



AI for Executive Leadership

Chris Porter • Innovation Profs • ASPE • September 11, 2026

Chris Porter



- Associate professor of computer science at Drake University and director of Drake's Artificial Intelligence program
- Teach classes in computer science, data analytics, artificial intelligence, and digital ethics

Innovation Profs LLC

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INNOVATION**PROFS**LLC

Today's plan

- AI overview
- Tool selection
- Get the most out of prompting
- How AI is being used in 2026
- Copilot deep dive
- Ethical/legal issues

AI Overview



What is artificial intelligence?

- Artificial Intelligence is a branch of computer science that deals with the creation of technology that enables machines and computers to think and act like humans.
- AI helps systems learn from data, recognize patterns and make decisions to solve complex problems.



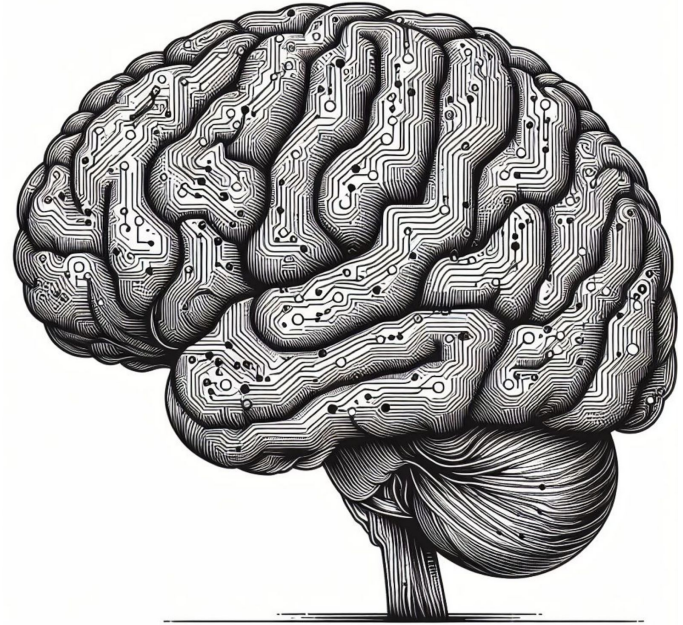
What is generative AI?

- Generative AI is a branch of artificial intelligence that uses generative models to **create brand-new content** such as text, images, video, audio, or code, rather than simply classifying or retrieving existing data.
- The model learns patterns in its training data and then produces original outputs when given an input prompt (e.g., “Summarize this text” or “Design a poster about _____”).



Large language models

- Large language models (LLMs) are machine learning models that have been trained using massive amounts of textual data.



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Large language models

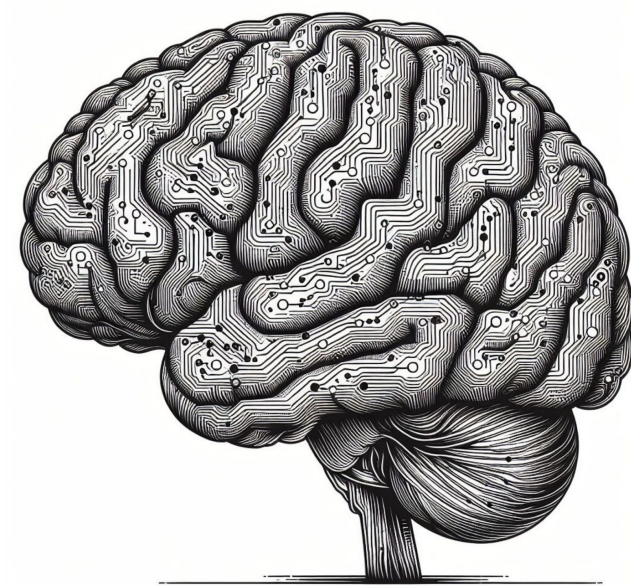
- The key breakthrough in the development of LLMs is the ability of models to provide on-topic, human-like text in response to the prompts they receive.

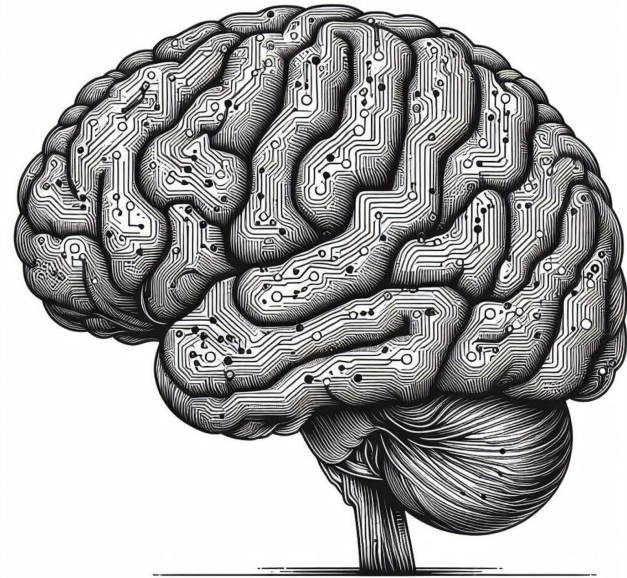
Large language models

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GPT-2 example
in response to a
prompt about
North Korea:

Life is a place full of surprises! Melt a glorious
Easter cake in French but not that green. Well,
a green cake, but for a Tuesday, of course! All
Easter party year and here is the reason for baka.



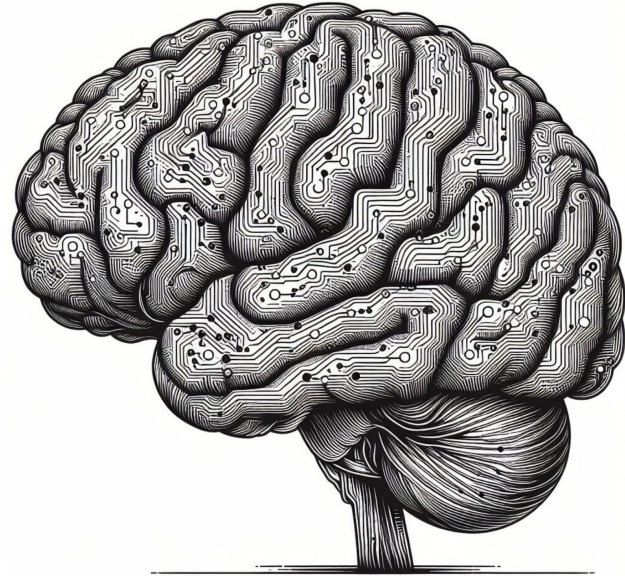


Complete this sentence:
"A duck walks into a..."





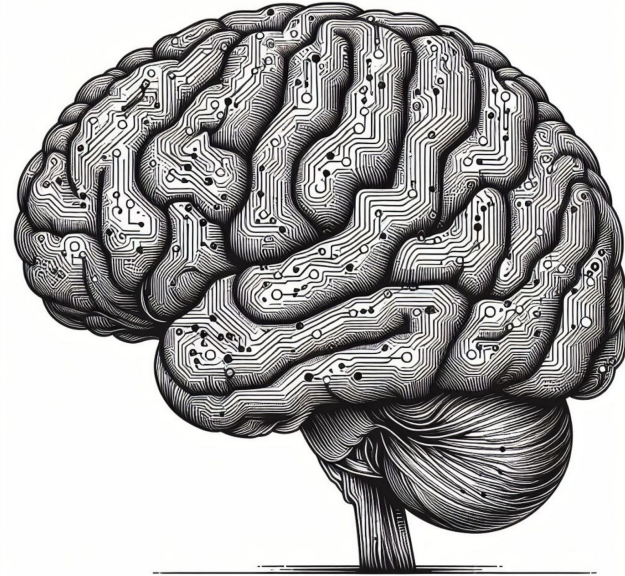
Complete this sentence:
"A duck walks into a..."



A duck walks into a { bar (93%)
pond (4%)
bucket (2%)
typhoon (1%)



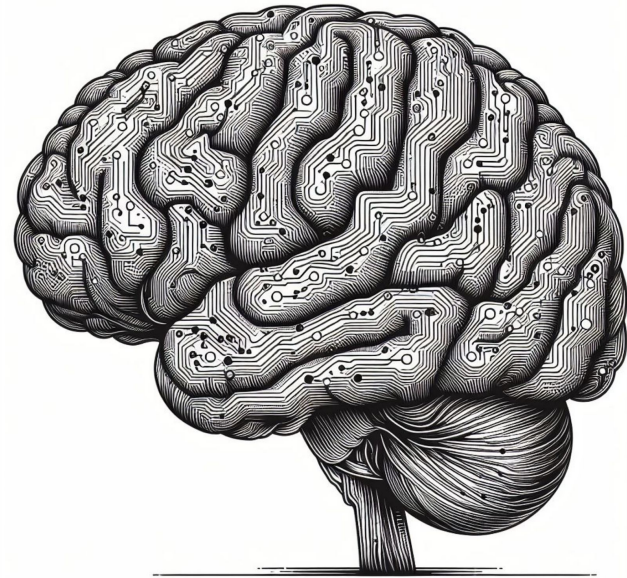
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A duck walks into a {
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Complete this sentence:
"A duck walks into a..."



A duck walks into a bar.

Tool Selection









ChatGPT



Claude



INNOVATION**PROFS**LLC



 Gemini

 ChatGPT

 Claude

 Copilot

 Gemini

 ChatGPT

 Claude

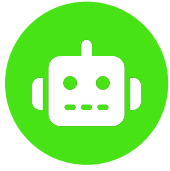
 perplexity

 Grok

 Meta AI

 deepseek

 Copilot



ChatGPT

GPT-5.6 is flagship with GPT-6 Astra just arriving · The versatile all-rounder

BEST FOR

The deepest ecosystem. Strong across text and images. The safe default if you want one tool for a wide range of work.

Note: Sora video generation was discontinued in April 2026.

KEY FEATURES

- Deep Research
- Codex coding agent and Agent Mode
- Custom GPTs
- Image generation (Images 2.5)
- Memory and advanced voice
- ChatGPT Work





Claude

Flagship model is Claude Opus 4.8 · The writing and reasoning specialist

BEST FOR

Produces the cleanest writing, handles careful analysis, and is strong at coding. It holds the thread across long documents. Claude is the pick when your work is heavy on drafting, editing, or building.

KEY FEATURES

- Projects and Artifacts
- Claude Code and Cowork
- Web search and cross-chat memory
- Strong long-document analysis
- Connectors (Gmail, Drive)



Gemini

Gemini 3.1 Pro · Best inside Google Workspace

BEST FOR

Wins if you live in Gmail, Docs, and Sheets, where it is built right in. A very large 1M-token context window, strong multimodal output, and a generous free tier round it out.

KEY FEATURES

- Native Workspace integration
- 1M-token context window
- Deep Research and NotebookLM
- Veo video generation
- Image generation (Nano Banana)



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Microsoft Copilot

Powered by GPT and Claude models · AI inside your Microsoft 365 apps

BEST FOR

Its edge is not the model, it is where it lives: embedded in Word, Excel, PowerPoint, Outlook, and Teams, and grounded in your organization's own data. The license is an add-on on top of a Microsoft 365 plan.

KEY FEATURES

- Works inside the Office apps
- Grounded in org data (MS Graph / WorkIQ)
- Drafts from your real files and email
- Excel formulas and slide generation
- Powered by OpenAI's GPT and Anthropic's Claude models



Beyond text...

Category	Top Tools	Why Use It?
Image Generation	Gemini, ChatGPT, Ideogram, Midjourney	To create high-quality visuals, graphics, and illustrations from text prompts for marketing, design, and storytelling.
Video Creation	Runway Gen-4, Google Veo 3	To create high-fidelity video clips with consistent characters, lighting and audio.
Voice & Audio	ElevenLabs, Suno	For ultra-realistic voice cloning and generation or generating full songs from a text prompt.
Productivity	Gamma, Powerpoint, Google Slides	To turn a single prompt into a fully designed slide deck in 60 seconds.
Coding/Web	Lovable, Bolt, Claude Artifacts	"Vibe-coding" ... building functional websites or apps just by describing them.

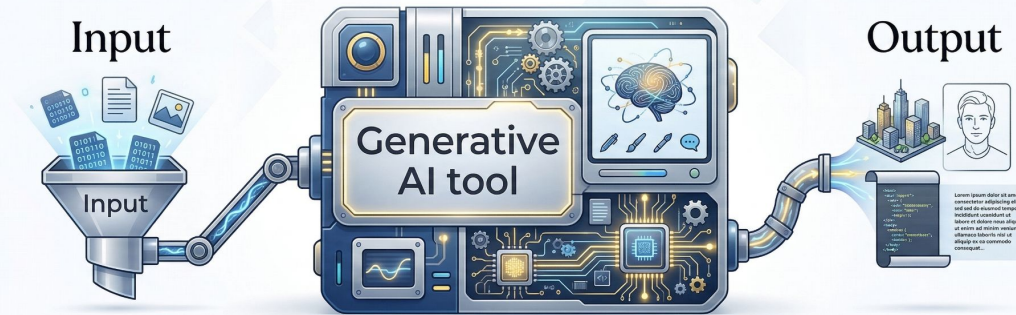


Get the most out of prompting



What is prompting?

- Prompting is the process of creating an input (usually text) instructing the Generative AI to generate the desired response.



Write an initial prompt

- Write a prompt asking an LLM of your choice to do something related to an item on your work to-do list.

Weak vs. Strong prompt



WEAK

Write a social media post about our event.



STRONG

Write a LinkedIn post promoting a free, one-hour virtual workshop for small-business owners who are curious about AI. Emphasize that it is practical and beginner-friendly. Use an upbeat, professional tone, keep it under 150 words, include three key benefits, and end with a clear invitation to register.

Our guiding template: BRIEF

- When you craft your prompts, it is helpful to include the following ingredients:
 - Background
 - Role
 - Instructions
 - Examples
 - Format
- There may be some overlap between these categories, but they still provide a useful heuristic for us.
- In addition, not all of these ingredients are required for an effective prompt.

Background

- When prompting an LLM, the words that you use as input inform the words that are chosen by the LLM as output.
- The more relevant background information you can provide, the better the response will be in general.
- This is where you can share your **context** and **constraints**.

did the groundhog see its shadow

Yes. According to the Groundhog Day events on February 2, 2026, the famous forecasting groundhog Punxsutawney Phil emerged from his burrow and **saw his shadow**, traditionally interpreted as a sign of **six more weeks of winter** rather than an early spring. [people.com +1](#)

Some other regional groundhogs made different predictions on the same day, but Phil's shadow sighting is the most widely reported this year. [nbcchicago.com](#)

        Sources

My kids and I are anxiously awaiting news of whether or not the groundhog saw his shadow today and what that means. What can you tell us?

Here's the latest on **Groundhog Day 2026!**

What the famous groundhog predicted today

The most well-known celebration in Punxsutawney, Pennsylvania is done for this morning. **Punxsutawney Phil came out of his burrow and saw his shadow**, according to the event's organizers. That means, according to tradition, **six more weeks of winter weather** instead of an early spring. [The Weather Cha... +1](#)

This announcement was made during the annual festivities at Gobbler's Knob before a large early-morning crowd. [The Weather Cha...](#)

How Groundhog Day tradition works

The idea behind Groundhog Day goes like this:

- If the groundhog sees its shadow on February 2, folklore says **winter will stick around for several more weeks**.
- If it **does not see a shadow**, that was traditionally taken as a sign that **spring is coming early**.

[Wikipedia](#)

Other predictions from today

Ceremonies happen in other places too. In some, like Woodstock, the local groundhog did **not** see a shadow, suggesting an early spring — even though Phil's call still leans toward more winter. [cbsnews.com](#)

What it really means

It's fun folk tradition and a great way to celebrate this time of year. There isn't scientific evidence that seeing a shadow actually controls the weather, but it's a lighthearted way for families and communities to mark the transition from winter toward spring. [countryliving.com](#)

If you want, I can share a quick explanation of where this tradition came from or what the extended weather outlook looks like for your area!

Role

- It is generally helpful to specify a role that you want the LLM to play in providing its response.
 - “Act as an expert in _____.”
- Two benefits from specifying a role for the LLM to play:
 - Improved accuracy and performance
 - Tailored tone and style

tell me about mcdonalds

McDonald's is one of the most recognizable fast-food companies in the world and kind of a masterclass in scale.

The basics

- Founded in 1940 by Richard and Maurice McDonald in San Bernardino, California
- Ray Kroc joined in the 1950s and turned it into a global franchise powerhouse
- Headquarters are in Chicago
- Best known for burgers, fries, Chicken McNuggets, and the Big Mac

How it really makes money

A common misconception is that McDonald's is mainly a restaurant company. It is also a massive real estate business.

- Most locations are franchised
- McDonald's often owns the land and building, then charges franchisees rent and fees
- This model creates very steady, predictable revenue

act as a restaurant critic. tell me about mcdonalds

McDonald's is the great paradox of the dining world. It is at once deeply familiar and strangely engineered, a restaurant you do not really visit so much as re-enter, like a well worn memory that smells faintly of fries.

The menu is built on consistency, not surprise. A Big Mac is not trying to impress you, it is trying to reassure you. The beef patties are thin and obedient, the lettuce shredded into anonymity, the sesame seed bun engineered for softness rather than character. And yet, the whole is more compelling than the parts. The special sauce is a masterclass in fast food alchemy, tangy, sweet, and just mysterious enough to keep you coming back.

Fries remain the crown jewel. When fresh, they are golden, salty, and almost elegant in their restraint. They have a narrow window of greatness, but inside it, they are arguably unmatched in the fast food universe. Cold fries, however, are a reminder that McDonald's magic is highly time sensitive.

The breakfast menu may be the brand's most honest expression. Egg McMuffins are efficient and satisfying, with real eggs that suggest an unexpected respect for morning routines. Hash browns are aggressively crispy, almost defiant in their oiliness, and universally beloved.



Instructions

- The instructions tell the LLM what we want it to do.
- The instructions can range from a simple request to a complex chain of steps or something in-between.
- One good thing to add to your instructions: “Ask me clarifying questions before answering.”

Examples

- Examples can help the LLM handle unique cases or exceptions in whatever task it is carrying out.
- Examples can also help ensure consistency in the output of the LLM for a given task.

I will give you names of movies, and you will write a short summary.

Sounds good.

Send the first movie title whenever you're ready. 🎬



Avatar

Avatar

Set on the lush alien world of Pandora, *Avatar* follows Jake Sully, a former Marine who uses a genetically engineered Na'vi body to interact with the planet's indigenous people. As he grows close to the Na'vi and their culture, Jake is forced to choose between helping human colonizers exploit Pandora's resources or defending the world and people he has come to love.



I will give you a movie title, and you will write a short summary.

Example:

Movie title: Jurassic Park

Plot: Dumb humans make dinos, dinos chomp humans!

Sequels: Too many

Deal 😊

Drop the first movie title when you are ready.



Avatar

Movie title: Avatar

Plot: Humans want space rocks. Blue cat people say no. Guy switches sides, rides big dragon.

Sequels: Still coming, somehow underwater now



Format

- If the output format matters, clearly and specifically describe the format you want.
- Formats could be things like:
 - Bullet points
 - Table
 - HTML Code
 - Executive Summary
 - Pros and Cons
 - Number of words
 - Etc.



what are some recent trends in podiatry

Yes. Podiatry is changing fairly quickly, particularly around **diabetic-foot prevention**, **minimally invasive procedures**, **digital monitoring**, and **personalized biomechanics**. Some of the biggest recent trends in 2025–2026 are:

1. AI-assisted diabetic-foot monitoring

AI is increasingly being explored for analyzing foot photographs, thermal images, wound characteristics, and other clinical data to identify problems earlier. Wearables and smart insoles/socks can also monitor temperature, pressure, and gait changes that may precede an ulcer. [PubMed +1](#)

The important caveat: **this is still an emerging technology rather than a replacement for clinical examination**. Recent reviews specifically note that larger clinical studies are needed before many AI/wearable approaches become routine care. [PubMed](#)

2. Remote patient monitoring and tele-podiatry

Care is moving beyond the clinic. Smartphone photographs, connected devices, and remote wound monitoring can allow clinicians to follow high-risk diabetic patients between visits. Some programs are combining this with AI-based wound assessment and continuous offloading/pressure monitoring. [HMP Global Learning Net...](#)

This fits into a broader shift from **reactive wound treatment** → **proactive ulcer prevention**.

3. Minimally invasive foot surgery

There's growing interest in smaller-incision/percutaneous approaches for conditions such as diabetic foot deformities, forefoot problems, and some reconstructive procedures.

what are some recent trends in podiatry? for each trend, tell me its benefit and whether it will last

Worked for 23s >

A useful way to think about current podiatry is that some trends are really **technology upgrades to established care**, while others are still in the “promising but prove it” stage. Here are the ones I’d put near the top in 2026.

Trend	Main benefit	Will it last?
Minimally invasive foot and ankle surgery	Smaller incisions, less soft-tissue disruption, often less postoperative pain and faster recovery. It has expanded well beyond bunion correction into osteotomies and some fusion procedures. PubMed Central (... +1)	Yes — very likely. The techniques and ins maturing, and this looks more like a perma fad.
Weight-bearing CT (WBCT)	Gives a true 3-D view of the foot and ankle while the patient is standing, which can reveal alignment and deformity that ordinary CT or 2-D radiographs may underestimate. Particularly useful for flatfoot/progressive collapsing foot deformity, hallux valgus and syndesmotic problems. PubMed Central (... +1)	Yes. Cost and access will limit universal a an important specialty imaging tool.
Smart insoles, socks and remote diabetic-foot monitoring	Sensors can monitor temperature and plantar pressure continuously, potentially flagging inflammation or excessive loading before an ulcer becomes obvious. A 2025 meta-analysis found fewer ulcers and am ↓ tions in groups using foot-temperature monitoring. ScienceDirect +1	Probably yes, but selectively. I expect it some high-risk diabetic patients rather th patient wears.

BRIEF Example

- **BACKGROUND:** Free, one-hour virtual AI workshop for small-business owners with no prior AI experience. Posting on LinkedIn.
- **ROLE:** You are a B2B copywriter who writes upbeat, non-corporate LinkedIn content for small-business audiences.
- **INSTRUCTIONS:** Write a LinkedIn post promoting the workshop. Emphasize it's practical and beginner-friendly. Include three benefits. End with a clear call to register. No jargon or buzzwords.
- **EXAMPLE:** “Feeling behind on AI? You're not alone — and you don't need to be a tech expert to catch up. Join us for a free, one-hour workshop built for small-business owners who want practical AI skills they can use right away.”
- **FORMAT:** Under 150 words. Short paragraphs or line breaks, not dense blocks.

Your turn!

- Try out a the BRIEF template on the prompt you wrote earlier.
 - **B — Background** - what context is needed?
 - **R — Role** - assign a role: “Act as a _____”
 - **I — Instructions** - what do you want the model to do?
 - **E — Examples** - show what good looks like
 - **F — Format** - how should the output be presented?
- How did the BRIEF version of the prompt perform compared to your original prompt?



How to use AI in 2026



Four ways to work with AI

As a Creator

Generate new content, code, and working prototypes from scratch, turning a rough idea into a first draft you can react to

As an Analyst

Interrogate data to find patterns, outliers, and insights you might miss

An a Strategist

Weigh options, pressure-test plans, and map out the steps to reach a goal

As a Researcher

Gather, summarize, and synthesize information across sources so you start from a clear picture instead of a blank page

AS A CREATOR

Turn a rough idea into a first draft

You need a job posting for a new role and you're staring at a blank page with three bullet points.

YOUR PROMPT

Act as an experienced hiring manager.
Turn these notes into a job posting:

- Marketing Coordinator, hybrid
- Needs: social, email, 2+ years
- Team of 4, fast-paced

Friendly tone. Intro, duties, requirements.



WHAT COMES BACK

Marketing Coordinator (Hybrid)

We're a fast-moving team of four hiring a coordinator to own our social and email channels.

You'll: plan campaigns, write copy, track results.

You bring: 2+ yrs, strong writing, social + email.

Always verify. A starting point, not a final post. Add your real pay range, perks, and voice.

Role • Instructions
Examples • Format

More Creator use cases

- First-draft the email you keep rewriting: a delicate decline, a follow-up, a firm-but-polite nudge.
- Build a meeting agenda and your talking points from a one-line goal.
- Make a reusable template: onboarding checklist, status-update format, recurring report.
- **Your turn: How can you use AI as a Creator?**



AS AN ANALYST

Find what's hiding in the numbers

You've got a column of monthly figures and a nagging feeling something's off, but no time to dig.

YOUR PROMPT

Act as a data analyst. Here's our monthly spend by category.

Tell me the top three things that stand out - trends, spikes, or anything unusual. Plain English, no jargon.

[paste the table]



WHAT COMES BACK

1. Software spend jumped 60% in Q2, likely new subscriptions.
2. Travel near zero Mar–May, then spiked in June.
3. “Misc” is your 2nd-largest line, worth itemizing.

Always verify. Check its math against the source. AI can misread a column or invent a trend.

**Background • Role
Instructions • Format**

More Analyst use cases

- Turn open-ended survey responses or customer feedback into a handful of themes.
- Compare two documents (two contracts, two drafts, last year's vs. this year's) and list what changed.
- Sort a messy list: categorize expenses, tag feedback, group tasks.
- **Your turn: How can you use AI as an Analyst?**

AS A STRATEGIST

Pressure-test a plan before you commit

You've got a plan you like, which is exactly when you need someone to poke holes in it.

YOUR PROMPT

Act as a skeptical operations lead. Here's my plan to move our team to a four-day work week.

Play devil's advocate: what could go wrong, what am I missing, and what would you do first?

[paste your plan]

WHAT COMES BACK

Risks: Friday coverage gaps, client expectations, burnout if 40 hrs in 4 days.

Missing: how you'll measure success; a trial period.

Do first: run a 6-week pilot with one team.

Always verify. It raises the questions. You know the politics and context it doesn't.

Role • Background
Instructions

More Strategist use cases

- Weigh two options as a clean pros-and-cons or a simple decision matrix.
- Rehearse a hard conversation (a negotiation, a performance review) by having it role-play the other side.
- List the tough questions you'll get in a meeting, so none of them are a surprise.
- **Your turn: How can you use AI as a Strategist?**

AS A RESEARCHER

Get up to speed before the meeting

You've got a meeting on a topic you half-understand and fifteen minutes to not look lost.

YOUR PROMPT

Act as a research assistant. Brief me on [the topic] for a meeting in 15 minutes.

Give me: what it is, why it matters now, and three questions I should be ready to answer. Keep it to one page.



WHAT COMES BACK

What it is: the topic in two plain sentences.

Why now: the trend or pressure driving it.

Be ready for: budget impact, timeline, who owns it.

Always verify. Verify the facts and dates — AI sounds confident even when it's outdated or wrong.

Role • Instructions
Format

More Researcher use cases

- Summarize a long email thread, report, or PDF into the decision and the action items.
- Have it explain something complex in plain English, and tell it the level (“explain it like I'm new to this”).
- Get a high-level comparison of tools or vendors as a starting point, then verify.
- **Your turn: How can you use AI as a Researcher?**

What's next: Agentic AI?

- Agentic AI refers to AI systems that can autonomously act, make decisions, and pursue goals across multiple steps or tools.
- Three traits of agentic AI:
 - **Autonomy:** it works toward a goal without you prompting every step.
 - **Tool use:** can call APIs, search the web, write files, send emails, query databases.
 - **Adaptation:** observes the result of each step and changes course if something goes wrong.

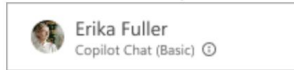
Copilot Deep Dive



Three versions of Copilot

- The version you have can be seen in the bottom-left corner when you login at **m365.cloud.microsoft**

- Copilot Chat (Basic) - You don't have the Microsoft 365 Copilot add-on license and don't have access to Copilot in Word, Excel, PowerPoint and OneNote.



- M365 Copilot (Basic) - You don't have the Microsoft 365 Copilot add-on license, but will have [standard access](#) to Copilot in the apps.



- M365 Copilot (Premium) - You have a Microsoft 365 Copilot add-on license with [priority access](#) for the full experience of Copilot in Word, Excel, PowerPoint, and OneNote.



“Free” version

- If you don't have the Microsoft 365 Copilot add-on, you will have one of two “free” options.

- Copilot Chat (Basic) - You don't have the Microsoft 365 Copilot add-on license and don't have access to Copilot in Word, Excel, PowerPoint and OneNote.



Erika Fuller
Copilot Chat (Basic) ⓘ

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Erika Fuller
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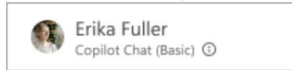
Erika Fuller
M365 Copilot (Premium) ⓘ



Paid version

- If you do have the Microsoft 365 Copilot add-on, you will have the M365 Copilot (Premium) version.

- Copilot Chat (Basic) - You don't have the Microsoft 365 Copilot add-on license and don't have access to Copilot in Word, Excel, PowerPoint and OneNote.



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Basic vs. Premium

- **Basic:** Standard access to Copilot capabilities, which is subject to service capacity and may vary throughout the day.
- **Premium:** Priority access to Copilot capabilities – faster response times and more consistent availability compared to standard access, including during peak usage periods, subject to service availability.

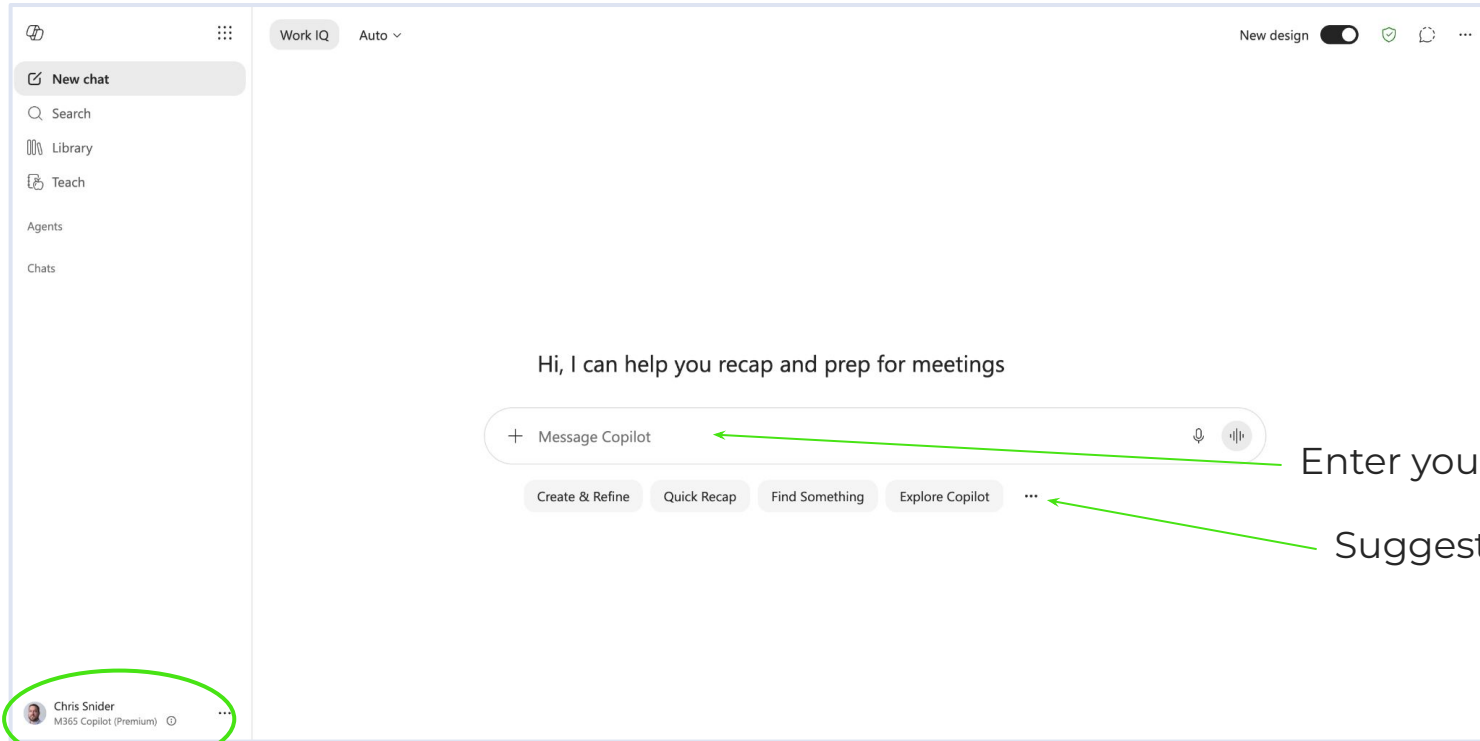


What you are paying for

- The free Copilot Chat is **web-grounded only** and cannot automatically access your internal work content.
- The paid license adds AI chat that **responds using your work data** (files, emails, chats, people).

Where to access

- In a web browser at **m365.cloud.microsoft**
- The **Microsoft 365 Copilot app** on your computer
- **Mobile app** on your phone
- Through **Teams, Outlook** and other Microsoft apps



Enter your prompt here

Suggested ways to use

See your version of Copilot down here

Enter a prompt and view results

What are some ways an HR professional can use Copilot Chat?

HR professionals can use **Copilot Chat** as a thinking partner, writing assistant, research tool, and productivity coach throughout the employee lifecycle.

Here are some practical use cases:

Recruiting and Hiring

Write job descriptions

- Create inclusive job postings
- Adjust reading level for different audiences
- Highlight required vs. preferred qualifications
- Remove biased or exclusionary language

Example prompt:

Create a customer service manager job description that focuses on skills and experience rather than specific degrees.

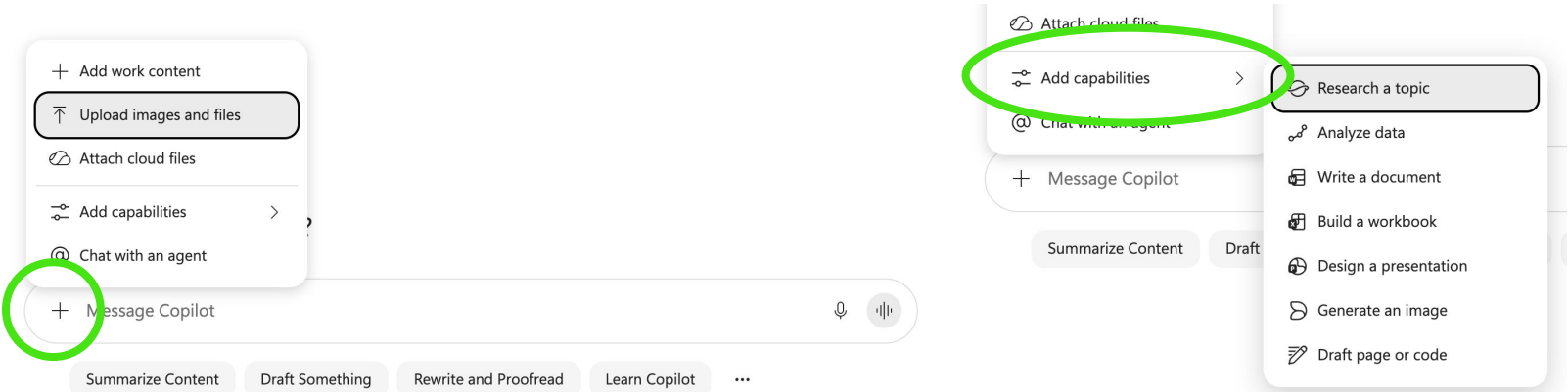
Develop interview materials

- Generate interview questions
- Create scoring rubrics
- Build behavioral interview scenarios
- Suggest follow-up questions



Add files

- Press the plus sign to add a document that you can summarize, analyze or rewrite.



Save your prompts

Save any prompt that you create by clicking on the Save Prompt option on the prompt.

What are some ways an HR professional can use Copilot Chat?
Save prompt



HR professionals can use **Copilot Chat** as a thinking partner, writing assistant, research tool, and productivity coach throughout the employee lifecycle.

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Share your prompts

Shared prompt links are accessible to anyone in your company. Added files can only be viewed with permission.

What are some ways an HR professional can use Copilot Chat?
Copy prompt link



HR professionals can use **Copilot Chat** as a thinking partner, writing assistant, research tool, and productivity coach throughout the employee lifecycle.

Here are some practical use cases:

Recruiting and Hiring

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- Highlight required vs. preferred qualifications
- Remove biased or exclusionary language

Example prompt:

Create a customer service manager job description that focuses on skills and experience rather than specific degrees.

Prompt Lab

What can I help you with?

+ Message Copilot



Summarize Content

Draft Something

Rewrite and Proofread

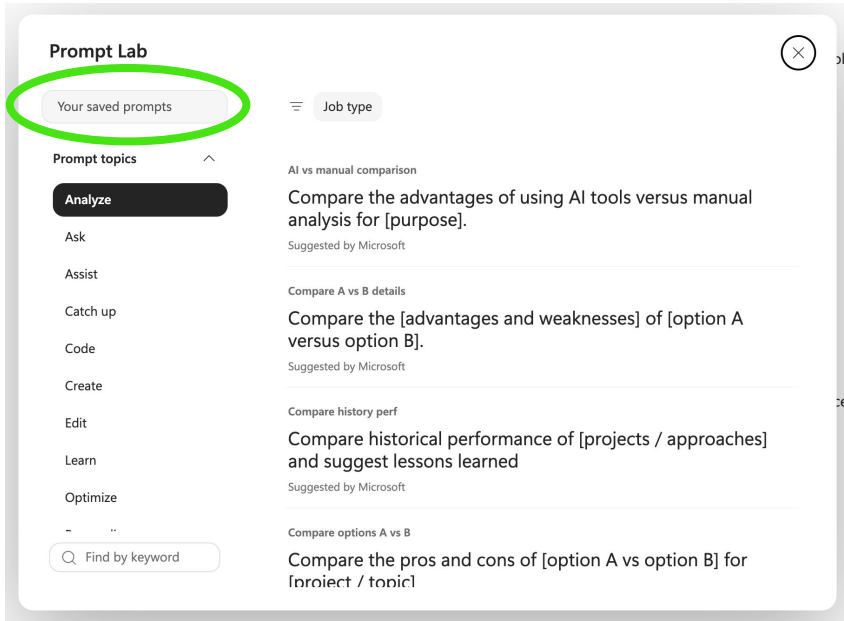
Learn Copilot

...

- Click on “...” below your prompt box to open up the Prompt Lab.



Prompt Lab



- The Prompt Lab includes suggested prompts as well as your saved prompts.

Model picker

Auto ▾



Auto

Decides how long to think

Quick response

Answers right away

Think deeper

Think longer for better answers

GPT

OpenAI



Claude

Anthropic



GPT 5.6 Think deeper

GPT 5.5 Quick response

- Click on Auto at the top of the screen to choose which AI model you want to use.



Top-right of your screen



Shield icon indicates
enterprise data protection



Start a temporary chat - not saved
to your chat history and does not
create memories



Find settings, recent
Pages, help and more



More than just text

- Copilot can create images using ChatGPT's image model.

create an image of three workers collaborating on a project at a conference room table



Turn this into a graphic to share via email:

Reporting Time and Leave Reminders

• **Bi-weekly Deadlines:** Hourly employees' time sheets are due by 10 a.m. every other Monday. Supervisors must approve time sheets by noon.





Reporting Time and Leave Reminders



BI-WEEKLY DEADLINES:
Hourly employees' time sheets are due by **10 a.m.** every other Monday. Supervisors must approve time sheets by **noon**.



MONTHLY DEADLINES:
August leave reports are due by **Sept. 15 at 4:30 p.m.**

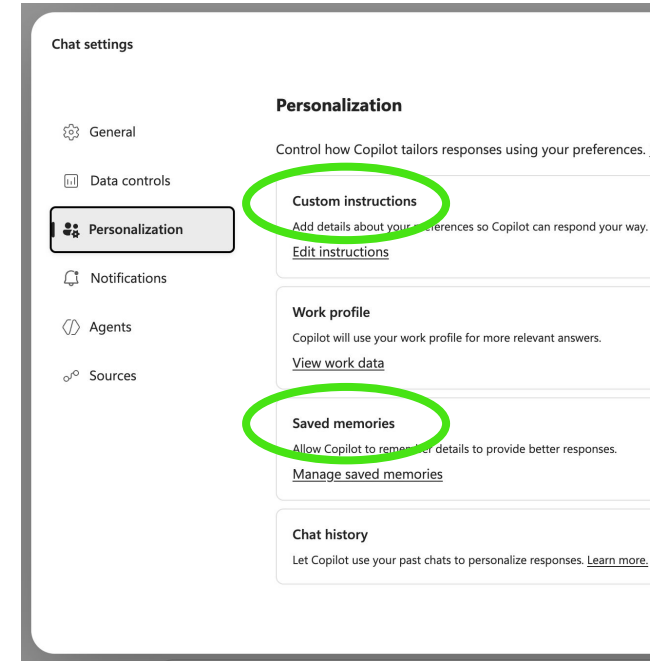


STUDENTS:
Must submit their hours by **noon** on the first day of each month, and supervisors have until the end of the second business day to approve them.

 *Thank you* for submitting and approving on time! 

Personalization

- Copilot can remember useful details between chats, making responses more personalized.
- **Personalization:** You can give the tool custom instructions and characteristics (tone, style, etc.)
- **Memory:** References saved memories, and chat history



WorkIQ

- The paid version lets you toggle on and off WorkIQ



Hi, what can I help you with?

+ Message Copilot



Summarize Content

Draft Something

Rewrite and Proofread

Learn Copilot



When WorkIQ is on

- Connects Copilot to your work data in Microsoft 365, including Outlook, Teams, SharePoint, OneDrive, and calendars.
- Understands organizational context, such as who works with whom, projects, meetings, and documents.
- Helps Copilot reason across multiple sources instead of treating each prompt as a standalone request.
- Honors existing permissions, meaning Copilot can only access information you're already allowed to see.



Context from your work data

- Your communications, activity history, and content in Microsoft 365 help Copilot to get additional context in real-time as it responds to your prompts.
- Using this information, Copilot preprocesses prompt inputs and postprocesses prompt outputs to improve performance.
- This is referred to as **grounding**.

Processing prompts

Pre-Processing

- Gather context
- Apply permissions
- Retrieve emails/files/meetings
- Build enriched prompt

LLM

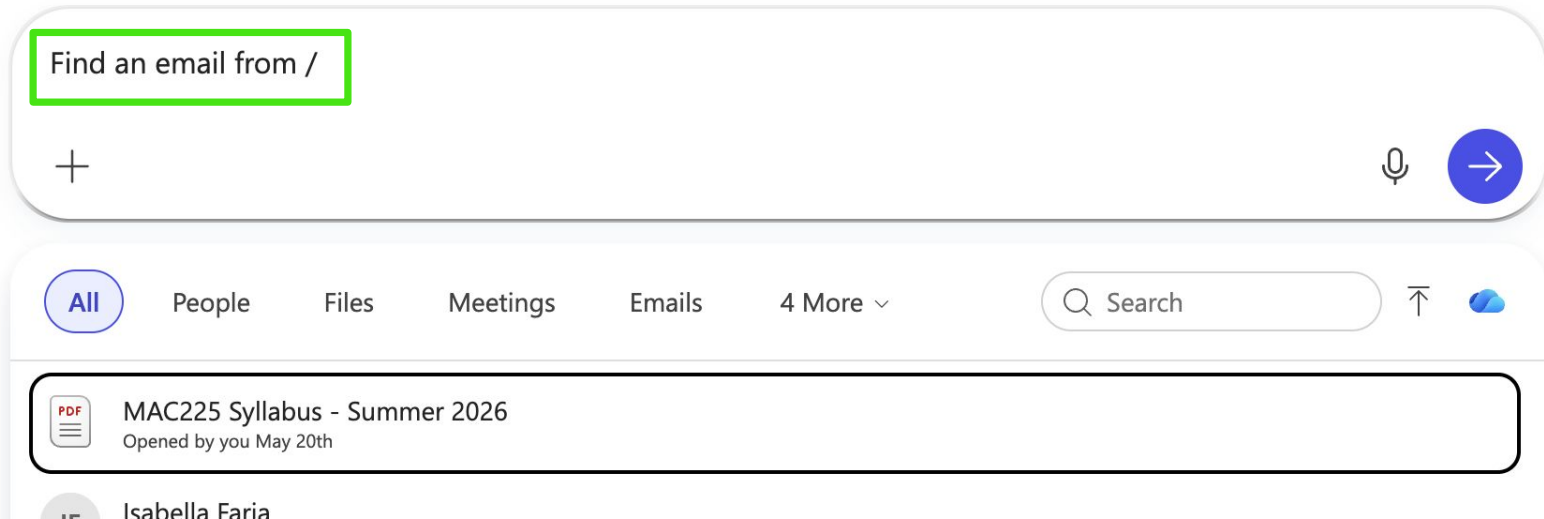
Generate
answer

Post-Processing

- Format response
- Add citations
- Trigger actions
- Enforce compliance

Reference your work

- Reference people, files, etc. by clicking the /



Reference your work

- Reference people, files, etc. by clicking the /

Find an email from /chris

+

🔊 ➔

All **People** Files Meetings Emails Chats Channels Sites Other 🔍 ↗ ☁

 **Christopher Porter**
christopher.porter@drake.edu

 **Chris Snider**
chris.snider@drake.edu



Demo

What did I commit to across my email and Teams in the last two weeks, and what are the deadlines? List each item with who asked and when it's due.





Reasoning completed in 3 steps >

I found 284 email results and 322 messages overall, but only a small number contain clear commitments you made in the last two weeks. Many messages are informational or responses without a stated deliverable.

Here are the confirmed commitments with identifiable deadlines or expectations, organized clearly.

✓ Your commitments (last ~2 weeks)

1. Sign and return reappointment letter

- What you committed to
 - Sign and return your appointment letter
- Who asked
 - [Katelyn Busch](#)
- When it was assigned
 - June 1, 2026
- Deadline
 - June 22, 2026
- Source
 - [Reappointment Letter 2026-2027](#)

✉ Reappointment Letter...

Links to actual people and files

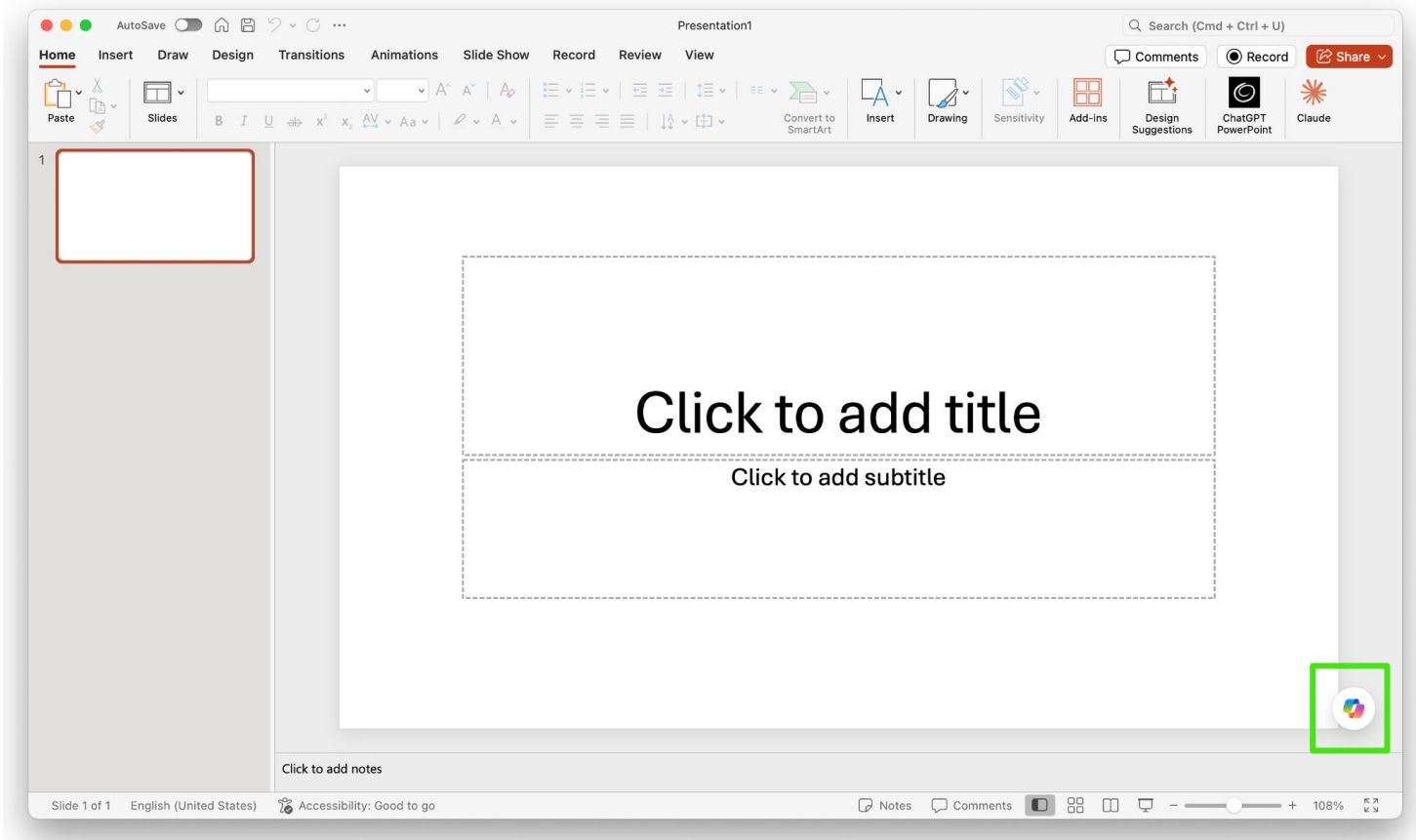
Let's try it

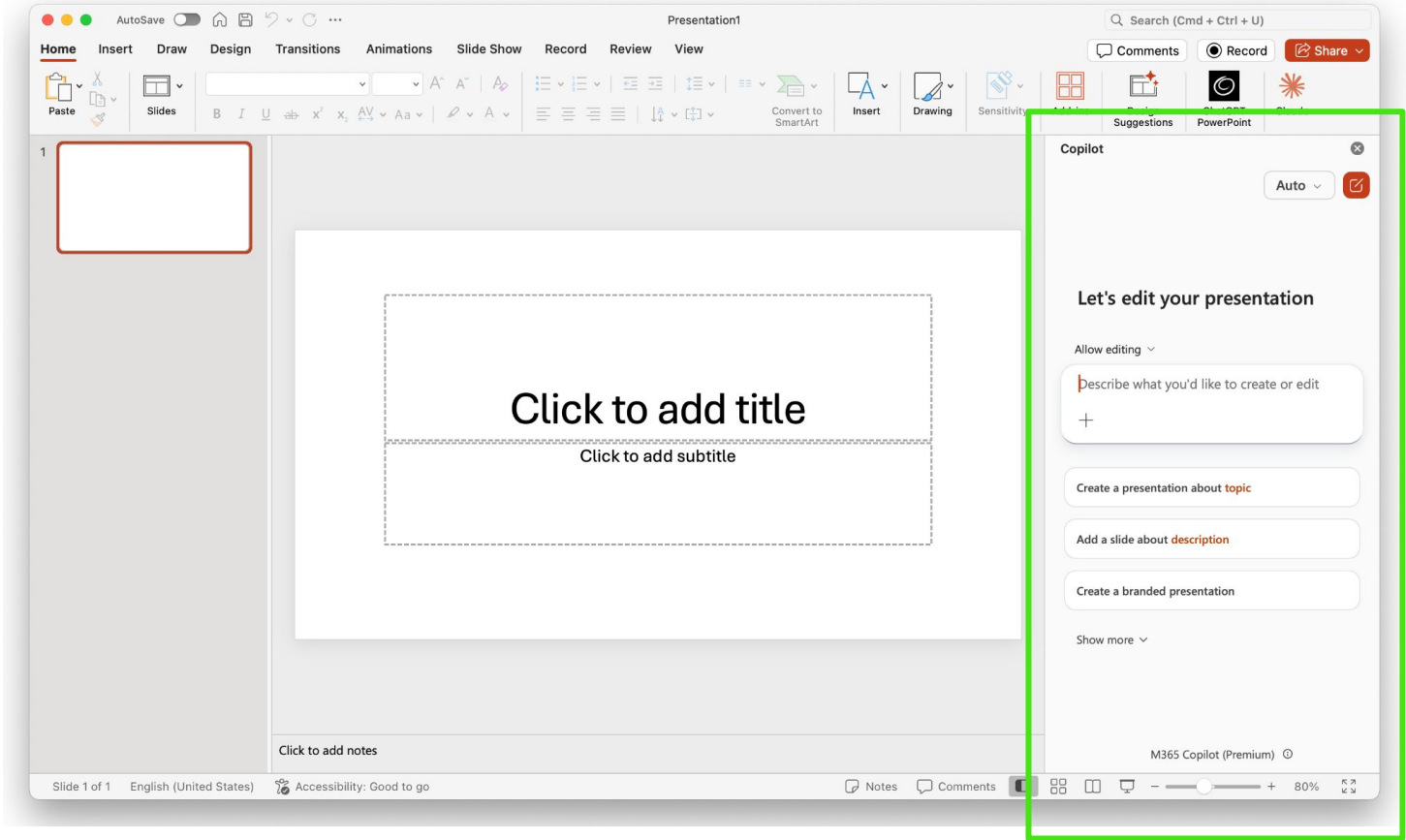
- Test some of your workflows/tasks in Copilot Chat



Copilot in Microsoft 365 apps

- Copilot is available side-by-side in select Microsoft 365 apps, including Outlook, Word, Excel, PowerPoint, and OneNote.





Copilot in Outlook

- Use Copilot Chat in Outlook to ask questions about your inbox, calendar, meetings, and other limited data.
- Here are examples of the types of prompts you can use:



Summarize my emails from the last week related to [project or customer name].



When is my next 1:1 meeting with /name?

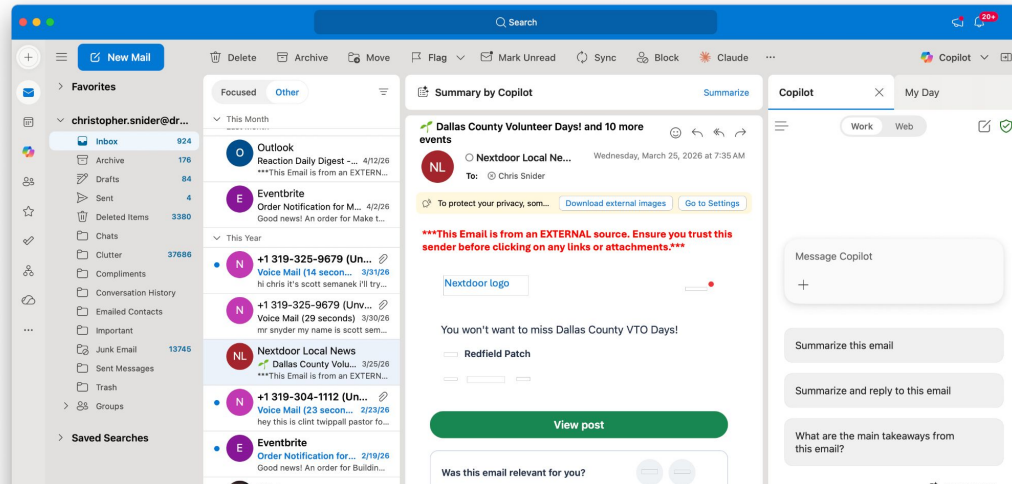


Draft an email update summarizing the customer escalations from this week.



Let's try it

- Access Copilot in Outlook and ask it a question about your inbox, your calendar, or ask it to write an email or respond to an email.



- **Example:** What action items do I need to complete this week based on my emails?

Outlook with add-on license

- If you have a Microsoft 365 Copilot add-on license, you'll be able to use Copilot Chat in Outlook to interact with your inbox, calendar, meetings, chats, and enterprise data:



Which unread emails are most important? Summarize them, synthesize any related context from my chats and documents, and prioritize the order in which I should respond.



Tell me when my next meeting with my skip-level manager is scheduled, help me draft an agenda based on my current projects, and create a first draft of a pre-read.

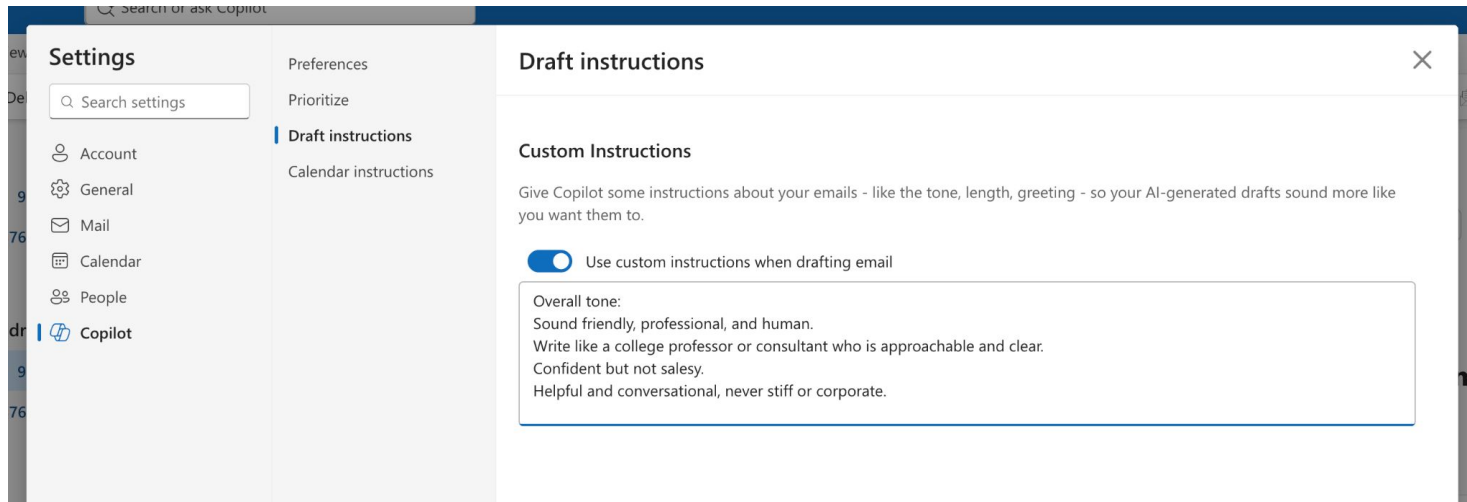


Create a welcome email to a new hire, including details on what they should do in their first four weeks, an org chart for the team including details on each person's role and their current projects, and related documents that they should review.



Outlook with add-on license

- Users with Premium can also add Draft instructions on how Copilot should write. Find this in your settings.



Copilot in Word

- Copilot Chat in Word helps you create, edit, and explore your documents with ease.
- You can ask questions about your document to quickly find details or clarify information, summarize or rewrite content to match your audience, and generate new text.

Copilot in Word

- Examples of the types of prompts you can use:



Write a compelling intro paragraph for this document.

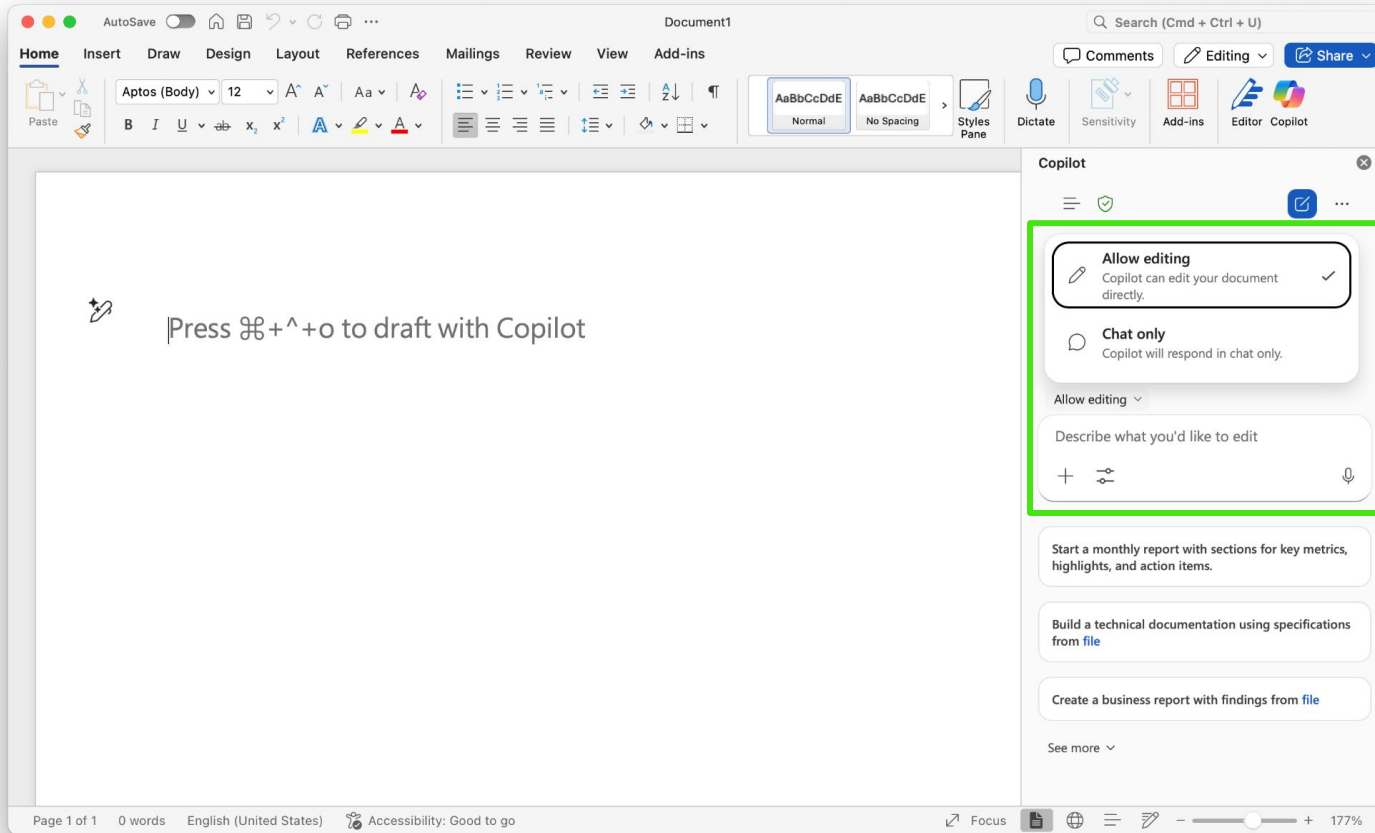


What are some questions a reader might have when going through this document?



Write a summary with the top 5 key points as a draft email that I can send to my team.





Copilot in PowerPoint

- Ask questions about your presentation to quickly surface key information, summarize slides to capture the main points, and generate relevant images to enhance your visual storytelling.
- Get insights into your presentation's content.
- Generate potential questions the audience may ask, ensuring you deliver a well-organized and compelling presentation.



Premium in Powerpoint

- Build a deck from a prompt
- Build a deck from a file
- Create and add individual slides
- Organize / restructure a deck
- Rewrite text
- Add images
- **The Premium advantage - reference your Work data**



Copilot in PowerPoint

- Examples of the types of prompts you can use:



What are some potential questions that I might be asked by the audience who I present this to?



Generate an image to use in my presentation.



Help me re-write the bullets on this slide.



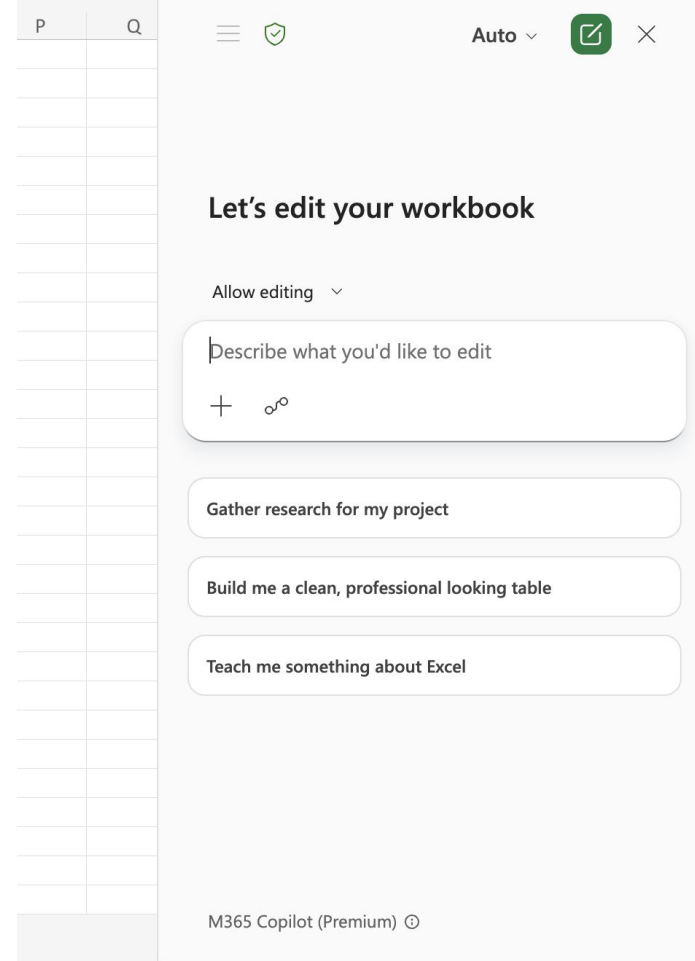
Copilot in Excel

- Interact with your data in smarter, more intuitive ways.
- Ask questions of your spreadsheets to quickly uncover insights, analyze trends, and identify patterns.
- Copilot helps you create clear visualizations and provides valuable answers right from the side pane, making your analysis accurate and accessible.



Copilot in Excel

- **Easily import data:** Copilot can help import data from various sources
- **Highlight, sort, and filter your data:** Use Copilot to easily highlight data or create custom filters
- **Generate and understand formulas:** Create new columns/rows that perform calculations based on your data
- **Identify insights:** Ask Copilot questions about your data



Copilot in Excel

- Examples of the types of prompts you can use:



Identify the top insights and trends from this data.



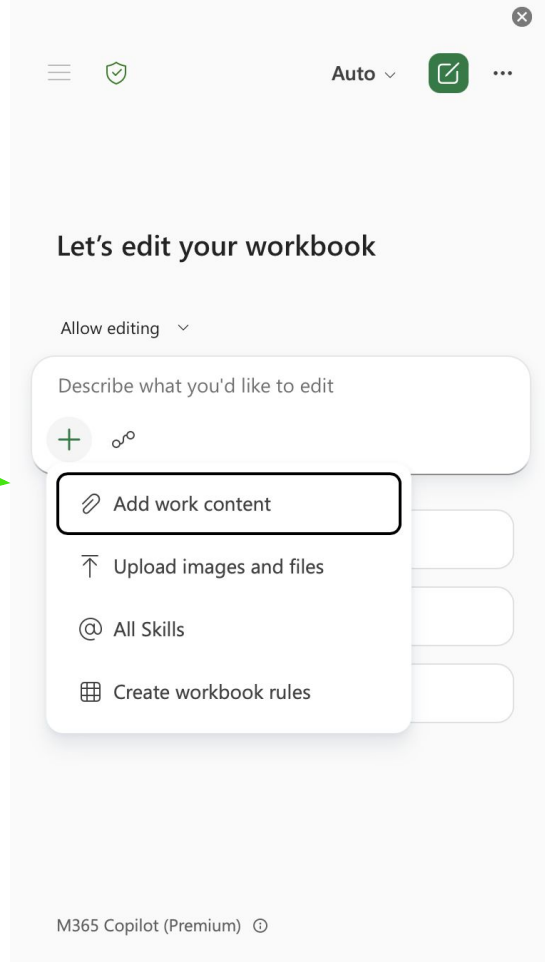
Create a visualization of the top-performing customer segments.



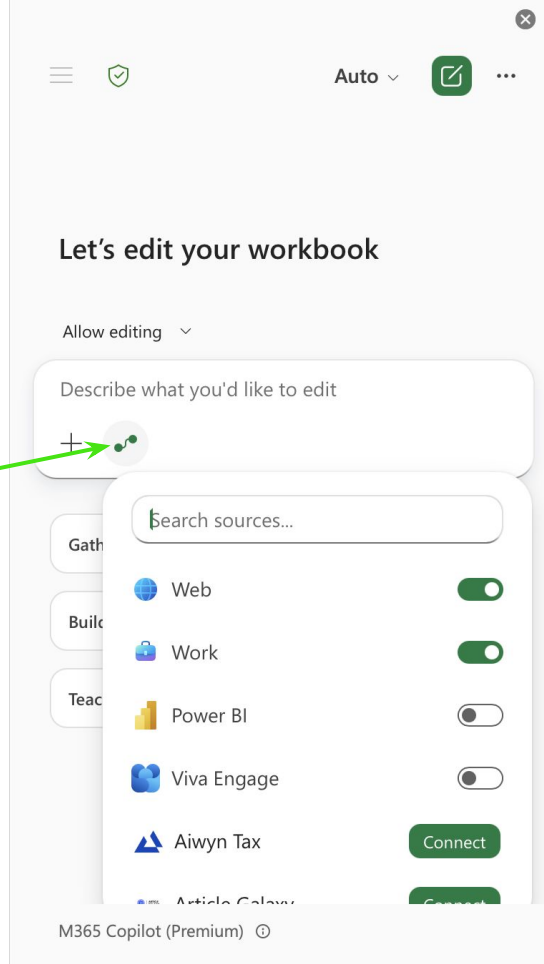
Forecast revenue for the next 8 quarters based on the sales data.



Upload work
content, images,
files

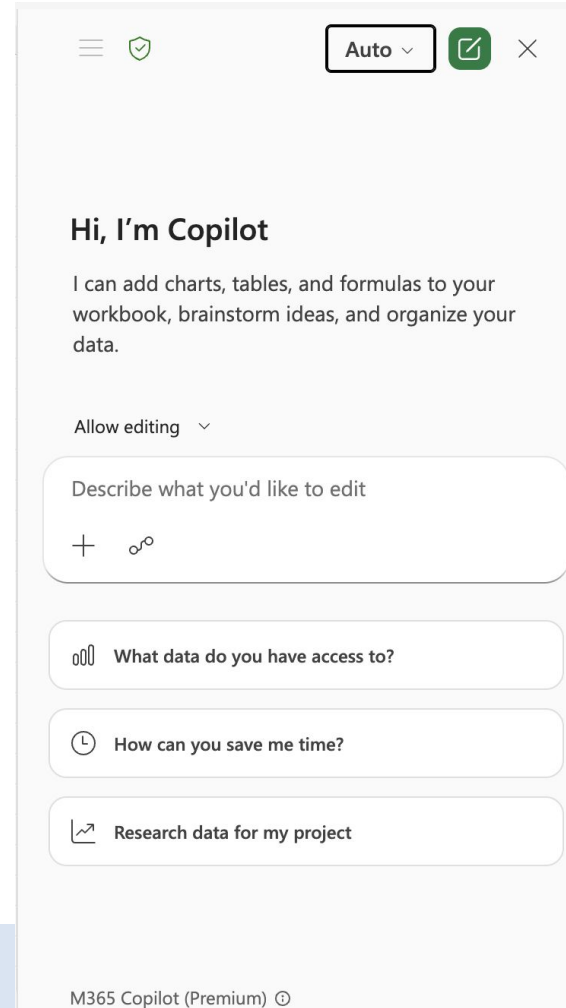


Reference external
sources/tools



Allow Editing

- When “Allow editing” is selected, Copilot will directly edit/modify your spreadsheet.
- It uses Excel's main features, such as tables, charts, and formulas, to help you update budgets, analyze data, or create financial models.
- Because it uses Excel’s built-in tools, your changes stay editable and you remain in control.



☰  Auto  ✕

Hi, I'm Copilot

I can add charts, tables, and formulas to your workbook, brainstorm ideas, and organize your data.

Allow editing ▾

Describe what you'd like to edit

+ ∞

 What data do you have access to?

 How can you save me time?

 Research data for my project

M365 Copilot (Premium) ©

How “Allow Editing” works

- After you submit a prompt, Copilot analyzes your task and creates a step-by-step plan.
- It works directly in your document to carry out that plan, review the results, and evaluate whether the outcome matches your intent.

Task	Prompt	Tool
Find what you owe	What did I commit to or get asked to do this week? List each item with who asked and the deadline.	Copilot Chat (Work mode)
Recap a meeting you missed	What were the key decisions and action items from this meeting, and what did I specifically get assigned?	Teams (meeting recap)
Triage your inbox	Summarize the unread emails in my inbox by priority, and flag anything that needs a reply today.	Outlook
Reply using your own files	Draft a reply to this email and pull the relevant figures from [my budget file] to answer their question.	Outlook
Turn a document into a deck	Create a presentation from [this document], with speaker notes.	PowerPoint
Spot trends in a spreadsheet	What are the top three trends in this data, and flag anything unusual or over budget.	Excel
Prep for a meeting	Brief me on the people I'm meeting at 2pm, including recent emails, our last conversations, and anything I should know.	Copilot Chat (Work mode)

Governance: Legal, ethical, privacy



Data Privacy

What goes in the prompt doesn't always stay private

- Never paste proprietary data or secure financial data into public AI tools
- Free versions may use your inputs to train future models
- Use enterprise tools for anything sensitive: Copilot, ChatGPT Enterprise, Claude for Work

Rule of thumb: If you wouldn't email it to a stranger, don't paste it into ChatGPT.

Hallucinations

AI makes things up, and sounds sure about it

- Invents facts, statistics, and sources that don't exist
- Cites studies, policies, and laws with the wrong numbers or wrong dates
- Produces names, quotes, and figures that look official

Always verify anything that matters (facts, numbers, names, sources) against the original.

Bias and Fairness

AI reflects the data it was trained on, flaws included

- Models can carry bias in language, tone, and recommendations
- Higher stakes anywhere AI touches hiring, customer treatment, or who gets approved or flagged
- A human should review any AI output that affects a person's job, money, or access to a service

If the decision affects a real person, a person owns it. Not the AI.

The Policy Gap

Most companies are using AI without rules around it

- Staff are already using AI, with or without permission
- Few organizations have a written AI policy in place
- Your team handles sensitive data, such as customer records, employee files, financials, which makes the demand for a policy more pressing

Questions?

- **innovationprofs.com/more**
- Slides from today
- Gen AI Newsletter
- Learn about future events, including upcoming free AI Lunch Club

