Al Office Hours

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www.endsight.net info@endsight.net (833) 363-7444

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Jason Clause **Director of** Marketing

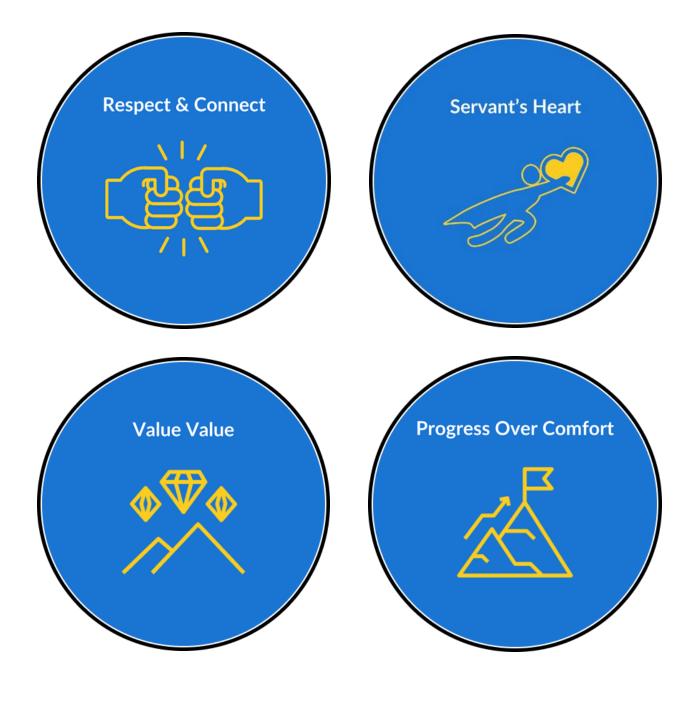
1144 Jordan Lane Napa, CA 94559 (510)280-2000 | info@endsight.net | www.endsight.net



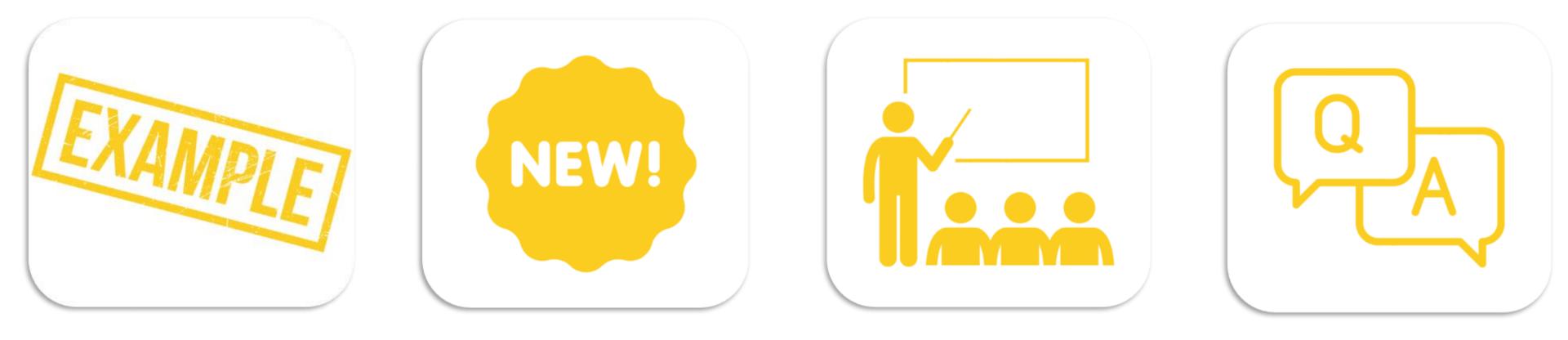
Michelle Brezenski Manager, Development

ABOUT



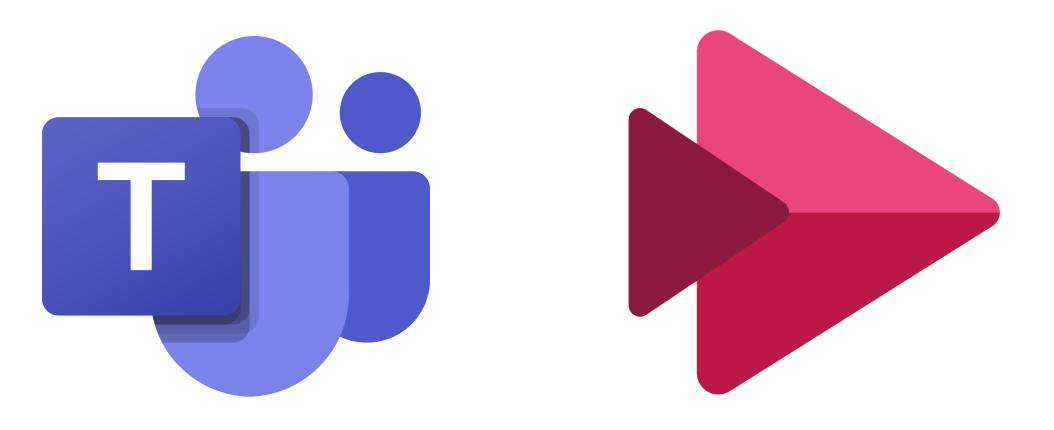






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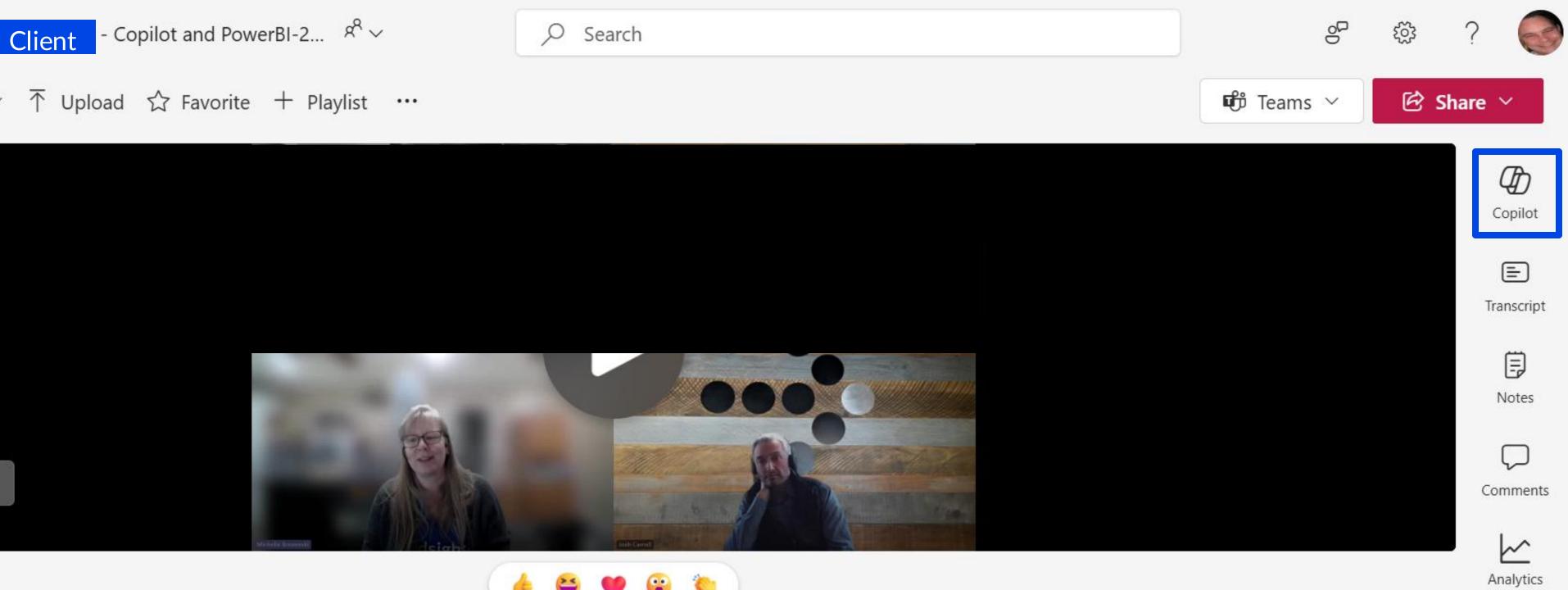










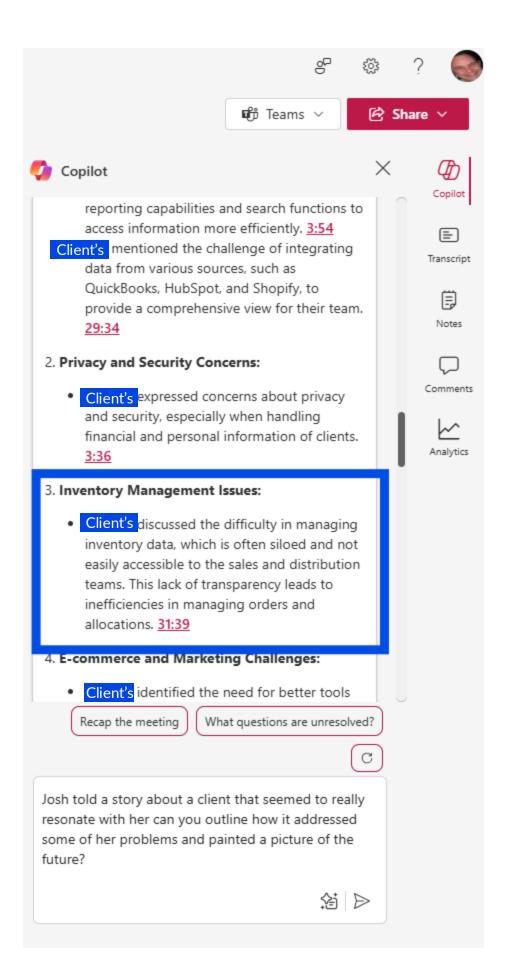




- Copilot and PowerBI nt

es in 85 days • 5 views • SharePoint App • HD • ··· > Documents > Recordings

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🕫 Teams 🗸	🖻 Share 🗸	🗗 Teams 🗸
t	× (D) Copilot	Copilot
elp you summarize and answer questior he video transcript.	ns 🚍 Transcript	reporting and the challenges of data silos. Client's mentioned their current use of Power BI with an outside vendor for sales and budget reporting. <u>19:24</u>
are some things you can try: Recap the meeting	Notes	E-commerce and Marketing Integration: Client's identified their e-commerce and marketing brand building team as potential
List the action items	Comments	users of Al tools. They discussed the use of HubSpot and Shopify for customer data and the need for better data integration and
Show me the parts where	Analytics	 Inventory Management Challenges: Client's and Josh discussed the challenges of inventory management and the need for better transparency and access to inventory data for sales and distribution teams. <u>31:39</u>
		 Next Steps and Implementation Plan: Michelle outlined the next steps, including discussing copilot licenses with Nick, reviewing SharePoint permissions, and setting up a user group to explore Al tools. They planned to meet again in a month to review progress. <u>44:28</u>
		□ Copy Al-generated content may be incorrect
		Recap the meeting What questions are unresolver
ist the main ideas Generate meeting notes	0	Client's mentioned several problems that she was having can you please list them?
	\triangleright	全 B



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Copilot

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Transcript

Notes

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Comments

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Analytics

Josh's Story and Its Relevance to <u>Client's</u> Problems:

Josh shared a story about a client, **Example** which resonated with **Client's** due to the similarities in challenges faced by both organizations. Here's how the story addressed <u>Client's</u> problems and painted a picture of the future:

1. Inventory Management and Transparency:

- Josh described how Example struggled with inventory management, where only a few people had access to inventory data, causing delays and inefficiencies in sales and distribution. This mirrored Client's issue with inventory transparency. 31:39
- The solution involved integrating inventory data into a centralized system, allowing salespeople to quickly access real-time inventory information. This approach could help Client's team by providing immediate access to inventory data, improving decision-making and customer service. 32:18

2. Data Integration and Accessibility:

- The story highlighted the importance of integrating data from various sources to create a unified view. For <u>Example</u> data from different systems to provide comprehensive insights. 31:23
- This approach aligns with Client's need to integrate data from QuickBooks, HubSpot, and Shopify, enabling her team to access and utilize • information more effectively. 29:34

3. Use of AI for Efficiency:

- Josh emphasized the role of AI in automating processes and providing quick answers to complex queries. For streamline operations and reduce manual efforts. 32:11
- Implementing similar AI solutions could help <u>Client's</u> organization automate manual processes, such as reporting and data analysis, leading to • increased efficiency and productivity. 3:18

4. Future Vision with AI:

Let's say all of the systems are connected. POS, Inventory, Accounting, CRM. The distributor calls with a big order. This same distributor has a large past due The story painted a future where AI and data integration lead to seamless operations, better deci invoice. Tell this story to demonstrate how easy vision aligns with <u>Client's</u> goals of utilizing AI to improve reporting, search functions, and overa Copilot could make the job of the sales person to By addressing these key areas, Josh's story provided a practical example of how AI and data integration determine if there is enough inventory to fulfill the clear path to overcoming current challenges and achieving future goals. order and to find out that this customer has a large </RESPONSE> past due bill.

this meant combining

Al tools helped Example

Story Demonstrating Copilot's Role in an Integrated System for Sales Efficiency:

Imagine a scenario where all systems—POS, Inventory, Accounting, and CRM—are seamlessly connected and enhanced by Copilot. A distributor calls with a large order, and the sales representative, Client needs to quickly determine if they can fulfill the order and check the distributor's payment status.

1. Order Inquiry:

Client receives a call from the distributor requesting a large order of a specific wine. Using Copilot, Client initiates a query to check the inventory levels and the distributor's account status.

2. Inventory Check:

Client asks Copilot, "Do we have enough inventory to fulfill a large order of [specific wine]?" Copilot quickly accesses the integrated inventory system and provides a real-time update, showing the current stock, including the number of cases available and those already allocated to other orders. Client sees that there are enough cases in stock to fulfill the distributor's order. 32:18

3. Payment Status:

Before confirming the order, Client needs to verify the distributor's payment status. Client asks Copilot, "What is the payment status of [Distributor Name]?" Copilot accesses the accounting system and retrieves the distributor's account details, including their payment history and outstanding invoices. 14:46 Copilot flags a large past due invoice, providing a clear warning that the distributor has an outstanding balance that needs to be addressed.

4. Decision Making:

Armed with this information Client can make an informed decision. They decide to discuss the past due invoice with the distributor before proceeding with the new order <u>Client</u> explains the situation and suggests resolving the outstanding payment to ensure smooth processing of the current order.

5. Resolution and Order Processing:

The distributor agrees to settle the past due invoice. Once the payment is confirmed, <u>Client</u>asks Copilot to update the inventory levels and finalize the new order. Copilot ensures that the inventory data is updated in real-time, maintaining accurate stock mar

6. Efficient Workflow:

Throughout this process, Client efficiently navigates through the integrated system with the help of Co switching between multiple platforms. This streamlined workflow saves time, reduces errors, and enha

By leveraging Copilot in an integrated system, Client can quickly and easily determine inventory available and efficient sales process. </RESPONSE>



This is really good. Now as a copywriting expert can you please write a blog article that tells this story from the point of view to someone in <u>Client's</u> role. Start with setting up the situation, detailing the pain of the current state and finally painting a picture of how the same interaction might work with copilot aiding the sales person.

Transforming Sales Efficiency with Copilot: A Game-Changer for Winery Management

In the fast-paced world of winery management, efficiency and accuracy are paramount. <u>Client's</u> a key player in a winery management company, understands the challenges of juggling multiple systems and ensuring seamless operations. Let's explore a common scenario that highlights the pain points of the current state and how Copilot can revolutionize the sales process.

The Current State: Navigating a Complex Web of Systems

Client's team manages several wineries, each with its own set of systems for POS, Inventory, Accounting, and CRM. When a distributor calls with a large order, the sales representative, Client faces a daunting task. They need to check inventory levels, verify the distributor's payment status, and ensure that the order can be fulfilled—all while navigating through multiple disconnected systems.

The Pain Points: Time-Consuming and Error-Prone Processes

1. Inventory Check:

•Clientmust log into the inventory system, search for the specific wine, and manually check the stock levels. This process is time-consuming and prone to errors, especially when inventory data is not updated in real-time.

2. Payment Status:

•To verify the distributor's payment status, Client heeds to access the accounting system separately. This involves switching between systems, which increases the risk of missing critical information about outstanding invoices.

3. Decision Making:

•With fragmented data, Client struggles to make informed decisions quickly. The lack of integration between systems leads to delays and potential miscommunication with the distributor......

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Activity	Chat	··· = 0	🊑 Michelle Brezei	nski C hat S	hared 🕂	
ø	Copilot					My question is, does it paint a realist picture of wh
Chat	Copilot			Ν	/lichelle Brezenski	1/16 1:51 PM
CO Teams					YES - especial	ly since i heard it read in my head in your voice lol
Calendar					that's wonder	ful!
Galls						I'm glad and sorry my voice is in your head. That
OneDrive						What if sent this to each of his Wine Clients:
Copilot						Subject Line: What if managing your winery was a Body: Hi [Client Name],
J HubSpot						I've been thinking about the unique challenges wi inventory managed across disconnected systems,
Planner						 Do we have enough inventory to fulfill a big Is the customer current on payments before s How can we quickly allocate inventory across
Power BI						For many wineries, getting these answers means d didn't have to be that way? With tools like Microsoft Copilet you could ask "//
						With tools like Microsoft Copilot, you could ask, "L the answer: "Yes, 1,200 cases are available. However, the custon
+ Apps						holding shipment until payment is received." That's not just an answer—it's a game changer. It
						 You can act quickly on opportunities withou Your team avoids delays and unnecessary b You maintain strong customer relationships
						I'd love to set up some time with Michelle Brez and your unique challenges. Chances are, Copil <u>Click here to schedule a quick call</u> , or let me know Looking forward to connecting,
				A	/ichelle Brezenski	1/16 1-56 PM
				I.	nichene brezenski	1/10 1.30 PM
					Type a messag	e



1/16 1:55 PM Edited

must be painful.

as simple as asking a question?

ineries like yours face. It's not uncommon to see millions of dollars in leaving teams waiting days for answers to critical questions:

- order?
- shipping?

ss direct-to-consumer and distribution channels without delays or confusion?

delays, inefficiencies, and sometimes missed opportunities. But what if it

Do we have 1,000 cases of Reserve Cabernet ready to ship?" and instantly get

mer has an outstanding balance of \$25,000 past due by 90 days. Recommend

means:

ut risking cash flow.

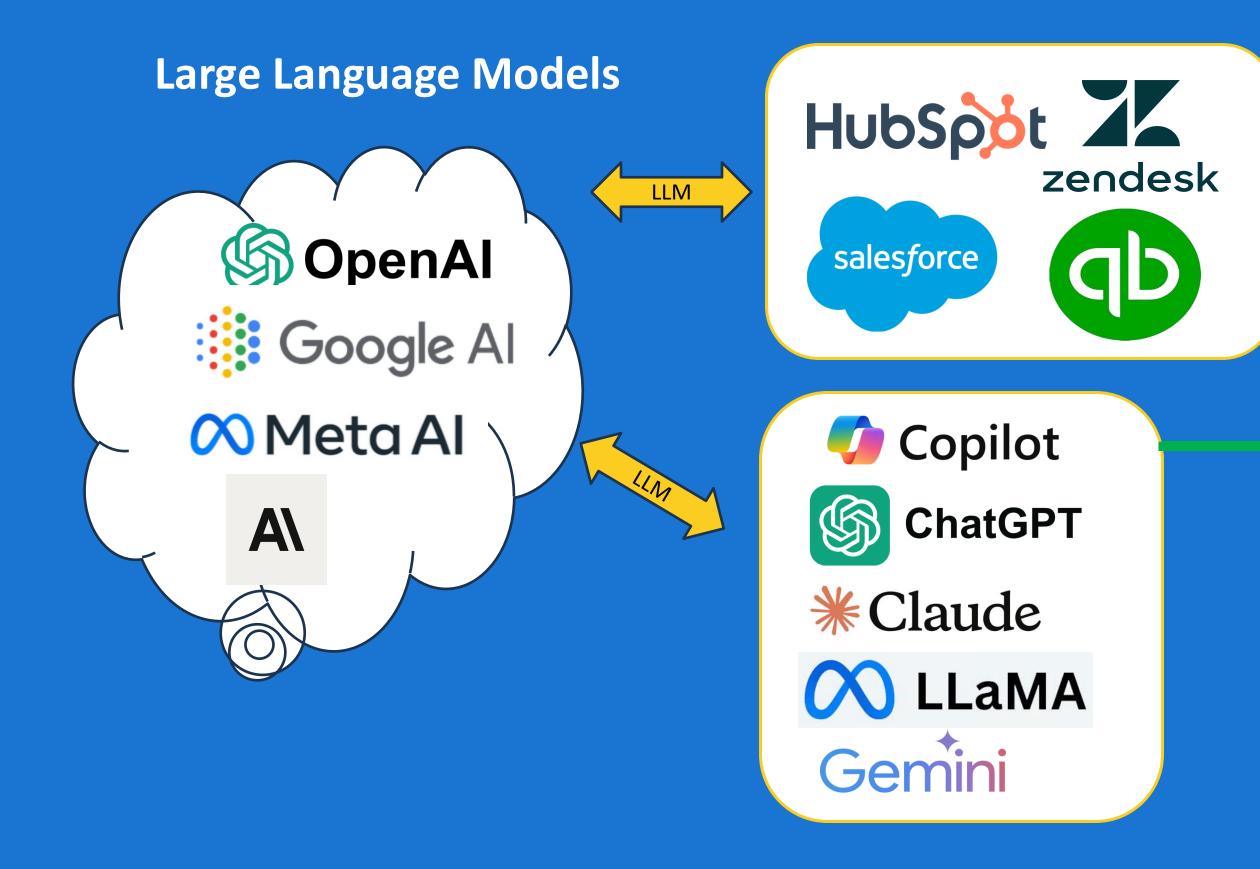
- ack-and-forth.
- s while protecting your bottom line.

enski, who leads our Copilot practice area, to talk about your winery lot can be set up to help.

a time that works for you.



What IS Artificial Intelligence?



Knowledge Sources

Vertical Cloud Application

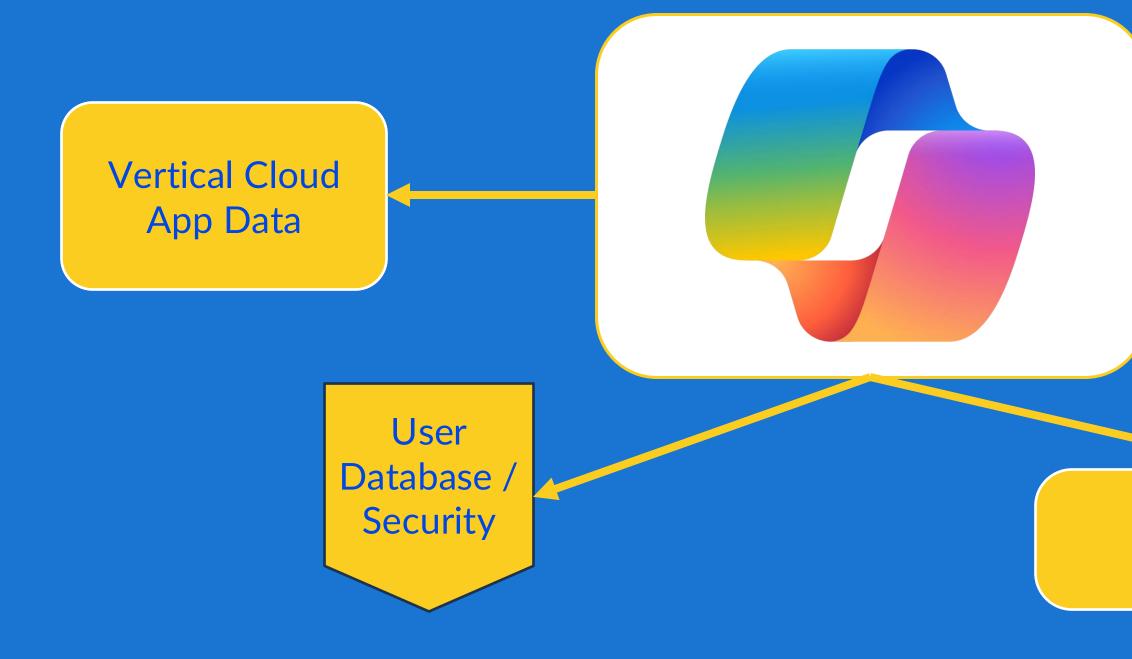
Enterprise / Org Data

Internet

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What distinguishes Copilot from

generic Artificial Intelligence?



Internet

Internal Network

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What's New?

- Copilot Chat
 - Different from Licensed version of Copilot for 365
 - Web-grounded with supplied references available for no additional charge with Business, Enterprise or Academic 365 licensing
 - Pay-As-You-Go for Work-grounded / Agents
- Copilot Prompt Gallery
 - Helps users discover, save, and share their favorite prompts.
 - This feature will be particularly useful during your prompt training session, as it allows attendees to explore and utilize various prompts effectively.
- Copilot Pages
 - Designed for AI collaborations
 - Persistent canvas to share and further iterate through prompts
 - Real-time updates
 - Available within Copilot Chat
- Copilot Visual Creator Agent
 - Al Generated images to enhance your documents and presentations
 - Natural language queries allow users to generate images by simply describing what they need.
 - Assists in creating both images and videos
- SharePoint Agents
 - Ready-made agent automatically scoped to the content on that site
 - Customizable agents to narrow scope or tailor prompts
 - Improves search results

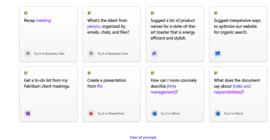
Microsoft 365 Copilot

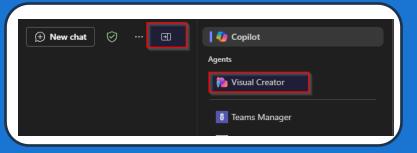


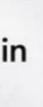




Powerful prompts, a click away









Copilot Chat

- Licensed version
 - Work-grounded information is directly retrieved from ALL 365-aware sources via MS graph – no need to reference files directly.
 - Integrated, in-context experiences across apps
 - Agents Work-grounded/Agents pointed at work information in specific business areas (SharePoint library, custom connector library)
- Copilot Chat
 - Basic chat to reason over business data, you must supply the data (file, email, etc.) to the chat.
 - Agents Same as above but billed based on what you use.
 - No in-app Copilot access
 - Protected by Enterprise Data Protection
- Pay as you go
 - Rated in messages consumed
 - Metered based on what's required to generate a response to a prompt
 - Knowledge contained within an LLM consumes fewer messages
 - Messages that require orchestration and information from MS Graph consume more
 - \$0.01/message
 - Pre-paid message packs \$200/25,000 messages/month



Copilo Web a Classi Genei Tenar messa Autor

Included Included — Metered **Copilot** Chat Copilot Copilot Chat - Web grounded (powered by GPT-40) Copilot Chat - Work grounded (work data in your tenant's Microsoft Graph and 3rd party data via Graph con Copilot Page File upload Code Interprete mage generatio Create agents using Copilot Studio³, including SharePoint agen Discover and pin agents se agents grounded in Web data Use agents grounded in work data (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors Use agents that act independently using autonomous actions Copilot reasons over personal work data (e.g., Outlook, OneDrive, Teams meeting transcripts and chat: Conilot in Team Copilot in Outlool Copilot in Word Copilot in Excel Copilot in PowerPoin Copilot Actions Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Emplo Copilot Control Enterprise Data Protection (EDP) IT management control Agent management SharePoint Advanced Management Copilot Analytics to measure usage and adoption Pre-built reports and advanced analytics to measure RO

lot Studio feature	Consumption rate
grounded answers (new)	0 messages
ic answers	1 message
erative answers	2 messages
nt Graph grounding for ages (new)	30 messages
nomous actions (new)	25 messages

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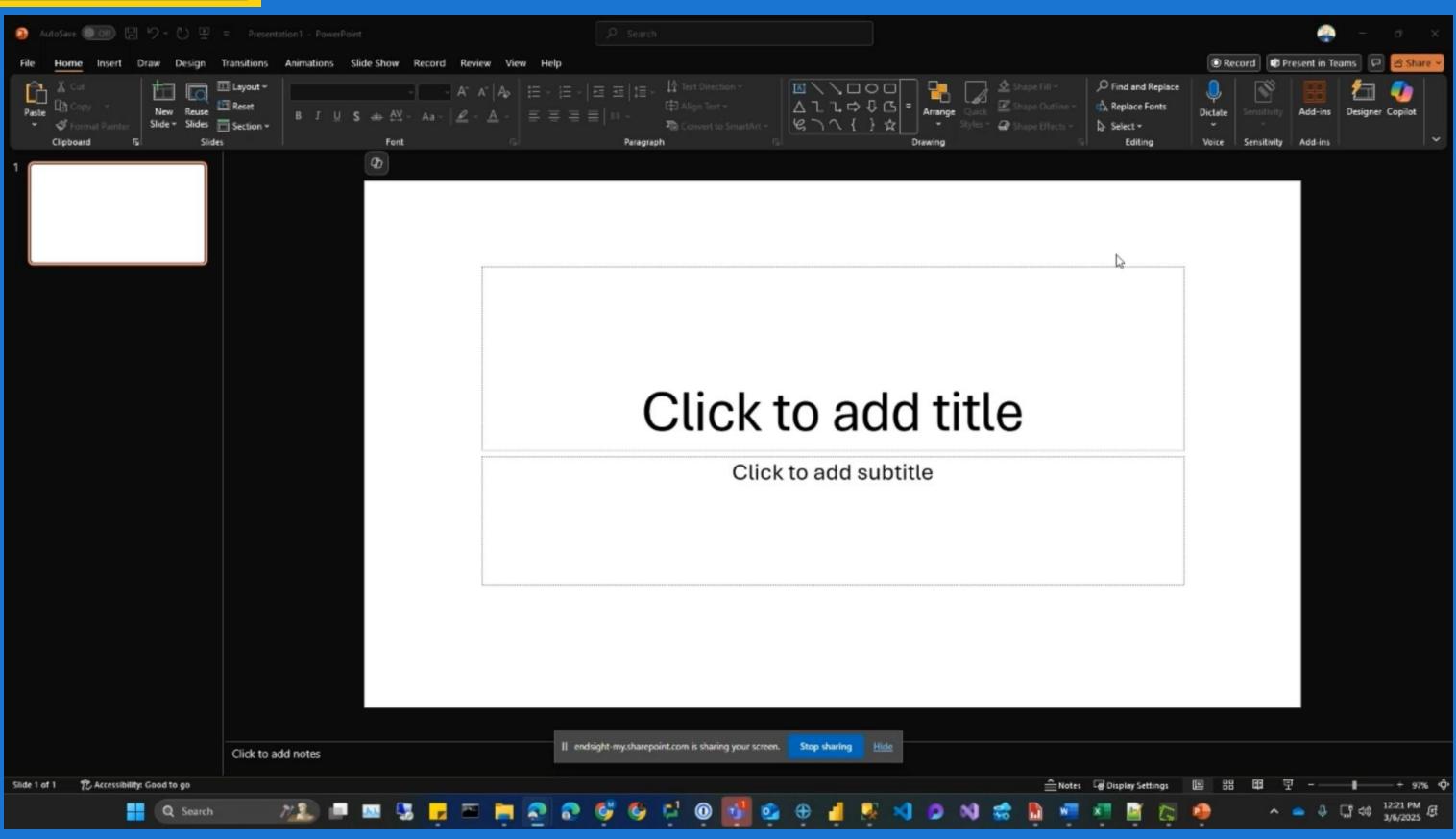


Copilot Pages

		Work Web		🕒 New chat 🛛 🖓 \cdots 🖭
Home		4 Copilot		
Copilot				
E Pages	🧭 Stand out on socials	🚀 Going on holiday?	🧭 Highlight the differences	
Creste	What are some tips for writing a great LinkedIn post?	Write some funny Out of Office email responses to use while I'm on vacation from [March 8-15]	Compare these files grouped by differences in formatting, structure, and content: [attach files]	
OneDrive	Interview warning signs	Ode faster	Gauge the temperature	
EB Apps	What are some red flags to watch out for during an interview?	Write a Python script to perform binary search	Give me a concise summary of recent news about [product or	
Admin			company]	
			ŀ e	
ŵ	Ask me anything		양 View prompts	
			@ ∂∣⊳	



Copilot Pages



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Powerful prompts, a click away

			P
Recap meeting	What's the latest from person, organized by emails, chats, and files?	Suggest a list of product names for a state-of-the- art toaster that is energy efficient and stylish.	Suggest inexpensive way to optimize our website for organic search.
o Try it in Business Chat	O Try it in Business Chat	•	
Get a to-do list from my Fabrikam client meetings.	Create a presentation from file	How can I more concisely describe [time management]?	What does the document say about [roles and responsibilities]?
0	Try it in PowerPoint	Try it in Word	Try it in Word

Copilot Prompting

::: Copilot Prompt Gallery			
Explore in products ~ Prompts to try Ge	tting started ~ What's ne	W	
Promp Microsoft prom App	ots to try Pots Your prompts Team V Task	prompts V Job type	~
	b-do list to list from my lient meetings	Stay informed What's the latest from person, organized by emails, chats, and files? The second se	 Name a product Suggest a list of product names for a state-of-the-art toaster that is energy efficient and stylish. Image: Ima
	presentations resentation from file	Write more confidently How can I more concisely describe [time management]?	 Find specific information What does the document say about [roles and responsibilities]? Image: Im
🗉 Summa	rize changes	S Explain a formula	♀ Create an agenda

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🔊 Generate ideas

Suggest inexpensive ways to optimize our website for organic search.

2

🔊 Draft an email

Write an email congratulating my team on the end of the fiscal year

5

🔊 Draft an agenda

Powerful prompts, a click away

Recap meeting	What's the latest from person, organized by emails, chats, and files?	Suggest a list of product names for a state-of-the- art toaster that is energy efficient and stylish.	Suggest inexpensive way to optimize our website for organic search.
o Try it in Business Chat	O Try it in Business Chat	P	
Get a to-do list from my Fabrikam client meetings.	Create a presentation from file	How can I more concisely describe [time management]?	What does the documen say about [roles and responsibilities]?
a	Try it in PowerPoint	Try it in Word	Try it in Word

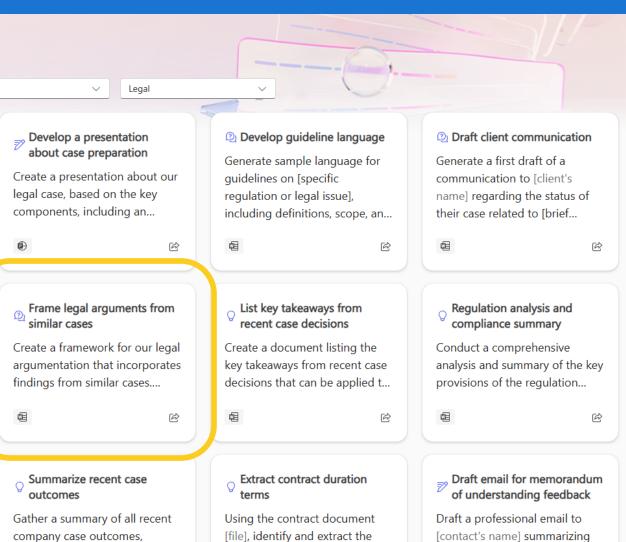
Copilot Prompting

Prompts to t	ry		
Арр	✓ Task	✓ Job type ✓	
Outlook	Understand	Department	
Word	Edit	Human Resources	
Excel	Create	Communications	
PowerPoint	Ask	Marketing	
OneNote	Catch up	Finance	
	Prepare	Sales	Prompts to try
d i	Analyze	Information Technology	App V Task
	Learn	Customer Service	· · · · · · · · · · · · · · · · · · ·
	Schedule	Legal	Compile similar successful
	🗌 Design	Industry	Search for and compile a list of
		Financial Services	cases similar to our current situation, focusing on those wi
		Retail	
		Manufacturing	
		Energy	
		Sustainability	Email summary for regulation compliance
		Consumer Goods	Search internal emails on
		Mobility	[regulation name] from [start date] to [end date] between
		Nonprofit	
			Regulation presentation for stakeholders

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Create a presentation about the

regulation [regulation name]



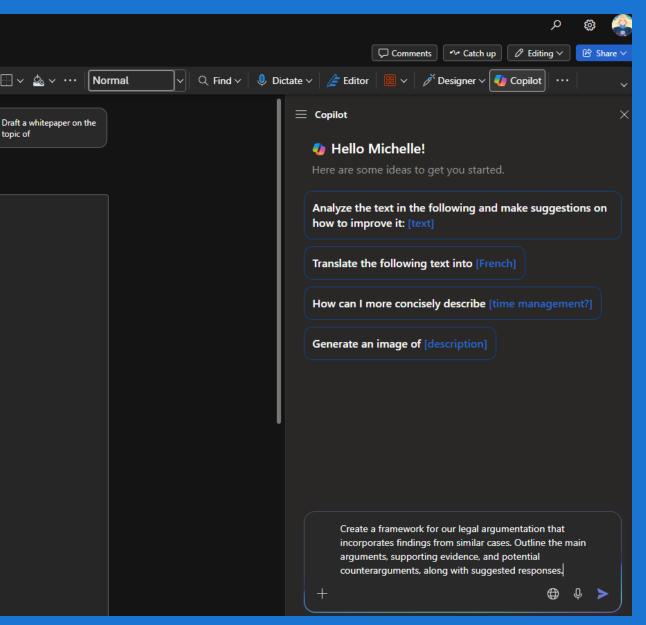
Powerful prompts a click away

Recap meeting	What's the latest from person, organized by emails, chats, and files?	Suggest a list of product names for a state-of-the- art toaster that is energy efficient and stylish.	Suggest inexpensive way to optimize our website for organic search.
o Try it in Business Chat	O Try it in Business Chat	P	
Get a to-do list from my Fabrikam client meetings.	Create a presentation from file	How can I more concisely describe [time management]?	What does the documen say about [roles and responsibilities]?
0	Try it in PowerPoint	Try it in Word	Try it in Word

Copilot Prompting

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	File Home	a Insert Layout	References Review Viev	w Help		
	7×0×	🗸 🕂 🗛 🖓 🗸	→ 12 → A [*] A [*] B	ℤ ⊔ ∀∨ ₄∨ & …	│≡ヽ≅ヽ≆ ≊ ≈ ≡	- ~
			Draft a business memo	Create a proposal based on file	Produce insights from file	
				What do you want Copilot to	o draft? 🖉 🎯	
Prame legal arguments from similar cases						
Author Microsoft						
Create a framework for our legal argumentation that incorporates findings fro similar cases. Outline the main arguments, supporting evidence, and potential counterarguments, along with suggested responses.						
Category						
Make it your own						
To be clear Customize the prompt to fit your situation by referencing the actual details yo need.						
Take it to the next level Consider incorporating visual aids to clarify complex arguments.						
Experiment This prompt works best on the Copilot Chat pane because it's meant to help y understand your document. Try pasting it into the Copilot chat box on your W		Ţ				





Powerful prompts, a click away

Copilot Prompting

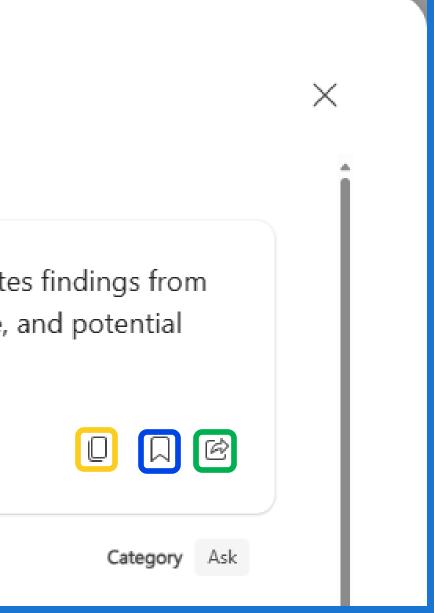
Prame legal arguments from similar cases

Author Microsoft

Create a framework for our legal argumentation that incorporates findings from similar cases. Outline the main arguments, supporting evidence, and potential counterarguments, along with suggested responses.





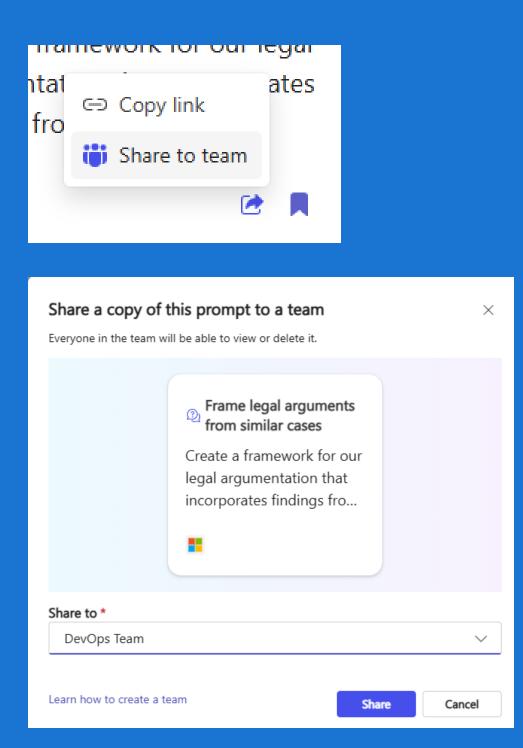


Powerful prompts, a click away 👩 Try it in Bu Try it in Word

Copilot Prompting

Prompts to try									
Microsoft prompts Your prompts Team p	rompts								
Created by all V App	∨ Task	∨ Job type							
Create a flowchart in Mermaid	Frame legal arguments from similar cases								
Create a flowchart in Mermaid syntax that shows the process for working service tickets fro	Create a framework for our legal argumentation that incorporates findings from similar cases								





Microsoft 365 Copilot

Copilot agents in SharePoint

Sharepoint Agents

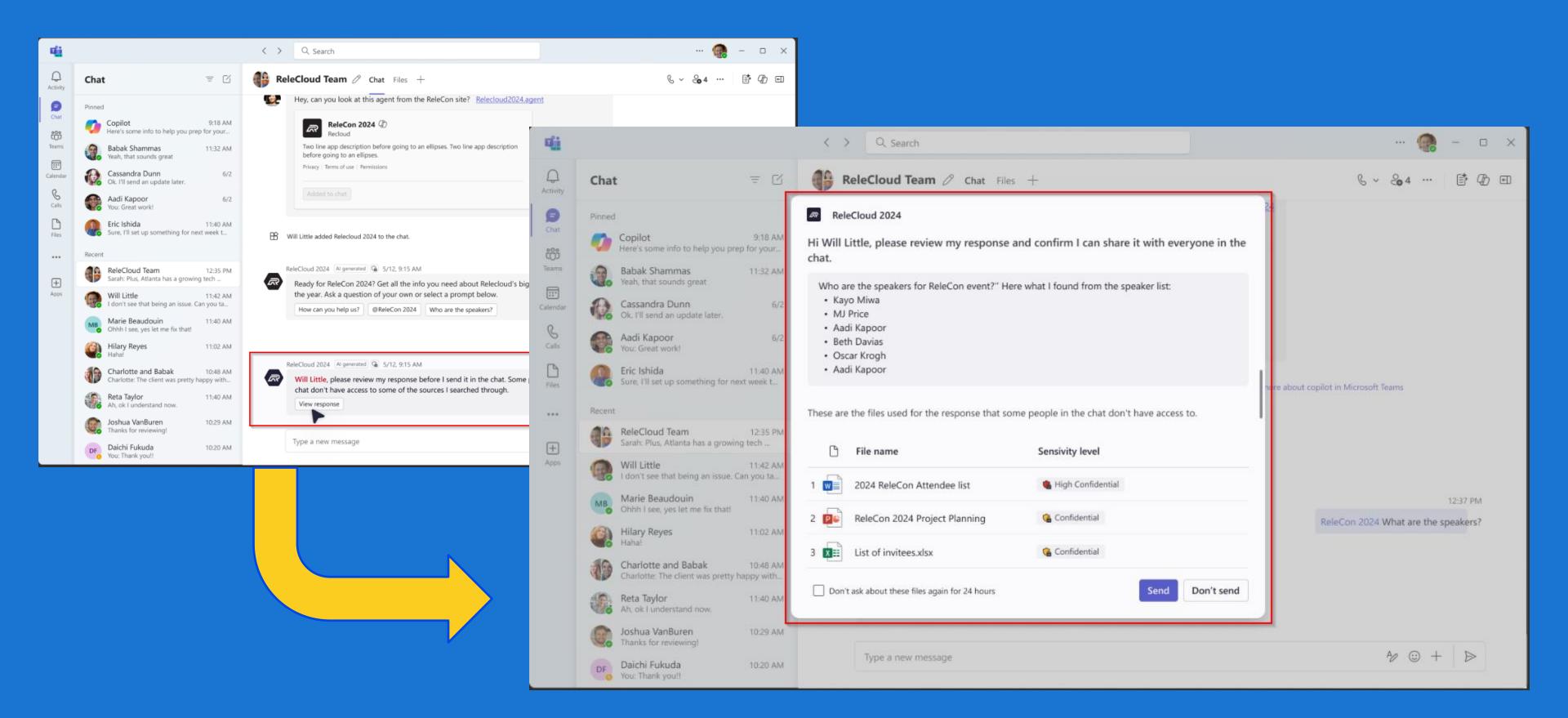
iii SharePoint ← βea	arch this site	☞ < < < <	Development ~	··· ×
Image: Constraint of the second state of the second st	∞ <⊐ & ? 🏩		Approved for this site (1) Development Recent (3) DevOps Team agent (2)	
this agent. Start a conversation by asking a question or selecting one of the suggested prompts.	Development \checkmark ··· \times	Edit agent	 DevOps Team agent (* DevOps Team agent 	1) Edit agent
Summarize any key highlights Create an FAQ based on these resources	Creating a service principal account involves several steps. Here's a detailed process based on the Power Platform 365 Service Principal Setup document 1:	Identity Sources Behavior Responses from agents are based on the sources selected. Users must have permission experience. Up to 20 sources can be chosen for each agent. Add a SharePoint site ③ Q Search by site title or enter a URL	Create an agent s to these sources for an optimal	Identity Sources Behavior Welcome messaging Help users understand how to best use this agent
How can I use these resources?	 1. Register an Application in Azure: Go to portal.azure.com and open the app registrations service. Select "New registration." 	Development Copilots Cop		Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.
What is the process for creating a service principle account?	Name the application "Power How do I grant admin consent? What are the next steps after adding API	+ Add document libraries, folders or files		Summarize any key highlights Create an FAQ based on these resources How can I use these resources?
, E V ♥ V	Can you explain more about the security benefits?			Instructions for agent Describe how the agent should engage with users Provide accurate information about the content in the selected files and reply in a formal tone.
	Ask a question about this site			Customize conversation workflows in Copilot Studio ×



Microsoft 365 Copilot

Copilot agents in **SharePoint**

Sharepoint Agents

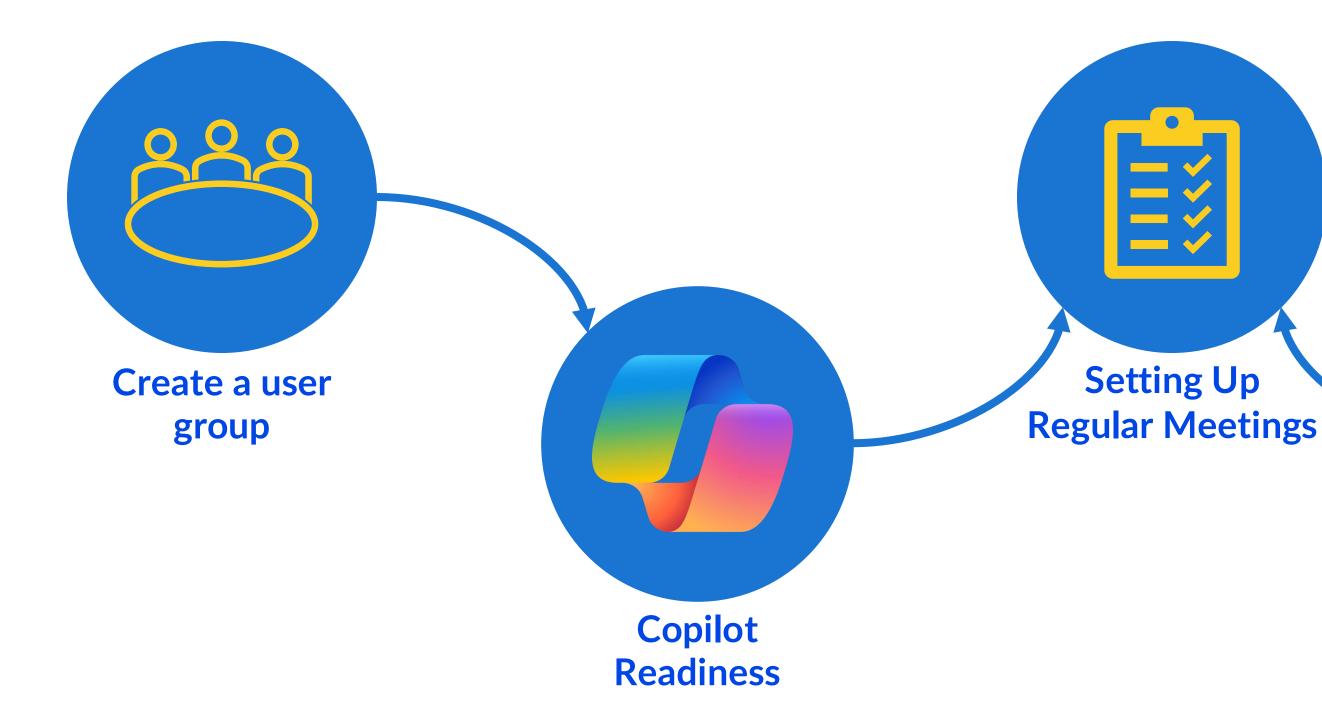


Al in the Wrong Hands: Cybersecurity Risks & Threats

- Discover the darker side of AI and learn how to protect your business from the latest cybersecurity threats.
 - 15-minute video featuring Stephen Hicks.
 - Learn how hackers are leveraging AI and the privacy concerns that arise.
 - This insightful video will be sent directly to you after!
 - Link will be on the page with webinar recording in the resources section.
 - You will get a link to this page by EOD today.
- o you after! ecording in the

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Where to start?





Utilizing **Resources**



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Pre-submitted Questions

1.How do I integrate Copilot with my existing systems? 2.How do I measure my success with Copilot? 3.Why Copilot instead of ChatGPT, Gemini, etc.

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Next Session!

June 26th @ 1 PM PST.

- Future dates are TBD \bigcirc
- ALL sessions will be recorded \bigcirc
- To register: \bigcirc
 - Scan the barcode (Landing page will be updated EOD)
 - Go to: https://www.endsight.net/development/webinar
 - Email akreps@endsight.net to register
 - Answer "Yes" in the poll:
 - We can register you for the remaining 2025 sessions OR just the next one.

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Cybersecurity Office Hours

• May 22nd @ 1 PM PST.

- To register: \bigcirc
 - Scan the barcode
 - Go to: https://get.endsight.net/cybersecurity/office/hours
 - Email akreps@endsight.net to register
 - Answer "Yes" in the poll.
 - We can register you for the next one.
 - To register for all of the remaining 2025 sessions, please email akreps@endsight.net.



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Thank you!

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