



Teams and Copilot in Teams

North Carolina Tech Days



Topics

- Quick Prompting Recap
- Copilot in Teams Overview
- Some Copilot in Teams Practice
- Questions

Art of Prompting - Key Elements

WHAT
do I want?



Goal (Objective)

What response do you want from Copilot?
(Desired outcome)

WHY / WHO
do I need it?



Context, Persona & Audience

Why do you need it?
Who is involved?
Act as a <Persona>

WHERE
to look?



Source (Grounding)

Which information sources should Copilot use (ground against)?

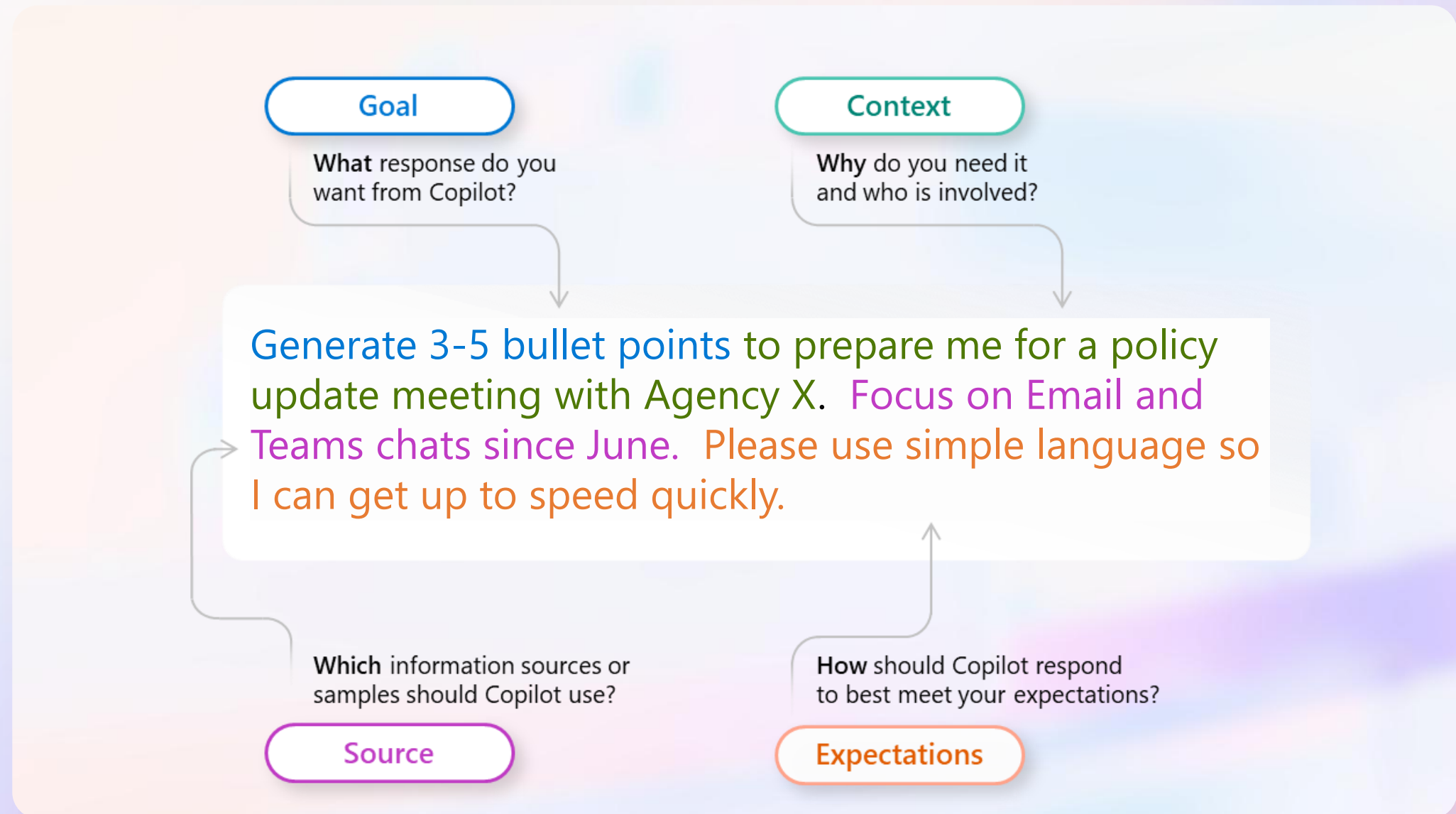
HOW
do I need it?



Expectations

How should Copilot respond to meet your expectations?

Art of Prompting - Key Elements



How to use: Copilot in Teams for chat

Note the specific prompts shown may vary



Sample use cases

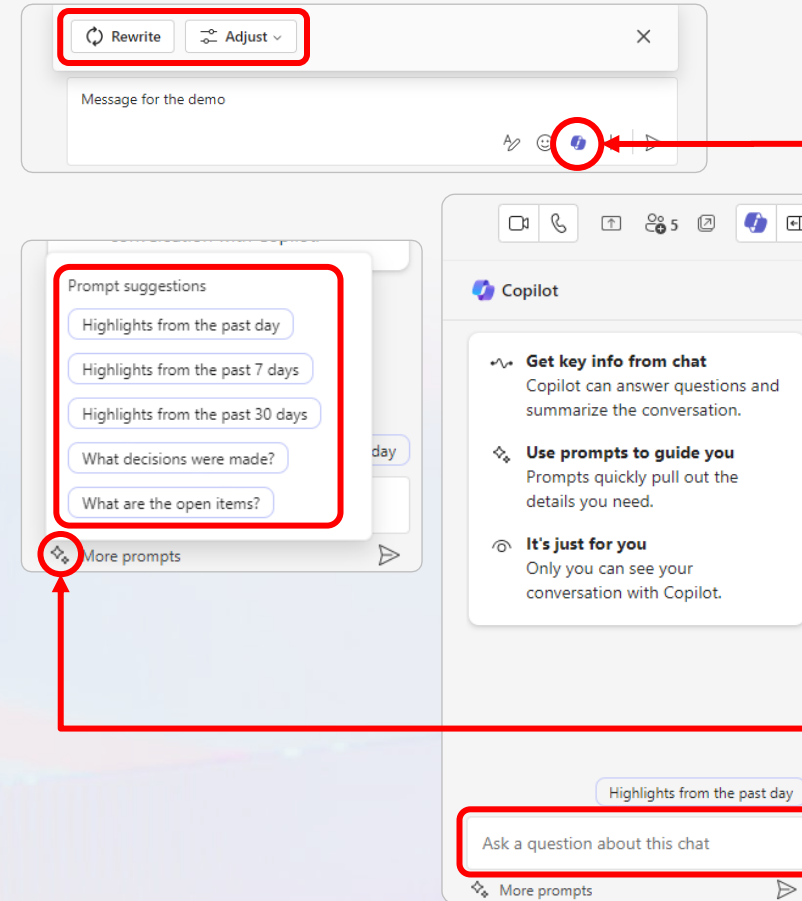
- Catch up on a chat thread with a summary or by getting key points and action items
- Draft a new chat entry in the thread

In the Teams chat window

- Rewrite a draft and adjust for length and tone

Use the Copilot chat pane to

- Ask questions about the content of the chat – does not work in Channels
- Summarize over a period of time
- Ask about decisions, open items, tasks
- Ask what a specific person said
- Ask about links



When creating a chat entry click on the Copilot icon to show the **Rewrite** and **Adjust** prompts when drafting a new chat

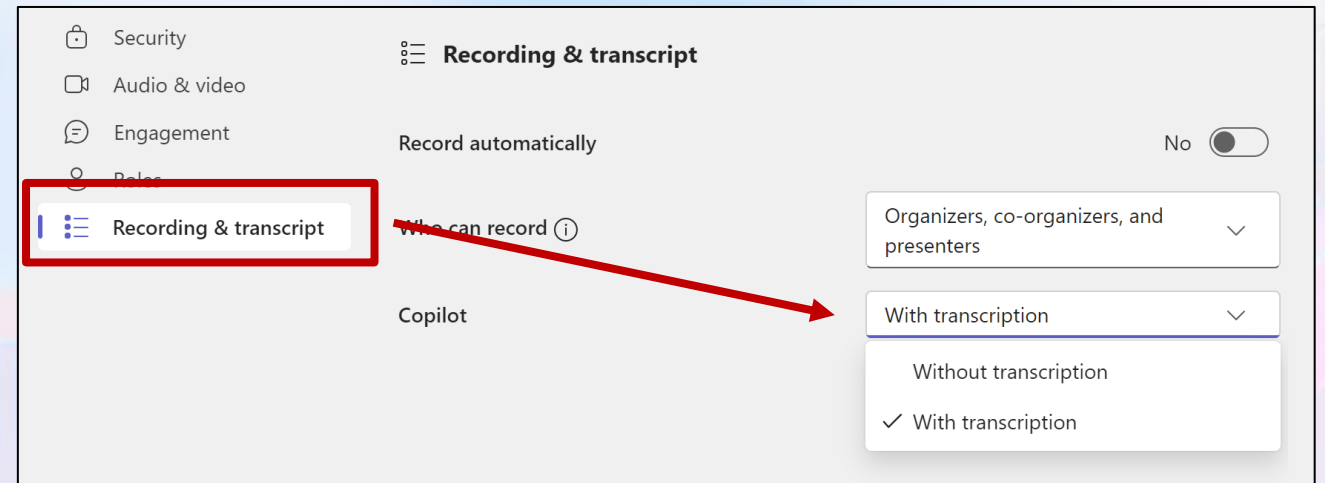
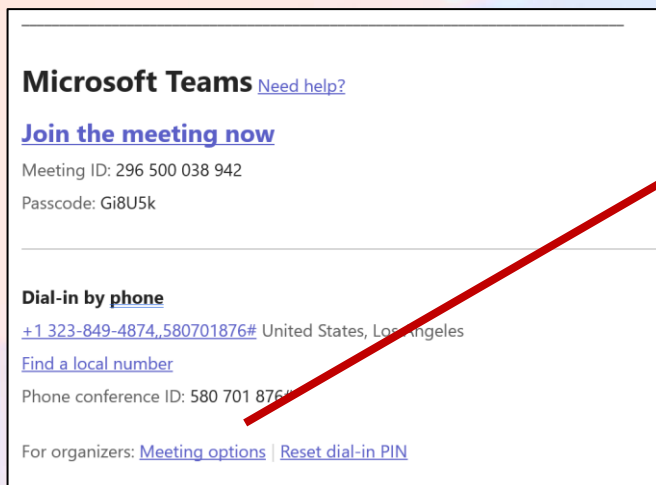
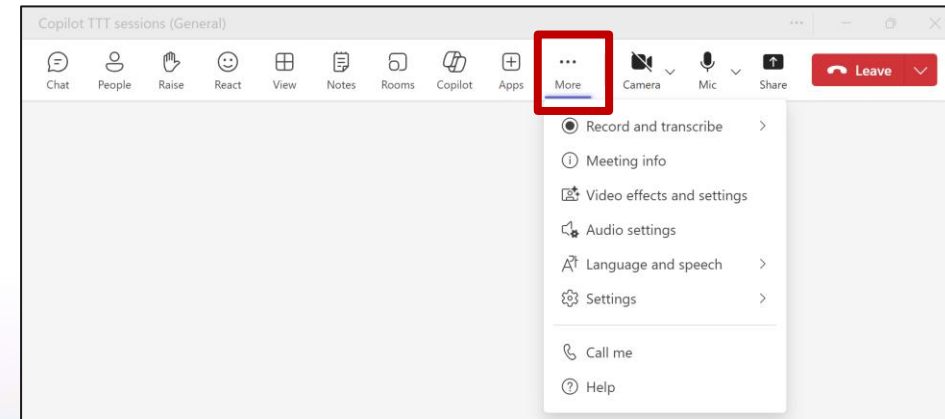
Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation

How to set up: Copilot in Teams Meeting



Sample use cases

- Start Recording or Transcription
- Use the Teams Meeting Option
- Recording and transcription



How to use: Copilot in Teams during a meeting



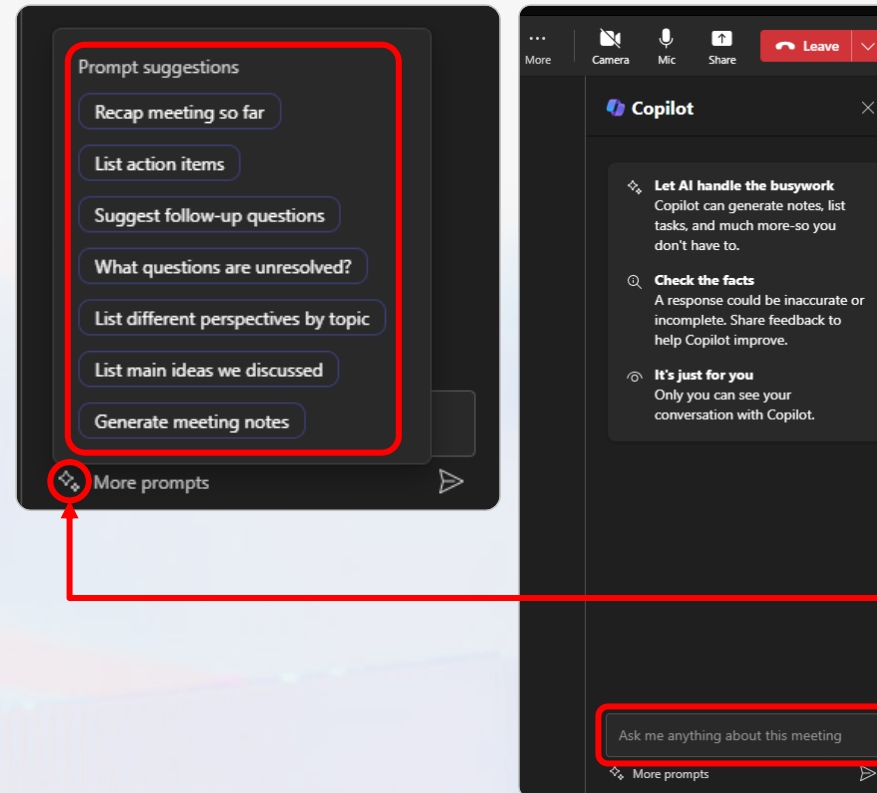
Note the specific prompts shown may vary

Sample use cases

- Get help during a meeting with a summary, key points, sentiment, or potential questions
- Catch up on a meeting with a summary or by asking questions
- Works during 1:1 and group calls, Meet Now, Scheduled private meetings, recurring meetings, Channel meetings

Use the Copilot chat pane to

- Get a summary of the meeting so far
- Key discussion points
- Who said what or what people said
- Where do people disagree
- Suggest action items



Click on the **Prompt Guide** icon
to show the prompts to edit a slide or learn about the presentation



How to use: Copilot in Teams after a meeting

Note the specific prompts shown may vary

Sample use cases

- Catch up on a meeting with a summary or by asking questions
- Works for scheduled meetings with a transcript (1:1 and group)

Use the Copilot chat pane on the Recap tab to

- Recap the meeting
- List action items
- Follow up questions
- Highlight the different perspectives on a topic
- List main ideas

The screenshot shows the Microsoft Teams interface with the Copilot chat pane open. The Copilot icon in the top left is highlighted with a red box. The chat pane is titled 'Copilot' and shows a 'Recap' tab. The main content area displays 'Content' with 'No files were shared.' and a 'Meeting notes' section. A red box highlights a list of 'Prompt suggestions' in the chat pane, including: 'Recap the meeting', 'List action items', 'Suggest follow-up questions', 'What questions are unresolved?', 'List different perspectives by topic', 'List main ideas we discussed', and 'Generate meeting notes'. A red arrow points from a text box to the 'More prompts' icon (a small square with a plus sign) in the bottom right of the chat pane. The text box says: 'Click on the **Prompt Guide** icon to show the prompts to ask questions about the meeting content'.

Microsoft Teams

Mobile into

Microsoft Stream

Copilot

Content

No files were shared.

Notes AI notes Mentions (5) Transcript

Generated by AI. Be sure to check for accuracy. Copy all

Meeting notes

Prompt suggestions

- Recap the meeting
- List action items
- Suggest follow-up questions
- What questions are unresolved?
- List different perspectives by topic
- List main ideas we discussed
- Generate meeting notes

More prompts

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 just for you
Only you can see your conversation with Copilot.

Ask me anything about this meeting

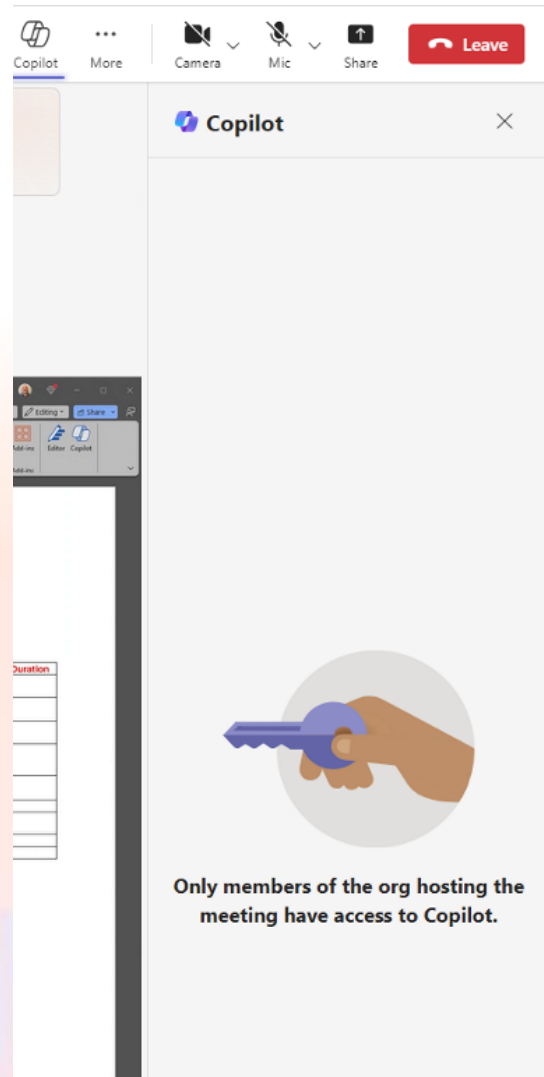
More prompts

Click on the **Prompt Guide** icon to show the prompts to ask questions about the meeting content



Copilot in Meetings runs in YOUR ORGANIZATION

Copilot won't work in meetings that are hosted outside the participant's organization.



Practice : Copilot in this Teams Meeting



1. Go to Copilot in this Teams Meeting
2. In chat box write this example prompt below

`"Give me a summary of this meeting?"`

3. then select **Send** icon

How did it work? Provide feedback, choose either the thumbs up or down reaction

Practice : Copilot in this Teams Meeting



1. Go to Copilot in this Teams Meeting
2. In chat box write this example prompt below

“What are some questions I can ask about prompting with Copilot?”

3. then select **Send** icon

How did it work? Provide feedback, choose either the thumbs up or down reaction

Practice : Copilot in a previous Teams Meeting

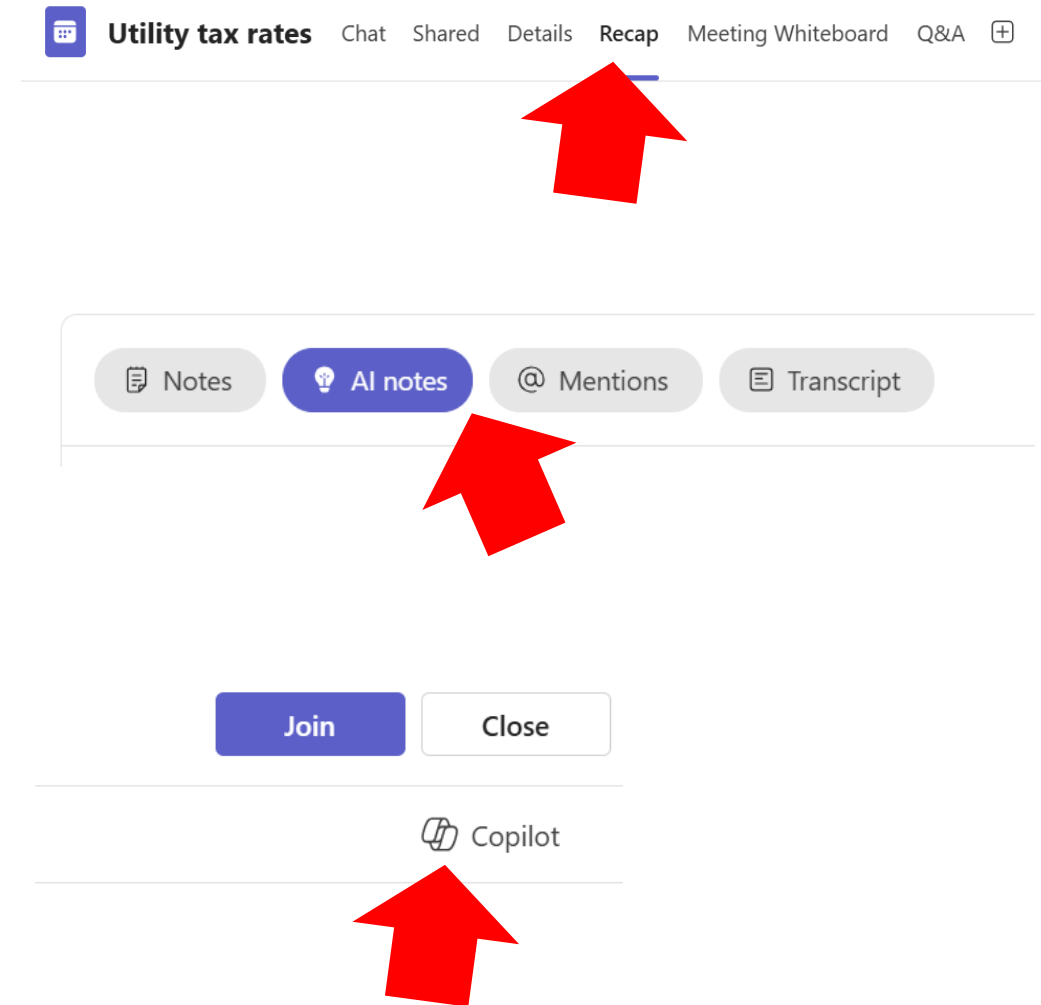


1. In Teams, open your calendar and navigate to this a previous meeting (In this case, to the Weekly Office Hours from 4/9)
2. Locate the Recap option in the Meeting menu
3. Observe the AI notes button
4. Select the Copilot icon in the upper right corner of the chat box, and enter the prompt.

"Give me a summary of this meeting?"

5. then select **Send** icon

How did it work? Provide feedback, choose either the thumbs up or down reaction



Practice : Copilot in a Teams Chat



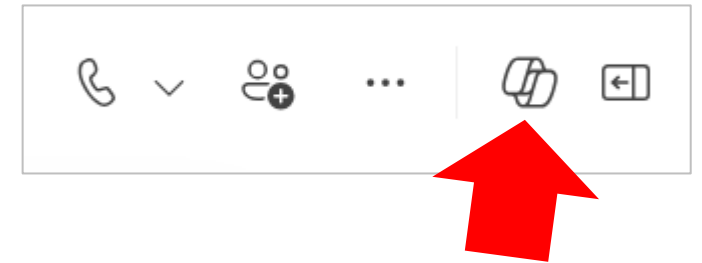
1. Go to the Chat Icon in Teams, located a “long running” chat with an individual or a group and select the “Open Copilot” icon
2. In chat box write this example prompt below

“Summarize this chat.”

Or you may also ask a question about the particular chat you have selected.

3. then select **Send** icon

How did it work? Provide feedback, choose either the thumbs up or down reaction



Practice : Reference Meetings in Copilot Chat



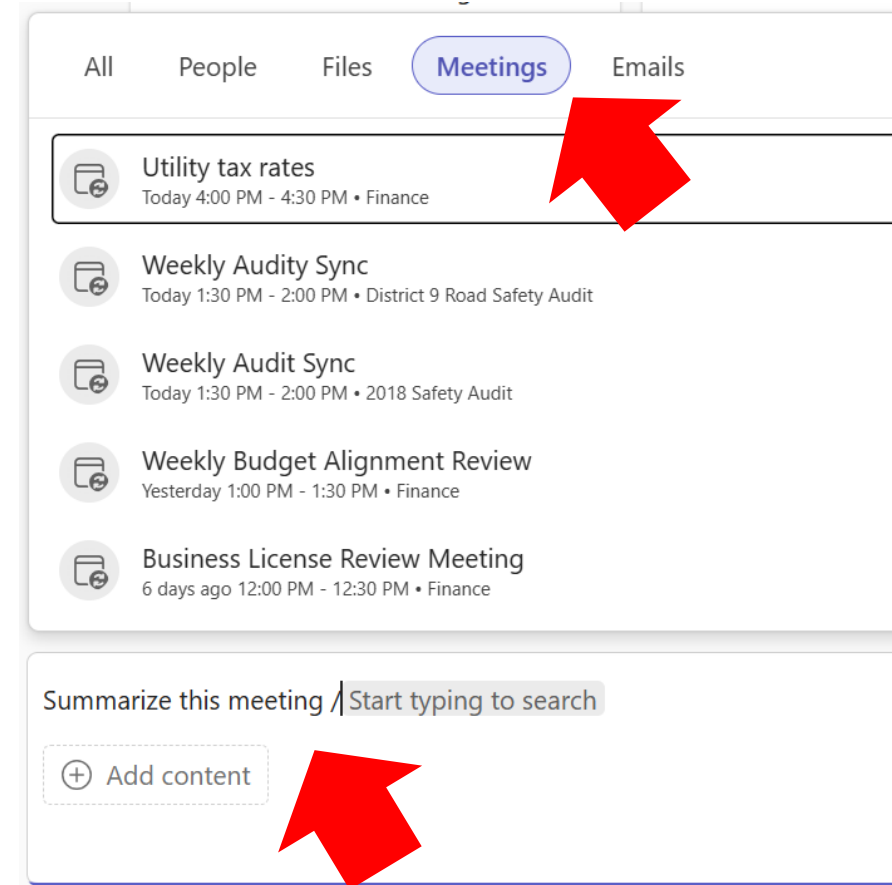
1. Open Copilot Chat
2. In chat box write this example prompt below

"Summarize this meeting."

And using either the forward slash / or the Add Content option, pick from a meeting that has a transcript. (You may use the Microsoft Copilot for M365 Weekly Office Hours session from 4/9)

3. then select **Send** icon

How did it work? Provide feedback, choose either the thumbs up or down reaction



Scheduling Meetings

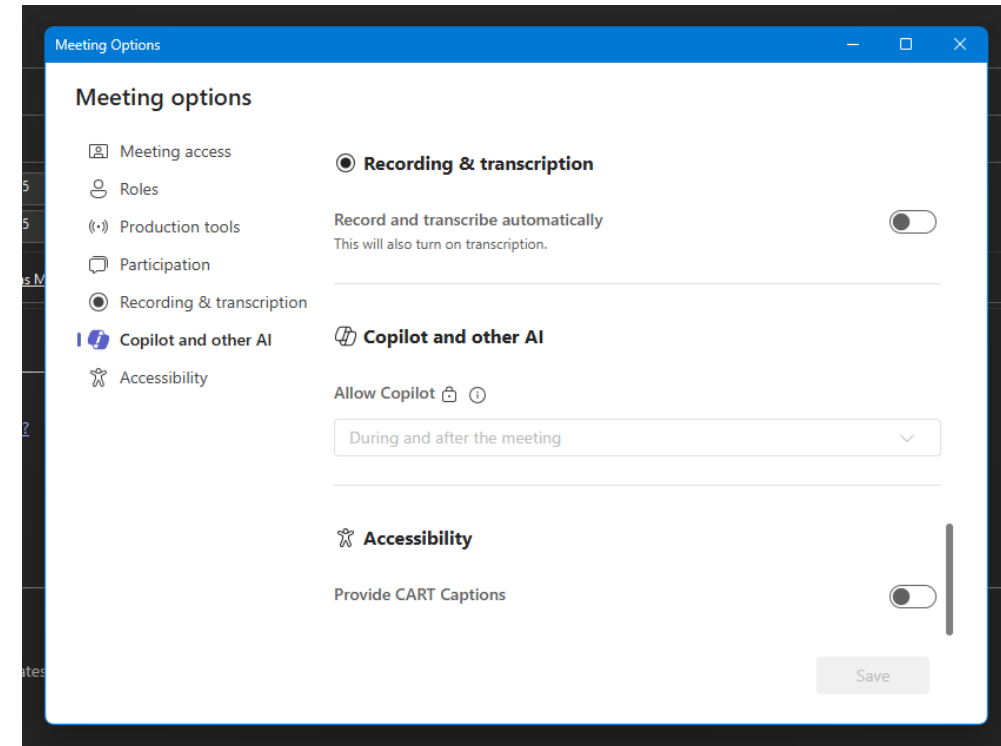


Options may be limited during current pilot testing periods

During and after the meeting: Transcription is required to use Copilot. Copilot starts as soon as someone in the meeting begins transcribing. Selecting **Copilot** in the meeting controls will send a prompt to start transcription; confirming will start Copilot and transcription for the meeting.

Only during the meeting: Copilot starts as soon as it's selected in the meeting controls. Copilot uses speech-to-text data to provide insights about what is said in the meeting. If someone starts transcribing the meeting, Copilot will be available during and after the meeting for portions that were transcribed. After the meeting ends, speech-to-text data and interactions with Copilot will no longer be available.

Off: Copilot is not available for the meeting. Recording and transcription are also unavailable for the meeting to prevent Microsoft 365 Copilot from accessing sensitive information.





Find more Teams prompts to try in [Copilot Lab](#)

Find action items

Are there any action items for me?



Compare Ideas

For each idea discussed, identify the pros and cons formatted as a table with 3 headers: idea, pros, cons.



What are the options?

Create a table of the options discussed with pros and cons



List ideas

List 5 ideas discussed



Get the schedule

List the key dates in a table



Get clarity

List the different opinions and suggest clarifying questions to ask for each



What decisions were made

Did the team achieve consensus on a decision and what was it?



Be prepared

What are the goals and topics from the meeting? Format each section with a bolded heading, and bolded names



Keep meetings moving

What questions can the group ask to generate more ideas or insights? Limit each to 30-60 characters



Summarize meetings

Summarize what was discussed about



Engineered Prompts for Teams



"Create an overview of all the messages in this chat of the last 10 days. Follow the formatting instructions exactly. Summarize every topic in a separate table, with only one cell each. Add each topic with the defined contents to this one cell. Add two line breaks between each topic and its table. In the summary of the topics, in the individual cells, add the following contents. Start with two line breaks, then create the heading of the topic in bold. Create a good term that reflects the topic briefly and concisely. Then add two line breaks. Continue in a new line with the title "Topic started by:", write this in bold. Name the person who started the topic. Then add two line breaks. Continue in a new line with "Started on:" write this in bold. Name the weekday (abbreviated) and the date (in the format DD.MM.) in normal font. Then add two line breaks. Continue in a new line with the point "TLDR:" in bold. Create a summarizing conclusion for the topic, in normal font. Then add two line breaks. Continue in a new line with the point "Content of the discussion:" in bold. Summarize the content of the conversation in detail, all in normal font. Then add two line breaks. Continue in a new line with the point: "Topic waiting for a reply:" in bold. Add a yes or no here, as an indication of whether a question or topic is still unanswered, in normal font. Add two line breaks at the end."

"Dear Copilot, I'd love your help on wrapping up my day and preparing for tomorrow.

Please name the first section: Today

Can you please write a short paragraph of my work today and separately list tasks that came from my meetings?

Also highlight my important things from my email based on your analysis.

In the next section named Your Meetings Tomorrow

Then, can you please help me with an overview of my meetings tomorrow. Create a table and list who organized the meeting and add details of the meeting. Please also show the category you would place that meeting (personal, internal, external or traveling) in and add any important things I need to know about the meeting. Please show me what % of time I am spending on the different categories in a list.

In the last section named: Get prepared

Finally, as my personal assistant, please write a small summary and brief me on all the important things I need to know to make tomorrow a productive day and please suggest when I should consider taking breaks."

"Write a new document on the cost, benefits, and considerations for installing solar panels on homes. Provide an introduction at the beginning of the document and a summary at the end of the document. Include a table of contents"

Questions

Thank you!

NC DIT Innovation Summit Follow-
Up

