

Microsoft 365 Copilot

Getting Started - Use Cases

October 2024



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01



User Groups

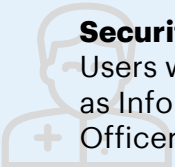
User Groups

Identified user groups recommended to be accounted for as part of the pilot



Leadership Roles

Users working in policy, strategic or commissioning roles such as IT Directors, Heads of Digital and Digital Transformation Leads.



Security and Information Governance (IG) Roles

Users working security and information roles such as Information Security Officers, Data Protection Officers, and Compliance Managers.



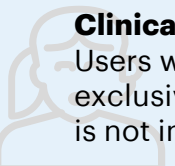
IT Administrator Roles

Users working in technical and IT roles such as Local Administrators, Programme and Service Desk Managers, and other IT specialists.



Business Operations Roles

Users who work typically from a desk-based environment, primarily managing specific business functions in departments e.g HR, Finance and Legal.



Clinical Roles (Non-Clinical Use)

Users working in clinical roles using M365 Copilot exclusively for non-clinical administrative tasks. It is not intended for clinical use.

USER GROUP DEFINITIONS

Types of users grouped by their primary work setting, the focus of their role, pilot participation level and the levels of digital integration in their ways of working.

User Group	Leadership	Security and IG	IT Admin	Business Operations	Clinicians (Non-Clinical Use)
Focus	High-level decision-making, strategy and organisational leadership.	Security monitoring, incident response, data privacy, and governance audits.	User account management, configuring systems and IT support.	Specialised business functions, knowledge-based work, and professional services.	General non-clinical administrative tasks, scheduling and documentation.
Pilot Participation Level	Medium	Medium	Medium	High	High
Digital Integration*					
Role type examples	<ul style="list-style-type: none">IT Directors, Heads of DigitalClinical Operational DirectorsChief Information Officers (CIOs)Senior Managers or Managers	<ul style="list-style-type: none">Information Governance ManagerRisk Management SpecialistsIncident Response Managers	<ul style="list-style-type: none">Local AdministratorsIT Support SpecialistsService Desk ManagersNetwork Administrators	<ul style="list-style-type: none">HR SpecialistsFinancial AnalystsLegal AdvisorsMarketing Coordinators	<ul style="list-style-type: none">Doctors,NursesPharmacistsTherapistsConsultantsSurgeonsRadiologists

Key: Full Integration Partial Integration Minimal Integration Low Integration

*How well digital tools and systems are used to support this role's responsibilities.

02

Copilot Functions

Microsoft 365 Copilot | Relevant Copilot Functions

The available functions of M365 Copilot for the pilot are outlined below.

Assist

Function used to:

- Assist you throughout your day, helping to keep you updated on the status of your team, work, and schedule.
- Prioritising events based on the role, past attendance, and agenda.



Ideate

Function used to:

- Generate new ideas and solutions.
- Create an initial draft in PowerPoint, Word Doc, and Outlook.
- Gain guidance on grammar, stylistic approach, and tonality.



Evaluate

Function used to:

- Evaluate existing materials to ensure you've met your objectives and have clearly articulated intent.
- Create charts, tables, and dashboards based on input and analyse data and generate insights.



Transcribe

Function used to:

- Transcribe meetings, automatically offering updates on what you may have missed, outlining key meeting notes, and recording any action items that were assigned.
- Capture information accurately from discussions or data inputs.



Summarise

Function used to:

- Summarise documents, email chains, and Teams meetings to prepare you and your team members for future collaboration.
- List out key points and action items from in-progress meetings.



Please note:

- If you are unsure which M365 app to use for Copilot, then Copilot Business Chat is a great option for general assistance with actions such as locating files and summarising your day.

03



User Personas & M365 Copilot Use Cases



NHS



M365 Copilot Use Cases for **Leadership**





“As a leader, I am constantly balancing competing priorities and feel like I have to play catch up to understand everywhere where my inputs are needed.”

M365 Copilot

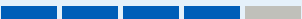
M365 Copilot Functions

- Assist
- Ideate
- Evaluate
- Transcribe
- Summarise

Top M365 Applications used today



Level of time spent in M365 Applications



Elina | Leadership Persona

Senior Manager | 3 Years

Role Responsibility:

As a Senior Leader within an NHS Trust, Elina is invited to countless Teams meetings every day. She must evaluate the importance of each meeting to determine which ones to attend and which ones to skip. In addition, there are times where her meetings run over, causing her to be late for the following meeting.

As it is not possible for Elina to attend every meeting, she must rely on either catching up through meeting notes that are sent out via email, which often get buried in Outlook, or through catch-up meetings scheduled later with team members.

Current Challenges:

- Switching between Teams and Outlook to see meeting updates.
- Meeting Overlap
- Pulling on other team members’ time to be brought up to date.
- Unclear meeting notes and lack of clear action items.

How will Elina benefit from Copilot?

Efficiency

- Elina experiences increased efficiency by better prioritising meetings, allowing her to allocate time more effectively and reduce the overall number of meetings she needs to attend.

Experience

- Non-working time is now more protected, not only for Elina, but for those she works with.
- Elina spends less time transitioning between applications and interfaces.

Effectiveness

- Post-meeting follow up conversations are reduced through clear and easily accessible meeting notes and action items generated by M365 Copilot that enable Elina to be more self-reliant.

Leadership Persona

Recommended actions and pitfalls to avoid when using M365 Copilot.



Do:

1. Use M365 Copilot for Prioritising Meetings:

- Leverage M365 Copilot to assess your calendar and help determine which meetings are most important, allowing for efficient time management and reducing unnecessary meetings.

2. Use M365 Copilot for Meeting Summaries:

- Use M365 Copilot to generate summaries of project updates or other key meetings, which helps in preparing effectively for upcoming discussions.

3. Use M365 Copilot to Protect Non-Working Time:

- Allow M365 Copilot to assist in prioritising your schedule and reducing redundant meetings, ensuring that both your time and the time of others is respected.

4. Use M365 Copilot for Clear Follow-Up Actions:

- Rely on M365 Copilot to create and distribute action items post-meeting to ensure that everyone involved understands their responsibilities and next steps.

5. Use M365 Copilot for Meeting Transcriptions:

- Use M365 Copilot in Teams to transcribe important meetings, especially when you need to leave early, so that you can catch up later without missing key points.

Don't:

1. Don't Rely on M365 Copilot Without Validation:

- Avoid assuming M365 Copilot-generated insights from data are always accurate. Always validate insights before making strategic decisions to avoid the risk of incorrect conclusions.

2. Don't Over-Rely on Summarisation on M365 Copilot:

- Be cautious about using M365 Copilot-generated summaries without reviewing them for completeness. Crucial updates or context could be missed, potentially impacting decisions or communication.

3. Don't Use M365 Copilot for Final Decision-Making:

- M365 Copilot can assist in analysis, but final decisions should always involve your expertise and judgment to ensure they are well-informed.

4. Don't Assume All Context is Captured by M365 Copilot:

- M365 Copilot may not capture every detail of a discussion. Avoid relying on its summaries as the sole record of important meetings; supplement with personal notes when needed.

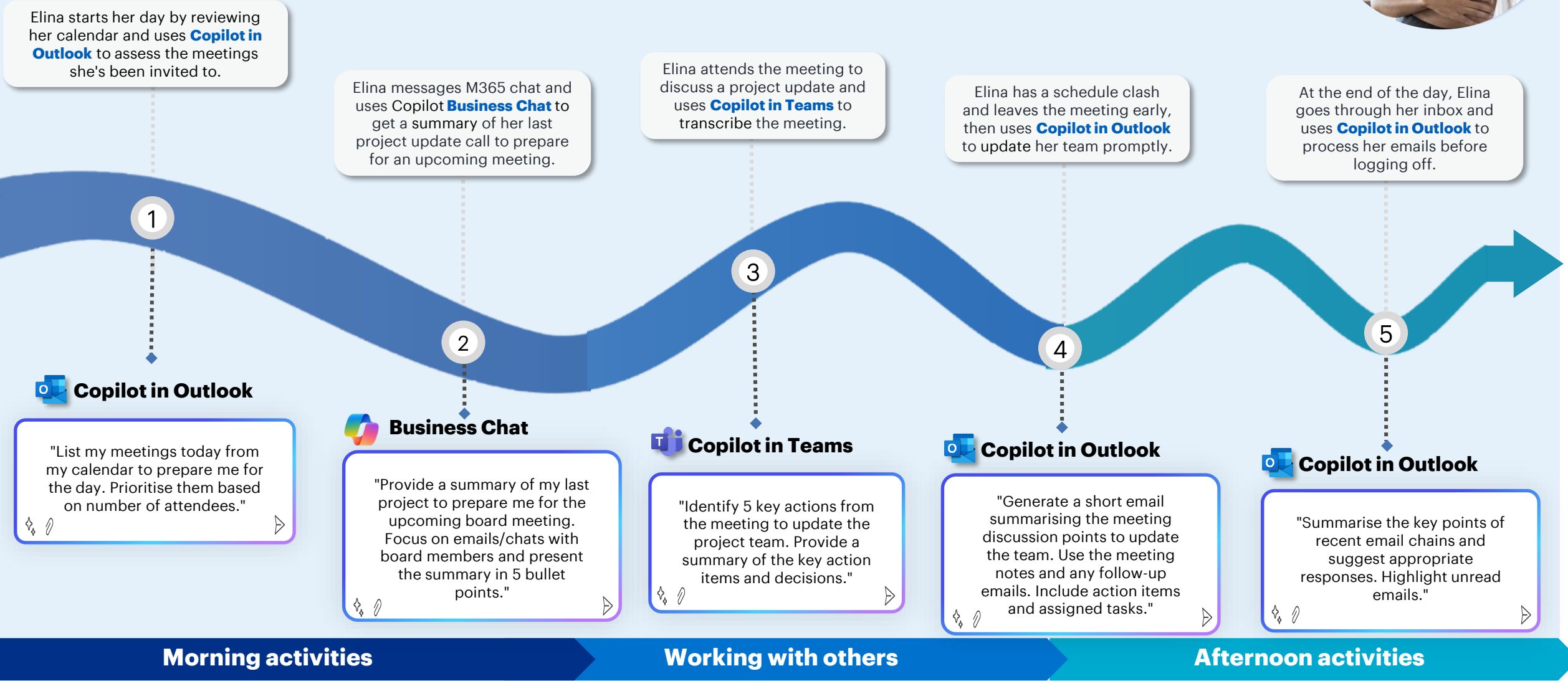
5. Don't Use M365 Copilot for Sensitive Communications:

- Avoid using M365 Copilot to draft or process highly sensitive emails or documents.

A day in the life | Leadership



- Copilot Benefits
- Enhanced Communication
- Accelerated Content Creation
- Encouraged Innovation



Inappropriate Use Case | Leadership

Elina | Senior Manager | 3 Years



Misinterpreting M365 Copilot Insights

Elina relies solely on M365 Copilot-generated insights to make strategic decisions **without validating the data or context**. This often leads to misinterpretations and poor decision-making.

1



Over-Reliance on Summarisation

Elina uses Copilot to summarise meeting notes and **misses critical updates or context**, which affects her understanding of ongoing projects.

2



Inadequate Follow-Up on Action Items

Elina **assumes** that Copilot will track all action items from meetings, resulting in **missed responsibilities and confusion** among team members.

3



Relying on M365 Copilot for Critical Communications

Elina drafts important communications using Copilot **without personalising or reviewing the content**, leading to messages that may lack the intended tone or clarity.

4



Ignoring Non-Working Time Protection

Elina uses M365 Copilot to schedule **back-to-back meetings without ensuring time for breaks**, compromising her well-being and productivity.

5



Warning to Elina

Inaccurate insights can lead to incorrect conclusions and unintended consequences.

Always validate M365 Copilot-generated insights with your own analysis and context before making strategic decisions.



Warning to Elina

Important context can be lost, impacting your ability to make informed decisions.

Review M365 Copilot-generated summaries carefully and supplement them with your notes.



Warning to Elina

Do not rely on M365 Copilot to track action items.

Regularly check and confirm follow-up actions to ensure accountability and clarity among team members.



Warning to Elina

Generated messages can misinterpret tone and context, leading to misunderstandings.

Always review and personalise important communications generated by M365 Copilot.



Warning to Elina

Be mindful of your schedule when using M365 Copilot.

Ensure there is adequate non-working time to recharge and maintain productivity. Protect your well-being and that of your team.

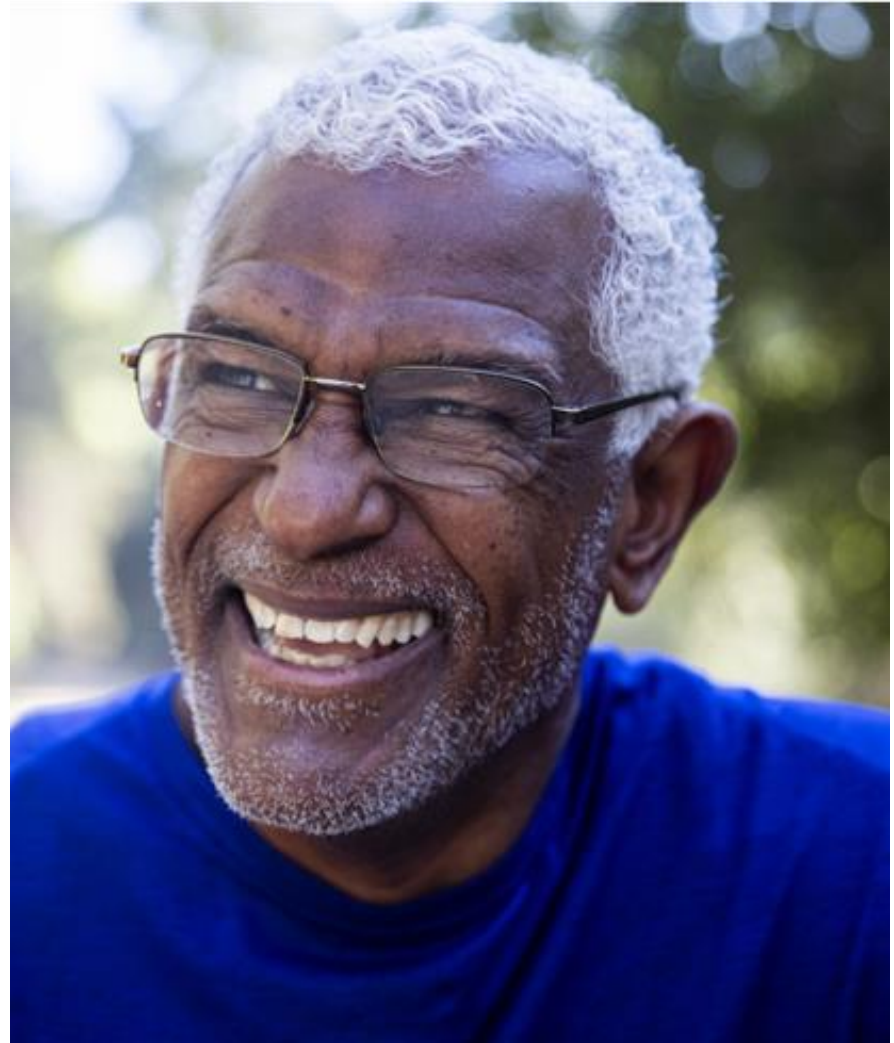
Morning activities

Working with others

Afternoon activities



M365 Copilot Use Cases for **Security & IG**





“In my role, staying ahead of potential threats is critical, but it often feels like a constant battle against time and resources.”

M365 Copilot

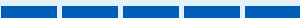
Top Copilot Functions Used

Assist Ideate Evaluate Transcribe Summarise

M365 Copilot Functions



Level of time spent in M365 Applications



Bernard | Security and IG Persona

Information Governance Manager | 4 Years

Role Responsibility:

As an Information Governance Manager within an NHS Trust, Bernard is responsible for ensuring data security and compliance with regulations. He monitors the trust’s information systems and must constantly evaluate potential security risks.

With the rise in cyber threats, Bernard frequently engages in security audits and assessments, often needing to coordinate with various departments to ensure compliance and mitigate risks. He also conducts training sessions to educate staff on best practices for data security.

Current Challenges:

Ensuring all employees are informed about evolving security policies.

Coordinating security practices across departments.

Balancing immediate security issues with long-term strategic planning.

Difficulty in tracking compliance across various departments.

Time-consuming manual security assessments that could be automated.

Managing the workload involved in responding to frequent data breaches.

How will Bernard benefit from Copilot?

Efficiency

- Bernard experiences enhanced efficiency by automating routine compliance checks and audits. Providing more time to address critical tasks requiring strategic oversight.

Experience

- Bernard's work experience will improve as he can focus more on strategic aspects of his role.
- M365 Copilot will reduce time spent on manual processes and gathering updates.

Effectiveness

- Bernard’s role will be more effective with the streamlining workflows and improving information access. With automated processes and concise summaries, he can make informed decisions quickly.

Security & IG Persona

Recommended actions and pitfalls to avoid when using M365 Copilot.



Do:

1. Use M365 Copilot for Routine Compliance Checks:

- Leverage M365 Copilot to assist with compliance audits and checks, freeing up time for more critical tasks that require your strategic oversight.

2. Use M365 Copilot for Organising Security Reports:

- Use M365 Copilot in Outlook to efficiently review and organise emails, including security incident reports and compliance updates, at the start of your day.

3. Use M365 Copilot for Accessing User Audit Documents:

- When preparing for user audits, utilise M365 Copilot Business Chat to quickly access the latest user audit logs documents, ensuring you have the most current information.

4. Use M365 Copilot for Gathering Insights:

- Employ M365 Copilot in Teams to extract and compile insights regarding data security practices from various departments, streamlining your workflow.

5. Use M365 Copilot for Reporting:

- Use M365 Copilot in Excel to create graphs and visuals from your findings, enhancing the clarity of your reports for senior management.

Don't:

1. Don't Prompt Without Oversight:

- Avoid fully relying on M365 Copilot to generate security assessments or compliance tracking without validating the results, as gaps or inaccuracies may arise from misinterpretation of policies.

2. Don't Compromise on Privacy:

- Be cautious not to use M365 Copilot for reviewing sensitive information if data classifications are not in place, as this could lead to unintentional sharing of confidential data.

3. Don't Skip Manual Checks:

- Do not assume M365 Copilot's generated processes are foolproof; always perform manual checks on critical compliance tasks to ensure thoroughness and accuracy.

4. Don't use M365 Copilot for Organisational Policies and Procedures:

- Avoid using Copilot for corporate policy matters, especially related to information security.


A day in the life | Security & IG



- Copilot Benefits
- Streamlined Information Management
- Enhanced Decision-Making
- Encouraged Innovation

At the start of his day, Bernard reviews emails, including security incident reports and compliance updates, using **Copilot in Outlook** to organise them.

1

 **Copilot in Outlook**

"Draft a two-paragraph response for common security queries using emails received yesterday. Highlight critical updates and use formal language."

Bernard is preparing for an upcoming security audit and uses Copilot **Business Chat** to access the latest compliance documents.

2

 **Business Chat**

"Locate the 5 most recent compliance reports to aid my security audit. Search within Teams and provide the names and modification dates of the reports."

Bernard needs to gather insights from various departments regarding data security practices and uses **Copilot in Teams** to extract information.

3

 **Copilot in Teams**

"Extract key insights from transcribed meetings and conversations about data security practices. Focus on meetings and conversations from the past week."

Bernard compiles his findings into a report for senior management and uses **Copilot in Excel** to create graphs and visuals based off a table.

4

 **Copilot in Excel**

"Generate 10 graphs and visuals for senior management based on data from this table. Highlight security risks and recommendations."

Bernard reviews the report and uses **Copilot in Teams** to ensure all action items from recent meetings are included.

5

 **Copilot in Teams**

"List all action items from meeting notes over the past 2 weeks to integrate into the report. Group by topic."

Morning activities

Working with others

Afternoon activities

Inappropriate Use Case| Security & IG

Bernard | Information Governance Manager | 4 Years



Prompting Missteps in Compliance Checks

Bernard automates compliance checks entirely using Copilot, **without manual oversight**. This may lead to critical compliance issues being missed due to system errors or incorrect interpretation of policies.

1



Misuse of M365 Copilot for Sensitive Data Reviews

Bernard uses M365 Copilot to prompt the review of sensitive security incident reports **without ensuring proper data classification** are in place, which could lead to unauthorised access or data breaches.

2



Over-Reliance on Summaries for Decision-Making

Bernard **relies solely on M365 Copilot-generated summaries** to make critical decisions regarding compliance and security practices, potentially missing important context or details.

3



Prompting Report Generation Without Verification

Bernard uses M365 Copilot to prompt the generation of reports and visuals for senior management **without verifying the data**, resulting in inaccuracies that could mislead stakeholders.

4



Prompting Action Items Without Manual Checks

Bernard relies on M365 Copilot to track and include all action items from recent meetings in compliance reports, **leading to missing critical follow-ups**.

5



Warning to Bernard

Do not fully rely on M365 Copilot for compliance checks without manual review.

Always perform a thorough review to ensure accuracy and completeness.



Warning to Bernard

Be careful when using M365 Copilot to review sensitive data.

Always ensure that data classifications are in place to prevent unauthorised access and avoid potential data breaches.



Warning to Bernard

Always ensure that access controls are properly configured to prevent unauthorised access and avoid potential data breaches.

Review the full documents and verify the accuracy of the summaries to ensure no critical information is missed.



Warning to Bernard

Inaccuracies in the data could lead to incorrect conclusions, which may mislead senior management.

Always verify the data used in reports generated by M365 Copilot.



Warning to Bernard

Do not assume M365 Copilot will capture every action item accurately.

Manually review and confirm all action items to ensure that critical responsibilities are not missed.

Morning activities

Working with others

Afternoon activities



M365 Copilot Use Cases for **IT Administration**



IT Administration Persona

Recommended actions and pitfalls to avoid when using M365 Copilot.



Do:

1. Use M365 Copilot for Common Queries:

- Do use M365 Copilot to answer routine tasks, such as responding to common IT queries (e.g., password resets) and tracking project progress, freeing up time for more critical issues.

2. Use M365 Copilot for Generate Insights from Data:

- Do use M365 Copilot to generate insights from recent data and create dashboards to identify trends and make informed decisions promptly.

3. Use M365 Copilot to Summarise Documents for Reporting:

- Do use M365 Copilot to summarise IT-related documents and generate slides or reports to facilitate communication with leadership and colleagues.

4. Use M65 Copilot for Managing Meetings and Project Deadlines:

- Do use M365 Copilot to assist with managing meetings, agendas, and project timelines. This can improve your efficiency in handling overlapping responsibilities.

5. Use M365 Copilot for Task Management:

- Do use M365 Copilot to help organise daily tasks, create reminders, and track deadlines. This will help ensure that tasks are assigned appropriately.

Don't:

1. Don't Generate Critical IT Configurations Without Verification:

- Generating the setup of user accounts or IT management tasks without manual review could lead to incorrect configurations, causing security vulnerabilities or service disruptions.

2. Don't Use M365 Copilot to Fully Draft IT Strategies:

- Avoid relying solely on M365 Copilot to create or finalise IT strategies. Always manually review AI-generated content to ensure it aligns with organisational policies.

3. Don't Rely Exclusively on Summarisation for Complex Reports:

- Important context may be lost if M365 Copilot is solely used to summarise complex technical reports, which can impact the quality of decisions made.

4. Don't Prompt Responses for Non-Routine IT Queries:

- Avoid using M365 Copilot to prompt answers to uncommon or complex IT requests without your input, as these often require detailed contextual understanding.



“I have such a packed and busy schedule. It would be nice to have something that enables me to focus on my project work.”

M365 Copilot

M365 Copilot Functions

Assist

Ideate

Evaluate

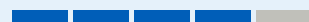
Transcribe

Summarise

Top M365 Applications used today



Level of time spent in
M365 Applications



Michelle | IT Administration Persona

Local IT Administrator | 9 Years

Role Responsibility:

As a Local Administrator within an NHS Trust, Michelle is responsible for managing all NHSmail user activity associated with her trust via the NHSmail Portal. This includes setting up new user accounts, assigning M365 licenses through user policies and supporting staff with IT related queries such as password resets. Outside of this, Michelle spends her time managing multiple projects, deadlines and leadership, staying up to date with the latest portal updates, all while maintaining a high level of accuracy and quality in her work.

In juggling meetings and user queries, Michelle finds it difficult to stay organised while keeping up with her own tasks.

Current Challenges:

Ad-hoc requests & user support queries

Adapting to changes to NHSmail Portal

Tracking the progress of deliverables

Managing time and tasks

Documentation management

Information overload

How will Michelle benefit from Copilot?

Efficiency

- M365 Copilot can help Michelle create and assign tasks, set deadline reminders, and track and update progress.
- Automating routine tasks, such as responding to common user queries and tracking project progress.

Experience

- Michelle feels more in control of her time, now that her tasks and schedule have been organised.
- Michelle can now navigate her responsibilities with greater ease and less stress.

Effectiveness

- Michelle's effectiveness increases significantly.
- With automated manual processes and quick access to essential information, Michelle can make more informed decisions promptly.

A day in the life | IT Administration



Copilot Benefits


Accelerated Content
Creation and Reduced Errors

Organised Data Access

Enhanced Productivity

At the start of her day, Michelle reviews emails, including IT-related user queries, using **Copilot in Outlook** to prioritise her tasks.

1

 **Copilot in Outlook**

"Summarise emails from yesterday with critical deadlines and user queries to highlight urgent/outstanding tasks. Please include sender name."

Michelle is working on an IT strategy pack and uses Copilot **Business Chat** to find last year's version.

2

 **Business Chat**

"Locate last year's IT strategy pack within the IT Teams site. Highlight the most important initiatives planned for the fiscal year."

Michelle accesses the most recent data update in Excel and uses **Copilot in Excel** to generate insights for the IT strategy pack.

3

 **Copilot in Excel**

"Provide insights from the highlighted data for use in the IT strategy meeting. Suggest conditional formatting."

Michelle uses **Copilot in Excel** to create a dashboard for the IT strategy pack.

4

 **Copilot in Excel**

"Add all insights to a grid."

Michelle summarises last year's IT strategy pack and uses **Copilot in PowerPoint** to create a slide pack and talk track.

5

 **Copilot in PowerPoint**

"Generate a slide pack and suggest a talk track for the IT strategy presentation using information from file /IT_Strategy."

Morning activities

Working with others

Afternoon activities

Inappropriate Use Case | IT Administration

Michelle | Local IT Administrator | 9 Years



Prompting User Account Setup Without Oversight

Michelle prompts the setup of new user accounts entirely with M365 Copilot, **without manually verifying each step**. This could result in incorrect configurations, leading to security vulnerabilities or disruptions in IT services.



Using M365 Copilot to Summarise Complex IT Reports

Michelle **relies entirely on** M365 **Copilot-generated summaries** for technical reports. Important details or nuances may be lost, impacting decision-making.



Prompting Responses to Non-Routine IT Queries

Michelle uses M365 Copilot to respond to **unusual IT-related user queries**. This could lead to misinformation, especially if the query requires specific technical understanding.



Inputting Sensitive IT Data for M365 Copilot Analysis

Michelle **inputs sensitive IT data**, such as user credentials or system vulnerabilities, into Copilot for analysis. This could lead to a breach of sensitive information if not properly secured.



Over-Reliance on M365 Copilot for IT Strategy Creation

Michelle uses M365 Copilot to draft an entire IT strategy **without adding her own input** or reviewing the generated content.

1

2

3

4

5



Warning to Michelle

Do not rely solely on M365 Copilot to set up user accounts without manual verification.

Always review and verify account configurations to ensure that all settings align with organisational security protocols.



Warning to Michelle

Avoid relying solely on M365 Copilot for summarising complex IT reports.

Manually review the full report to capture all essential details before making any decisions based on the summary.



Warning to Michelle

Do not use M365 Copilot for prompting answers to non-routine or complex IT queries without manual input.

Review M365 Copilot-generated responses and adapt them as needed.



Warning to Michelle

Avoid inputting sensitive IT data into M365 Copilot.

Handle sensitive information manually.



Warning to Michelle

Do not depend completely on M365 Copilot for creating IT strategies.

Review and customise drafts to ensure it reflects the specific needs and objectives of your organisation.

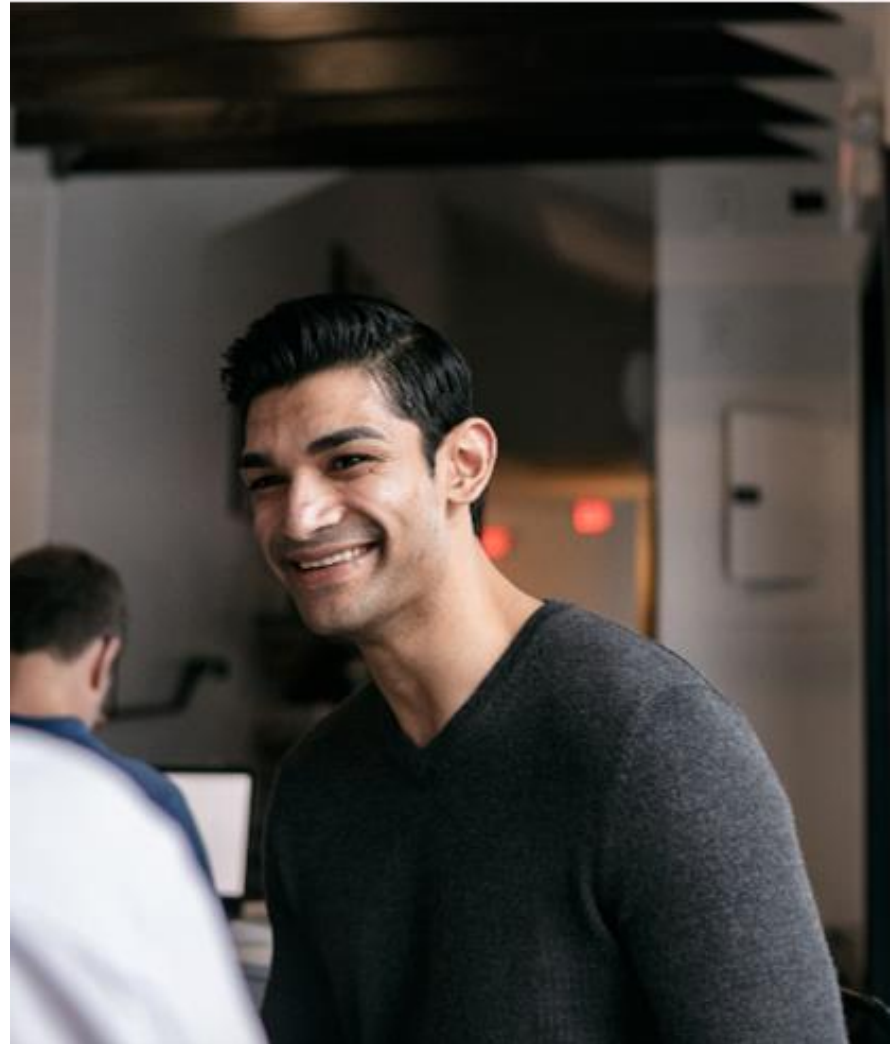
Morning activities

Working with others

Afternoon activities



Copilot Scenarios for **Business Operations**



Business Operations Persona

Recommended actions and pitfalls to avoid when using M365 Copilot.



Do:

1. Verify Content Generated by M365 Copilot:

- Always review content generated by M365 Copilot for accuracy, especially in important communications like job descriptions or recruitment emails.

2. Customise Responses Generated by M365 Copilot :

- Tailor M365 Copilot-generated responses to meet the specific needs of the recipient to ensure better communication.

3. Use M365 Copilot for Creativity:

- Spend more time developing creative approaches to matching individuals with vacancies, as M365 Copilot assists with formatting and content review.

4. Add Human Touch to Feedback Generated by M365 Copilot :

- Edit M365 Copilot prompt responses to provide empathy and professionalism, particularly when responding to sensitive candidate feedback.

5. Maintain Privacy Controls when using M365 Copilot :

- When using M365 Copilot to process candidate or employee data, ensure data classifications are on to prevent unauthorised access.

Don't:

1. Don't Use M365 Copilot Prompted Responses for All Situations:

- Avoid using M365 Copilot to prompt negative feedback or complex questions without human oversight. It can lead to inappropriate responses.

2. Don't Ignore Customisation:

- Avoid sending generic, prompted responses without adding personalisation; it can make communication feel impersonal and ineffective.

3. Don't Use M365 Copilot to Communicate Sensitive Information:

- Refrain from using M365 Copilot for sensitive or confidential communication, especially if empathy is critical.

4. Don't Use M365 Copilot to Validate Candidate Data:

- Do not rely entirely on M365 Copilot-generated insights for evaluating candidates.



“Every email, every document – it’s my passion to connect healthcare professionals with their dream roles. My dyslexia can add hurdles, and at times, leaves me feeling frustrated”

M365 Copilot

M365 Copilot Functions

- Assist
- Ideate
- Evaluate
- Transcribe
- Summarise

Top M365 Applications used today



Level of time spent in M365 Applications



Miguel | Business Operations Persona

Recruitment Specialist | 5 Years

Role Responsibility:

Miguel, an HR Specialist specialising in recruitment & staffing, is passionate about helping healthcare professionals find fulfilling roles within the NHS. He was diagnosed with dyslexia during his university years but has never let it hinder his career aspirations.

Miguel is consistently communicating with colleagues to gather role requirements via Teams and Outlook, before translating this information into job descriptions, postings and recruitment emails. With his dyslexia, he finds he spends more time proof-reading and in peer-review calls, to mitigate some of the challenges he faces with written communication such as spelling errors or grammatical inconsistencies.

Current Challenges:

- Written communication challenges
- Managing multiple recruitment tasks
- Time-consuming content revisions
- Tracking shared files
- Complex information processing
- Job description consistency

How will Miguel benefit from Copilot?

Efficiency

- Miguel experiences increased efficiency in creating new recruitment content, replying to emails and reducing time spent proofreading.

Experience

- Miguel feels more confident in the emails and content he generates.
- Miguel can spend more time focusing on creative ways to align individuals with open role vacancies.

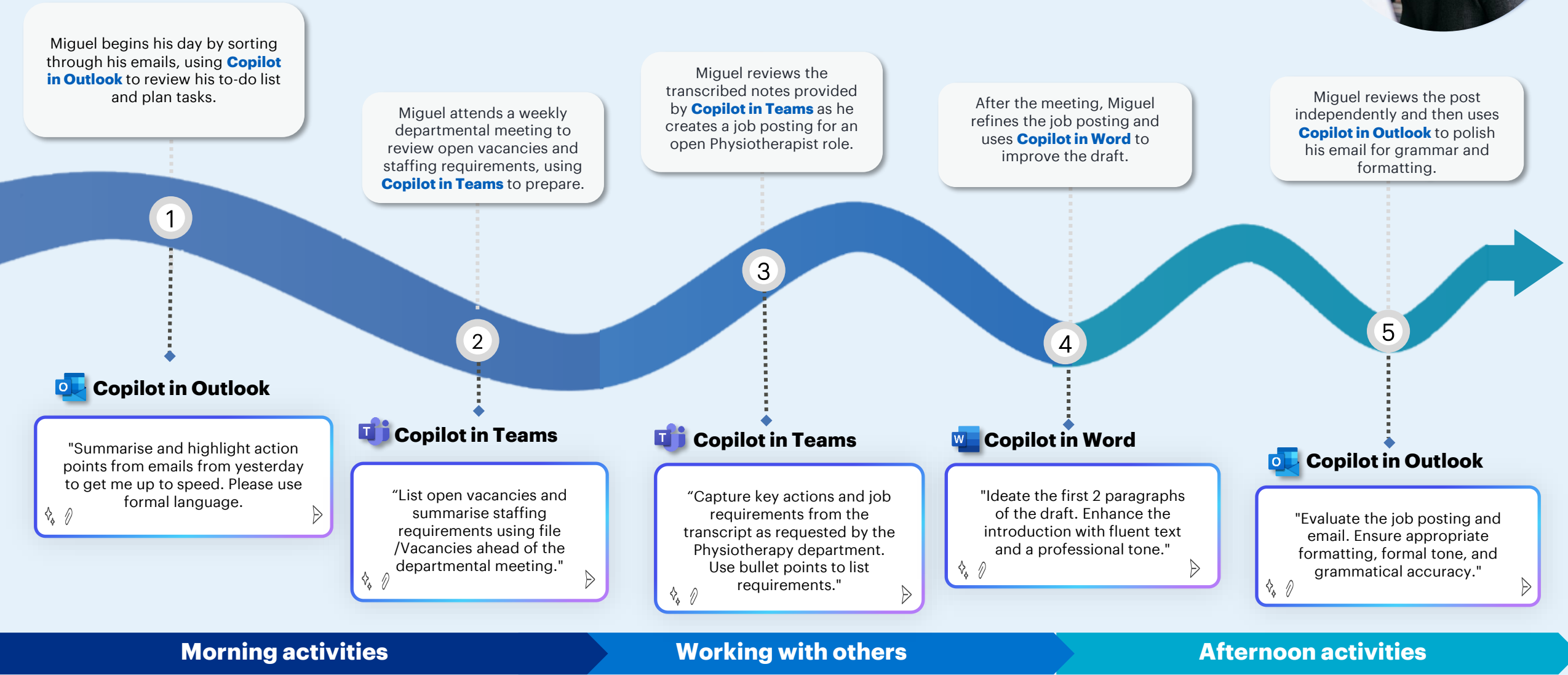
Effectiveness

- Peer review calls are reduced, with the support of M365 Copilot in formatting and reviewing the grammatical elements of content generated.

A day in the life | Business Operations

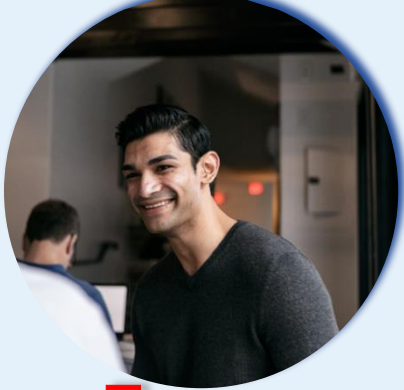


- Copilot Benefits
- Summarising Key Points
- Accelerated Content Creation
- Support for Learning Difficulties



Inappropriate Use Case | Business Operations

Miguel | Recruitment Specialist | 5 Years



Lack of Personalisation in Candidate Communication

Miguel uses Copilot to craft responses to candidate inquiries **without customising the content** to individual candidates, affecting the candidate experience negatively.

1

Warning to Miguel

Customise all M365 Copilot-generated responses to address candidates' specific questions and needs.

Personalised communication is key in building relationships and attracting the right talent.



Errors in Role Requirement Interpretation

Miguel **depends on M365 Copilot to summarise** role requirements gathered from colleagues, which may lead to incorrect or incomplete job postings.

2

Warning to Miguel

Do not assume M365 Copilot fully understands all role requirements shared by colleagues.

Cross-check with stakeholders to ensure accuracy in job postings.



Privacy Concerns with Candidate Data

Miguel uses M365 Copilot to summarise candidate data, including personal details, **without verifying privacy settings**, risking unintentional sharing of sensitive information.

3

Warning to Miguel

Take special care not to expose confidential information and maintain compliance with data privacy regulations.

Ensure all privacy settings are appropriately configured when using Copilot to handle candidate data.



Generated Candidate Feedback Response

Miguel uses M365 Copilot to generate candidate feedback, including negative comments, **without human oversight**, risking inappropriate responses.

4

Warning to Miguel

Do not rely on M365 Copilot for sensitive or negative feedback responses.

Review and edit such responses to ensure they convey empathy and professionalism



Miscommunication Due to Lack of Verification

Miguel relies on M365 Copilot to draft and finalise job descriptions and recruitment emails **without a thorough review**, potentially resulting in inaccuracies.

5

Warning to Miguel

Generated content may overlook important details, so a human review is crucial for accuracy.

Always verify the content generated by M365 Copilot.

Morning activities

Working with others

Afternoon activities



M365 Copilot Use Cases for **Clinical**





“Freeing up time through improved administrative support helps me save time in my role.”

M365 Copilot

M365 Copilot Functions

- Assist
- Ideate
- Evaluate
- Transcribe
- Summarise

Top M365 Applications used today



Level of time spent in M365 Applications



Henrik | Clinical Persona (Non-Clinical Use)

Nurse Practitioner | 7 Years

Role Responsibility:

Henrik has been working within the NHS for the past 7 years, prioritising administrative tasks.

He spends his time managing schedules and collaborating with colleagues across various departments.

Henrik is constantly on the go, navigating between different systems and tasks, which can make it challenging to track down the information he needs quickly. This often results in extra time spent searching for what he needs.

Current Challenges:

Lack of time to keep up to date with the M365 apps & systems

Finding files that have been shared through multiple channels

Managing time effectively with administrative tasks.

Limited resources for ongoing training on new systems and technologies.

How will Henrik benefit from Copilot?

Efficiency

- M365 Copilot enables Henrik to quickly find files across different channels, significantly reducing the time spent sifting through Teams and Outlook.

Experience

- Henrik saves time in finding the information he needs.
- M365 Copilot can provide quick tutorials to support Henrik in navigation.

Effectiveness

- M365 Copilot provides easy access to essential information and reduces the time spent on administrative tasks.
- Improving Henrik’s overall effectiveness.

Clinical Persona (Non-Clinical Use)

Recommended actions and pitfalls to avoid when using M365 Copilot.



Do:

1. Use M365 Copilot for Document Preparation:

- Use M365 Copilot to assist in drafting and updating administrative documents, such as presentations.

2. Use M365 Copilot for Simplifying Administrative Tasks:

- Use M365 Copilot to quickly locate essential files and reduce time spent searching through different channels.

3. Use M365 Copilot to Format General Documents :

- Allow M365 Copilot to assist in drafting and formatting general documents.

4. Use M365 Copilot for Gather Feedback on Presentations:

- Use M365 Copilot in Teams to gather feedback on presentations or administrative initiatives for process improvement.

Don't:

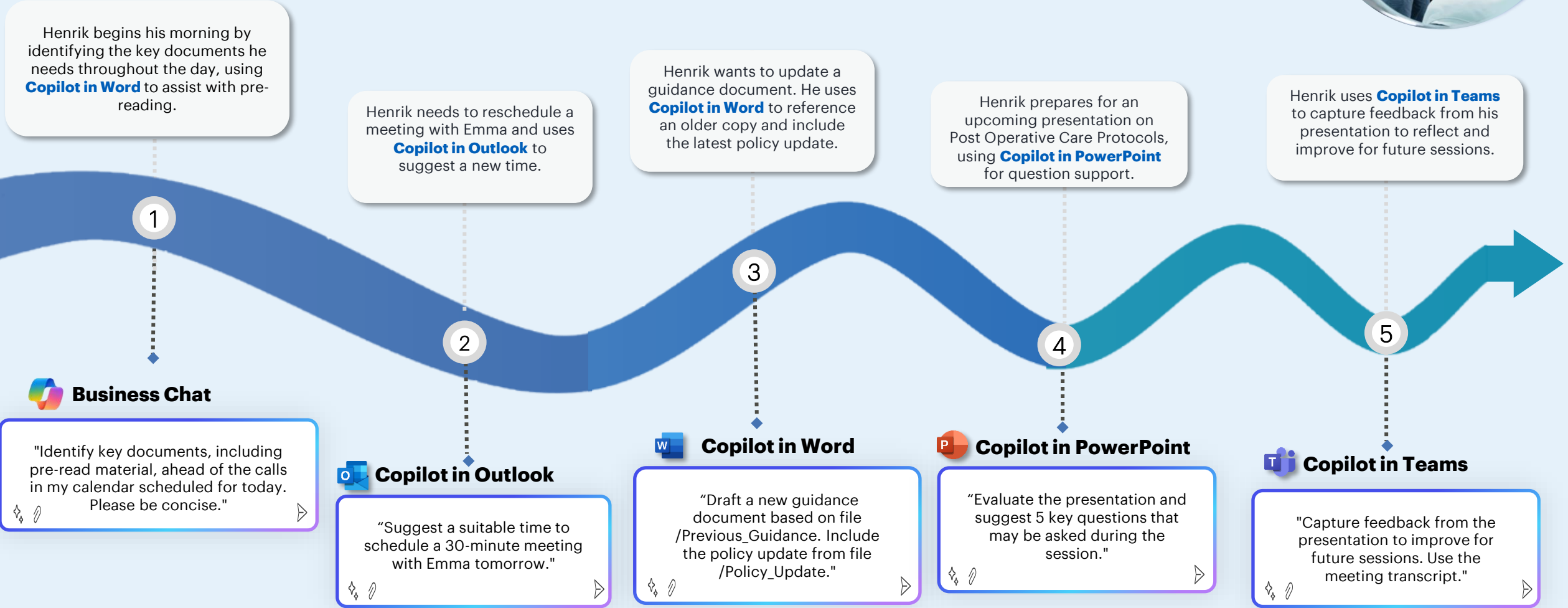
1. Do Not Use M365 Copilot in Clinical Scenarios.

- Users performing clinical tasks must carefully consider the risks associated with utilising M365 Copilot in their environment.
- The initial phase of the M365 Copilot pilot is focused on administrative and business support tasks, not clinical use. **Therefore, you should not accept a Copilot licence unless you commit to not using Copilot-generated outputs to inform or guide clinical decisions.**

A day in the life | Clinical Persona (Non-Clinical Use)



- Copilot Benefits
- Efficient document summaries
- Organised data access
- Time-saving for ideation



Morning activities

Working with others

Afternoon activities