

STARTING SOON

We'll begin shortly

Giving everyone a few minutes to join.

Unlocking Microsoft 365 Copilot

Practical AI for the Not-For-Profit sector | Webinar 2 of 3

While you wait, have a think about

If Copilot could save you time on one task tomorrow, what would it be?



Housekeeping

- Attendee microphones and cameras are off
- Meeting chat is disabled
- Use the Q&A panel to send questions at any time
- Questions are answered in the Q&A at the end

WEBINAR 2 OF 3

Unlocking Microsoft 365 Copilot

Practical AI for the Not-For-Profit sector



What you'll walk away with

Six practical outcomes from today's session

01 What it is

02 How it differs

03 Where it helps

04 How to prompt

05 Where to start

06 Adopting safely

A practical session, not a technical deep dive — useful work, clear boundaries and a sensible place to start.

PART 1 OF 4

Understanding Copilot

What it is, what it isn't, and how it works with your information

What Microsoft 365 Copilot is

In plain English, without the marketing speak



Helps you understand

Reads, summarises and analyses information, so you can focus on interpretation and action.



Works inside your everyday tools

Available across familiar Microsoft 365 apps such as Outlook, Teams, Word and PowerPoint.



Creates a starting point

Drafts content, organises information and helps you get past the blank page.



Grounded in your context

Uses work information the signed-in user is authorised to access and always needs human judgement.

Think of Copilot as an assistant that helps you work with information, not just find it.

What Copilot is not

Cutting through the hype and the fear



Not a magic button

It won't fix poor data, broken processes or unclear strategy.



Not a replacement for people

It handles routine work. Judgement, empathy and relationships stay firmly with your team.



Not always right

It can miss context or get details wrong. Human review is non-negotiable.



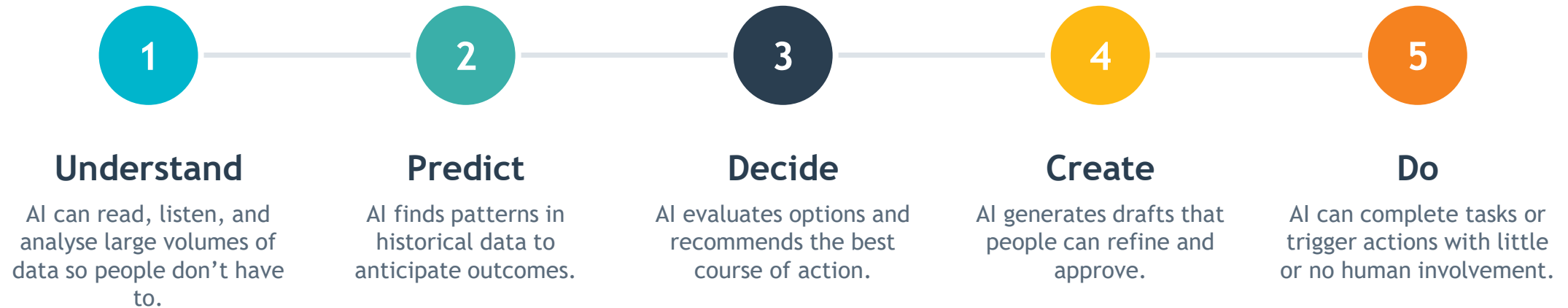
Not a standalone project

Value comes when foundations, governance and adoption are addressed together.

Copilot doesn't replace expertise. It removes some of the work that gets in the way of using it.

How AI helps people work

Five ways AI can support your organisation



Most organisations begin with understanding and creating, long before they move towards automation.

How Copilot works behind the scenes

Your prompt, your work context, your existing permissions – then human review

1

Your prompt

The task, question or instruction you give it.

2

Your work context

Information already available to you in Microsoft 365.

3

Your permissions

The access you already have, unchanged.

4

AI reasoning

The model drafts, summarises or analyses.

5

Human review

You check, correct and decide.

**Copilot does not create a new permission model.
It works within the access and information environment you already have.**

What Microsoft 365 Copilot can access



Available through Microsoft 365

Subject to the user's permissions, configuration and availability

- Teams
- SharePoint
- OneDrive
- Outlook
- Office documents
- Meeting content



Requires an approved connection

External systems are not automatically available to Copilot

- CRM systems
- Case management systems
- Finance and payroll
- Network drives
- Other business applications

Connectors, agents or integrations can bring approved information into scope.

Microsoft 365 Copilot

Works within the signed-in user's existing access

Copilot does not expand access rights or automatically search systems outside Microsoft 365.

PART 2 OF 4

Preparing your organisation

Where to start, and what to review before you roll anything out

Where to start your Copilot journey

Get foundations and quick wins right before agents and automation



Start where the foundations are solid. Momentum matters more than ambition.

Preparing Your Organisation for Copilot

Three things to review before rollout

1

Information

Where does your information live?

Is it current, organised and possible for the right people to find?

2

Permissions

Who can see what?

Copilot works with the access that already exists, so it makes existing access patterns visible.

3

Governance

What is acceptable use?

Do people understand expectations around AI use, sensitive information, approvals and accountability?

Copilot doesn't create permission problems. It reveals permission problems that may already exist.

PART 3 OF 4

Copilot in practice

Four everyday use cases, better prompts, and knowing when to slow down

USE CASE 1

Board papers

From a 200-page pack to a one-page briefing

01 The situation

A 200-page board pack lands on Friday afternoon and the meeting is Monday.

02 What Copilot does

Summarises the key decisions, risks and financial commitments into a draft board briefing.

03 What stays human

You read the critical papers, validate the recommendations and make the decisions.

Three hours of reading becomes a focused briefing in minutes.

EXAMPLE PROMPT

“Summarise this board pack into the top three decisions required, key risks, financial commitments and actions. Present it as a one-page board briefing in plain English.”

USE CASE 2

Grants and funding

From scattered evidence to a structured first draft

01 The situation

Applications, acquittals and funder reports consume days of effort.

02 What Copilot does

Drafts funding applications aligned to funder criteria, consolidates the evidence and prepares funder reports.

03 What stays human

You validate the figures, add the strategic narrative, review compliance requirements and approve the submission.

Turn days of collation and drafting into a structured first draft.

EXAMPLE PROMPT

“Using our program overview, outcomes report and the funder’s guidelines, draft a funding application outline. Map each section to the assessment criteria and identify any missing evidence.”

USE CASE 3

Policies & Procedures

From scattered information to a review-ready first draft

01 The situation

Policies and procedures take time to create, update and maintain.

02 What Copilot does

Uses existing organisational information to draft and update policy documents.

03 What stays human

Apply organisational judgement, validate compliance requirements and approve the final policy.

Copilot drafts the document. People own the outcome.

EXAMPLE PROMPT

“Draft a flexible working policy using our employee handbook and recent leadership decisions. Use plain English, keep it under two pages, and identify any decisions that require executive approval.”

USE CASE 4

Meetings that create action

From preparation to follow-through

EXAMPLE PROMPT

“From this meeting, list confirmed decisions, actions and named owners. Separate confirmed items from suggestions and draft a short follow-up email.”

BEFORE THE MEETING

Challenge: Preparation takes time.

COPILOT CAN

Summarises past discussions and prepares your briefing.

WHAT STAYS HUMAN

Deciding what the meeting is for and who needs to be there.

DURING THE MEETING

Challenge: Decisions, actions and context get missed.

COPILOT CAN

Helps capture decisions and actions as the conversation happens.

WHAT STAYS HUMAN

Confirming decisions and agreeing what matters most.

AFTER THE MEETING

Challenge: Follow-up gets delayed and actions are forgotten.

COPILOT CAN

Drafts recaps and follow-up communications.

WHAT STAYS HUMAN

Validating owners and dates and owning the communication.

The value isn't faster notes. It's clearer continuity from conversation to action.

How to get better results from Copilot

Task + context + source + output, then review and refine

1. Task

Be specific about what you need

2. Context

Say who it's for and why

3. Source

Point Copilot at the right information

4. Output

Describe the format you want

5. Review & Refine

Iterate until the result meets your needs

TOO VAGUE

"Summarise this report"

BETTER

"Summarise this report into three key risks, three opportunities and three recommended actions."

Useful follow-ups

Ask Copilot to refine its first answer

Make this shorter

Rewrite in plain English

Cite the source for each point

Highlight any assumptions

A useful prompt gives Copilot the same clarity you'd give a capable colleague.

Using Copilot responsibly

Before using an AI-generated result, ask:



Accurate

Have I checked the facts? Are the sources reliable?



Safe

Does this contain sensitive or confidential information?



Fair

Could bias or assumptions be influencing the result?



Approved

Is this an approved tool and use case for us?



Accountable

Would I be comfortable taking responsibility for this?

HUMAN JUDGEMENT MATTERS MOST

Grant applications and funding submissions

Board and executive reporting

HR and people decisions

Legal, financial or compliance matters

Decisions affecting people or services

The higher the consequence of an error, the higher the level of human review required.

PART 4 OF 4

Adopting with confidence

Choosing where to start, what good adoption looks like, and how to prepare

Choosing your first use cases

Start with value, not complexity



Start where the pain is loudest

The teams asking for help are the ones who'll embrace the change.

Quick wins first

Build credibility with small, visible successes before tackling bigger workflows.

Measure what matters

Track time saved, quality improved and stress reduced, not just adoption rates.

Pick three use cases to start - not thirty - and let early wins build momentum.

What successful adoption looks like

The patterns we see in organisations getting real value

Visible executive use

Leaders use it themselves and talk about it, rather than announcing it from above.

Champions, not mandates

People adopt what their peers use successfully, not what they're told to use.

Specific use cases

Real problems with clear owners, measurable outcomes and visible value.

Honest about wins and misses

Teams share what didn't work as openly as what did. Learning beats perfection.

Organisations seeing real returns treat Copilot as a capability to build, not a tool to deploy.

Key takeaways

What to remember, and what comes next

1 Copilot supports people. It doesn't replace expertise or accountability.

2 Start with real work, reliable information and manageable risk.

3 Good prompts help, but human review remains essential.

4 Prepare the foundations, prove the value, then expand deliberately.

NEXT IN THE SERIES

Webinar 3 — From Copilot to agents: purpose-specific AI for knowledge and workflows

Not sure where to start?

You don't need a complete Copilot strategy before the first conversation

Lanrex can help you understand

- ✓ Your highest-value opportunities
- ✓ Your information and security foundations
- ✓ The right first use case
- ✓ A practical roadmap for what comes next

Let's explore your Copilot starting point

BOOK A CONVERSATION

Talk to Lanrex about
your AI starting point



WEBINAR 3

From Copilot to agents:
purpose-specific AI



One useful conversation can bring clarity to the next step.



Questions?

Over to you — and here's how to keep the conversation going.

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