

Akkodis Academy Tech Talk:

Microsoft 365 Copilot for SMBs

Featuring



**ANATOLI
KOVALEV**
Vice-President,
Akkodis Academy
Expert Speaker



Akkodis Academy



>50,000



Tech, Business & Method Skills



Hands-on training



Academies in 10 dedicated countries



>150 learning professionals

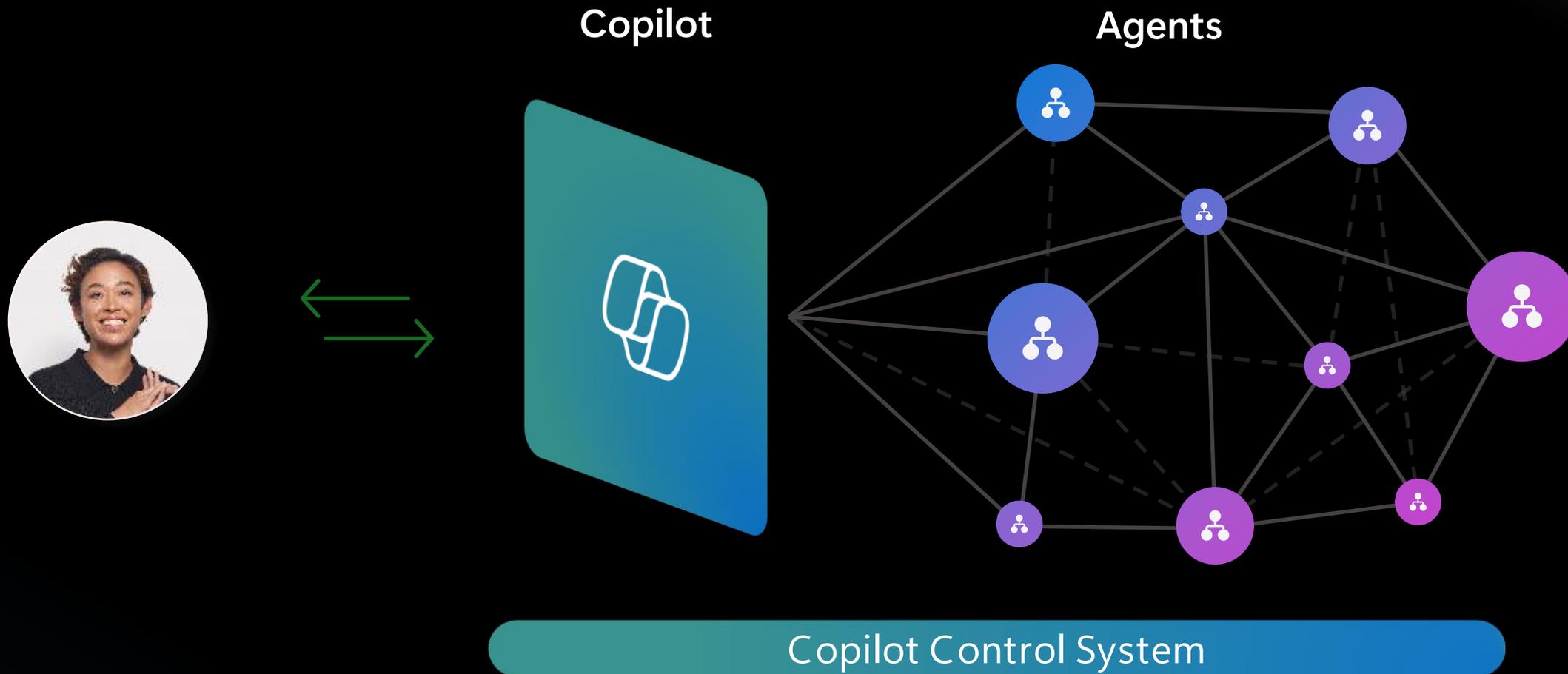
Country led catalogue of >300 trainings in selected Industries & Tech Practices



Agenda

- **Welcome & Introduction**
- **Akkodis Academy presents:**
 - **Boosting productivity with Microsoft Copilot**
 - **Learn the art of prompting**
 - **Practical use cases for SMBs**
 - **Finance**
 - **Marketing**
 - **Sales**
 - **Human Resources**
 - **Operations**
 - **Transforming your business with Copilot + Agents**
 - **Making Copilot work for you**
- **Questions & Answers**

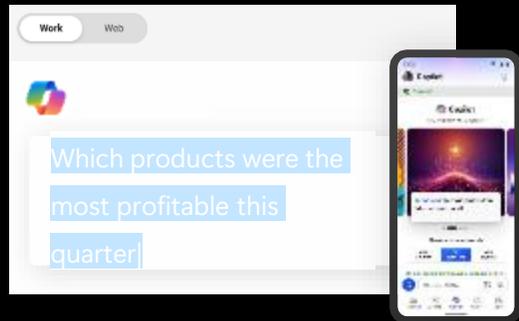
Copilot is the UI for AI





Microsoft 365 Copilot

Your AI assistant for work



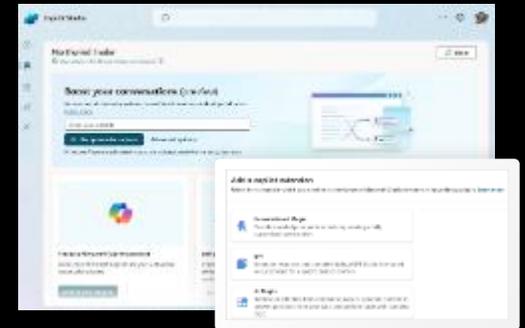
Single chat destination
for web and work



Microsoft 365
Apps



Microsoft
Graph



Copilot
Studio

Enterprise-grade security, privacy, and compliance

Recap a meeting



- Draft an email with notes and action items from **meeting**

Summarize an email thread



- Click on the Summarize icon

Draft an email



- Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.

Summarize a document



- Give me a bulleted list of key points from **file**



How can **Copilot** help you with your work?

Tell me about a topic/project



- Tell me what's new about **topic** organized by emails, chats, and files?

Give me some ideas for ...



- Suggest 10 compelling taglines based on **file**

Help me write...



- Generate three ways to say [x]

What did they say ...



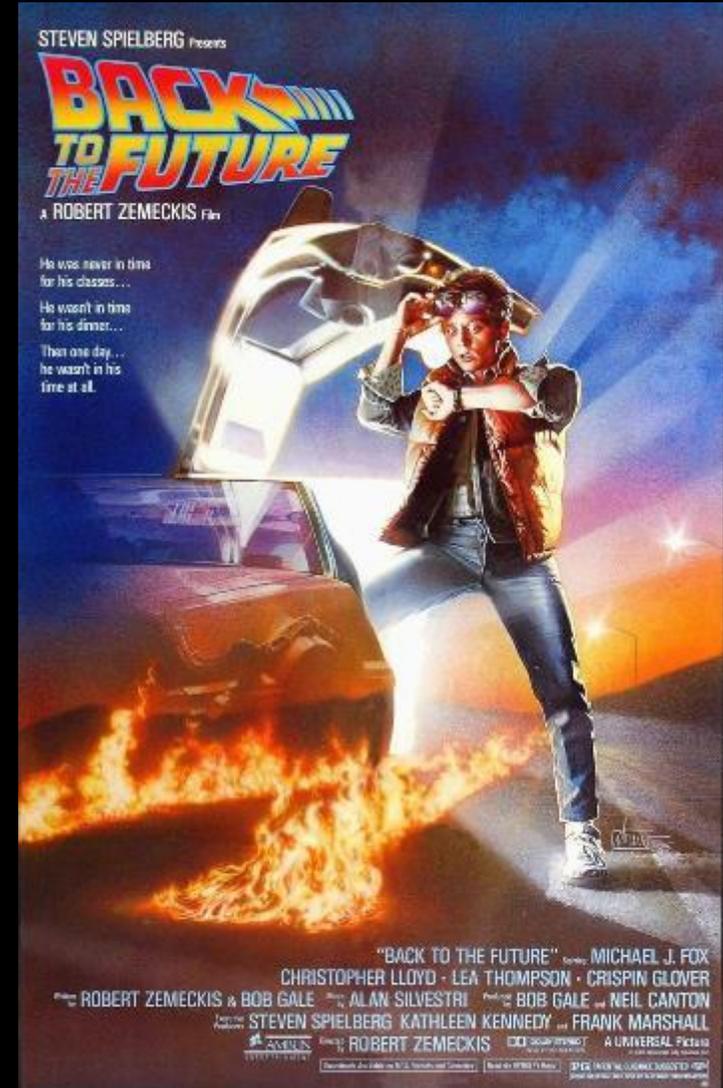
- What did **person** say about **topic**

• Knowledge is Power

- The value of grounding AI in your data

- Great Scott!

- What is the plot of Back to the Future?
- Who is Marty McFly?
- How do I make a chocolate cake?



<https://bit.ly/greatscottagent>

We secure your data at rest and in transit

Your control your data

Your data is not used to train or enrich foundation models

You're protected against AI security and copyright risks



**Microsoft 365
Copilot is built
on trust**

• Learn the Art of Prompting

- The most important business skill for working with AI

Prompts

summarizing, editing, or transforming.

1. Tell Copilot what you need

Learn about projects and concepts:

"What is [Project X] and who are the key stakeholders working on it?"

Edit text:

"Check this product launch rationale for inconsistencies."

Transform documents:

"Transform this FAQ doc into a 10-slide onboarding guide."

Summarize information:

"Write a session abstract of this [presentation]."

Create engaging content:

"Create a value proposition for [Product X]."

Catch-up on missed items:

"Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients

Goal

What
response do
you want
from
Copilot?

Context

Why do
you need it
and who is
involved?

Source

Which
information
sources or
samples
should Copilot
use?

Expectations

How should
Copilot
respond
to best meet
your
expectations?

key elements

2. Include the right prompt ingredients

key elements

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations



GCSE in practice

Example of GCSE framework

Let's try the following two prompts using Copilot in Word and compare the responses.

- *Prompt 1:* Write a blog post about sustainable practices in agriculture.
- *Prompt 2:* Craft a 1500-word blog post for a general audience interested in sustainability, focusing on the significance and benefits of sustainable agricultural practices like organic farming and agroforestry. Include real-world examples, innovative technologies, and insights from reputable sources. Conclude with a reflection on the importance of these practices and a call for collective efforts to embrace them

Goal

Context

Source

Expectations

File Home Insert Draw Design Layout References Mailings Review View Help

Clipboard Font Paragraph Styles Editing

Normal No Spacing Heading Heading 2

Find Replace Select Dictate Sensitivity Add-ins Editor Copilot

Draft with Copilot

Describe what you'd like to write, including notes or an outline, and Copilot can generate a draft to help you get started

0/2000

Generate Reference a file

File Home Insert Draw Design Layout References Mailings Review View Help

Clipboard Font Paragraph Styles Editing

Clipboard Paste Font Paragraph Styles Editing Voice Sensitivity Add-ins Editor Copilot

Draft with Copilot [Close]

Describe what you'd like to write, including notes or an outline, and Copilot can generate a draft to help you get started

0/2000

Generate Reference a file

Keep iterating to improve your prompts

You are an HR Manager who needs to prep for an upcoming Candidate hiring interview for a new position within the IT department for an AI Engineer. Create a prompt that will help you prepare for the interview.

Good

Help me prepare for an upcoming candidate interview for a new AI Engineer role in our IT department by creating a list of questions

Better

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please prepare a list of appropriate questions for the candidate, so that I looked prepared during the interview

Best

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please review the candidate's resume here: [/\[resume file\]](#) and the position detail here: [/\[position doc\]](#) and provide me a comprehensive list of questions that I can use to determine the candidate's fit against the position

Goal

Context

Source

Expectations



Expand the purpose of the prompt

3. Ask yourself these questions when prompting



Why am I using this prompt?

What is the context for this task.



What will I do with the output of this prompt?

Am I going to send it on to someone else?
Transform it into a different format?



Can I extend Copilot's remit to save more time

Can I ask Copilot to do a bigger task to automate more work?

impactful

entire

Example – extending the prompt’s purpose

We’re all familiar with creating a list of actions in Teams meetings but why are you doing this? If it is to send to someone else then why not get Copilot to write the email for you. It saves you time and improves the quality of your meeting follow up.

- *Prompt 1:* Recap the /Contoso and Fabrikam Sustainability meeting creating a table for action items, owners and due dates.
- *Prompt 2:* Write a follow up e-mail to the attendees of the /Contoso and Fabrikam Sustainability meeting with a table showing decisions made, another showing actions and owners and lastly a list of considerations for the next meeting

Goal

Context

Source

Expectations



Search (Ctrl+Alt+E)



QC



Activity



Chat



Teams



Calendar



Calls



OneDrive



Copilot



Apps

New chat



For Microsoft 365

Decode acronyms

What does [LLM] stand for?

Help me write

Write an email to my team about our top priorities for next quarter from file

Prep for that meeting

Help me prepare for meeting

Boost your knowledge

Help me learn about [topic].

Generate ideas

List ideas for a fun remote team building event

Stay on top

What do I have [Monday at 3 pm] ?

View prompts

Use / to insert people, files and more

Add people, files, and more for better results

0 / 2000









Keep it conversational

Following up

4. Keep the conversation going



Generating content ideas

Lead with broader requests, then give specific details about the content.



Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

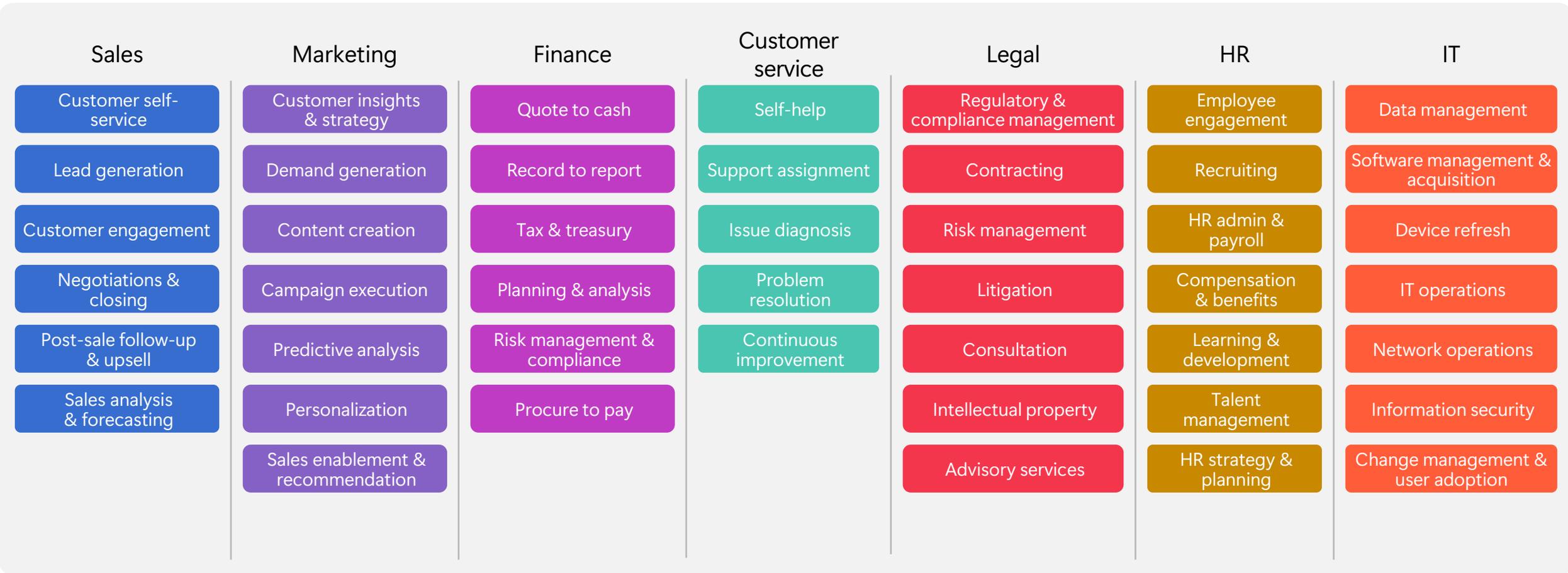
• Practical use cases for SMBs

- Finance
- Marketing
- Sales
- Human Resources
- Operations

Where do I start?



Key processes by function



Don't (just) summarise -
interrogate

Executive use case

File Home Insert Draw Design Layout References Mailings Review View Developer Help Acrobat Shape Format

Clipboard: Paste, Cut, Copy, Format Painter

Font: Calibri, 10.5, Bold, Italic, Underline, Text Color, Background Color

Paragraph: Bullets, Numbering, Indentation, Paragraph Spacing, Styles

Styles: Normal, No Spacing, Heading 1-5, Title, Subtitle, Subtle Emphasis

Editing: Find, Replace, Select

Adobe Acrobat: Create a PDF, Dictate

Sensitivity: Sensitivity

Add-ins: Add-ins, Editor Copilot

Copilot Summary

Copilot



Copilot
Your everyday AI companion

- Understand**
Summarize this doc
- Create an image**
Generate an image of [description]
- Understand quickly**
Explain this document in three sentences
- Write more confidently**
How can I more concisely describe [time management?]

Summarize this doc

Working on it...

Stop generating

Ask me anything about this document

Copilot Summary



Copilot

Summarize this doc

Copilot AI-generated content may be incorrect.

Here's a summary of the document:

The report examines the economic and social impacts of the nbn network in Australia, highlighting significant benefits in productivity, employment, and wellbeing.

- **Economic Impact:** The nbn network has enabled \$122 billion in GDP productivity benefits from 2012 to 2022, contributing to 0.14% annual multifactor productivity growth, which is nearly one quarter of all MFP growth during this period. ¹
- **Job Creation:** Between 2012 and 2022, the nbn network supported 169,000 additional jobs, with 101,000 of these held by women. An additional 113,000 jobs are expected to be created by 2030. ^{2 3}
- **Business Support:** The nbn network supported the creation of 87,000 additional businesses between 2012 and 2022, with a further 55,000 businesses expected to be supported by 2030. ^{4 5}
- **Equalizing Economic Opportunity:** Remote communities experienced up to 16 times the productivity benefit compared to major cities, and the most disadvantaged communities saw 5 times the productivity benefit compared to more advantaged areas. ^{6 7}
- **Improved Wellbeing:** 3 in 4 nbn users reported that having the nbn network at home positively impacted their life satisfaction in the last year, with fewer than 1% reporting a negative impact. ^{8 9}
- **Positive Employment Outcomes:** 77% of nbn users who worked from home or used internet-enabled job search platforms reported positive impacts on their employment outcomes. ^{10 11}
- **Educational Benefits:** 82% of nbn users who engaged in education from home reported positive impacts on their educational outcomes. ^{12 13}
- **Health and Environmental Benefits:** 77% of nbn users who accessed telehealth services reported positive health outcomes, and 85% felt the nbn network helped reduce their emissions. ^{14 15}

1 "Productivity: Ove..." 2 "Jobs: Supporting 1..." +13

Make the summary more formal Make the summary more casual

Ask me anything about this document

- Don't Summarise - Interrogate

- Compare these prompts

- Summarise this doc

- Create a reading guide for this report before I get started. Give me a two-sentence summary, and then a few bullet points about the most important arguments and supporting evidence. Then give me a list of key assumptions the author makes but doesn't address.

Copilot Summary



Copilot

Copilot AI-generated content may be incorrect.

Sure, Lisa! Here's a reading guide for the report:

Two-Sentence Summary: The report examines the economic and social impacts of the nbn network in Australia, highlighting significant benefits in productivity, employment, and wellbeing. It quantifies the positive effects of increased broadband speeds on GDP, job creation, business support, and overall life satisfaction for nbn users.

Most Important Arguments and Supporting Evidence:

- Economic Impact:** The nbn network has enabled \$122 billion in GDP productivity benefits from 2012 to 2022, contributing to 0.14% annual multifactor productivity growth, which is nearly one quarter of all MFP growth during this period.
- Job Creation:** Between 2012 and 2022, the nbn network supported 169,000 additional jobs, with 101,000 of these held by women. An additional 113,000 jobs are expected to be created by 2030.
- Business Support:** The nbn network supported the creation of 87,000 additional businesses between 2012 and 2022, with a further 55,000 businesses expected to be supported by 2030.
- Equalizing Economic Opportunity:** Remote communities experienced up to 16 times the productivity benefit compared to major cities, and the most disadvantaged communities saw 5 times the productivity benefit compared to more advantaged areas.
- Improved Wellbeing:** 3 in 4 nbn users reported that having the nbn network at home positively impacted their life satisfaction in the last year, with fewer than 1% reporting a negative impact.
- Positive Employment Outcomes:** 77% of nbn users who worked from home or used internet-enabled job search platforms reported positive impacts on their employment outcomes.
- Educational Benefits:** 82% of nbn users who engaged in education from home reported positive impacts on their educational outcomes.
- Health and Environmental Benefits:** 77% of nbn users who accessed telehealth services reported positive health outcomes, and 85% felt the nbn network helped reduce their emissions.

Key Assumptions the Author Makes but Doesn't Address:

- The report assumes that the positive impacts of the nbn network on GDP, employment, and business creation will continue at the same rate in the future without considering potential economic downturns or technological disruptions.
- It assumes that the benefits of increased broadband speeds are uniformly distributed across different regions and demographics, without addressing potential disparities in access and usage.
- The report does not account for the impact of alternative technologies, such as mobile networks, on the observed economic and social benefits.
- It assumes that the survey responses from nbn users accurately reflect the broader population's experiences and outcomes.

I hope this guide helps you get started with the report! If you have any more questions or need further assistance, feel free to ask.

Can you provide more details on the economic impact? What are the potential technological disruptions mentioned?

Ask me anything about this document

Microsoft 365 Copilot use cases and ideas for finance professionals

- Draft an email to your insurance company using Microsoft 365 Copilot in Outlook
- Analyse a financial spreadsheet using Microsoft 365 Copilot in Excel
- Create a financial analysis report using Microsoft 365 Copilot in Word
- Summarize financial results using Microsoft 365 Copilot in Word

Analyse a financial spreadsheet using
Microsoft 365 Copilot in Excel

Finance use case

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: Custom, \$, %, #, 00, 00

Styles: Normal, Bad, Good, Neutral

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

Sensitivity: Sensitivity

Add-ins: Add-ins, Analyze Data, Copilot

Adobe Acrobat: Create a PDF

C6 | 5/03/2023

Campaign Owner	Campaign Name	Launch Date	Campaign Type	Budget	Revenue	Total Users Targeted	Engaged Users
Halima, Yakubu	Late Jan Email	27-Jan	Digital marketing	\$ 500	\$ 6,980	4,205	465
Kovaleva, Anna	Billboards small	29-Jan	Brand marketing	\$ 250	\$ 4,732	2,000	500
Smith, Avery	Billboards large	3-Feb	Brand marketing	\$ 4,500	\$ 5,632	10,000	362
Glazkov, Ilya	Product review 3x	16-Jan	Customer Experience	\$ 2,750	\$ 5,676	35,000	5,418
Lawson, Andre	Targeted - Group 1	5-Mar	Digital marketing	\$ 5,800	\$ 136	10,000	285
Cartier, Christian	Billboards small	3-Jan	Brand marketing	\$ 800	\$ 8,703	2,500	496
Barden, Malik	Industry Conference	23-Feb	Customer Experience	\$ 600	\$ 4,540	950	618
Macedo, Beatriz	Targeted - Group 2	25-Feb	Digital marketing	\$ 800	\$ 788	2,000	367
Halima, Yakubu	Feb email - North	11-Feb	Digital marketing	\$ 500	\$ 12,423	4,205	902
Halima, Yakubu	Feb email - South	13-Mar	Digital marketing	\$ 500	\$ 9,293	3,687	673
Halima, Yakubu	Feb email - West	22-Mar	Digital marketing	\$ 500	\$ 16,342	5,278	1,029
Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470

Copilot

- Create formulas
Suggest a formula column
- Understand
Summarize using PivotTables or charts
- Advanced analysis
Get deeper analysis results using Python
- Apply color and formatting
Highlight all cells with [incomplete in red]
- Ask Copilot
How do I sum values based on [criteria]

Chat history

Show data insights

Show a suggestion for a formula column

Suggest conditional formatting

Ask a question, or tell me what you'd like to do with A1:H13

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color

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Show a suggestion for a formula column

Suggest conditional formatting

Create a pivot table to analyze the total revenue generated by each campaign type.

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

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Highlight all cells with [incomplete in red]
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Chat history

Create a pivot table to analyze the total revenue generated by each campaign type.

Analyzing A1:H13...

Stop generating

Ask a question, or tell me what you'd like to do with A1:H13

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color, Font Color, Wrap Text, Merge & Center

Alignment: General, Conditional Formatting, Format as Table

Number: \$, %, #, 00, 00

Styles: Normal, Bad, Good, Neutral

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

Sensitivity: Sensitivity, Add-ins

Add-ins: Add-ins, Analyze Data, Copilot

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Comments | Share

017

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Copilot

the total revenue generated by each campaign type.

I analyzed data in A1:H13, and here's what I found:

Campaign Type	Sum of Revenue
Brand marketing	\$19,067
Customer Experience	\$12,424
Digital marketing	\$45,962
Grand Total	\$77,453

+ Add to a new sheet

AI-generated content may be incorrect

Here's a PivotTable based on your prompt. The total revenue generated by each campaign type includes \$19,067 for Brand marketing and \$12,424 for Customer Experience. See the table above for more details.

Copy

AI-generated content may be incorrect

Get deeper analysis results using Python

Percentage of total 'Engaged Users' that comes from 'Campaign Owner' 'Kovaleva, Anna'

Insights for 'Budget'

Ask a question, or tell me what you'd like to do with A1:H13

Microphone Disabled

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Decimals

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Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

Sensitivity: Sensitivity

Add-ins: Add-ins, Analyze Data, Copilot

Adobe Acrobat: Create a PDF

Comments | Share

A1

Campaign Type	Sum of Revenue
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Customer Experience	\$ 12,424
Digital marketing	\$ 45,962
Grand Total	\$ 77,453

Copilot

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Grand Total	\$77,453

+ Add to a new sheet

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AI-generated content may be incorrect

Add to a new sheet

Done! I added to Sheet2.

To continue analyzing with more prompts, go back to the source table.

Go back to data | Undo

AI-generated content may be incorrect

Ask a question, or tell me how I can help

🗨️ | 🗣️ | ▶️

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color

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C6 | 5/03/2023

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Barden, Malik	Industry Conference	23-Feb	Customer Experience	\$ 600	\$ 4,540	950	618
Macedo, Beatriz	Targeted - Group 2	25-Feb	Digital marketing	\$ 800	\$ 788	2,000	367
Halima, Yakubu	Feb email - North	11-Feb	Digital marketing	\$ 500	\$ 12,423	4,205	902
Halima, Yakubu	Feb email - South	13-Mar	Digital marketing	\$ 500	\$ 9,293	3,687	673
Halima, Yakubu	Feb email - West	22-Mar	Digital marketing	\$ 500	\$ 16,342	5,278	1,029
Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470

Copilot

Customer Experience: \$12,767

Digital marketing	\$45,962
Grand Total	\$77,453

+ Add to a new sheet

AI-generated content may be incorrect

The total revenue generated by each campaign type includes \$19,067 for Brand marketing and \$12,424 for Customer Experience. See the PivotTable above for more details.

AI-generated content may be incorrect

Add to a new sheet

Done! I added to Sheet2.

To continue analyzing with more prompts, go back to the source table.

Undo

AI-generated content may be incorrect

Get deeper analysis results using Python

How many different 'Campaign Type' are there?

Percentage of total 'Revenue' for each 'Campaign Owner'

Calculate the ROI for each campaign

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Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color, Font Color

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Number: Custom, Currency, Percentage, Thousand Separator, Increase/Decrease Decimal

Styles: Normal, Bad, Good, Neutral

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

Sensitivity: Sensitivity

Add-ins: Add-ins, Analyze Data, Copilot

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C6 | 5/03/2023

Campaign Owner	Campaign Name	Launch Date	Campaign Type	Budget	Revenue	Total Users Targeted	Engaged Users
Halima, Yakubu	Late Jan Email	27-Jan	Digital marketing	\$ 500	\$ 6,980	4,205	465
Kovaleva, Anna	Billboards small	29-Jan	Brand marketing	\$ 250	\$ 4,732	2,000	500
Smith, Avery	Billboards large	3-Feb	Brand marketing	\$ 4,500	\$ 5,632	10,000	362
Glazkov, Ilya	Product review 3x	16-Jan	Customer Experience	\$ 2,750	\$ 5,676	35,000	5,418
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Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470

Copilot

Calculate the ROI for each campaign

Looking at A1:H13, here's 1 formula column to review and insert in Column I:

ROI

Calculates the return on investment (ROI) for each campaign by determining the percentage difference between the revenue generated and the budget spent, provided the budget is not zero.

```

=IF([@Budget]=0,0,(([@Revenue]-[@Budget])/[@Budget]))
    
```

Show explanation

	I
1	ROI
2	1296.0%
3	1792.8%
4	25.2%
5	106.4%
...	...

+ Insert column

AI-generated content may be incorrect

Give me another suggestion based on my prompt

Ask a question, or tell me what you'd like to do with A1:H13

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Copilot

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`=IF([@Budget]=0,0,(([@Revenue]-[@Budget])/[@Budget]))`

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	I
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3	1792.8%
4	25.2%
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+ Insert column

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Sensitivity: Sensitivity, Add-ins

Add-ins: Add-ins, Analyze Data, Copilot

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Copilot

ROI

Calculates the return on investment (ROI) for each campaign by determining the percentage difference between the revenue generated and the budget spent, provided the budget is not zero.

fx

`=IF([@Budget]=0,0,([@Revenue]-[@Budget])/[@Budget])`

Calculates the Return on Investment (ROI) for each campaign in the table by using the following steps:

- Uses the IF function to check if the "Budget" column value is equal to 0 (zero dollars).
- If the "Budget" is zero, the formula returns 0 (zero percent).
- If the "Budget" is not zero, the formula subtracts the "Budget" column value from the "Revenue" column value, then divides the result by the "Budget" column value.

Hide explanation

Give me another suggestion based on my prompt

Ask a question, or tell me what you'd like to do with A1:H13

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

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C6 | 5/03/2023

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Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470	247.7%

Copilot

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```

Show explanation

	I
1	ROI
2	1296.0%
3	1792.8%
4	25.2%
5	106.4%
...	...

+ Insert column

AI-generated content may be incorrect

Give me another suggestion based on my prompt

Ask a question, or tell me what you'd like to do with A1:H13

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Sensitivity: Sensitivity

Add-ins: Add-ins, Analyze Data, Copilot

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11 | ROI

Campaign Owner	Campaign Name	Launch Date	Campaign Type	Budget	Revenue	Total Users Targeted	Engaged Users	ROI
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Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470	247.7%

Copilot

revenue generated and the budget spent, provided the budget is not zero.

$$=IF([@Budget]=0,0,([@Revenue]-[@Budget])/[@Budget])$$

Show explanation

	I
1	ROI
2	1296.0%
3	1792.8%
4	25.2%
5	106.4%
...	...

AI-generated content may be incorrect

Insert column

Done! I inserted 'ROI' to column I.

Undo

AI-generated content may be incorrect

Show data insights

Show a suggestion for a formula column

Suggest conditional formatting

Ask a question, or tell me what you'd like to do with A1:H13

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

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Comments | Share

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Copilot

revenue generated and the budget spent, provided the budget is not zero.

$$=IF([\text{Budget}]=0,0,([\text{Revenue}]-[\text{Budget}])/[\text{Budget}])$$

Show explanation

	I
1	ROI
2	1296.0%
3	1792.8%
4	25.2%
5	106.4%
...	...

AI-generated content may be incorrect

Insert column

Done! I inserted 'ROI' to column I.

Undo

AI-generated content may be incorrect

Show data insights

Show a suggestion for a formula column

Suggest conditional formatting

That change looks good. However, I would like you to also calculate the ROI for each campaign type

Campaign Owner	Campaign Name	Launch Date	Campaign Type	Budget	Revenue	Total Users Targeted	Engaged Users	ROI
Halima, Yakubu	Late Jan Email	27-Jan	Digital marketing	\$ 500	\$ 6,980	4,205	465	1296.0%
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Copilot

campaign type

I analyzed data in A1:13, and here's what I found:

'ROI' by 'Campaign Type'

Average of ROI

0.0% 500.0% 1000.0% 1500.0%

+ Add to a new sheet

AI-generated content may be incorrect

The average ROI for each campaign type includes 1418.1% for Digital marketing and 935.3% for Brand marketing. See the table above for more details.

AI-generated content may be incorrect

Get deeper analysis results using Python

What is the average budget for each campaign type?

Show the total revenue for each campaign type

Ask a question, or tell me what you'd like to do with A1:13

Campaign Type	Average of ROI
Digital marketing	1418.1%
Brand marketing	935.3%
Customer Experience	336.9%
Grand Total	1027.1%

'ROI' by 'Campaign Type'

Campaign Type	Average of ROI
Digital marketing	1418.1%
Brand marketing	935.3%
Customer Experience	336.9%

Copilot

I analyzed data in this table and here's what I found:

'ROI' by 'Campaign Type'
Average of ROI

+ Add to a new sheet

AI-generated content may be incorrect

The average ROI for each campaign type includes 1418.1% for Digital marketing and 935.3% for Brand marketing. See the table above for more details.

AI-generated content may be incorrect

Add to a new sheet

Done! I added 'ROI' by 'Campaign Type' to Sheet3.

To continue analyzing with more prompts, go back to the source table.

Undo

AI-generated content may be incorrect

Ask a question, or tell me how I can help

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Copilot

brand marketing

0.0% 500.0% 1000.0% 1500.0%

+ Add to a new sheet

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The average ROI for each campaign type includes 1418.1% for Digital marketing and 935.3% for Brand marketing. See the table above for more details.

AI-generated content may be incorrect

Add to a new sheet

Done! I added 'ROI' by 'Campaign Type' to Sheet3.

To continue analyzing with more prompts, go back to the source table.

Undo

AI-generated content may be incorrect

Sort the campaign types by average ROI in descending order

How many campaigns are there for each campaign type?

Show data insights

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Copilot

Show data insights

I analyzed data in A1:13, and here's what I found:

'Budget' by 'Launch Date'

Sum of Budget

+ Add to a new sheet

AI-generated content may be incorrect

The total budget by launch date includes \$800 on 3-Jan and \$2,750 on 16-Jan. See the table above for more details.

Copy

AI-generated content may be incorrect

Get deeper analysis results using Python

Can I see another insight?

Add all insights to grid

Ask a question, or tell me what you'd like to do with A1:13

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Decimals

Styles: Normal, Bad, Good, Neutral

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Sort & Filter, Find & Select

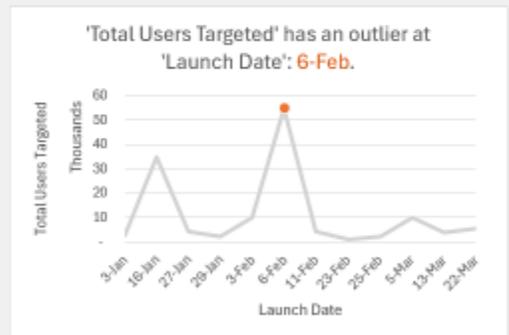
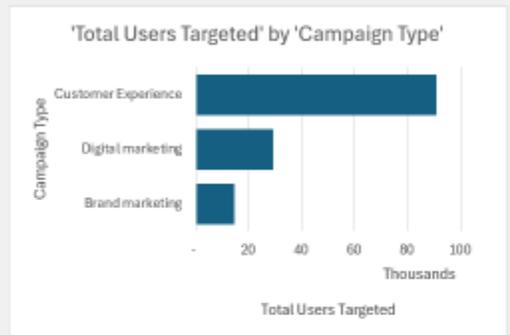
Sensitivity: Sensitivity

Add-ins: Add-ins, Analyze Data, Copilot, Create a PDF

Comments | Share

A1

A B C D E F G H I J K L M N O P Q R S T



Copilot

I analyzed data in A1:13, and here's what I found:

'Budget' by 'Launch Date'
Sum of Budget

+ Add to a new sheet

AI-generated content may be incorrect

The total budget by launch date includes \$800 on 3-Jan and \$2,750 on 16-Jan. See the table above for more details.

AI-generated content may be incorrect

Add all insights to grid

Done! I added all insights from Table1 to a new sheet.

To continue analyzing with more prompts, go back to the source table.

Go back to data | Undo

AI-generated content may be incorrect

Ask a question, or tell me how I can help

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat Table Design

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Comments | Share

C6 | 5/03/2023

Campaign Owner	Campaign Name	Launch Date	Campaign Type	Budget	Revenue	Total Users Targeted	Engaged Users	ROI
Halima, Yakubu	Late Jan Email	27-Jan	Digital marketing	\$ 500	\$ 6,980	4,205	465	1296.0%
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Cartier, Christian	Billboards small	3-Jan	Brand marketing	\$ 800	\$ 8,703	2,500	496	987.9%
Barden, Malik	Industry Conference	23-Feb	Customer Experience	\$ 600	\$ 4,540	950	618	656.7%
Macedo, Beatriz	Targeted - Group 2	25-Feb	Digital marketing	\$ 800	\$ 768	2,000	367	-1.5%
Halima, Yakubu	Feb email - North	11-Feb	Digital marketing	\$ 500	\$ 12,423	4,205	902	2384.6%
Halima, Yakubu	Feb email - South	13-Mar	Digital marketing	\$ 500	\$ 9,293	3,687	673	1758.6%
Halima, Yakubu	Feb email - West	22-Mar	Digital marketing	\$ 500	\$ 16,342	5,278	1,029	3168.4%
Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470	247.7%

Copilot

Launch Date

+ Add to a new sheet

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Undo

AI-generated content may be incorrect

Get deeper analysis results using Python

Can I see another insight?

Add all insights to grid

Add data bars to the Revenue column and sort by Revenue in descending order

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Copilot

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Add data bars to the Revenue column and sort by Revenue in descending order

OK! Looking at **A1:13**, here are 2 changes to review and apply:

- Apply a custom sort on column 'Revenue' in table Table1
- Data Bar:** Create a data bar conditional formatting rule with gradient blue on F2:F13

Apply

AI-generated content may be incorrect

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Adobe Acrobat: Create a PDF

C6 | 27/01/2023

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Copilot

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AI-generated content may be incorrect

Apply

Done! I made the changes.

Undo

AI-generated content may be incorrect

Bold the first column

Show items with 'Campaign Type' of 'Digital marketing'

Ask a question, or tell me what you'd like to do with A1:13

Create a financial analysis report using
Microsoft 365 Copilot in Word

Finance use case

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Clipboard: Paste, Cut, Copy, Format Painter

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Paragraph: Bulleted List, Numbered List, Decrease Indent, Increase Indent, Paragraph Spacing, Paragraph Style

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Editing: Find, Replace, Select

Adobe Acrobat: Create a PDF

Voice: Dictate

Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot

Copilot Summary [Check for new summary](#)

The document provides details on various marketing campaigns, including the campaign owner, name, launch date, type, budget, revenue, total users targeted, engaged users, ROI, and days since launch. Campaigns by Halima Yakubu, Kovaleva Anna, Smith Avery, Glazkov Ilya, Lawson Andre, Cartier Christian, Barden Malik, Macedo Beatriz, and Connors Morgan are listed with their respective metrics. Additionally, it includes average ROI by campaign type and total revenue by campaign name.

[Copy](#) [Open in chat](#)

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Connors, Morgan	Product mention 5x	6-Feb	Customer Experience	\$ 635	\$ 2,208	55,000	1,470	247.72%	356

Copilot
Your everyday AI companion

- Understand**
Summarize this doc
- Create an image**
Generate an image of [description]
- Discover key points**
What arguments does this document make?
- Add a brand image**
Suggest brand images of [description]

Summarize this doc [Is there a call to action?](#)

Ask me anything about this document

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Adobe Acrobat: Create a PDF

Voice: Dictate

Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot

Write an article based on File

Create a proposal based on File

Draft an email about

I'm the Director of Finance for Fabrikam. Please create a Q1 Marketing Campaign Analysis report based on the attached file, which provides data on our Q1 marketing campaigns. Include the following sections in the report: Executive Summary, Data Analysis, and Recommendations. /Type the name of a file for Copilot to work from

- All
- Files
- Meetings
- Emails
- Fabrikam Q1 marketing campaign data
- MASTERCLASS - Practical AI Skills for Nonprofits
- MASTERCLASS - Practical AI Skills for Nonprofits
- 002 - Prompt Masterclass.pptx
- Copilot Prompt-a-thon for Partners.pptx

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Clipboard Font Paragraph Styles

Find Replace Select Adobe Acrobat Voice Sensitivity Add-ins Editor Copilot

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[Fabrikam Q1 marketing campaign data.docx](#)

Fabrikam Q1 mar... x



Q1 Marketing Campaign Analysis

Fabrikam Q1 Marketing Campaign Data

Executive Summary

The Q1 marketing campaigns for Fabrikam have showcased a diverse range of strategies, including digital marketing, brand marketing, and customer experience initiatives. The analysis of these campaigns reveals significant insights into their performance, budget allocation, and return on investment (ROI). Key findings include the highest ROI achieved by digital marketing campaigns and the substantial revenue generated by specific campaigns such as the "Feb email - West."

Data Analysis

Campaign Performance Overview

- **Highest ROI:** The digital marketing campaign "Feb email - West" delivered the highest ROI at 3168.40%, with a budget of \$500 and revenue of \$16,342.
- **Revenue Generation:** The top three revenue-generating campaigns were "Feb email - West" (\$16,342), "Billboards small" (\$13,435), and "Feb email - North" (\$12,423).
- **Engaged Users:** The "Product review 3x" campaign targeted 35,000 users and engaged 5,418, achieving an ROI of 106.40%.
- **Budget Allocation:** The "Targeted - Group 1" campaign had the highest budget at \$5,800 but resulted in the lowest ROI at -97.66%.

Average ROI by Campaign Type

- Digital Marketing: 1418.07%
- Brand Marketing: 935.28%
- Customer Experience: 336.93%

Total Revenue by Campaign Type

- Digital Marketing: \$45,962
- Brand Marketing: \$19,067
- Customer Experience: \$12,424

Budget by Launch Date

- **Top Budget Campaigns:** "Targeted - Group 1" (\$5,800), "Billboards small" (\$3,500), "Product review 3x" (\$2,750).
- **Lowest Budget Campaigns:** "Feb email - North," "Feb email - South" each at \$500.

Recommendations

- **Focus on Digital Marketing:** Given the impressive ROI and revenue generated by digital marketing campaigns, allocate more budget towards similar campaigns in future quarters.
- **Optimize Underperforming Campaigns:** Review and analyze the underperformance of high-budget campaigns such as "Targeted - Group 1" to identify areas for improvement.
- **Leverage Successful Strategies:** Replicate and expand the strategies used in successful campaigns like "Feb email - West" to maximize engagement and revenue.
- **Balanced Budget Allocation:** Ensure a more balanced budget allocation across different campaign types to diversify risk and capitalize on varying strengths.

1 of 1 | I'm the Director of F... | AI-generated content may be incorrect

Keep it | For example, "Make it formal"

Q1 Marketing Campaign Analysis

Fabrikam Q1 Marketing Campaign Data

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Q1 Marketing Campaign Analysis

Fabrikam Q1 Marketing Campaign Data

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Focus Area	Details
Focus on Digital Marketing	Allocate more budget towards similar campaigns in future quarters due to impressive ROI and revenue.
Optimize Underperforming Campaigns	Review and analyze "Targeted - Group 1" to identify areas for improvement.
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< 1 of 1 > Visualize as a table AI-generated content may be incorrect

Keep it For example, "Remove the row about..."

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos (Body), 11, Bold, Italic, Underline, Text Color, Background Color, Font Color

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Editor Copilot

Q1 Marketing Campaign Analysis

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< To fine tune the draft, add some detail and regenerate

Add a column describing the impact for each recommendation →

Q1 Marketing Campaign Analysis

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Focus on Digital Marketing	Allocate more budget towards similar campaigns in future quarters due to impressive ROI and revenue.	Increased ROI and revenue generation.
Optimize Underperforming Campaigns	Review and analyze "Targeted - Group 1" to identify areas for improvement.	Improved performance of high-budget campaigns.
Leverage Successful Strategies	Replicate and expand strategies used in successful campaigns like "Feb email - West".	Maximized engagement and revenue.
Balanced Budget Allocation	Ensure a more balanced budget allocation across different campaign types.	Diversified risk and capitalized on varying strengths.

3 of 3 Visualize as a table AI-generated content may be incorrect

Keep it For example, "Make table content more concise"

Q1 Marketing Campaign Analysis

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- Revenue Generation:** The top three revenue-generating campaigns were "Feb email - West" (\$16,342), "Billboards small" (\$13,435), and "Feb email - North" (\$12,423).
- Engaged Users:** The "Product review 3x" campaign targeted 35,000 users and engaged 5,418, achieving an ROI of 106.40%.
- Budget Allocation:** The "Targeted - Group 1" campaign had the highest budget at \$5,800 but resulted in the lowest ROI at -97.66%.

Average ROI by Campaign Type

- Digital Marketing: 1418.07%
- Brand Marketing: 935.28%
- Customer Experience: 336.93%

Total Revenue by Campaign Type

- Digital Marketing: \$45,962
- Brand Marketing: \$19,067
- Customer Experience: \$12,424

Budget by Launch Date

- Top Budget Campaigns:** "Targeted - Group 1" (\$5,800), "Billboards large" (\$4,500), and "Product review 3x" (\$2,750).
- Lowest Budget Campaigns:** "Feb email - North," "Feb email - South," and "Feb email - West" each at \$500.

Recommendations

Focus Area	Details	Impact
Focus on Digital Marketing	Allocate more budget towards similar campaigns in future quarters due to impressive ROI and revenue.	Increased ROI and revenue generation.
Optimize Underperforming Campaigns	Review and analyze "Targeted - Group 1" to identify areas for improvement.	Improved performance of high-budget campaigns.
Leverage Successful Strategies	Replicate and expand strategies used in successful campaigns like "Feb email - West".	Maximized engagement and revenue.
Balanced Budget Allocation	Ensure a more balanced budget allocation across different campaign types.	Diversified risk and capitalized on varying strengths.

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Executive Summary

The Q1 marketing campaigns for Fabrikam have showcased a diverse range of strategies, including digital marketing, brand marketing, and customer experience initiatives. The analysis of these campaigns reveals significant insights into their performance, budget allocation, and return on investment (ROI). Key findings include the highest ROI achieved by digital marketing campaigns and the substantial revenue generated by specific campaigns such as the "Feb email - West."

Data Analysis

Campaign Performance Overview

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Balanced Budget Allocation	Ensure a more balanced budget allocation across different campaign types.	Diversified risk and capitalized on varying strengths.

Enhance Audience Segmentation Utilize advanced analytics to refine audience segmentation. Target more precise demographics for higher conversion rates.

Invest in Cutting-Edge Tools Adopt the latest marketing technologies and tools. Stay ahead of the competition and enhance campaign effectiveness.

Foster Cross-Channel Integration Ensure seamless integration and consistent messaging across all marketing channels. Strengthened brand presence and cohesive customer journey.

Monitor and Adapt to Market Trends Stay agile by continuously monitoring market trends and adjusting strategies accordingly. Maintain relevance and competitiveness in a dynamic market landscape.

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- Get calendar info**
When's my next meeting with Lidia Holloway ?
- Understand the main points**
Give me a bulleted list of key points from Thunderbolt eBike Battery...
- Check Teams mentions**
Summarize Teams messages where I was @mentioned this week.
- Understand quickly**
Provide a comprehensive summary of my emails about [the FY24 Sales Report]
- Maximize your time!**
What's on my calendar tomorrow morning?
- Visualize the data**
Create an image of a bar chart demonstrating growth.

View prompts

Catch me up on my emails about the Adventure Works manufacturing expansion project

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Copilot Catch me up on my emails about...

Catch me up on my emails about the Adventure Works manufacturing expansion project.

- Sure, Alex! Here are the key points from your recent emails about the Adventure Works manufacturing expansion project:
- Updated Quote for eBike Production Line Machinery:** Bob Kay from Northwind Manufacturing sent an updated quote for the new production line machinery. The total cost is \$850,000, which includes installation and a 2-year warranty. The delivery time is approximately 4 months from the confirmation date ¹.
 - Final Review of Expansion Contract:** Allan Deyoung sent an email regarding the final draft of the contract for the manufacturing facility expansion. There have been last-minute adjustments to the terms related to supply chain commitments and penalty clauses due to recent fluctuations in material costs. Allan requested your review of the financial implications of these changes. Megan Bowen and Lee Gu also provided their input on the marketing and sales impact of the revised contract terms ².
 - Task Assignment:** You assigned a task to Megan Bowen to reassess the project timeline with the operations team. This task is related to the Manufacturing Expansion Contract Review ³.

Let me know if you need more details or if there's anything else I can assist you with!

1 Updated Quote for eBike ... 2 Re: Final Review of Expans... 3 You've been assigned a task

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Can you provide more details on the updated quote for the eBike production line machinery?

What were Megan Bowen and Lee Gu's inputs on the marketing and sales impact of the revised contract terms?

Can you summarize the financial implications of the changes in the expansion contract? View prompts

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...
 been adjustments to the terms related to supply chain commitments and penalty clauses. These changes could potentially impact the overall project budget and financial planning ¹.

- Sales Projections:** Lee Gu has expressed concerns about the sales impact of the revised contract terms. Specifically, there is a potential 15% variance from the original forecasts for Q4 due to the adjusted production start dates ¹.
- Marketing Campaigns:** Megan Bowen mentioned that aligning the marketing campaigns with the new project timeline will be challenging but manageable. This could affect the timing and effectiveness of marketing efforts, potentially influencing revenue generation ³.
- Payment Structure:** The contract review meeting notes indicate that the payment structure involves a 50% upfront payment upon contract signing, with the remaining 50% split across project phases. This structure aims to ensure alignment with project progress and timely financial management ².
- Cost and Risk Management:** The meeting notes also highlight discussions on potential cost overruns and risk management strategies. Aligning financial decisions with sales and demand forecasts is crucial to mitigate these risks ².

These changes require careful consideration to ensure that the financial implications are managed effectively and that the project remains on track.

Let me know if you need more details or have any other questions!

1 A Re: Final Review of Expans... 2 Accounting Guidance for ...

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Can you provide more details on the potential cost overruns and risk management strategies?

What are the next steps for reviewing the financial implications with the team?

Can you summarize the input provided by Megan Bowen and Lee Gu on the marketing and sales impact? View prompts

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3. **Marketing Campaigns:** Megan Bowen mentioned that aligning the marketing campaigns with the new project timeline will be challenging but manageable. This could affect the timing and effectiveness of marketing efforts, potentially influencing revenue generation (1).

4. **Payment Structure:** The contract review meeting notes indicate that the payment structure involves a 50% upfront payment upon contract signing, with the remaining 50% split across project phases. This structure aims to ensure alignment with project progress and timely financial management (2).

5. **Cost and Risk Management:** The meeting notes also highlight discussions on potential cost overruns and risk management strategies. Aligning financial decisions with sales and demand forecasts is crucial to mitigate these risks (2).

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1 A Re: Final Review of Expans... 2 Accounting Guidance for ...

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What are the next steps for reviewing the financial implications with the team?

Can you summarize the input provided by Megan Bowen and Lee Gu on the marketing and sales impact? View prompts

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Certainly, Alex! The recent changes in the expansion contract for the Adventure Works manufacturing project have several financial implications:

- Supply Chain Commitments and Penalty Clauses:** Due to recent fluctuations in material costs, there have been adjustments to the terms related to supply chain commitments and penalty clauses. These changes could potentially impact the overall project budget and financial planning (1).
- Sales Projections:** Lee Gu has expressed concerns about the sales impact of the revised contract terms. Specifically, there is a potential 15% variance from the original forecasts for Q4 due to the adjusted production start dates (1).
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Catch me up on my emails about...

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- 1 A Re: Final Review of Expans...
- 2 Accounting Guidance for ...

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Manufacturing Expansion Contract - Adventure Works & Northwind

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Aptos (Body) 11 A A B I U ... Normal No Spacing Heading 1 Find Dictate Designer

1. Scope of the Project
This Agreement outlines the terms of the expansion project for Adventure Works' manufacturing facility. The purpose of the expansion is to meet increased sales demand, providing an additional production capacity for the Thunderbolt series of eBikes and other bicycle models. The project will also address supply chain improvements and provide a long-term solution for growing operational demands.

2. Project Start Date and Duration

- Project Start Date: October 1, 2024
- Project End Date (estimated): September 30, 2025
- Total Duration: 12 months

3. Total Project Cost

- Total Cost: \$2,500,000 USD

This cost includes all materials, labor, construction, and consulting fees associated with the expansion of the manufacturing facility.

4. Monthly Fee

- Monthly Fee: \$208,333 USD

The monthly fee includes project management, labor, and operational costs. Payments are due at the end of each calendar month.

5. License Term
The license for the use of the upgraded facility and production line is set for **5 years** from the completion date of the project (anticipated as September 30, 2025). The license will automatically renew unless either party provides a written termination notice 60 days before the expiration of the term.

6. Terms and Conditions for Invoicing

1. Payment Schedule:

- 50% upfront payment due within 15 days of contract signing.
- 25% payment due upon completion of the initial phase of the manufacturing expansion (installation of equipment and initial site preparations).
- 25% final payment due upon project completion and final inspection approval by Northwind.

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Lee Gu

Allan Deyoung

Megan Bowen

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Allan Deyoung

Lee Gu

Allan Deyoung

Megan Bowen

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Today

Summarize this meeting so far and provide key points and action items.

Copilot 4:14 PM

Here's a summary of the key points and action items from the meeting:

Key Points:

- The meeting focused on reviewing the Northland contract for the new manufacturing expansion project.
- Alex suggested adjusting payment terms to milestone-based payments to reduce cash flow strain.
- Lee supported the idea for more flexibility in managing project phases.
- Megan raised concerns about the tight timeline for the manufacturing expansion, suggesting

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100% 22 Pt Give Feedback to Microsoft

Allan Deyoung

Lee Gu

Allan Deyoung

Megan Bowen

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Megan raised concerns about the tight timeline for the manufacturing expansion, suggesting it might lead to operational risks.

- Allan agreed to look into extending the timeline and to discuss adjusting payment terms to milestone-based payments with Northland's legal and financial team.

Action Items:

- Payment Terms Adjustment** - Allan to discuss with Northland's legal and financial team about adjusting to milestone-based payments. [1]
- Timeline Extension** - Allan to explore extending the project timeline to mitigate operational risks. [2]

These adjustments aim to protect both parties and smooth out cash flow issues while aligning the expansion with sales forecasts and marketing efforts.

Recap meeting so far

List action items

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Recording is ready
- Adele Vance 9/18
You: Absolutely. I can start working on that and co...
- Contract Review Meeting: MOU with ... 9/17
Recording is ready
- Nestor Wilke 9/13
You: Hey Nestor, I wanted to bring something to y...
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You: Thanks for creating this group chat Debra Be...
- Research sync: smart tech in next gen... 9/11
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- Debra Berger 9/11
Awesome insights, Alex. The report you put toget...

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- Manufacturing Expansion Co... payment structure.
- Review the timeline again, based on Megan's concern. Probably needs more thought.
 - Follow up on potential risks with Lee.
 - Will send updated contract to Northwind after I circle back with the team on these adjustments.

Follow-up tasks

Task	Assign...	Due
1 Review Payment Terms with Finance and Legal	Allan ...	Mon, Sep 23
2 Reassess Project Timeline with the Operations Team	Allan ... Mega...	Mon, Sep 23
3 Evaluate Risk Mitigation Strategy with Lee Gu	Allan ... Lee Gu	Tue, Sep 24
4 Review Contract Payment Terms and Timeline	Alex ...	Mon, Sep 23

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- Lee supported the need for more flexibility in managing project phases.
- Megan raised concerns about the tight timeline for the manufacturing expansion, suggesting it might lead to operational risks.
- Allan agreed to look into extending the timeline and to discuss adjusting payment terms to milestone-based payments with Northland's legal and financial team.

Action Items:

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Ask me anything about this meeting

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Speakers Topics Chapters

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Alex Wilber

Lee Gu

Megan Bowen

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These adjustments aim to protect both parties and smooth out cash flow issues while aligning the expansion with sales forecasts and marketing efforts.

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Summarize the timeline adjustments discussed in the meeting.

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During the meeting, the following points were discussed regarding timeline adjustments for the manufacturing expansion project:

- Concerns Raised:** Megan expressed concerns that the current timeline is too tight, which might lead to operational risks or rushing through critical phases. 1
- Proposal for Extension:** Allan agreed to look into extending the timeline to reduce the likelihood of rushing the work. 2
- Benefits of Extension:** Extending the timeline would provide more flexibility in managing phases, align the expansion with sales forecasts, and allow for a focused marketing push without operational scrambles. 3

These discussions highlight the team's consideration for a more flexible and risk-mitigated approach to the project timeline.

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Recap the meeting

List action items

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Navigation

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Headings Pages Results

- Scope of the Project
- This contract is made between Adventure Works...
- Project Start Date and Duration
- Total Project Cost
- Monthly Fee
- License Term
- Terms and Conditions for Invoicing
 - Milestone 1: Initial Design and Planning (1...
 - Milestone 2: Site Preparation and Initial Co...
 - Milestone 3: Installation of Equipment and...
 - Milestone 4: Final Construction and Testin...
 - Milestone 5: Project Completion and Han...
- Invoicing Terms
- Project Timeline
- Required Documentation and Regulatory Appro...
- Liability and Insurance
- Warranty and Support
- Termination
- Confidentiality
- Governing Law
- Notices
- Signatures

CONTRACT AGREEMENT

This Contract Agreement ("Agreement") is made effective as of **October 1, 2024**, by and between **Adventure Works** ("Client") and **Northwind** ("Company").

Scope of the Project

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Project Start Date and Duration

- Project Start Date:** October 1, 2024
- Project End Date** (estimated): September 30, 2025
- Total Duration:** 12 months

Total Project Cost

- Total Cost:** \$2,500,000 USD

This cost includes all materials, labor, construction, and consulting fees associated with the expansion of the manufacturing facility.

Monthly Fee

- Monthly Fee:** \$208,333 USD

The monthly fee includes project management, labor, and operational costs. Payments are due at the end of each calendar month.

License Term

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Terms and Conditions for Invoicing

Payment for the project will be made based on the completion of the following project milestones:

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Ask
How can I more concisely describe [time management?]

Chat history

Summarize this doc Is there a call to action?

What is the commitment and monthly payment for this project?



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Tell me more about Adventure Works

Ask me anything about this document



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Tell me more about Adventure Works

What are the terms and conditions for invoicing? Please list the key items here.



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Terms and Conditions for Invoicing

Payment for the project will be made based on the completion of the following project milestones:

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completion of specific project milestones

- Milestone 1:** Initial Design and Planning (10% of total project cost), due upon completion and approval of all design and planning documents
- Milestone 2:** Site Preparation and Initial Construction (20% of total project cost), due once site preparation and initial construction work has commenced and passed inspection
- Milestone 3:** Installation of Equipment and Production Lines (30% of total project cost), due upon completion of the installation of the new production lines and associated equipment
- Milestone 4:** Final Construction and Testing (30% of total project cost), due after final construction is completed, including any structural modifications, and initial testing of equipment
- Milestone 5:** Project Completion and Handover (10% of total project cost), due upon final inspection, handover of the completed facility, and Adventure Works' approval
- Invoice Issuance:** Invoices will be issued upon the completion of each milestone and are payable within 30 days of receipt
- Additional Work:** If additional work is required beyond the original scope, the

Ask me anything about this document

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New chat, Shield, List, More, Close

- 4. **Payment Structure:** The contract review meeting notes indicate that the payment structure involves a 50% upfront payment upon contract signing, with the remaining 50% split across project phases. This structure aims to ensure alignment with project progress and timely financial management 2.
- 5. **Cost and Risk Management:** The meeting notes also highlight discussions on potential cost overruns and risk management strategies. Aligning financial decisions with sales and demand forecasts is crucial to mitigate these risks 2.

These changes require careful consideration to ensure that the financial implications are managed effectively and that the project remains on track.

Let me know if you need more details or have any other questions!

1 A Re: Final Review of Expans... 2 Accounting Guidance for ...

Edit in Pages

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2 of 30 responses AI-generated content may be incorrect

You can find your page here: Can you summarize the . If you want to add other responses to it, just click "Edit in Pages".

Can you provide more details on the potential cost overruns and risk management strategies?

What are the next steps for reviewing the financial implications with the team?

Can you summarize the input provided by Megan Bowen and Lee Gu on the marketing and sales impact? View prompts

Create a meeting agenda based on the Manufacturing Expansion Contract Review meeting and associated emails with the objective of aligning on the account recommendations for this deal.

Add people, files, and more for better results

183 / 14000

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commitments and penalty clauses due to material cost fluctuations ¹.

- Review the payment structure and timeline adjustments ².

3. Financial Implications (5 minutes)

- Alex Wilber to present the financial implications of the revised contract terms ¹.
- Discuss potential cost overruns and risk management strategies ³.

4. Sales and Marketing Impact (5 minutes)

- Lee Gu to address concerns about the sales impact and potential 15% variance from original forecasts for Q4 ¹.
- Megan Bowen to discuss the alignment of marketing campaigns with the new project timeline ¹.

5. Recommendations and Next Steps (5 minutes)

- Finalize the recommendations for the contract adjustments.
- Assign action items and set deadlines for any follow-up tasks.

6. Q&A and Closing Remarks (5 minutes)

- Open floor for any questions or additional comments.
- Summarize key takeaways and confirm next steps.

Please review this agenda and let me know if there are any changes or additional items you would like to include.

1 A Re: Final Review of Expans... 2 M You have late tasks 3 M You have late tasks

Edit in Pages Copy 3 of 30 responses AI-generated content may be incorrect

Could you summarize the input from Megan Bowen and Lee Gu regarding the marketing and sales impact? View prompts

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Marketing

Microsoft 365 Copilot use cases and ideas for marketing professionals

- Conduct market analysis using Microsoft 365 Copilot Chat
- Brainstorm marketing campaign ideas using Microsoft 365 Copilot in Loop
- Consolidate multiple marketing reports using Microsoft 365 Copilot in Word
- Analyse a market trend spreadsheet using Microsoft 365 Copilot in Excel

Consolidate multiple marketing reports
using Microsoft 365 Copilot in Word

Marketing use case

Product Name: Mystic Spice Premium Chai Tea

Product Description:

Indulge in the rich and aromatic embrace of Mystic Spice Premium Chai Tea, a meticulously crafted blend that pays homage to the timeless traditions of Indian chai. Each cup offers an enchanting journey through the vibrant landscapes of India, bringing you an authentic chai experience right in your home.

Key Features:

- Authentic Blend:** Our [chai](#) is a harmonious mix of premium black tea leaves and a signature selection of ground spices, including cinnamon, cardamom, cloves, ginger, and black pepper. This age-old recipe promises an authentic and robust flavor in every sip.
- Health-Enhancing Ingredients:** Each ingredient in Mystic Spice Chai Tea is chosen for its natural health benefits. Ginger and cardamom aid in digestion, cinnamon helps regulate blood sugar, and cloves add a boost of antioxidants.
- Rich Aroma and Flavor:** The warm, spicy aroma and deep, invigorating taste of our [chai](#) make it the perfect beverage to start your day or unwind in the evening. The flavors are intense yet balanced, creating a comforting and soothing experience.
- Versatile Brewing Options:** Whether you love your [chai](#) steaming hot, as a refreshing iced tea, or as a creamy latte, our blend is versatile enough to suit any preference. Easy brewing instructions are included to help you enjoy your [chai](#) just the way you like it.
- Sustainably Sourced:** Committed to sustainability, we source our ingredients from small-scale farms that practice organic farming, ensuring not only the finest quality but also the welfare of our planet.
- Elegant Packaging:** Mystic Spice Chai Tea comes in beautifully designed, eco-friendly packaging, making it an ideal gift for tea lovers or a luxurious treat for yourself.
- Customer Satisfaction Guarantee:** We stand behind our product and offer a satisfaction guarantee. If Mystic Spice Chai Tea doesn't meet your expectations, we are committed to making it right.

Ideal For: Tea enthusiasts, health-conscious individuals, lovers of warm, spicy beverages, and anyone looking to explore the rich flavors of traditional Indian chai.

Enjoy the authentic taste of India with Mystic Spice Premium Chai Tea - where every cup is a story of flavor and heritage.

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Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot

Copilot Summary [Check for new summary](#)

Date	Total Chai Sales (units)	Artisanal Chai Sales (units)	Premade Chai Sales (units)	Social Media Engagement (views)	Online Searches for Chai
1/1/2023	784	197	587	5373	3393
1/31/2023	659	448	211	6874	2663
2/28/2023	729	473	256	7744	2546
3/31/2023	292	338	-46	4468	2371
4/30/2023	935	499	436	1705	2996
5/31/2023	863	315	548	3599	599
6/30/2023	807	235	572	9666	5016
7/30/2023	459	177	282	26304	2510
8/29/2023	109	82	27	11691	2594
9/30/2023	586	388	198	6230	2784
10/31/2023	659	448	211	6874	2663
11/30/2023	729	473	256	7744	2546
12/31/2023	1117	690	427	8312	2987

Promotion Plan for Chai Tea in Latin America

A document that outlines the strategy, objectives, and tactics for marketing Chai tea in the region

Executive Summary

Chai tea is a spiced tea drink that originated in India and has become popular around the world. It is a versatile beverage that can be enjoyed hot or cold, with or without milk, and with different spices and sweeteners. Chai tea has many health benefits, such as boosting immunity, reducing inflammation, and improving digestion. It also has a rich cultural and historical significance, as it is often associated with hospitality, friendship, and relaxation.

The Latin American market offers a great opportunity for Chai tea, as the region has a growing demand for healthy, natural, and exotic products. The region also has a strong tea culture, especially in countries like Argentina, Chile, and Uruguay, where mate is a popular drink. Chai tea can appeal to both tea lovers and coffee drinkers, as it offers a similar caffeine boost and a more complex flavor profile. Chai tea can also fit into the lifestyle and preferences of Latin American consumers, who enjoy socializing, sharing, and indulging in sweet treats.

The promotion plan for Chai tea in Latin America aims to achieve the following objectives:

- Increase awareness and interest in Chai tea among the target audience
- Position Chai tea as a premium, natural, and healthy product that offers a unique and satisfying experience
- Encourage trial and purchase of Chai tea through various channels and incentives
- Build loyalty and retention among Chai tea consumers through engagement and feedback

The promotion plan for Chai tea in Latin America will use a combination of tactics, such as:

- Creating a catchy and memorable brand name and logo for Chai tea
- Developing a website and social media presence for Chai tea that showcases its benefits, features, and stories
- Launching a digital marketing campaign that uses SEO, SEM, email marketing, and influencer marketing to reach and attract potential customers
- Distributing free samples and coupons of Chai tea in strategic locations, such as supermarkets, cafes, and health stores
- Organizing events and contests that invite people to try and share Chai tea with their friends and family
- Partnering with local businesses and organizations that share the same values and vision as Chai tea

The promotion plan for Chai tea in Latin America will be implemented over a period of 12 months, with a budget of \$100,000. The plan will be monitored and evaluated using key performance indicators, such as website traffic, social media engagement, email open rates, conversion rates, sales volume, customer satisfaction, and retention rates.

Potential Taglines for Chai Tea

Here are 10 possible taglines that could be used to promote Chai tea in Latin America:

- Chai tea: The spice of life
- Chai tea: A world of flavor in a cup
- Chai tea: Discover the magic of India
- Chai tea: The perfect blend of health and pleasure
- Chai tea: More than just tea, a way of life
- Chai tea: A drink for all seasons and reasons
- Chai tea: The ultimate indulgence for your senses
- Chai tea: A sweet escape from the everyday
- Chai tea: Share the warmth, share the love
- Chai tea: Treat yourself to something special

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- All Files Meetings Emails
- Contoso Chai Tea market trends 2023
- Promotion Plan for Chai Tea in Latin America
- Mystic Spice Premium Chai Tea product description
- Adatum 5 Year Financial Results
- Fabrikam Q1 marketing campaign data
- MASTERCLASS - Practical AI Skills for Nonprofits

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Contoso Chai Te... | Promotion Plan f... | +1



Spice Premium Chai Tea

Prepared by the Marketing Director for Contoso Beverage

Introduction

Mystic Spice Premium Chai Tea is an exquisite blend that captures the essence of traditional Indian chai. This report aims to provide a comprehensive analysis of the Latin American market for Mystic Spice Premium Chai Tea, combining insights from market trends, product description, and a detailed promotion plan for the region.

Product Description

Mystic Spice Premium Chai Tea is a meticulously crafted blend that offers an authentic chai experience. The key features of this product include:

- **Authentic Blend:** A mix of premium black tea leaves and a signature selection of spices like cinnamon, cardamom, cloves, ginger, and black pepper, promising a robust flavor in every sip.
- **Health-Enhancing Ingredients:** Ingredients chosen for their natural health benefits, such as ginger aiding in digestion and cinnamon helping to regulate blood sugar.
- **Rich Aroma and Flavor:** The warm, spicy aroma and invigorating taste make it perfect for any time of day.
- **Versatile Brewing Options:** Suitable for preparation as hot tea, iced tea, or a creamy latte.
- **Sustainably Sourced:** Ingredients from small-scale farms practicing organic farming.
- **Elegant Packaging:** Eco-friendly packaging, ideal as a gift or personal treat.
- **Customer Satisfaction Guarantee:** We offer a satisfaction guarantee to ensure customer delight.

Mystic Spice Premium Chai Tea is ideal for tea enthusiasts, health-conscious individuals, and anyone looking to explore the rich flavors of traditional Indian chai.

Market Trends for Chai Tea in 2023

An analysis of the Contoso Chai Tea market trends for 2023 reveals significant insights:

- **Sales Performance:** There has been an overall fluctuation in total chai sales, with notable peaks in January (784 units) and December (1117 units).
- **Artisanal vs. Premade Sales:** Artisanal chai sales have consistently performed well, with a significant increase in December (690 units), indicating a growing preference for high-quality, handcrafted products.

consumer interest during mid-year.

These trends underscore the potential for Mystic Spice Premium Chai Tea to capitalize on the demand for artisanal, high-quality chai products, particularly through robust online marketing and social media engagement.

Promotion Plan for Latin America

The promotion plan for introducing Mystic Spice Premium Chai Tea to the Latin American market outlines several strategic objectives and tactics:

Objectives

- Increase awareness and interest in Mystic Spice Premium Chai Tea among the target audience.
- Position the tea as a premium, natural, and healthy product offering a unique and satisfying experience.
- Encourage trial and purchase through various channels and incentives.
- Build loyalty and retention among consumers via engagement and feedback.

Tactics

- **Branding:** Develop a catchy and memorable brand name and logo.
- **Online Presence:** Create a website and social media profiles to showcase benefits, features, and stories.
- **Digital Marketing Campaigns:** Utilize SEO, SEM, email marketing, and influencer partnerships to reach potential customers.
- **Free Samples and Coupons:** Distribute these in strategic locations such as supermarkets, cafes, and health stores.
- **Events and Contests:** Organize events that invite people to try and share the tea with friends and family.
- **Partnerships:** Collaborate with local businesses and organizations that align with our values and vision.

Implementation Plan

The promotion plan will be implemented over 12 months with a budget of \$100,000. Key performance indicators will monitor and evaluate success, including website traffic, social media engagement, email open rates, conversion rates, sales volume, customer satisfaction, and retention rates.

Potential Taglines

Below are ten potential taglines for promoting Mystic Spice Premium Chai Tea in Latin America:

1 of 1 | I'm the LATAM Mark... | AI-generated content may be incorrect

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- **Sales Performance:** There has been an overall fluctuation in total chai sales, with notable peaks in January (784 units) and December (1117 units).
- **Artisanal vs. Premade Sales:** Artisanal chai sales have consistently performed well, with a significant increase in December (690 units), indicating a growing preference for high-quality, handcrafted products.

consumer interest during mid-year.

These trends underscore the potential for Mystic Spice Premium Chai Tea to capitalize on the demand for artisanal, high-quality chai products, particularly through robust online marketing and social media engagement.

Promotion Plan for Latin America

The promotion plan for introducing Mystic Spice Premium Chai Tea to the Latin American market outlines several strategic objectives and tactics:

Objectives

- Increase awareness and interest in Mystic Spice Premium Chai Tea among the target audience.
- Position the tea as a premium, natural, and healthy product offering a unique and satisfying experience.
- Encourage trial and purchase through various channels and incentives.
- Build loyalty and retention among consumers via engagement and feedback.

Tactics

- **Branding:** Develop a catchy and memorable brand name and logo.
- **Online Presence:** Create a website and social media profiles to showcase benefits, features, and stories.
- **Digital Marketing Campaigns:** Utilize SEO, SEM, email marketing, and influencer partnerships to reach potential customers.
- **Free Samples and Coupons:** Distribute these in strategic locations such as supermarkets, cafes, and health stores.
- **Events and Contests:** Organize events that invite people to try and share the tea with friends and family.
- **Partnerships:** Collaborate with local businesses and organizations that align with our values and vision.

Implementation Plan

The promotion plan will be implemented over 12 months with a budget of \$100,000. Key performance indicators will monitor and evaluate success, including website traffic, social media engagement, email open rates, conversion rates, sales volume, customer satisfaction, and retention rates.

Potential Taglines

Below are ten potential taglines for promoting Mystic Spice Premium Chai Tea in Latin America:

< To fine tune the draft, add some detail and regenerate

This report looks good. However, please add a section titled Competitive Analysis. Review the beverage companies in Latin America that sell Chai Tea and then provide information in this section on the strengths and weaknesses of these competitors, their market share, and their pricing strategies. >

File Home Insert Draw Design Layout References Mailings Review View Developer Help Acrobat

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Display (Head) 28, Bold, Italic, Underline, Text Color, Background Color, Font Color

Paragraph: Bullets, Numbering, Indentation, Spacing, Paragraph Style

Styles: Normal, No Spacing, Heading 1, Heading 2, Heading 3, Title, Subtitle, Subtle Emphasis, Emphasis, Intense Emphasis

Editing: Find, Replace, Select

Adobe Acrobat: Create a PDF

Voice: Dictate

Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot

- Chai tea: A world of flavor in a cup
- Chai tea: Discover the magic of India
- Chai tea: The perfect blend of health and pleasure
- Chai tea: More than just tea, a way of life
- Chai tea: A drink for all seasons and reasons
- Chai tea: The ultimate indulgence for your senses
- Chai tea: A sweet escape from the everyday
- Chai tea: Share the warmth, share the love
- Chai tea: Treat yourself to something special

Competitive Analysis

In Latin America, several beverage companies sell Chai Tea, each with their unique strengths, weaknesses, market share, and pricing strategies. Here is an overview:

Competitor 1: Teavana

- Strengths: Strong brand recognition, extensive distribution network, high-quality products.
- Weaknesses: Higher price point, limited local flavors, less focus on artisanal approach.
- Market Share: 25%
- Pricing Strategy: Premium pricing

Competitor 2: Twinings

- Strengths: Well-established brand, diverse product range, competitive pricing.
- Weaknesses: Traditional marketing strategies, less engagement with younger demographics.
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Competitor 3: La Virginia

- Strengths: Strong presence in local markets, affordable prices, good flavor variety.
- Weaknesses: Limited international reach, less premium positioning.
- Market Share: 15%
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Understanding the strengths and weaknesses of these competitors allows Mystic Spice Premium Chai Tea to position itself effectively in the market. By leveraging unique selling points such as artisanal quality, health benefits, and sustainable sourcing, along with a well-planned promotion strategy, Mystic Spice can gain a competitive edge and capture a significant share of the Latin American market.

Mystic Spice Premium Chai Tea presents a significant opportunity for Contoso Beverage to expand its footprint in the Latin American market. By leveraging the insights from market trends, understanding the competitive landscape, and implementing a strategic promotion plan, Mystic Spice can effectively position itself as a premium, health-conscious choice that resonates with the lifestyle and preferences of Latin American consumers.

< 2 of 2 > I'm the LATAM Mark... AI-generated content may be incorrect

Keep it For example, "Make it professional"

Clipboard: Paste, Cut, Copy, Format Painter

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< To fine tune the draft, add some detail and regenerate

Nice job! One last thing. Please add a section titled Distribution Channels. Review the distribution channels used to sell Chai Tea in Latin America and then provide information in this section on the types of retailers, wholesalers, and distributors used →

- Chai tea: The **spice** of life
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Distribution Channels

To successfully market Mystic Spice Premium Chai Tea in Latin America, it is crucial to understand the distribution channels utilized for chai tea sales in the region. The key distribution channels include:

Retailers

- Supermarkets and Hypermarkets: These large retail stores offer wide visibility and **reach to** a diverse customer base.
- Specialty Tea and Coffee Shops: Ideal for targeting tea enthusiasts seeking premium and artisanal products.
- Health Food Stores: These stores cater to health-conscious consumers looking for natural and healthy beverages.
- Online Retailers: E-commerce platforms provide convenience and accessibility, reaching a broader audience.

Wholesalers

- Regional Wholesalers: These wholesalers distribute products to various local retailers, ensuring coverage across different areas.
- Food Service Distributors: Supplying cafes, restaurants, and hotels, these distributors help increase brand presence in the hospitality sector.

Distributors

- National Distributors: These distributors manage large-scale distribution across the country, ensuring consistent supply and availability.
- Specialty Beverage Distributors: Focused on niche markets, these distributors cater to specialty stores and premium retail outlets.

By leveraging these distribution channels, Mystic Spice Premium Chai Tea can effectively reach its target audience in Latin America, ensuring widespread availability and accessibility.

Conclusion

Mystic Spice Premium Chai Tea presents a significant opportunity for Contoso Beverage to expand its footprint in the Latin American market. By leveraging the insights from market trends, understanding the competitive landscape, and implementing a strategic promotion plan, Mystic Spice can effectively position itself as a premium, health-conscious choice that resonates with the lifestyle and preferences of Latin American consumers.

< 3 of 3 > I'm the LATAM Mark... AI-generated content may be incorrect

Keep it For example, "Make the tone friendlier" →

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LATAM Market Analysis Report for Mystic Spice Premium Chai Tea

Prepared by the Marketing Director for Contoso Beverage

Introduction

Mystic Spice Premium Chai Tea is an exquisite blend that captures the essence of traditional Indian chai. This report aims to provide a comprehensive analysis of the Latin American market for Mystic Spice Premium Chai Tea, combining insights from market trends, product description, and a promotion plan for the region.

- Write a Prompt...
- Auto Rewrite
- Visualize as a Table

Product Description

Mystic Spice Premium Chai Tea is a meticulously crafted blend that offers an authentic chai experience. The key features of this product include:

- Authentic Blend:** A mix of premium black tea leaves and a signature selection of spices like cinnamon, cardamom, cloves, ginger, and black pepper, promising a robust flavor in every sip.
- Health-Enhancing Ingredients:** Ingredients chosen for their natural health benefits, such as ginger aiding in digestion and cinnamon helping to regulate blood sugar.
- Rich Aroma and Flavor:** The warm, spicy aroma and invigorating taste make it perfect for any time of day.
- Versatile Brewing Options:** Suitable for preparation as hot tea, iced tea, or a creamy latte.
- Sustainably Sourced:** Ingredients from small-scale farms practicing organic farming.
- Elegant Packaging:** Eco-friendly packaging, ideal as a gift or personal treat.
- Customer Satisfaction Guarantee:** We offer a satisfaction guarantee to ensure customer delight.

Mystic Spice Premium Chai Tea is ideal for tea enthusiasts, health-conscious individuals, and anyone looking to explore the rich flavors of traditional Indian chai.

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- Online Searches:** The highest number of searches was in June (5016), reflecting increased consumer interest during mid-year.

These trends underscore the potential for Mystic Spice Premium Chai Tea to capitalize on the demand for artisanal, high-quality chai products, particularly through robust online marketing and social media engagement.

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The promotion plan for introducing Mystic Spice Premium Chai Tea to the Latin American market outlines several strategic objectives and tactics:

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Rewrite with Copilot 1 of 3

Mystic Spice Premium Chai Tea captures the essence of traditional Indian chai. This report analyzes the Latin American market for Mystic Spice Premium Chai Tea, covering market trends, product details, and a promotion plan for the region.

AI-generated content may be incorrect

Replace

Insert below

What do you want Copilot to change?

ginger aiding in digestion and cinnamon helping to regulate blood sugar.

- Rich Aroma and Flavor: The warm, spicy aroma and invigorating taste make it perfect for any time of day.
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Microsoft 365 Copilot use cases and ideas for sales professionals

- Create a market research report using Microsoft 365 Copilot in Loop
- Create a sales presentation using Microsoft 365 Copilot in PowerPoint
- Prepare your meeting notes from emails using Microsoft 365 Copilot Chat
- Compare supplier agreements using Microsoft 365 Copilot in Word

Create a sales presentation using
Microsoft 365 Copilot in PowerPoint

Sales use case

Market Trend Report: Contoso Protein Plus

The New Social Media Sensation

Report Date: January 22, 2024

In recent weeks, Contoso Protein Plus has become a significant social media sensation, and the brand is riding the wave of popularity following a video that was released on social media. This trend analysis explores the key factors contributing to the sudden surge in demand for Contoso Protein Plus. Today, Contoso Beverage Ltd. has limited its sales of Contoso Protein Plus to the Southwest US, which is the company's home base. Given the market trend for this product, Contoso must decide whether it will be viable to take this product nationally.

The Viral Reel

The catalyst for the rapid rise in demand for Contoso Protein Plus can be traced back to a captivating and influential reel posted on social media platforms, particularly Instagram and TikTok. The reel featured a fitness influencer who highlighted the product's taste, effectiveness, and versatility. The compelling content showcased the influencer seamlessly integrating Contoso Protein Plus into their daily fitness routine, and it resonated with a broad audience.

Key Factors Behind the Hype

- Engaging Content:** The viral reel successfully conveyed the product's appeal through engaging visuals and informative content. It captivated viewers by demonstrating the ease of incorporating Contoso Protein Plus into a daily fitness regimen.
- Influencer Marketing:** The power of influencer marketing cannot be overstated. The fitness influencer's endorsement of the product lent credibility to its quality and efficacy.

3. Taste and Flavor Varieties: Contoso Protein Plus' reputation for delicious and diverse flavors was a key selling point in the viral content. This made the product appear more appealing and consumer-friendly.

4. Health and Fitness Trends: The ongoing surge in health and fitness consciousness, combined with an increase in the number of people embracing workout routines and active lifestyles, created a receptive market for a product like Contoso Protein Plus.

5. Easy Availability: The product's accessibility through various online retailers further fueled the hype. Online platforms offered the convenience of purchasing, and this was underscored by the influencer's recommendation.

6. Positive Reviews and Testimonials: The reel was not an isolated case. Several consumers and fitness enthusiasts shared their positive experiences with Contoso Protein Plus on social media. This user-generated content added to the product's credibility and helped establish a robust online community around it.

7. Word of Mouth: Social media platforms foster the rapid spread of trends through word of mouth. Users who tried the product shared their experiences, inspiring more individuals to follow suit.

Impacts on Contoso Protein Plus's Market Position

As a result of this viral reel and the subsequent social media hype, Contoso Protein Plus has experienced a remarkable boost in sales and brand recognition. It has positioned itself as a trendy, go-to choice for those looking to supplement their fitness and nutrition routines. The brand's marketing team has actively engaged with the viral content to amplify its reach and impact.

Conclusion

The power of social media in influencing consumer choices and creating trends cannot be underestimated. Contoso Protein Plus' recent surge in popularity serves as a testament to the potential of viral content and influencer marketing in the digital age. As the fitness and health industry continues to thrive, it is likely that Contoso Protein Plus will maintain its



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- 📄 Thunderbolt Specifications v1.0
Jamie Lawson modified May 9, 2024
- 📄 P2P Booked Fares Fact Sheet
Jamie Lawson modified January 30, 2018
- 📄 Asset management FAQ
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Here's the outline for the presentation I'm generating:

- Introduction
- The New Social Media Sensation
- The Viral Reel
- Key Factors Behind the Hype
- Impacts on Contoso Protein Plus's Market Position
- Conclusion



Generating slides (93%)...

Stop generating

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Overview of Contoso Protein Plus

- Social Media Sensation
 - Contoso Protein Plus has gained significant popularity on social media.
 - A viral video contributed to the surge in demand.
- Current Market Scope
 - Sales are currently limited to the Southwest US.
 - This region is the company's home base.
- Future Market Potential
 - Contoso must evaluate the viability of national distribution.
 - Market trends indicate potential for broader reach.



Contoso Protein Plus has become a social media sensation due to a viral video. Currently, sales are limited to the Southwest US. Contoso must decide if national distribution is viable given the market trends.

Original Content:

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Market Position
• Conclusion

Copilot AI-generated content may be incorrect.

Here's a draft of Market Trend Report-Protein shake.docx as a presentation.

I've drafted 14 slides and made some changes based on your doc:

- Included speaker notes containing additional details
- Added images to make your deck more engaging
- Applied layouts to organise slides

You can also use **Designer** for adjusting layouts.

What is the report date for the Market Trend Report?

What are the key factors behind the hype of Contoso Protein Plus?

Ask me anything about this presentation



- 1 Market Trend Report
- 2 Agenda
- 3 Overview of Contoso Protein Plus
- 4 Report Date
- 5 The Viral Reel
- 6 Engaging Content

Overview of Contoso Protein Plus

- Social Media Sensation
 - Contoso Protein Plus has gained significant popularity on social media.
 - A viral video contributed to the surge in demand.
- Current Market Scope
 - Sales are currently limited to the Southwest US.
 - This region is the company's home base.
- Future Market Potential
 - Contoso must evaluate the viability of national distribution.
 - Market trends indicate potential for broader reach.



Contoso Protein Plus has become a social media sensation due to a viral video. Currently, sales are limited to the Southwest US. Contoso must decide if national distribution is viable given the market trends.

Original Content:
 In recent weeks, Contoso Protein Plus has become a significant social media sensation, and the brand is riding the wave of popularity following a video that was released on social media. This trend analysis explores the key factors contributing to the sudden surge in demand for Contoso Protein Plus. Today, Contoso Beverage Ltd. has limited its sales of Contoso Protein Plus to the Southwest US, which is the company's home base. Given the market trend for this product, Contoso must decide whether it will be viable to take this product nationally.

Copilot

- Conclusion

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What is the report date for the Market Trend Report?

What are the key factors behind the hype of Contoso Protein Plus?

Add a slide at the end of the presentation for Q&A.



This slide is dedicated to addressing any questions or comments from the audience. Encourage participants to share their thoughts or seek clarification on any aspects of the presentation. Engaging in a dialogue will help reinforce key points and provide additional insights. Thank you for your attention, and I look forward to your questions.

Copilot

- Added images to make your deck more engaging
- Applied layouts to organise slides

You can also use **Designer** for adjusting layouts.

Add a slide at the end of the presentation for Q&A.

Copilot AI-generated content may be incorrect.

OK, here you go. A Q&A slide has been added at the end of the presentation.

If you'd like, **Designer** also has other layout options to consider.

What is the report date for the Market Trend Report?

What are the key factors behind the hype of Contoso Protein Plus?

Ask me anything about this presentation

7 Influencer Marketing

8 Taste and Flavor Varieties

9 Health and Fitness Trends

10 Positive Reviews and Testimonials

11 Easy Availability

12 Insights on Contoso Protein Plus's Market Position



Health and Fitness Trends

- Surge in Health and Fitness Consciousness
 - Growing awareness about health and fitness
 - Increased interest in maintaining a healthy lifestyle
- Embracing Workout Routines
 - More people adopting regular workout routines
 - Active lifestyles becoming more popular
- Receptive Market for Contoso Protein Plus
 - Product aligns with current health trends
 - Increased demand for health supplements

The rise in health and fitness awareness has led to more people adopting active lifestyles and workout routines. This trend has created a receptive market for products like Contoso Protein Plus, which aligns with the current demand for health supplements.

Original Content:

4. Health and Fitness Trends: The ongoing surge in health and fitness consciousness, combined with an increase in the number of people embracing workout routines and active lifestyles, created a receptive market for a product like Contoso Protein Plus.

Copilot

I've added speaker notes to this slide. These notes do not contain visual context. Review the notes and make edits manually, or undo and try again.



Please suggest a list of questions that the audience may have during this presentation

Copilot AI-generated content may be incorrect

I've added speaker notes to this slide. These notes do not contain visual context. Review the notes and make edits manually, or undo and try again.



What is the report date for the Market Trend Report?

What are the key factors behind the hype of Contoso Protein Plus?

Add a slide about the health benefits of protein





The Health Benefits of Protein

- Protein supports muscle growth and repair after exercise.
- It aids in maintaining a healthy weight by promoting satiety.
- Protein plays a vital role in hormone production and immune function.

Protein is an essential macronutrient that offers numerous health benefits. It is crucial for muscle growth and repair, especially post-exercise. Additionally, protein contributes to weight management by increasing feelings of fullness, which can help control appetite. Moreover, it is vital for hormone production and supports the immune system, ensuring overall health and wellness.

Copilot AI-generated content may be incorrect

I've added speaker notes to this slide. These notes do not contain visual context. Review the notes and make edits manually, or undo and try again.

Add a slide about the health benefits of protein

Copilot AI-generated content may be incorrect

OK, here you go. A slide about the health benefits of protein has been added.

If you'd like, **Designer** also has other layout options to consider.

What is the report date for the Market Trend Report?

What are the key factors behind the hype of Contoso Protein Plus?

Ask me anything about this presentation

Human Resources

Microsoft 365 Copilot use cases and ideas for human resources professionals

- Create a job description using Microsoft 365 Copilot in Word
- Analyze resumes and make a recommendation using Microsoft 365 Copilot in Word
- Create interview questions using Microsoft 365 Copilot in Loop
- Compose an email offer letter using Microsoft 365 Copilot in Outlook

Analyze resumes and make a recommendation
using Microsoft 365 Copilot in Word

Human Resources use case

Job Description: Senior Animation Designer

Graphic Design Institute

Overview

We are seeking a highly skilled and experienced Senior Animation Designer to join our dynamic team at the Graphic Design Institute. The successful candidate will lead animation design projects, provide mentorship to junior designers, and ensure the creation of high-quality, visually appealing, and user-friendly designs that meet project requirements.

Responsibilities

Collaboration

- Work collaboratively with other designers, developers, and stakeholders to create high-quality designs.
- Lead brainstorming sessions to generate creative ideas.
- Provide constructive feedback to other team members.
- Communicate effectively with team members, stakeholders, and clients to ensure project requirements are met.

Design

- Create visually appealing designs that are user-friendly, accessible, and responsive.
- Use design software such as Adobe Creative Suite, Sketch, or Figma to create designs.
- Create wireframes, prototypes, and mockups to illustrate design concepts.
- Ensure designs are optimized for different devices and platforms.
- Provide guidance to junior designers on design best practices.

Communication

- Provide regular updates on project progress.
- Respond to feedback and make necessary changes to designs.
- Present designs to stakeholders and clients.

Research

- Conduct research to identify user needs, preferences, and behaviors to inform design decisions.
- Conduct user interviews and surveys to gather feedback.
- Analyze user data to identify trends and patterns.
- Stay [up-to-date](#) with the latest design trends and technologies.

Testing

- Conduct usability testing to ensure designs meet user needs and are accessible to all users.
- Create test plans and scenarios.
- Conduct user testing sessions.
- Analyze test results and make necessary changes to designs.
- Provide guidance to junior designers on testing best practices.

Documentation

- Create and maintain design documentation, including style guides, design systems, and design specifications.
- Ensure design documentation is up-to-date and accurate.
- Provide guidance to junior designers on documentation best practices.

Professional Development

- Stay [up-to-date](#) with the latest design trends, tools, and technologies to improve design quality and efficiency.
- Attend design conferences and workshops.
- Participate in online design communities.
- Take courses to learn new design skills.

Leadership

- Lead the design team and provide guidance to junior designers.
- Provide mentorship and coaching to junior designers.
- Lead design reviews and provide constructive feedback to team members.
- Ensure designs meet project requirements and are delivered on time.

Qualifications

- [Bachelor's degree in Graphic Design](#), Animation, or a related field.
- Minimum of 5 years of experience in animation design or a related field.
- Proficiency in design software such as Adobe Creative Suite, Sketch, or Figma.
- Strong portfolio showcasing user-friendly, accessible, and responsive designs.
- Excellent communication, collaboration, and leadership skills.
- Proven ability to conduct research and usability testing.
- Experience in creating and maintaining design documentation.
- Commitment to staying [up-to-date](#) with the latest design trends and technologies.

We look forward to welcoming a talented and passionate Senior Animation Designer to our team. If you meet the above qualifications and are excited about this opportunity, please apply with your resume and portfolio.

Copilot Summary

Alex Wilber is an experienced Animation Designer with a strong background in both 2D and 3D animation, looking to leverage his skills in a dynamic work environment.

- Work Experience:** Alex has worked as an Animation Designer at Spark Animation since January 2021, leading a team of 12 animators and collaborating with various stakeholders to produce high-quality 3D animations using software like Maya, Blender, and Adobe Creative Suite. [1] [2]
- Previous Roles:** Prior to Spark Animation, Alex worked at Pixel Studio from June 2018 to December 2020, creating 2D and 3D animations for various projects and at Flash Animation as a Junior Animation Designer from September 2016 to May 2018, assisting in 2D animations for web and mobile platforms. [3] [4]
- Education and Skills:** Alex holds a Bachelor of Arts in Fine Arts with a major in Animation from the University of Art and Design and is pursuing a Master of Arts in Animation from Online University. He is proficient in various animation software and has strong creative and collaborative skills. [5] [6]

Copy Open in chat

AI-generated content may be incorrect

Resume: Alex Wilber

Animation Designer

Contact Information

- Email: alex.wilber@example.com

Objective

To apply my creative and technical skills as an Animation Designer in a dynamic and innovative environment.

Work Experience

- Spark Animation: Animation Designer (Jan 2021 - Present)

Lead a team of 12 animators to create high-quality 3D animations for various projects, including feature films, commercials, and video games. Collaborate with directors, producers, and clients to ensure the artistic vision and quality standards are met. Use Maya, Blender, and Adobe Creative Suite to design and animate characters, environments, and effects.

- Pixel Studio: Animation Designer (Jun 2018 - Dec 2020)

Education

- University of Art and Design, New York, NY (Sep 2010 - Jun 2014)

Bachelor of Arts in Fine Arts, Major in Animation

- Online University, Remote (Sep 2015 - 2020)

Master of Arts in Animation, Expected Graduation: Dec 2025

Skills

- Proficient in various animation software, such as Maya, Blender, Toon Boom, Flash, Photoshop, After Effects, and Animate
- Experienced in both 2D and 3D animation, as well as motion graphics and visual effects
- Creative and artistic, with a keen eye for detail, color, and composition
- Team player, with excellent communication and collaboration skills
- Adaptable and flexible, able to work on different styles and genres of animation

Interests

- Watching animated movies and shows
- Playing video games
- Drawing and painting

File Home Insert Draw Design Layout References Mailings Review View Developer Help Acrobat

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos (Body), 11, Bold, Italic, Underline, Text Color, Background Color

Paragraph: Bullets, Numbering, Indentation, Paragraph Spacing, Text Alignment, Text Orientation

Styles: Normal, No Spacing, Heading 1, Heading 2, Title, Subtitle, Subtle Emphasis, Emphasis, Intense Emphasis, Strong

Editing: Find, Replace, Select

Adobe Acrobat: Create a PDF

Voice: Dictate

Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot

Produce insights from File | Create an outline for | Produce summary of File

I'm the Hiring Manager for Graphic Design Institute. We're hiring for the position of Senior Animation Designer. Please create a report that compares the attached resumes to the requirements for a Senior Animation Designer in the attached job description file and rank the candidates from most qualified to least qualified. Thank you! [Graphic Design Institute - Job Description.docx/res](#)

Graphic Design

- All
- Files
- Meetings
- Emails

- Graphic Design Institute - Design Team Responsibilities
- Resume - Holly Dickson
- Resume - Patti Fernandez
- Resume - Nestor Wilke
- Resume - Alex Wilber
- Adatum 5 Year Financial Results

File Home Insert Draw Design Layout References Mailings Review View Developer Help Acrobat

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Sensitivity: Sensitivity

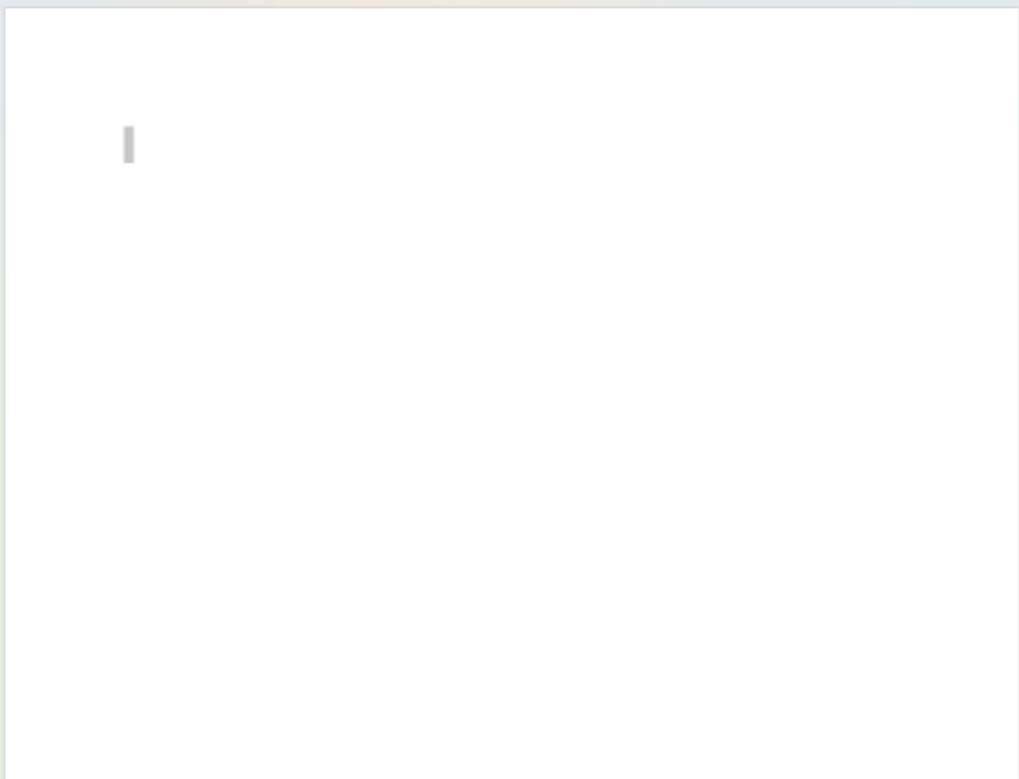
Add-ins: Add-ins

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Graphic Design I... Resume - Holly... +3



Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Display (Head) 28, Bold, Italic, Underline, Text Color, Background Color, Font Color

Paragraph: Bullets, Numbering, Indentation, Spacing, Paragraph Style

Styles: AaBbCcD, AaBbCcD, AaBb, AaBbC, AaBbCc, AaB, AaBbCc, AaBbCcC, AaBbCcC, AaBbCcC, AaBbCcC, AaBbCcC

Editing: Find, Replace, Select

Adobe Acrobat: Create a PDF

Voice: Dictate

Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot: Editor Copilot

- Research and usability testing
 - Maintaining design documentation
 - Professional development
 - Leadership
- Qualifications:
- Bachelor's degree in Graphic Design, Animation, or related field
 - Minimum of 5 years of experience in animation design or related field
 - Proficiency in design software (Adobe Creative Suite, Sketch, Figma)
 - Strong portfolio
 - Excellent communication, collaboration, and leadership skills
 - Proven ability in research and usability testing
 - Experience in creating and maintaining design documentation

Alex Wilber

- Qualifications:
- Bachelor of Arts in Fine Arts (Animation), pursuing Master of Arts in Animation
 - 7 years of experience in animation design, including senior roles
 - Proficient in Maya, Blender, Toon Boom, Flash, Photoshop, After Effects
 - Experience leading a team and managing projects
- Strengths:
- Met the experience requirement with extensive senior role experience
 - Strong portfolio with leadership and collaboration skills
 - Proficiency in multiple animation software
 - Published author and certified expert
- Weaknesses:

- Currently pursuing a Master's degree, which may imply a current focus on education alongside work

Nestor Wilke

- Qualifications:
- Bachelor of Fine Arts in Animation
 - Over 25 years of experience in the industry
 - Proficient in Adobe After Effects, Autodesk Maya, Cinema 4D
 - Extensive senior and managerial experience
- Strengths:
- Vast industry experience and leadership roles
 - Strong portfolio
 - Proficiency in relevant animation software
 - Proven ability in research and usability testing

Ranking of Candidates

1. Nestor Wilke - Most qualified with extensive experience and senior role expertise.
2. Patti Fernandez - Highly qualified with strong experience and leadership skills.
3. Alex Wilber - Very qualified with ample experience and current educational pursuit.
4. Holly Dickson - Least qualified due to limited experience and lack of senior role experience.

Conclusion

Based on the comparison of the candidates' resumes to the job description, Nestor Wilke is the most qualified candidate for the Senior Animation Designer position, followed closely by Patti Fernandez. Alex Wilber, while experienced, is ranked third due to his ongoing education. Holly Dickson, while experienced, does not meet the minimum experience requirement for

1 of 1 I'm the Hiring Mana... AI-generated content may be incorrect

Keep it [Refresh] [Delete] For example, "Make it formal" [Arrow]

File Home Insert Draw Design Layout References Mailings Review View Developer Help Acrobat

Clipboard: Paste, Cut, Copy, Format Painter

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Sensitivity: Sensitivity

Add-ins: Add-ins

Editor Copilot

- Excellent communication, collaboration, and leadership skills
- Proven ability in research and usability testing
- Experience in creating and maintaining design documentation

- Published author and certified expert

Weaknesses:

- Currently pursuing a Master's degree, which may imply a current focus on education alongside work

Nestor Wilke

Qualifications:

- Bachelor of Fine Arts in Animation
- Over 25 years of experience in the industry
- Proficient in Adobe After Effects, Autodesk Maya, Cinema 4D
- Extensive senior and managerial experience

Strengths:

- Vast industry experience and leadership roles
- Strong portfolio
- Proficiency in relevant animation software
- Proven ability in research and usability testing

Weaknesses:

- None identified; highly experienced and qualified

Patti Fernandez

Qualifications:

- Bachelor of Fine Arts in Animation
- 10 years of experience in the industry
- Proficient in Maya, Blender, Adobe Animate, and Unity
- Experience in leading teams and managing projects

Strengths:

Ranking of Candidates

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2. Patti Fernandez - Highly qualified with strong experience and leadership skills.
3. Alex Wilber - Very qualified with ample experience and current educational pursuit.
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Draft with Copilot

Please create a table comparing the 4 candidates

48/2000

Generate Reference your content

- Currently pursuing a Master's degree, which may imply a current focus on education alongside work

Nestor Wilke

Qualifications:

- Bachelor of Fine Arts in Animation
- Over 25 years of experience in the industry
- Proficient in Adobe After Effects, Autodesk Maya, Cinema 4D
- Extensive senior and managerial experience

Strengths:

- Vast industry experience and leadership roles
- Strong portfolio
- Proficiency in relevant animation software
- Proven ability in research and usability testing

Weaknesses:

- None identified; highly experienced and qualified

Patti Fernandez

Qualifications:

- Bachelor of Fine Arts in Animation
- 10 years of experience in the industry
- Proficient in Maya, Blender, Adobe Animate, and Unity
- Experience in leading teams and managing projects

Strengths:

- Meets the experience requirement with senior and lead animator roles
- Strong portfolio
- Proficiency in multiple animation software
- Leadership and team management skills

Weaknesses:

- None significant; well-rounded and experienced

Ranking of Candidates

1. Nestor Wilke - Most qualified with extensive experience and senior role expertise.
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Candidate	Experience	Leadership Skills	Current Education	Ranking
Nestor Wilke	Extensive	Yes	No	1
Patti Fernandez	Strong	Yes	No	2
Alex Wilber	Ample	Yes	Yes	3
Holly Dickson	Limited	No	No	4

1 of 1 Please create a table... AI-generated content may be incorrect

Keep it For example, "Make it formal"

Operations

Microsoft 365 Copilot use cases and ideas for operations professionals

- Brainstorm project plan ideas using Microsoft 365 Copilot in Whiteboard
- Draft a meeting reply using Microsoft 365 Copilot in Outlook
- Compare reporting results using Microsoft 365 Copilot in Word
- Create a presentation using Microsoft 365 Copilot in PowerPoint

Use Microsoft 365 Copilot in Outlook
to manage communications

Operations use case

Outlook Action Bar:

- New, Ignore, Block, Delete, Archive, Report
- Reply, Reply all, Forward, Meeting, Schedule with Copilot
- Share to Teams, Sweep, Move, Rules
- Quick steps
- Read / Unread, Categorise, Flag, Pin, Snooze, Policy
- Print, Discover groups, Undo

Favourites and Folders sidebar:

- Favourites
- Folders
- Go to Groups

Focused Other

Urgent: Order Fulfillment Delays – Inventory Discrepancy

Summary by Copilot

Polly Bedford
 To: **Jamie Lawson**
 Mon 17/02/2025 4:24 PM

Hi Jamie,

I found the issue—20 units were part of a damaged return batch that was mistakenly added back to inventory instead of being marked as non-sellable. Additionally, 5 more units were allocated to an order that was canceled but not reflected in WMS. That explains the 25-unit shortfall.

To prevent this in the future, I suggest we:

- Implement a double-check system for returned stock before marking it as available.
- Ensure all canceled orders automatically adjust inventory in WMS.
- Schedule weekly audits of high-demand products like the Smart Mugs.

Let me know if you agree with these action items, or if you'd like to add anything else.

Best,
Polly

Reply Forward

Polly Bedford
 Hi Jamie, Thanks for flagging this. I just did a quick manual count of the Contos...
 Mon 17/02/2025 4:23 PM

You
 [Blurred text]

Copilot sidebar:

- Organise my inbox: Create an inbox rule to [categorise emails from person to blue]
- Help me plan: Set my out of office from [next Monday 9:00 to next Friday 15:00]
- Find something: Find the file that [person shared last week about]
- Plan and set goals: How do I set and track long-term career goals?
- Chat history
- Describe what you'd like to do, or type / to reference emails, people and more

Home View Help

New Block Delete Archive Report Reply Reply all Forward Meeting Schedule with Copilot Share to Teams Sweep Move Rules Quick steps Read / Categorise Unread Flag Pin Snooze Policy Print Discover groups Undo

Favourites

Folders

Go to Groups

Focused Other

Polly Bedford Urgent: Order Fulfillme... 4:24 PM
Hi Jamie, I found the issue—20 u...

Last month

Urgent: Order Fulfillment Delays – Inventory Discrepancy

Summary by Copilot From this conversation

You informed **Polly Bedford** about customer complaints regarding delayed shipments of Contoso Smart Mugs and discrepancies between the warehouse management system (WMS) inventory levels and actual stock (1).

Polly Bedford confirmed that the warehouse only has 25 units instead of the 50 shown in WMS and suspected errors in the last inventory update (2).

Polly Bedford identified that 20 units were part of a damaged return batch mistakenly added back to inventory, and 5 units were allocated to a cancelled order not reflected in WMS, explaining the 25-unit shortfall (3).

Polly Bedford suggested implementing a double-check system for returned stock, ensuring cancelled orders adjust inventory in WMS, and scheduling weekly audits of high-demand products (3).

Ask Copilot

AI-generated content may be incorrect

Polly Bedford To: Jamie Lawson Mon 17/02/2025 4:24 PM

Hi Jamie,

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Copilot

Organise my inbox
Create an inbox rule to [categorise emails from person to blue]

Help me plan
Set my out of office from [next Monday 9:00 to next Friday 15:00]

Find something
Find the file that [person shared last week about]

Plan and set goals
How do I set and track long-term career goals?

Chat history

Describe what you'd like to do, or type / to reference emails, people and more

Message Insert Format text Draw Options

Paste Copy Undo Font size: Aptos 12 Bold Italic Underline Link Signature Record Pictures Apps Polls Copilot for Sales Viva Insights Loop components Dictate High importance Low importance Sensitivity Switch to plain text Print draft Save draft Save as Scheduling poll Editor Check accessibility Auto format options Copilot

Send To: Polly Bedford

Coaching
Draft
Give Copilot a brief description and Copilot will create a draft email.

Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy

Draft saved at 4:30 PM

From: Polly Bedford <Polly.Bedford@bhgtm.onmicrosoft.com>
Sent: 17 February 2025 4:24 PM
To: Jamie Lawson <admin@bhgtm.onmicrosoft.com>
Subject: Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy

Hi Jamie,

I found the issue—20 units were part of a damaged return batch that was mistakenly added back to inventory instead of being marked as non-sellable. Additionally, 5 more units were allocated to an order that was canceled but not reflected in WMS. That explains the 25-unit shortfall.

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Polly

From: Polly Bedford <Polly.Bedford@bhgtm.onmicrosoft.com>
Sent: Monday, February 17, 2025 1:23 PM
To: Jamie Lawson <admin@bhgtm.onmicrosoft.com>
Subject: Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy

Hi Jamie,

Thanks for flagging this. I just did a quick manual count of the Contoso Smart Mugs in the warehouse, and you're right—we only have 25 units on hand, not 50. It looks like there was an error in the last inventory update. I suspect that either:

1. A batch of returned items was incorrectly added back to available stock without inspection.
2. Some orders weren't properly marked as shipped, leading to an inaccurate stock count.

Message Insert Format text Draw Options

Paste Copy Paste as Plain text Clipboard

Aptos 12 Bold Italic Underline Link Signature Record Pictures Emoji Table

Styles Attach file Link Signature Record Insert

Apps Polls Copilot for Sales Viva Insights Add-ins

Loop components Collaborate Dictate Voice

High importance importance Low importance importance Tags

Sensitivity Switch to plain text Format

Print draft Print Save draft Save as Save

Scheduling poll Find time Editor Check accessibility Auto format options Options

Copilot

Send To: Polly Bedford

Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy

Draft saved at 4:30 PM

Thank Polly for finding the answer to the problem

Sent: 17 February 2025 4:24 PM
To: Jamie Lawson <admin@bhgtm.onmicrosoft.com>
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Hi Jamie,

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Message Insert Format text Draw Options

Paste 12 Basic Text Styles Attach file Link Signature Record Pictures Add-ins Copilot for Sales Viva Insights Loop components Dictate High importance Low importance Sensitivity Switch to plain text Print draft Save draft Save as Scheduling poll Editor Check accessibility Auto format options Copilot

Send To: Polly Bedford

Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy Draft saved at 4:31 PM

Hi Polly,

Thank you so much for your diligence in tracking down the issue. Your thorough investigation has clarified the discrepancy and helped us understand the root cause of the 25-unit shortfall. I really appreciate your attention to detail and quick action in identifying that 20 units were mistakenly re-added to the inventory after being returned damaged, and the additional 5 units were not accounted for due to a cancelled order not reflecting in the WMS.

I completely agree with your suggested measures to prevent such issues in the future. Implementing a double-check system for returned stock, ensuring that cancelled orders automatically adjust inventory in the WMS, and scheduling weekly audits for high-demand products like the Smart Mugs sound like excellent steps to enhance our inventory management processes.

Thanks again, Polly. Your proactive approach and commitment to resolving this matter swiftly have been invaluable. If there's anything else that needs to be addressed, please feel free to let me know.

Best regards,
Jamie

Thank Polly for finding the answer to the ...

AI generated...

make it a friendly and less formal tone

Subject: Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy

Hi Jamie,

I found the issue—20 units were part of a damaged return batch that was mistakenly added back to inventory instead of being marked as non-sellable. Additionally, 5 more units were allocated to an order that was canceled but not reflected in WMS. That explains the 25-unit shortfall.

To prevent this in the future, I suggest we:

- Implement a double-check system for returned stock before marking it as available.
- Ensure all canceled orders automatically adjust inventory in WMS.
- Schedule weekly audits of high-demand products like the Smart Mugs.

Let me know if you agree with these action items, or if you'd like to add anything else.

Best,
Polly

From: Polly Bedford <Polly.Bedford@bhgtm.onmicrosoft.com>

Sent: Monday, February 17, 2025 1:22 PM

Message Insert Format text Draw Options

Clipboard Basic Text Styles Insert Add-ins Collaborate Voice Format Print Save Find time Editor Options

Aptos 12 Bold Italic Underline Link Signature Record Attach file Link Signature Record Apps Polls Copilot for Sales Viva Insights Loop components Dictate High importance Low importance Sensitivity Switch to plain text Print draft Save draft Save as Scheduling poll Editor Check accessibility Auto format options

Send To: Polly Bedford

Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy Draft saved at 4:31 PM

Hi Polly,

Thanks a ton for sorting out the issue. Your thorough investigation really cleared up the discrepancy and helped us understand the root cause of the 25-unit shortfall. I truly appreciate your attention to detail and quick action in identifying that 20 units were mistakenly re-added to the inventory after being returned damaged, and the additional 5 units were not accounted for due to a cancelled order not reflecting in the WMS.

I'm on board with your suggested measures to prevent this from happening again. Adding a double-check system for returned stock, making sure cancelled orders automatically adjust inventory in the WMS, and scheduling weekly audits for high-demand products like the Smart Mugs all sound like great steps to improve our inventory management.

Thanks again, Polly. Your proactive approach and quick resolution have been incredibly helpful. If there's anything else that needs attention, just let me know.

Best,
Jamie

2 of 2 make it a friendly and less formal tone

AI generated...

Try an option below

- Keep it
- Discard
- Modify content
 - Retry
 - Make it shorter
 - Make it longer

Inventory Discrepancy

ged return batch that was mistakenly added back to inventory instead of being marked as non-sellable. Additionally, 5 more units were allocated to an order that was canceled but not reflected in WMS. That explains the

turned stock before marking it as available.

- Ensure all canceled orders automatically adjust inventory in WMS.
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Let me know if you agree with these action items, or if you'd like to add anything else.

Best,
Polly

From: Polly Bedford <Polly.Bedford@bhgtm.onmicrosoft.com>

Sent: Monday, February 17, 2025 1:22 PM

Message Insert Format text Draw Options

Clipboard Basic Text Styles Insert Add-ins Collaborate Voice Tags Format Print Save Find time Editor Accessibility Options

Aptos 12 Bold Italic Underline Link Signature Record Attach file App Polls Copilot for Sales Viva Insights Loop components Dictate High importance Low importance Sensitivity Switch to plain text Print draft Save draft Save as Scheduling poll Editor Check accessibility Auto format options

Copilot

Send To: Polly Bedford

Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy Draft saved at 4:32 PM

Hi Polly,

Thanks a ton for sorting out the issue. Your thorough investigation really cleared up the discrepancy and helped us understand the root cause of the 25-unit shortfall. I truly appreciate your attention to detail and quick action in identifying that 20 units were mistakenly re-added to the inventory after being returned damaged, and the additional 5 units were not accounted for due to a cancelled order not reflecting in the WMS.

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Thanks again, Polly. Your proactive approach and quick resolution have been incredibly helpful. If there's anything else that needs attention, just let me know.

Best,
Jamie

From: Polly Bedford <Polly.Bedford@bhgtm.onmicrosoft.com>
Sent: 17 February 2025 4:24 PM
To: Jamie Lawson <admin@bhgtm.onmicrosoft.com>
Subject: Re: Urgent: Order Fulfillment Delays – Inventory Discrepancy

Hi Jamie,

I found the issue—20 units were part of a damaged return batch that was mistakenly added back to inventory instead of being marked as non-sellable. Additionally, 5 more units were allocated to an order that was canceled but not reflected in WMS. That explains the 25-unit shortfall.

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Let me know if you agree with these action items, or if you'd like to add anything else.

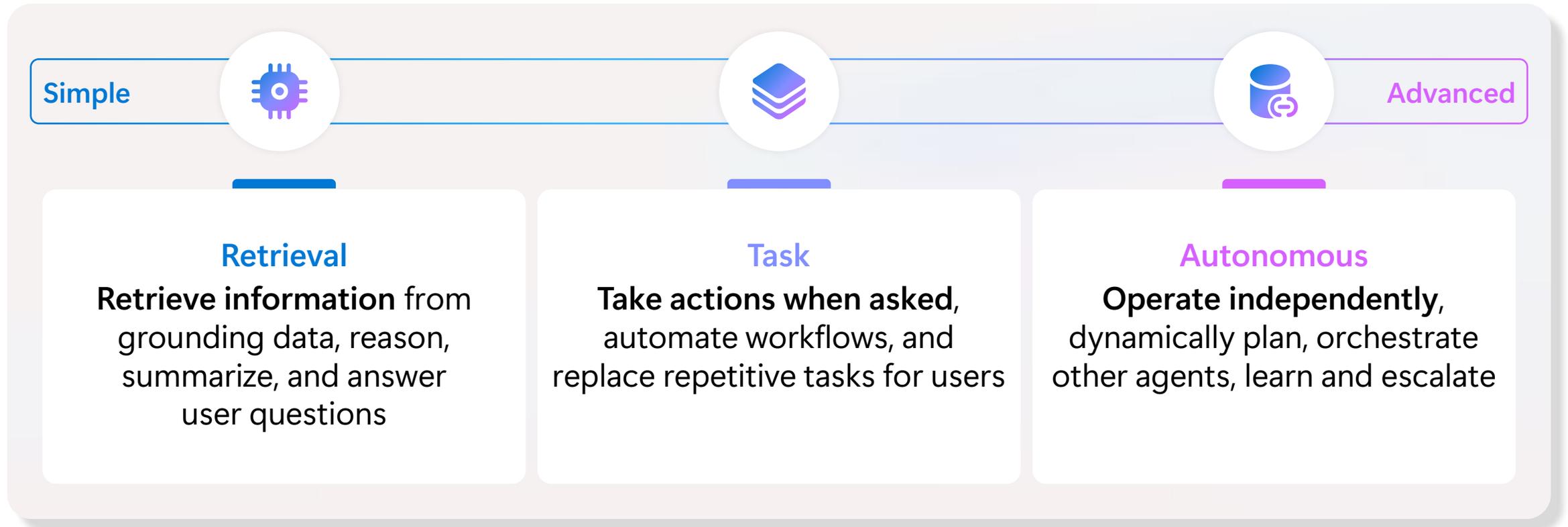
Best,
Polly

From: Polly Bedford <Polly.Bedford@bhgtm.onmicrosoft.com>
Sent: Monday, February 17, 2025 1:32 PM

- **Transforming your business with Copilot + Agents**

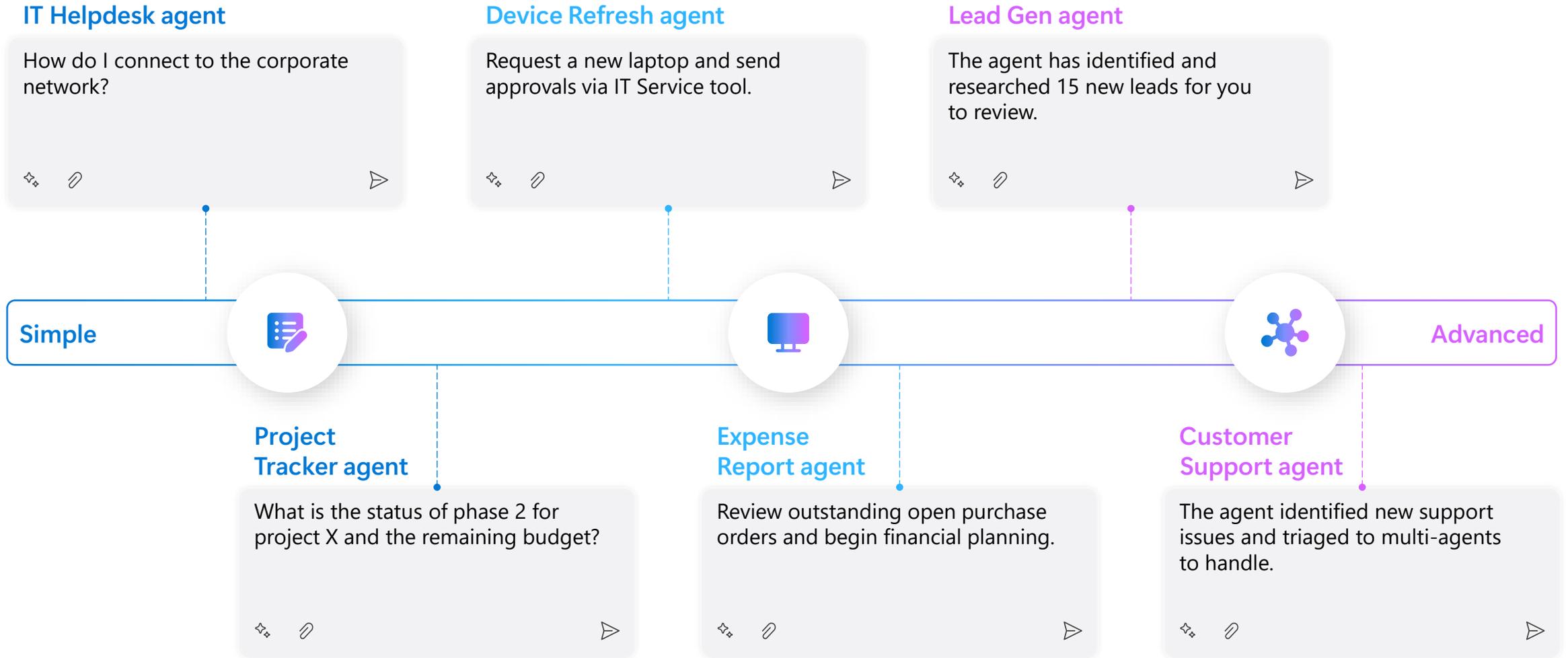
What are Copilot agents?

Agents expand Copilot's knowledge and skills or can operate autonomously to complete tasks or automate processes



Copilot agents vary in level of complexity and capabilities depending on your need

Spectrum of Copilot agents



- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- Copilot
- Approvals
- Planner
- Viva Learning
- ...
- Apps

Apps

Search apps and more

Apps

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- Built with Power Platform
- See more
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Workflows

Manage your apps

Agents Filter

<p>Perfect Wiki <small>OOO RD17</small> Add</p> <p>Build and organize your knowledge base of company res...</p> <p>★ 4.6 (266 ratings)</p> <p>Communication Content management</p>	<p>Jira Cloud <small>Atlassian.com</small> Add</p> <p>Empower your team to track, update, and manage project...</p> <p>★ 4.1 (458 ratings)</p> <p>IT/Admin Project management</p>	<p>Dropbox <small>Dropbox, Inc.</small> Add</p> <p>Share files and upload content to Dropbox without leavin...</p> <p>★ 4.3 (43 ratings)</p> <p>Communication Content management</p>	<p>monday.com <small>monday.com</small> Add</p> <p>Enhance your Microsoft 365 tools with project managem...</p> <p>★ 4.4 (178 ratings)</p> <p>Communication Project management</p>
<p>Miro <small>Miro</small> Add</p> <p>Create, embed, pin, search and get notifications for Miro ...</p> <p>★ 4.0 (34 ratings)</p> <p>Communication Productivity</p>	<p>Confluence Cloud <small>Atlassian.com</small> Add</p> <p>Capture rich meeting notes, share pages, & stay up-to-da...</p> <p>★ 2.6 (10 ratings)</p> <p>Communication Content management</p>	<p>Mural <small>Mural</small> Add</p> <p>Take ideas from imagination to activation with Mural in M...</p> <p>★ 4.4 (512 ratings)</p> <p>Communication Productivity</p>	<p>Matter <small>MatterApp Inc.</small> Add</p> <p>Employee Recognition, Rewards, Surveys, and Celebration...</p> <p>★ 5.0 (938 ratings)</p> <p>Communication Human resources & recruiting</p>
<p>Now Virtual Agent <small>ServiceNow</small> Add</p> <p>Find answers, file requests and complete routine ServiceN...</p> <p>★ 4.2 (654 ratings)</p> <p>Productivity</p>	<p>Trello <small>Atlassian.com</small> Add</p> <p>Trello lets you work more collaboratively and get more do...</p> <p>★ 3.4 (120 ratings)</p> <p>Communication Productivity</p>	<p>Decisions <small>Decisions</small> Add</p> <p>AI-powered meetings: Agendas, summaries, decisions...</p> <p>★ 4.2 (3.4K ratings)</p> <p>Communication Productivity</p>	<p>Teams Manager <small>Solutions2Share GmbH</small> Add</p> <p>Control your Teams with governance, lifecycles, templates...</p> <p>★ 4.6 (1.2K ratings)</p> <p>IT/Admin Productivity</p>
<p>Presentations AI <small>Infographx technologies</small> Add</p> <p>Instantly create and design stunning presentations with z...</p> <p>★ 4.4 (61 ratings)</p> <p>Communication Productivity</p>	<p>Prompt Coach <small>Microsoft Corporation</small> Add</p> <p>Write and improve your prompts</p> <p>★ 4.0 (8 ratings)</p> <p>Productivity Training & tutorial</p>	<p>Priority Matrix <small>Appluence Inc</small> Add</p> <p>Focus on high-impact tasks. Do the work that matters.</p> <p>★ 4.5 (182 ratings)</p> <p>Productivity Project management</p>	<p>Idea Coach <small>Microsoft Corporation</small> Add</p> <p>Plan and navigate the brainstorming process</p> <p>★ 5.0 (1 rating)</p> <p>Productivity Training & tutorial</p>
<p>Backlog <small>Nulab Inc.</small> Add</p> <p>Add tasks and get notified about Backlog updates in Micr...</p> <p>★ 3.6 (7 ratings)</p> <p>Communication Productivity</p>	<p>Writing Coach <small>Microsoft Corporation</small> Add</p> <p>Take your writing to the next level with Writing Coach</p> <p>★ 2.7 (7 ratings)</p> <p>Productivity Training & tutorial</p>	<p>Career Coach <small>Microsoft Corporation</small> Add</p> <p>Elevate your career with Career Coach</p> <p>★ 3.5 (2 ratings)</p> <p>Content management Training & tutorial</p>	<p>ArcGIS <small>Esri, Inc.</small> Add</p> <p>Explore a trending world of maps and data</p> <p>★ 4.1 (17 ratings)</p> <p>Communication Maps & feeds</p>
<p>ServiceDesk Plus Cloud <small>Zoho Corporation Private Limited</small> Add</p> <p>Manage all your ServiceDesk Plus Cloud incident and serv...</p> <p>★ 4.1 (250 ratings)</p> <p>IT/Admin Productivity</p>	<p>Learn365 <small>Zensai International ApS</small> Add</p> <p>Learn, share, and manage training inside Microsoft Teams</p> <p>★ 4.1 (822 ratings)</p> <p>Human resources & recruiting Productivity</p>	<p>Starmind <small>Starmind AG</small> Add</p> <p>An AI-powered knowledge network for employees to tap ...</p> <p>★ 4.7 (22 ratings)</p> <p>Communication Productivity</p>	<p>Lucidchart <small>Lucid Software Inc</small> Add</p> <p>Gain clarity as you collaborate on diagrams directly in Mic...</p> <p>★ 3.9 (125 ratings)</p> <p>Productivity Workflow & business management</p>
<p>Seismic <small>Seismic</small> Add</p>	<p>DailyBot <small>DailyBot</small> Add</p>	<p>iPlanner Pro <small>iGlobe</small> Add</p>	<p>Klaxoon <small>Klaxoon</small> Add</p>

- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- Copilot
- Approvals
- Planner
- Viva Learning
- ...
- Apps

Prompt Coach

<p> Prompt Generation</p> <p>Help me generate a prompt to be used in Copilot.</p>	<p> Analyze Prompt</p> <p>Analyze my prompt and provide feedback on how I could improve it.</p>	<p> Prompt Compliance</p> <p>Evaluate if my prompt is compliant and following the responsible AI guidelines.</p>
<p> Prompt Engineering</p> <p>How do I write a good prompt?</p>	<p> Fix my prompt</p> <p>I am not getting the output I expect from my prompt. How can I fix it?</p>	<p> Prompt Examples</p> <p>Show me 3 good prompt examples.</p>

 [View prompts](#)

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“Hundreds of years ago. I think hardly anyone understood the impact that widespread literacy will have. Today, I think hardly anyone understands the impact that democratising access to AI will have. Building AI systems has been out of reach for most people, but that does not have to be the case. In the coming era for AI, we’ll empower everyone to build AI systems for themselves, and I think that will be incredibly exciting future.”

Andrew Ng



Microsoft 365 Copilot

AKKODIS

• Making Copilot Work for You

Q&A (15 minutes)

• Let's make Copilot work for you

Implementation | Guidance | Training | Agent Building

<https://www.tech-academy.com.au/akkodis-m365cp>



AKKODIS ACADEMY

Microsoft 365 Copilot for SMBS

About Us

Akkodis Academy offers tailored training and upskilling programs to SME/MSME clients with innovative solutions. Through an extensive suite of offerings and flexible training modalities, we empower individuals and teams with specialised resources, tools, and accelerators necessary to enhance business value and foster innovation practices within their own practices and teams.

The combination of Akkodis Academy and Consulting with the capacity, capability, and experience to significantly deliver the services required by our clients, also sets Akkodis apart from our competitors. Our unique position at the intersection of talent, technology and training allows us to bring together the essential elements for enabling businesses to digitally transform at scale. Providing the right people, processes, and platforms across all facets of technology is at the core of Akkodis' business model.

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Our Speakers

Anand Koushan, VP Akkodis Academy SME & MSME, Akkodis

Anand is an innovation leader with over 12 years of experience in the education and technology sectors, having led teams in the role as VP of the Akkodis Academy and the Global Head of SME and MSME.

With an extensive track record in managing educational programs in collaboration with major industry partners, Anand is known for successful implementation and delivery of initiatives and successful leading educational courses (PBL, 2019) that address emerging experiential needs.

His current responsibilities include the Tech Academy's global talent training operations as SME and MSME. He is also responsible for leading, managing and mentoring both SME/MSME in wide range of leading emerging technologies such as AI, ML, Cloud, and IoT.

His key responsibilities include:

- **Strategic** - Develop and implement strategic initiatives and partnerships
- **Operational** - Manage day-to-day operations and ensure the delivery of high-quality training and support services
- **Marketing** - Lead marketing and promotional activities
- **Business Development** - Identify and pursue new business opportunities

Lisa Daniels, Copilot Lead, Barhead Solutions & Microsoft 365 Copilot MVP

Lisa is a trusted expert in Microsoft 365 and Business Applications, helping businesses unlock the value of Microsoft with the Microsoft Copilot. She works closely with organisations to integrate the newly exciting AI features and use AI to provide customised solutions that drive meaningful business value. By utilising through the Power Platform, Business Process Automation, Copilot and various productivity, security tools, and customised AI solutions.

A former Microsoft Most Valuable Professional (MVP), Lisa is a recognized thought leader in the Microsoft ecosystem. She is published author, international conference speaker, and content creator with a YouTube channel of over 10,000 subscribers where she shares practical insights on Microsoft Copilot, Power Platform, and Business Applications. Lisa focuses her expertise on helping the small business build their resilience and business continuity. She supports organisations to identify and implement practical solutions that drive transformation and unlock new opportunities.

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