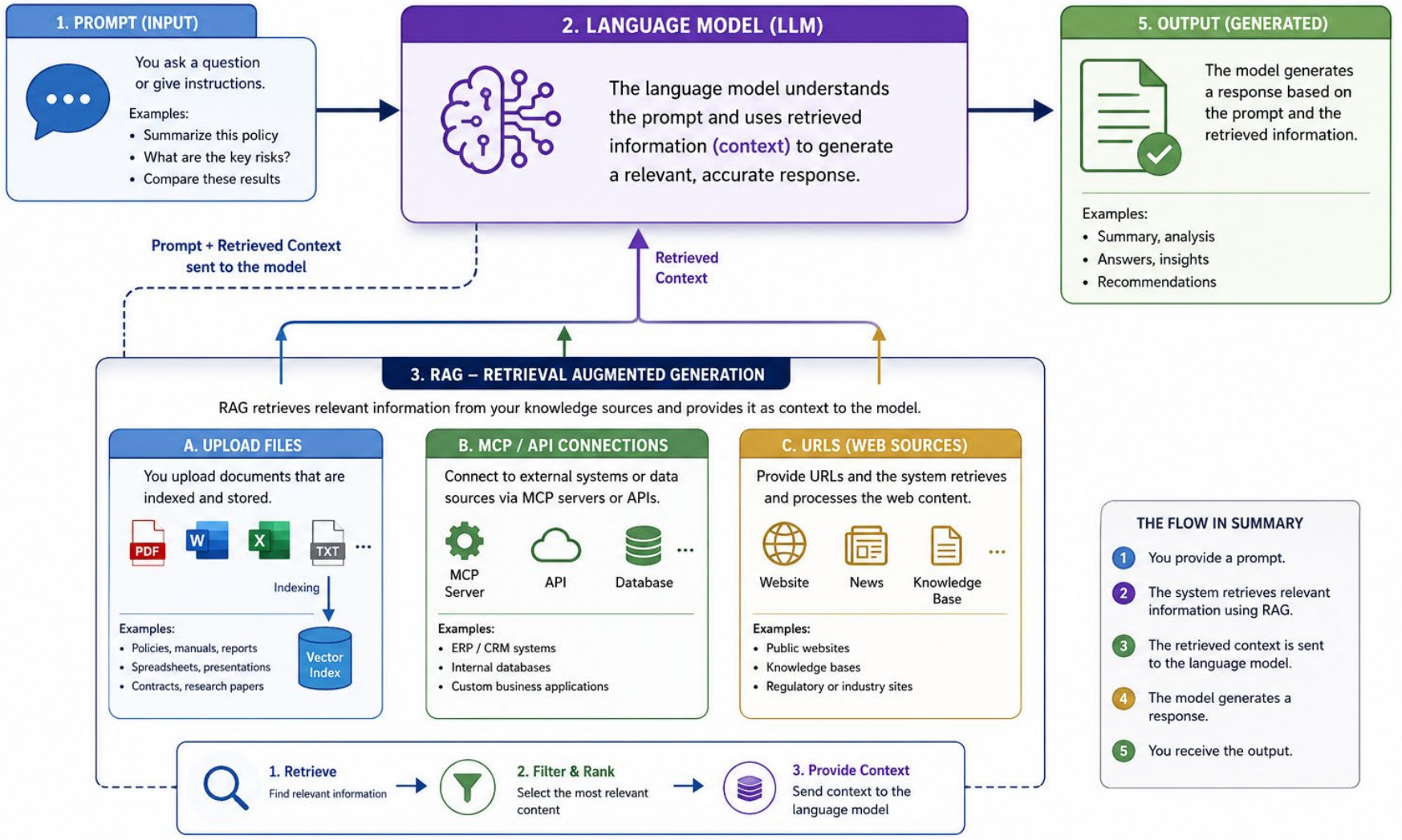
- Define AI's role (functional role + domain expertise)
- Describe the audience for the output
- Objective – specific outcome desired
- Context – background information
- Provide example(s)
- Optimize supporting data – RAG
- Define any constraints
- Require links to citations
- Output structure / deliverables

Ask the AI to create / improve the prompt

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How a Language Model, Prompt and RAG Work Together



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MICROSOFT COPILOT ADVANCED FEATURES REVIEW



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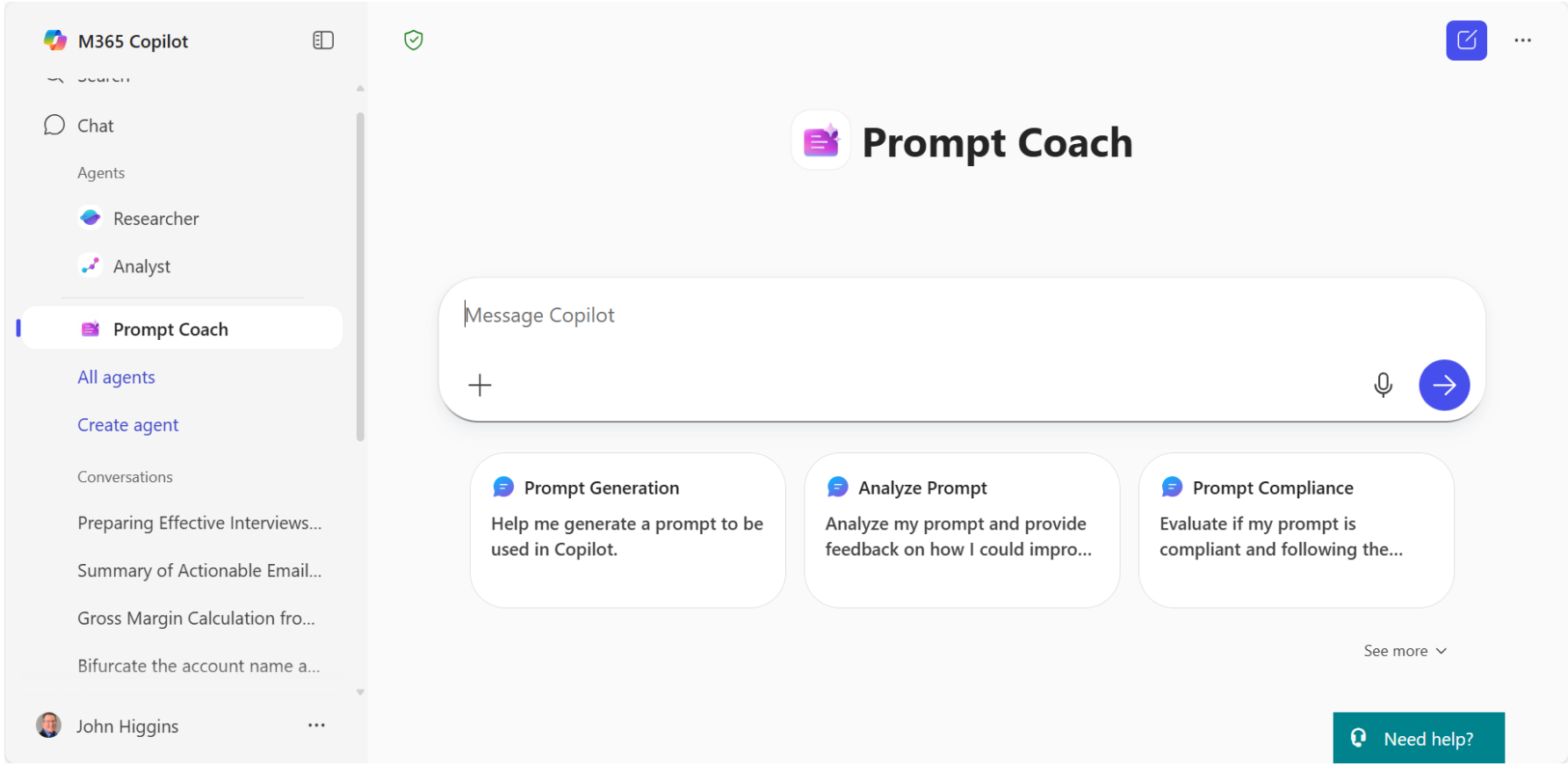
ChatGPT Advanced Features

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

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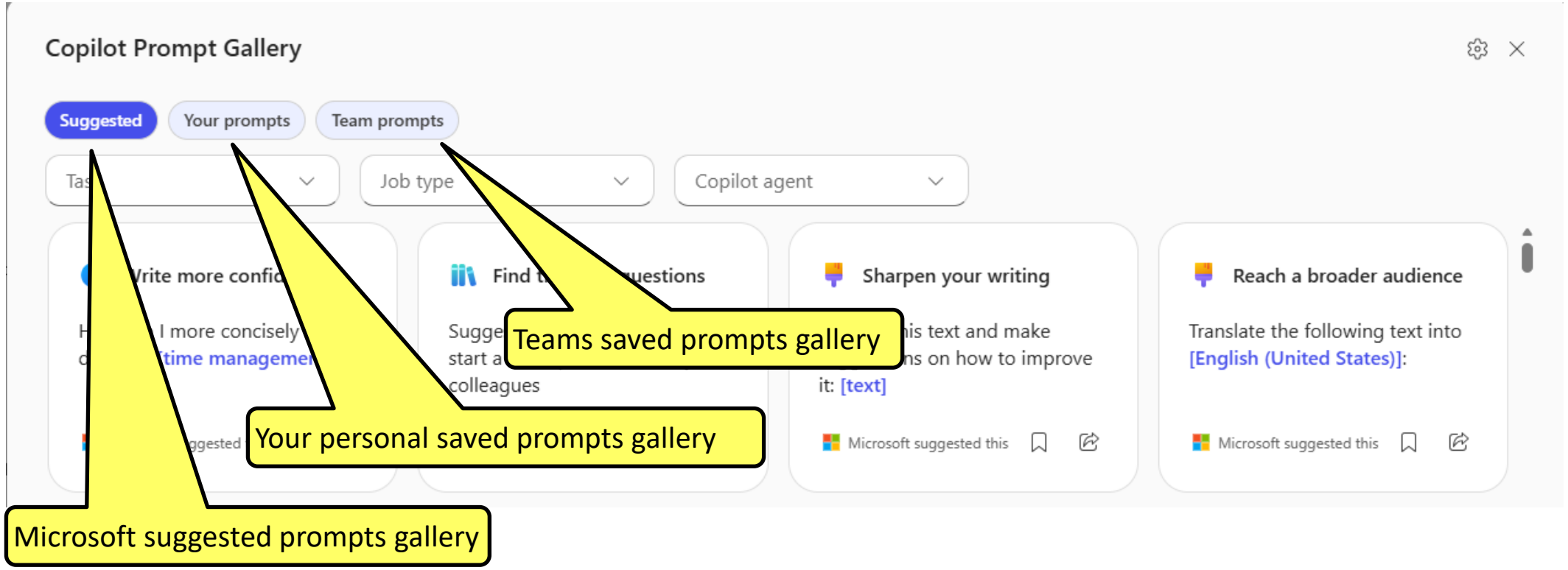
Copilot Prompt Coach



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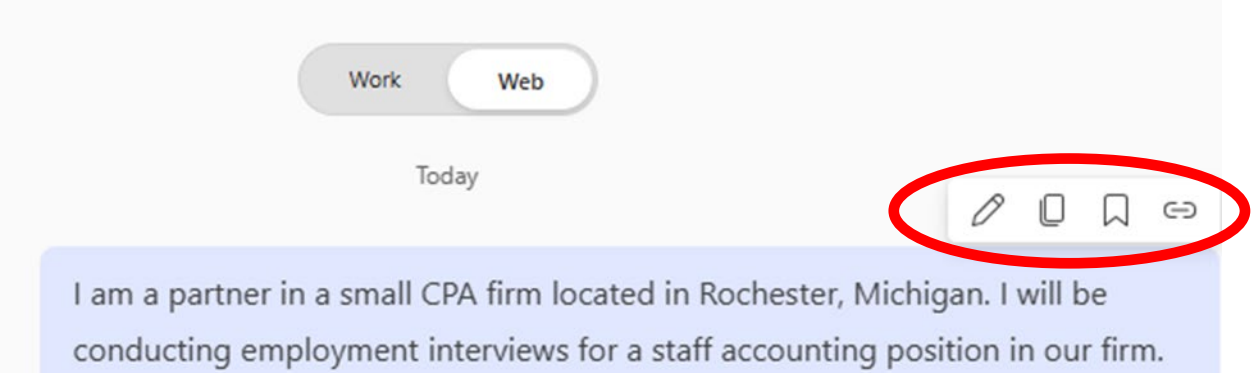
Prompt Gallery

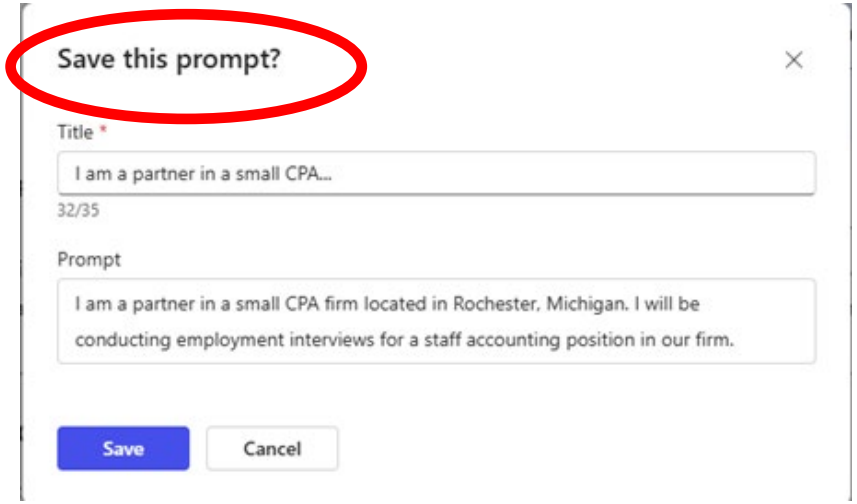


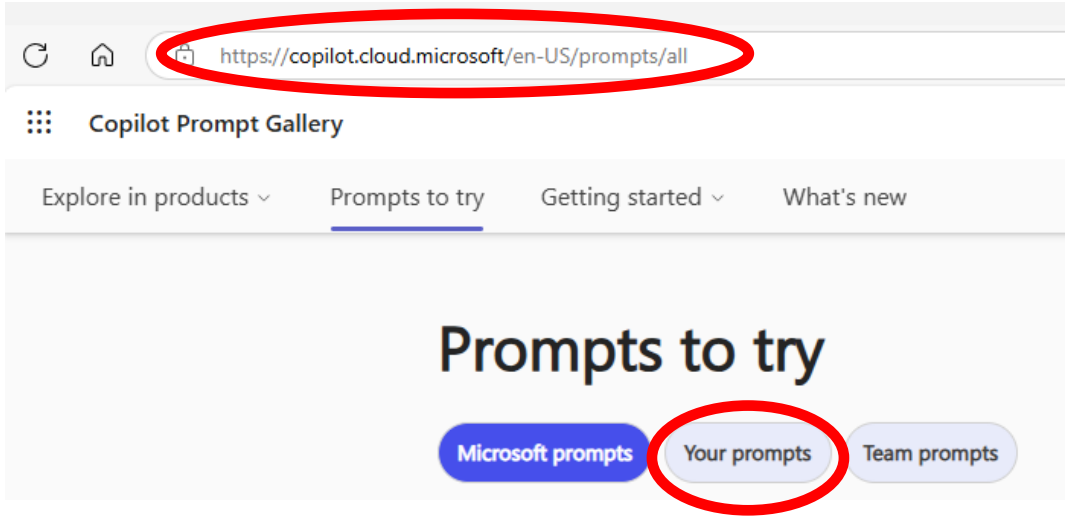
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Storing Your Copilot Prompts



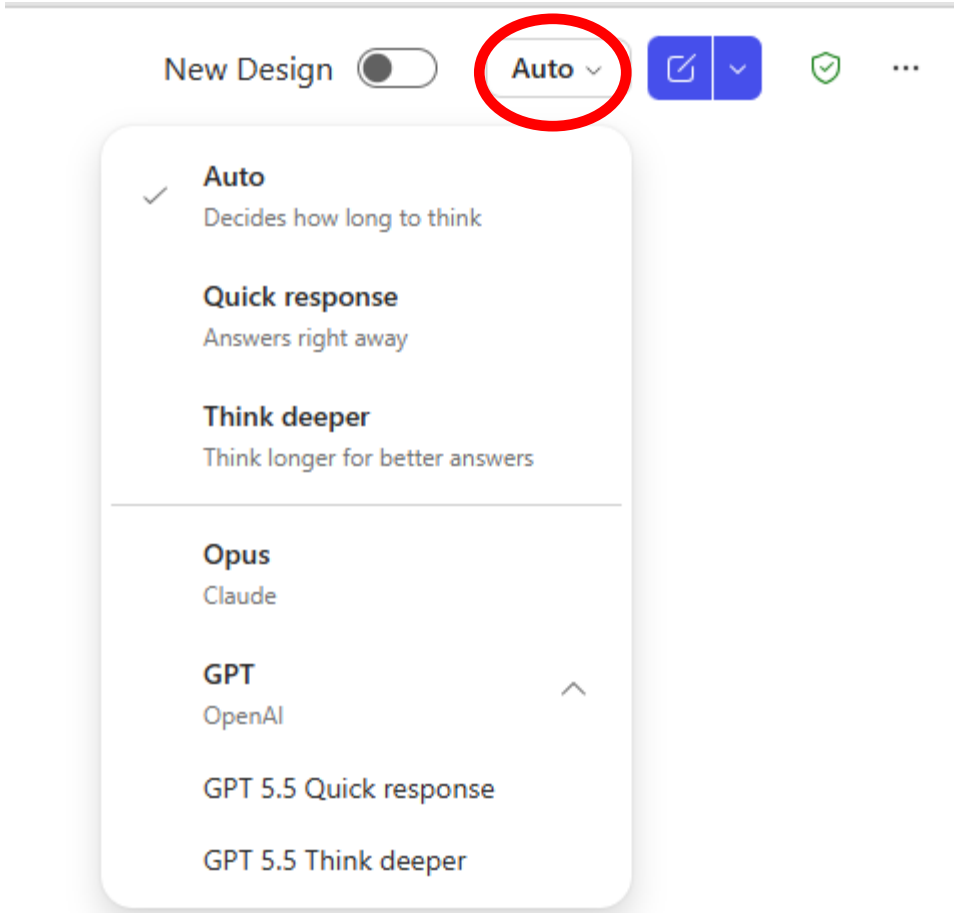




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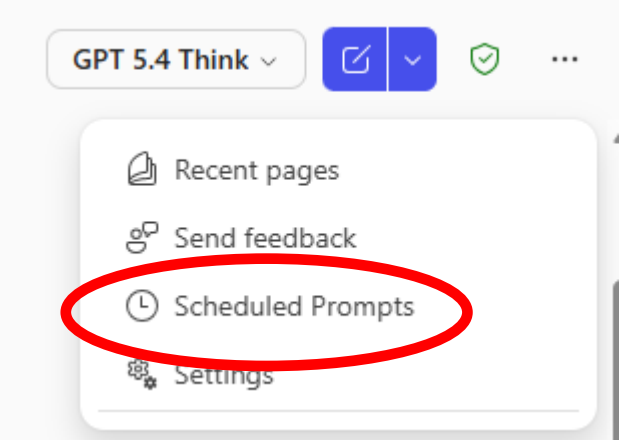
Copilot Model Options

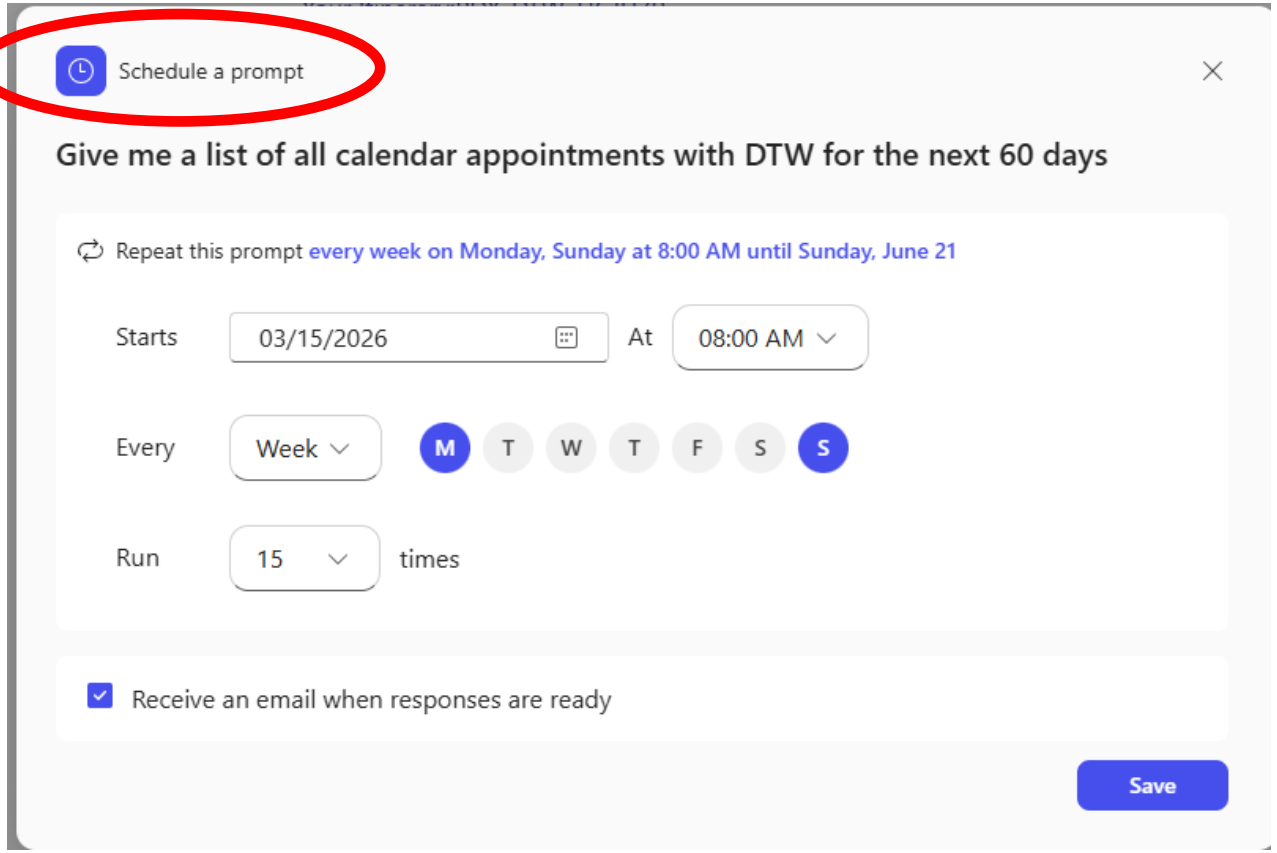


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Scheduled Prompts





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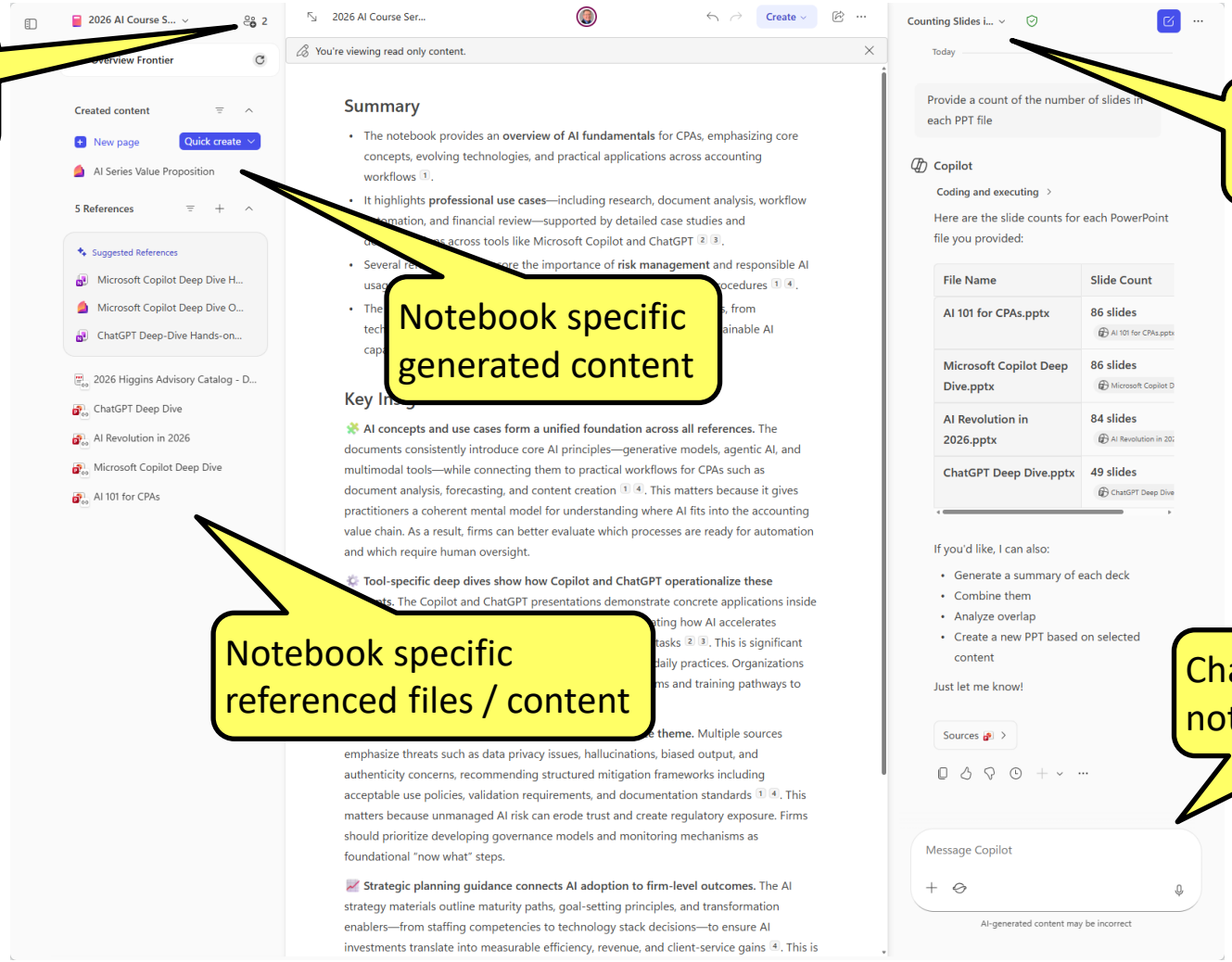
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Microsoft 365 Copilot Notebooks

- 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

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Microsoft 365 Copilot Notebooks



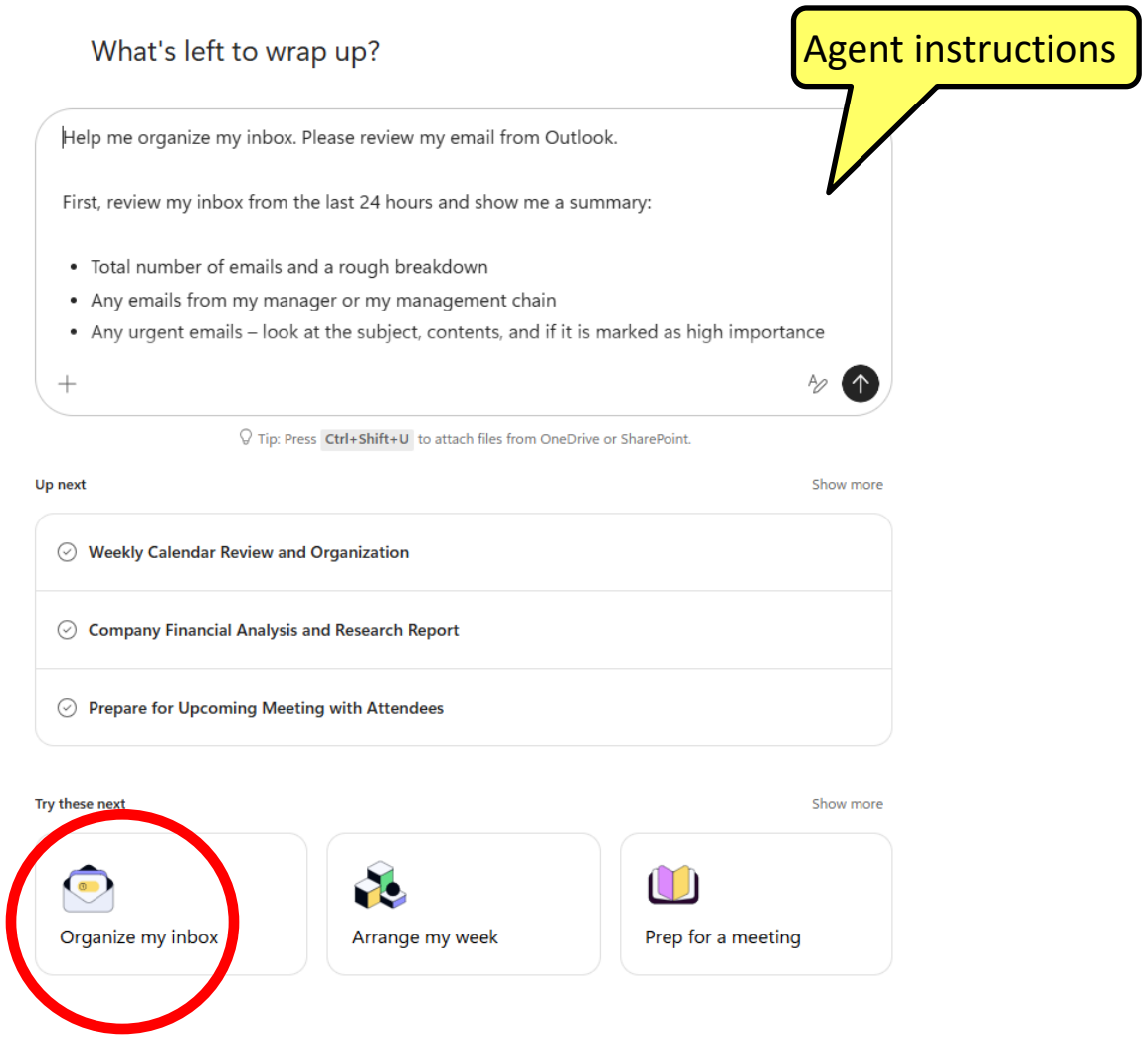
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Copilot Agents

- 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

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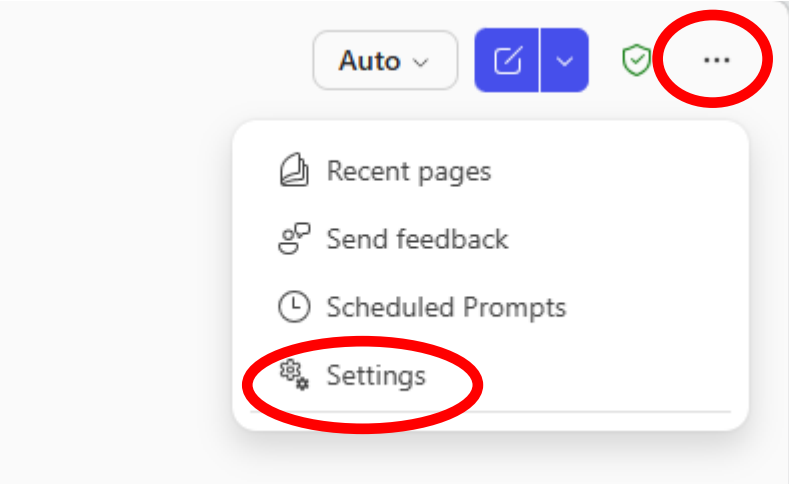
Copilot Agents

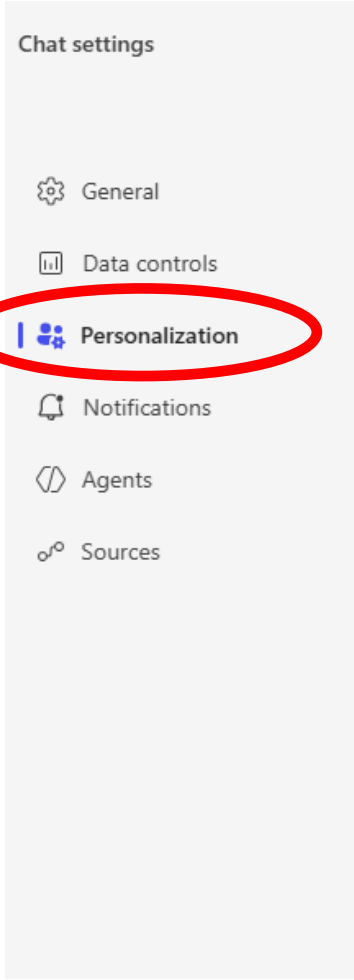


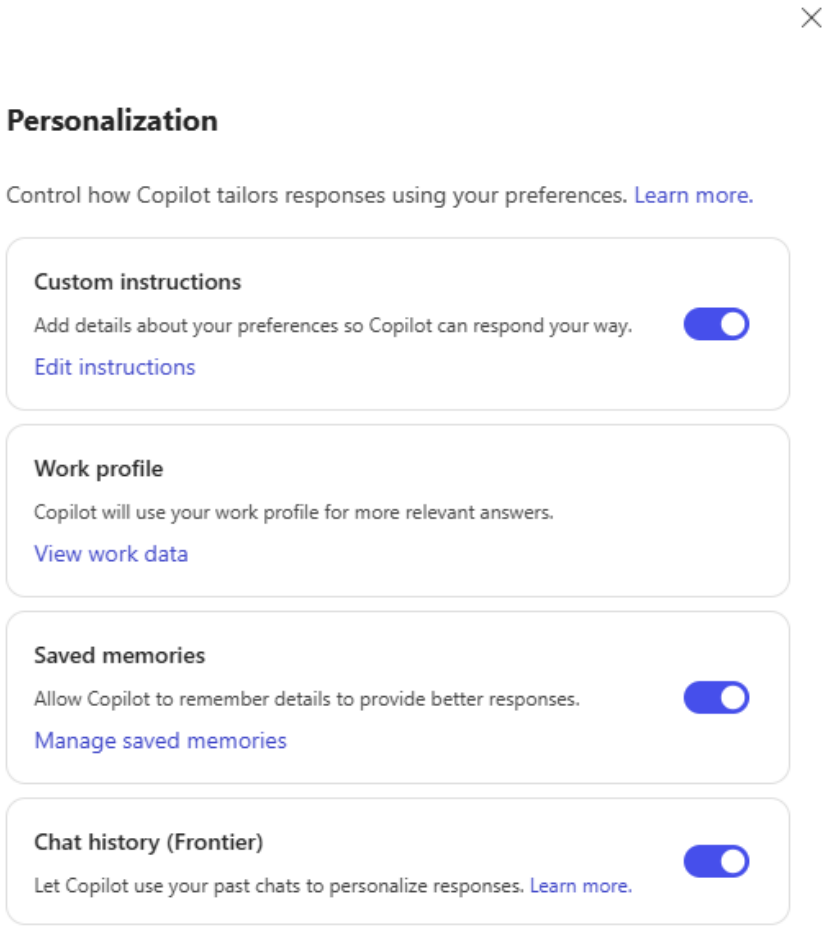
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Copilot Personalization



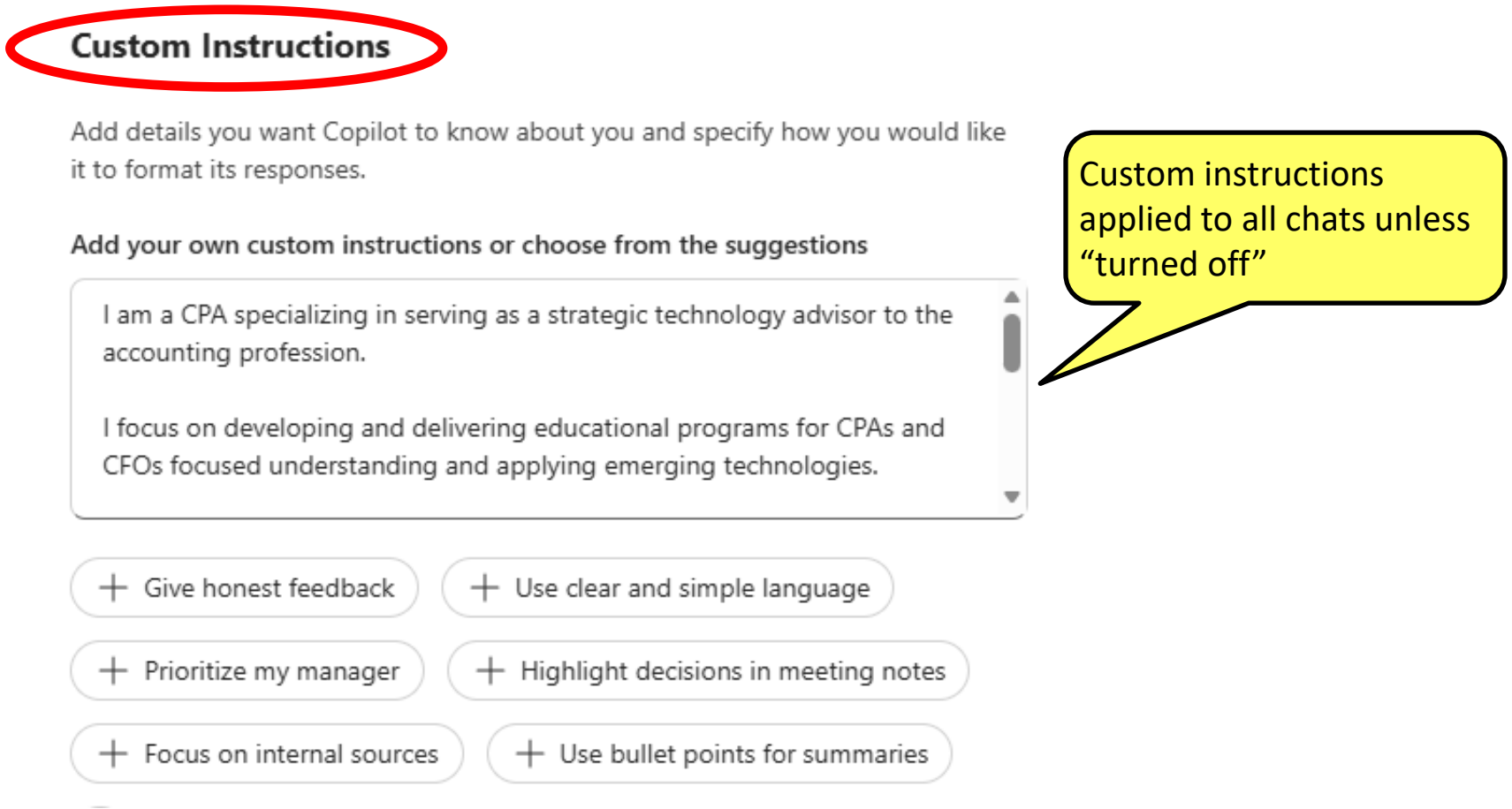




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Copilot Personalization – Custom Instructions



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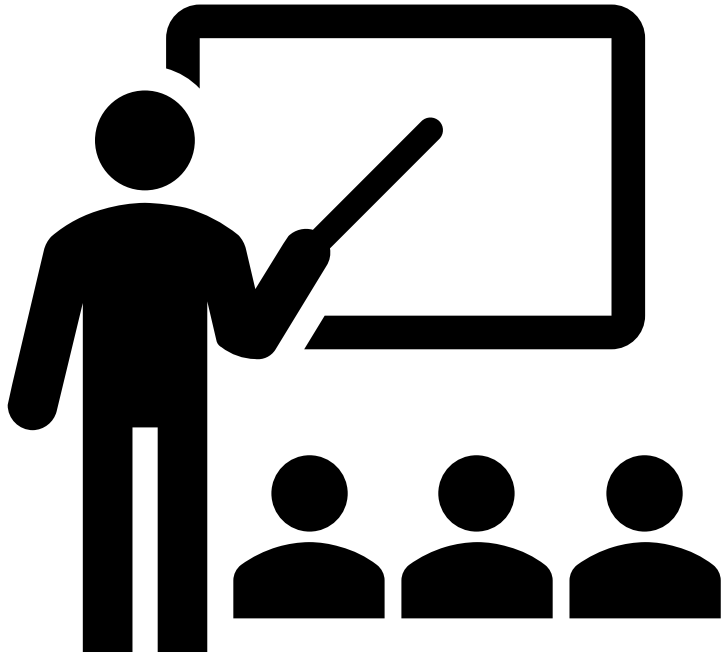
Live Content Slide

When playing as a slideshow, this slide will display live content

Poll: What other technology topics would you like to see at a future conference (AI and other)

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WRAP-UP



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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!***

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Questions ?



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Thank you!!!

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APPENDIX: ACCOUNTING / TAX / FINANCE CASE STUDIES



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Case Study 1: Tax Research

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

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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.

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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.

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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.

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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.

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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.

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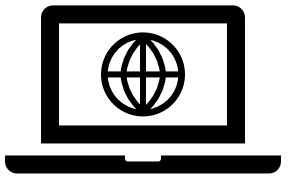
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Case Study 4: Data Analysis

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

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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.

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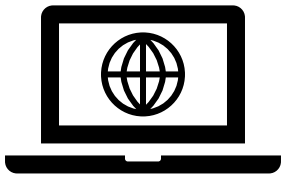
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Case Study 5: Workflow Automation

- 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.

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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.

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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.

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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.

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