

# Enhancing Productivity with Microsoft 365 Apps & Copilot



Presented By  
John H. Higgins, CPA.CITP  
Rochester, Michigan



# Learning Goals

- Identify opportunities to leverage lesser-known Microsoft 365 apps to maximize your ROI
- Identify how the Copilot generative AI app can super charge your use of Microsoft 365

# John H. Higgins, CPA.CITP

## Strategic Technology Advisor



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Nationally recognized thought leader, advisor, author and speaker on CPA technology

Strategic technology advisor to the profession w/ 35+ years of experience

Founded and sold two CPA technology advisory startups

Former National Mid-market Technology Partner - BDO

CPA Practice advisor Top 25 Thought Leader for the CPA profession

AICPA Business & Industry Hall of Fame Inductee

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!

# Presentation Outline

- Microsoft 365 Ecosystem Overview
- Teams / SharePoint Review
- Use OneNote to Manage Your Notes
- Use Planner to Manage Projects
- Use Stream to Document Policies & Procedures
- Use Bookings to Manage Your Appointments
- Use Copilot AI to Super Charge Your Productivity
- Wrap-up

# MICROSOFT 365 ECOSYSTEM OVERVIEW



# Microsoft 365 Application Suite

Traditional Office  
Desktop Apps

Primary End User  
Apps

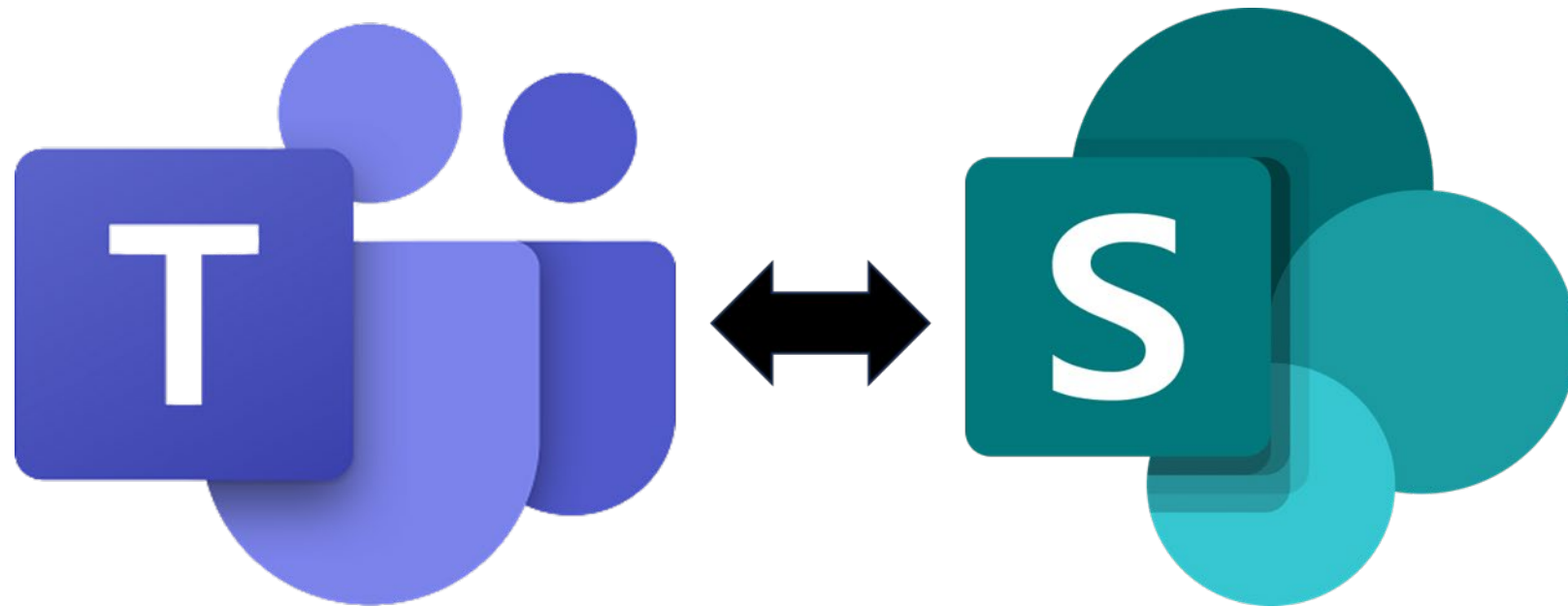
IT Technical Apps

- Admin
- Bookings
- Calendar
- Clipchamp
- Compliance
- Delve
- Excel
- Forms
- Insights
- Lists
- Loop
- OneDrive
- OneNote
- Outlook
- People
- Planner
- Power Apps
- Power Automate
- Power BI Pro
- PowerPoint
- Purview
- Security
- SharePoint
- Stream
- Sway
- Teams
- To-Do
- Viva Insights
- Whiteboard
- Word

AI Add-in



# TEAMS / SHAREPOINT REVIEW

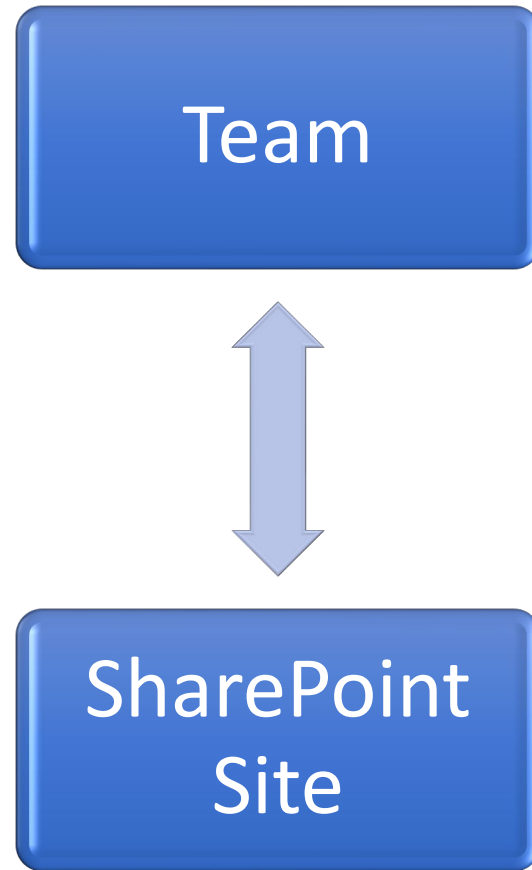


Establish Teams as your hub  
for communications,  
collaboration and  
knowledge sharing

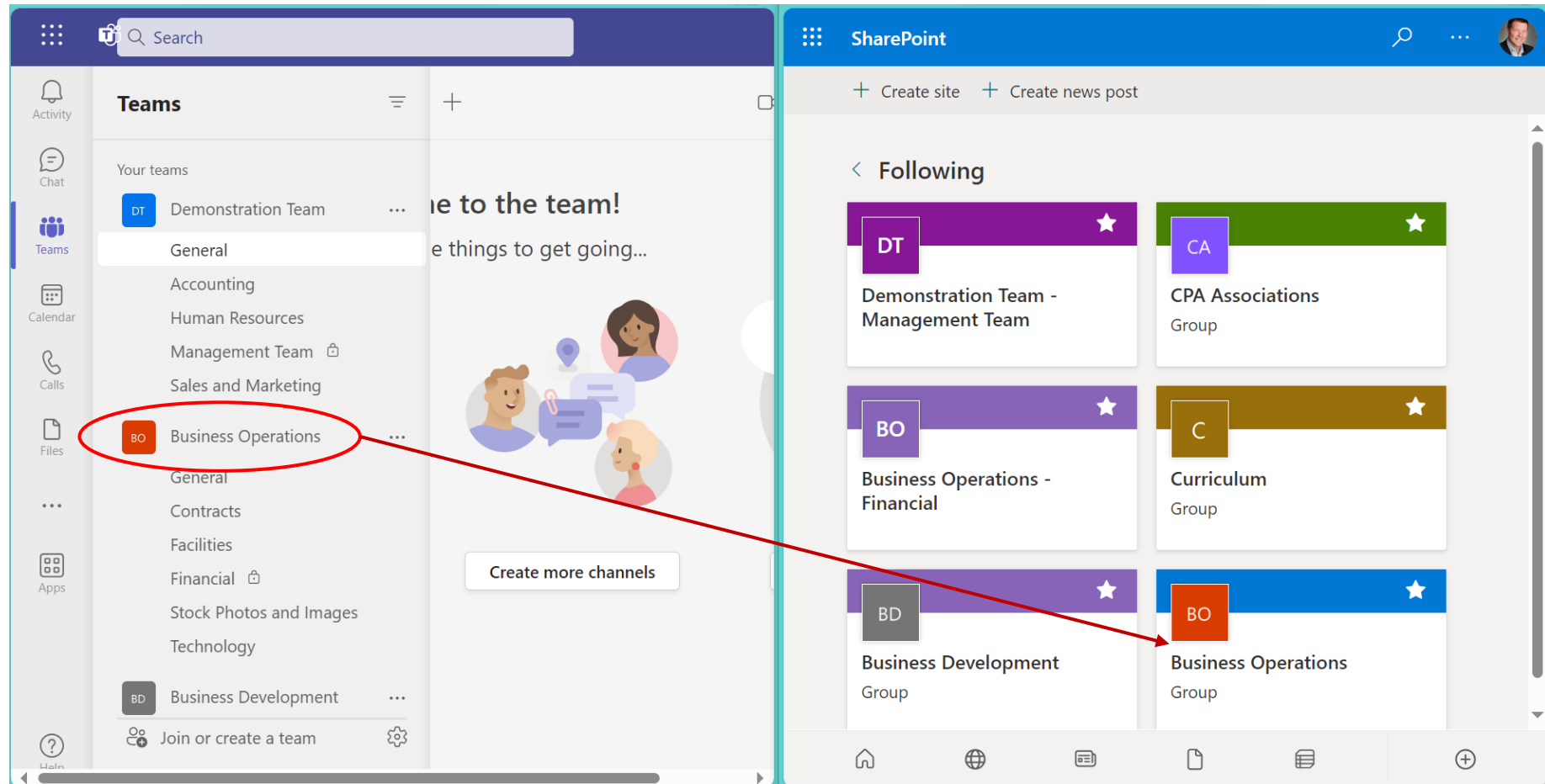
# Communication, Collaboration & Knowledge Sharing

- ✓ Central repository for all your conversations
- ✓ Central hub for accessing all your files
- ✓ Launch pad to access all your apps
- ✓ Communications gateway to external parties
- ✓ Email replacement
- ✓ Optimize Microsoft 365 integration value

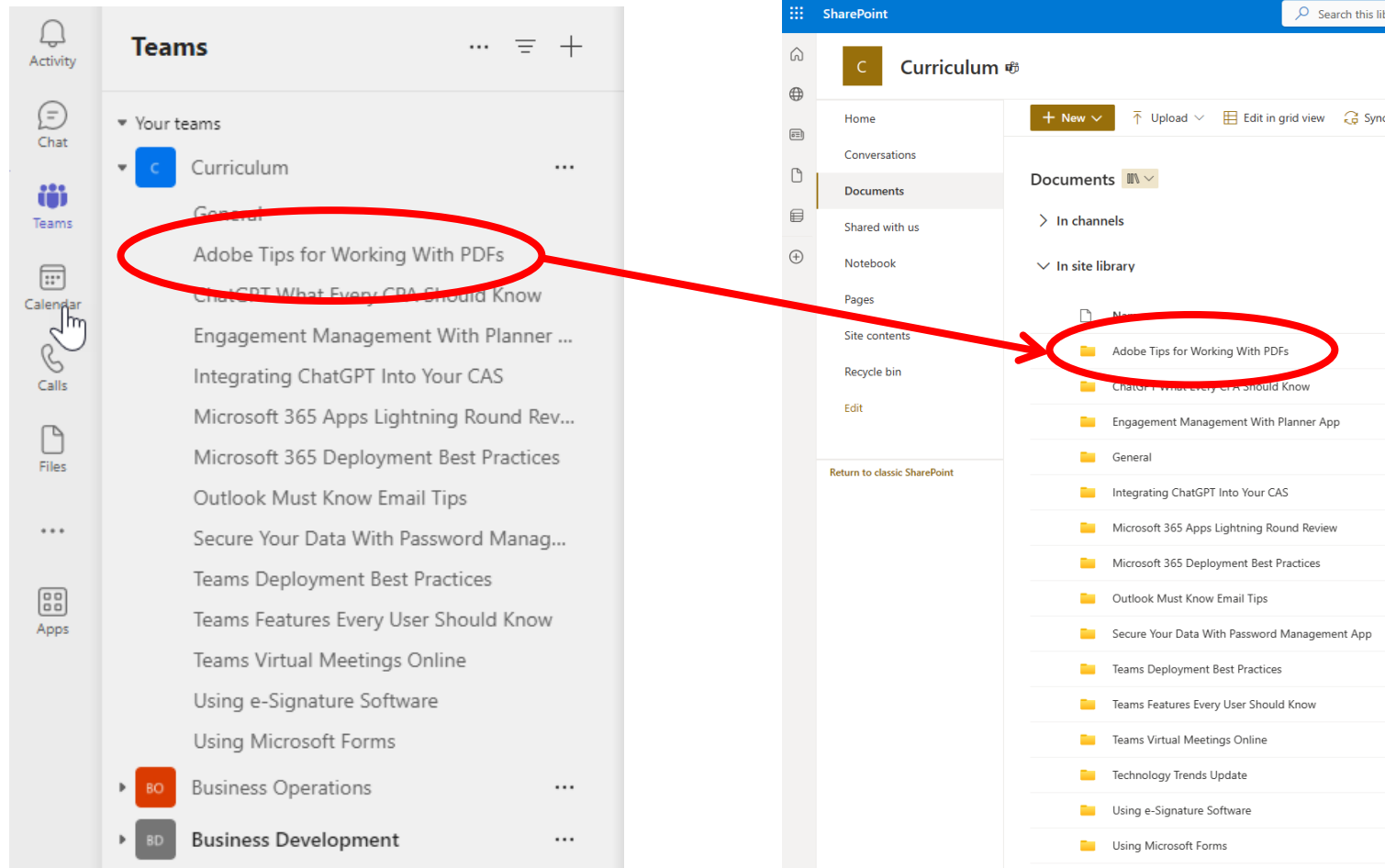
# Teams / SharePoint Relationship



# Teams / SharePoint Sites 1:1 Relationship



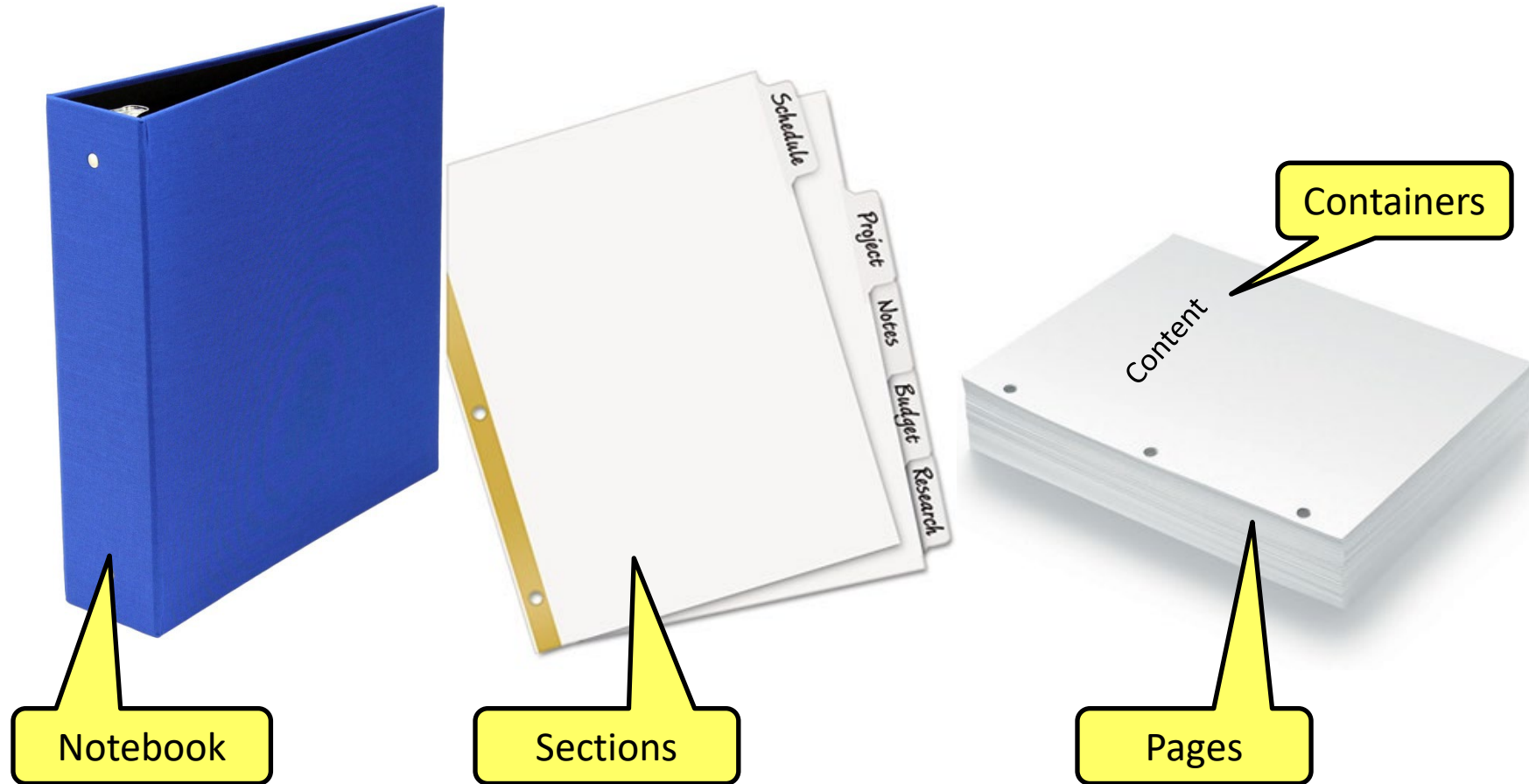
# Teams Channel – SharePoint Site Folders 1:1



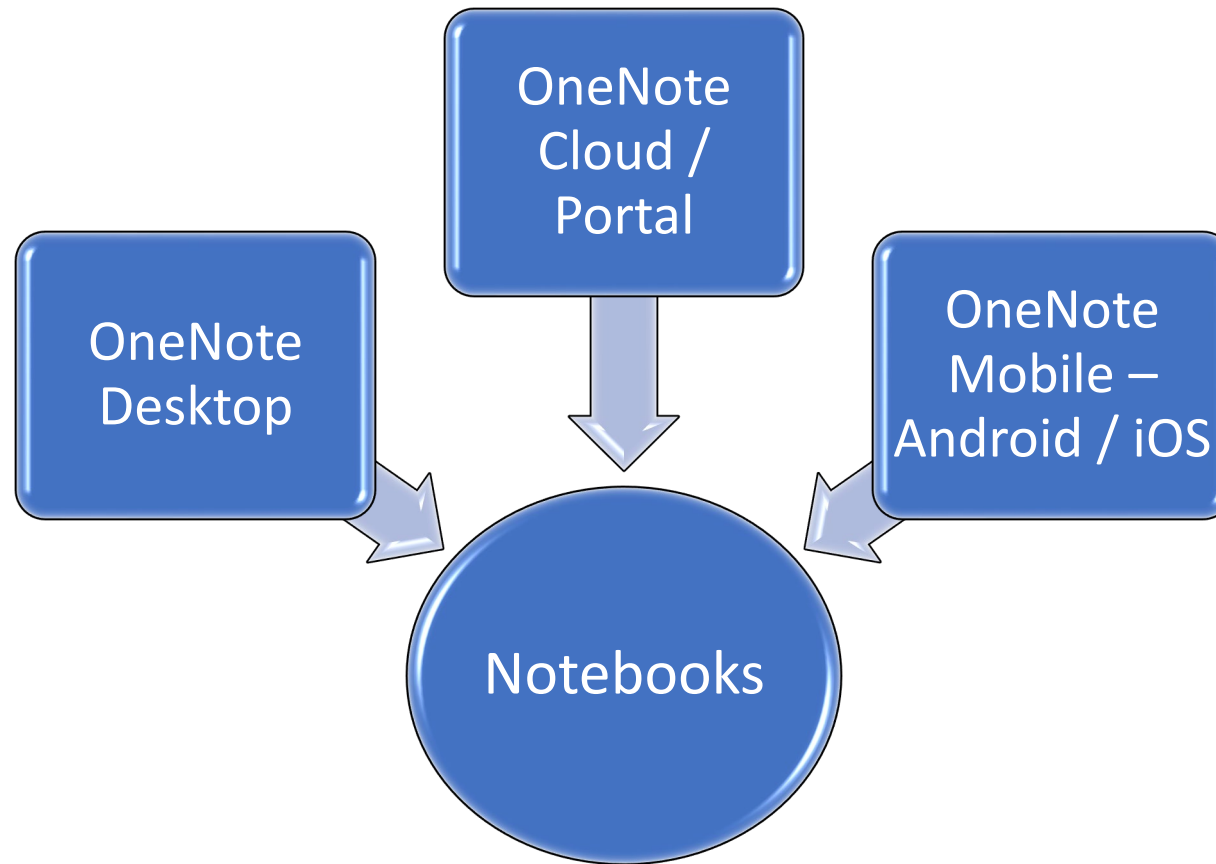
# USE ONENOTE TO MANAGE YOUR NOTES



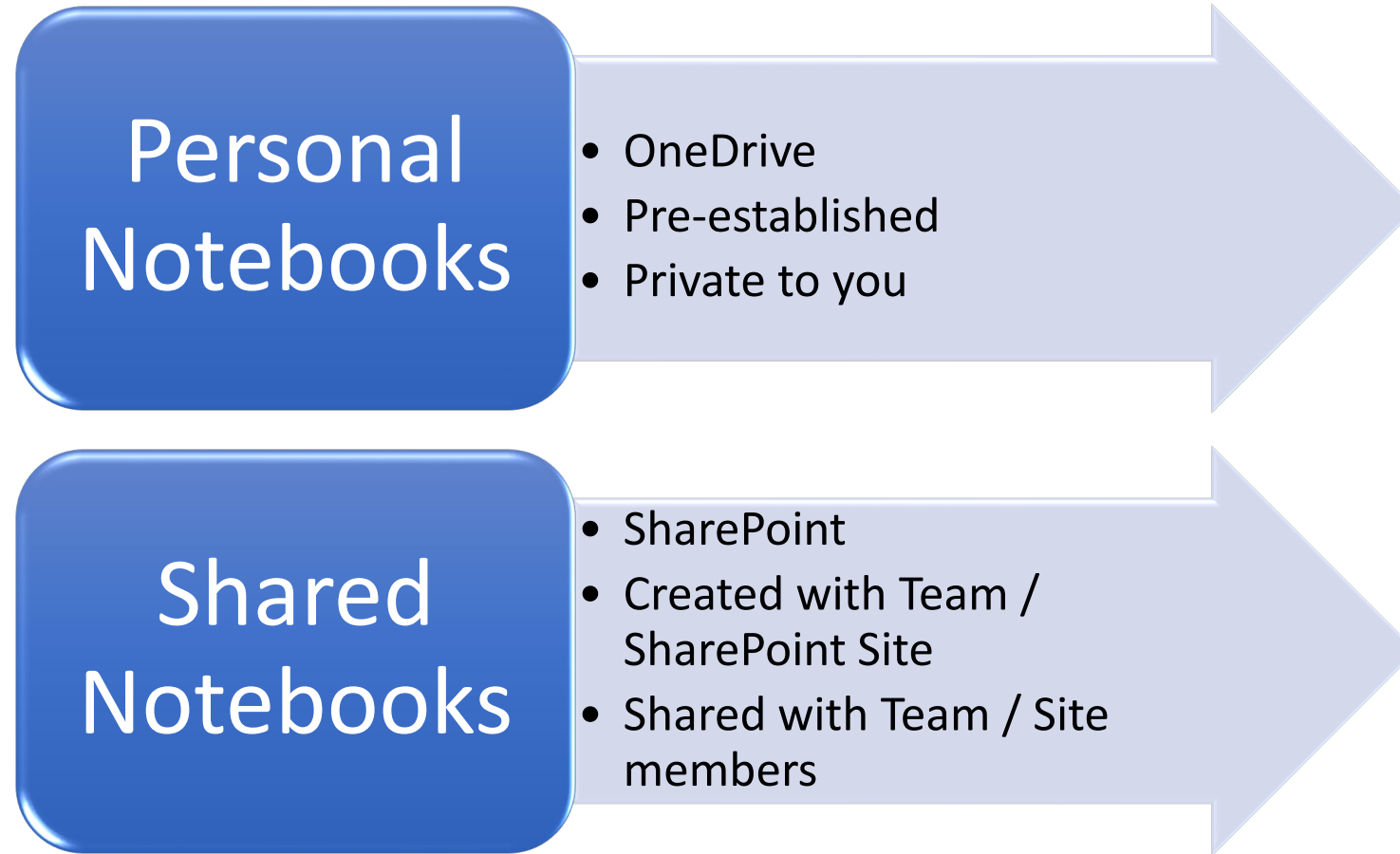
# OneNote Content Organization

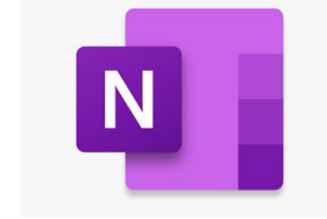


# The OneNote Apps



# OneNote Notebook Storage





# OneNote App Things to Know

Supports multiple content formats

- Text / audio / video / files / drawing / links

Dictate option

One to one Teams / SharePoint / Notebook relationship

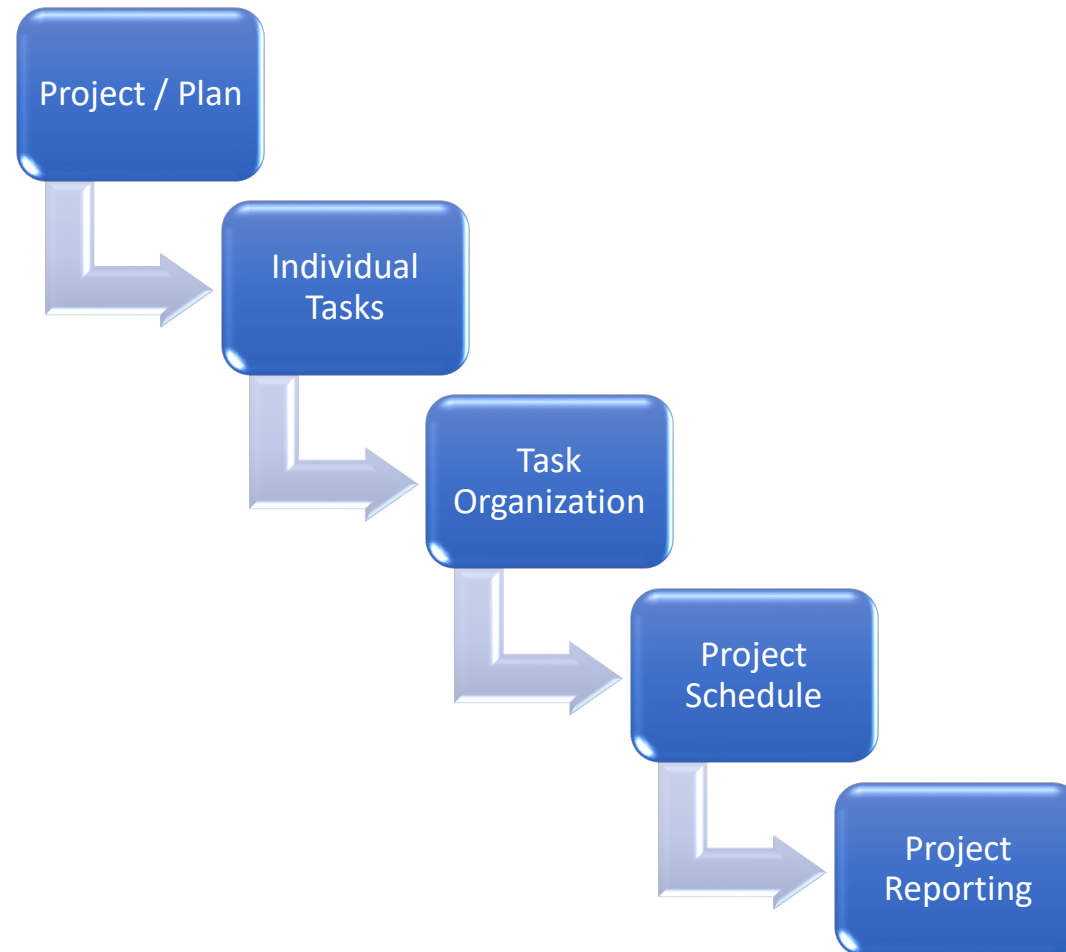
Shared access to notebooks

Custom note page templates

# USE PLANNER TO MANAGE PROJECTS



# Planner APP Features



# Planner App Home Screen

The screenshot displays the Planner App interface. On the left sidebar, the 'My Plans' option is circled in red and highlighted by a yellow speech bubble labeled 'Plans'. Below it are 'My Day', 'My Tasks', and a 'Pinned' section with three items: 'Tax Engagement Demonstrat...', 'Courseware Development', and 'MMO'. At the bottom of the sidebar is a '+ New plan' button. The main content area is titled 'My Plans > MS Teams Deployment' and features a navigation bar with 'Grid', 'Board', 'Schedule', 'Charts', and 'Timeline'. The 'Board' view is active, showing three columns: 'Set up this planner', 'Get ready', and 'Roll out to early adopters'. Each column contains a 'Project management' task card with a title, description, progress indicator, and due date. The 'Set up this planner' column has a due date of 12/31/2024. The 'Get ready' column has a due date of 12/31/2024. The 'Roll out to early adopters' column has a due date of 02/28.

# Project Plan Board View

The screenshot displays the Microsoft Planner interface in 'Board' view for the 'MS Teams Deployment' project. The top navigation bar includes tabs for 'Grid', 'Board' (highlighted with a red circle and a 'View Board' tooltip), 'Schedule', 'Charts', and 'Timeline'. The main area is divided into four columns representing project stages: 'Set up this planner', 'Get ready', 'Roll out to early adopters' (highlighted with a red circle), and 'Org-wide rollout'. Each column has an 'Add task' button and a list of tasks. The 'Roll out to early adopters' column is annotated with a yellow callout box labeled 'Organizing Buckets'. The 'Get ready' column has a task 'Build your Teams adoption plan' annotated with a yellow callout box labeled 'Individual Tasks'. The 'Set up this planner' column has a task 'Project kickoff' with a progress indicator of 0/6 and a due date of 12/31. The 'Get ready' column has a task 'Build your Teams adoption plan' with a progress indicator of 0/5 and a due date of 12/31. The 'Roll out to early adopters' column has a task 'Implement your adoption plan' with a progress indicator of 0/1 and a due date of 03/28. The 'Org-wide rollout' column has a task 'Update your adoption' with a progress indicator of 0/1 and a due date of 03/11. The interface also includes a search bar, filters, and a 'Group by Bucket' dropdown.

# Task Card Details

Task  
Details

Task Detailed  
Description /  
Notes

Task Checklist Items

Task Description / Name

Assigned to

Task classification labels

File attachments / links

Comments / activity journal

MS Teams Deployment

☐ Implement your adoption plan  
Last changed 11/12/2023 by you

Assign

Project management X Adoption X

Bucket: Roll out to early adopters

Progress: ☐ Not started

Priority: Medium

Start date: Start anytime

Due date: 01/29/2024

Repeat: Does not repeat

Notes

☒ Show on card

You created an adoption plan under "Get ready." Now it's time to implement it.

If you need further guidance, check out our "Adopt Teams" resources in the attachment below.

Checklist 0 / 1

☐ Implement the adoption plan you created under Get ready

☐ Add an item

Attachments

1. Adopt Microsoft Teams  
<https://docs.microsoft.com/Mi...>

☐ Show on card

Add attachment

Comments

Type your message here

Copy task

Move task

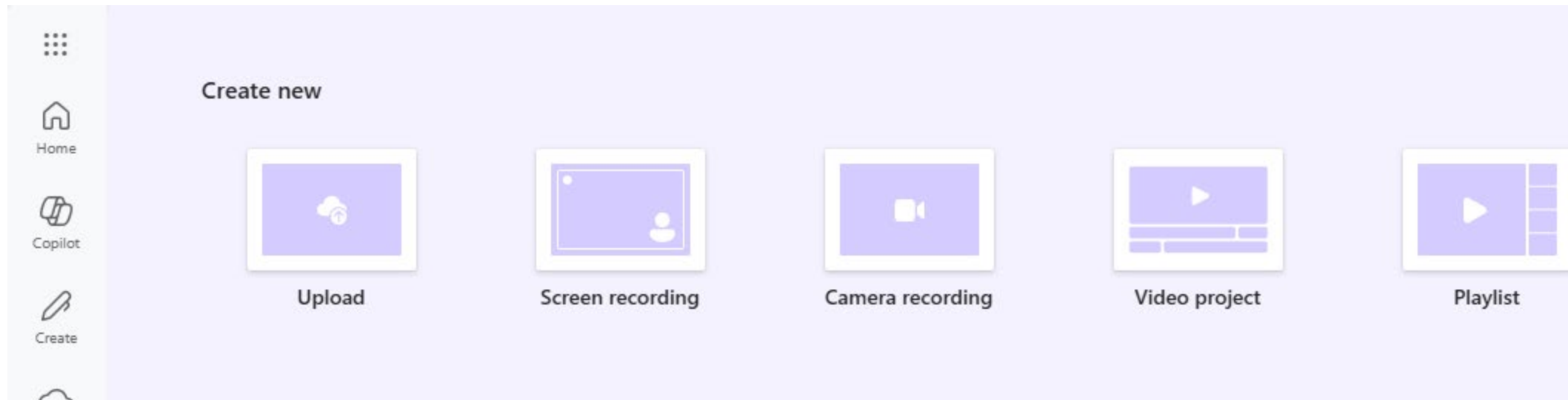
Copy link to task

Delete

# USE STREAM TO DOCUMENT POLICIES & PROCEDURES



# Stream App Home Screen



# Stream App Recording Screen



Stream

Recording in progress

Step 1: Open Microsoft Teams "First, open the Microsoft Teams app on

Planner

My Plans > Courseware Development

Live Presentation: Add task

Live In person 100 minutes

WCPE Masterclass for 1040s - Part 2 - Stowe VT 8/11/25

Live virtual 150 Minutes

CPABC - BC Hydro ChatGPT and Copilot Bootcamp - 5/15 & 5/22

Live virtual 150 Minutes

CPABC - ChatGPT and Microsoft Copilot Hands-on Bootcamp - 5/28/25

Live virtual 50 minutes

WICPA School District Conference - Virtual 5/29/25

Webinar rebroadcast 50 minutes

CPAx Update - Synchronize Files to the Cloud with OneDrive and SharePoint

Webinar rebroadcast 50 minutes

CPAx Update - Microsoft 365 Applications Lightning Round

Webinar rebroadcast 50 minutes

CPAx Update - Microsoft Outlook Must Know Email Tips

Task Templates

Live virtual 100 minutes

Live Virtual Template

Session 3

Session 4

Webinar rebroadcast 100 minutes

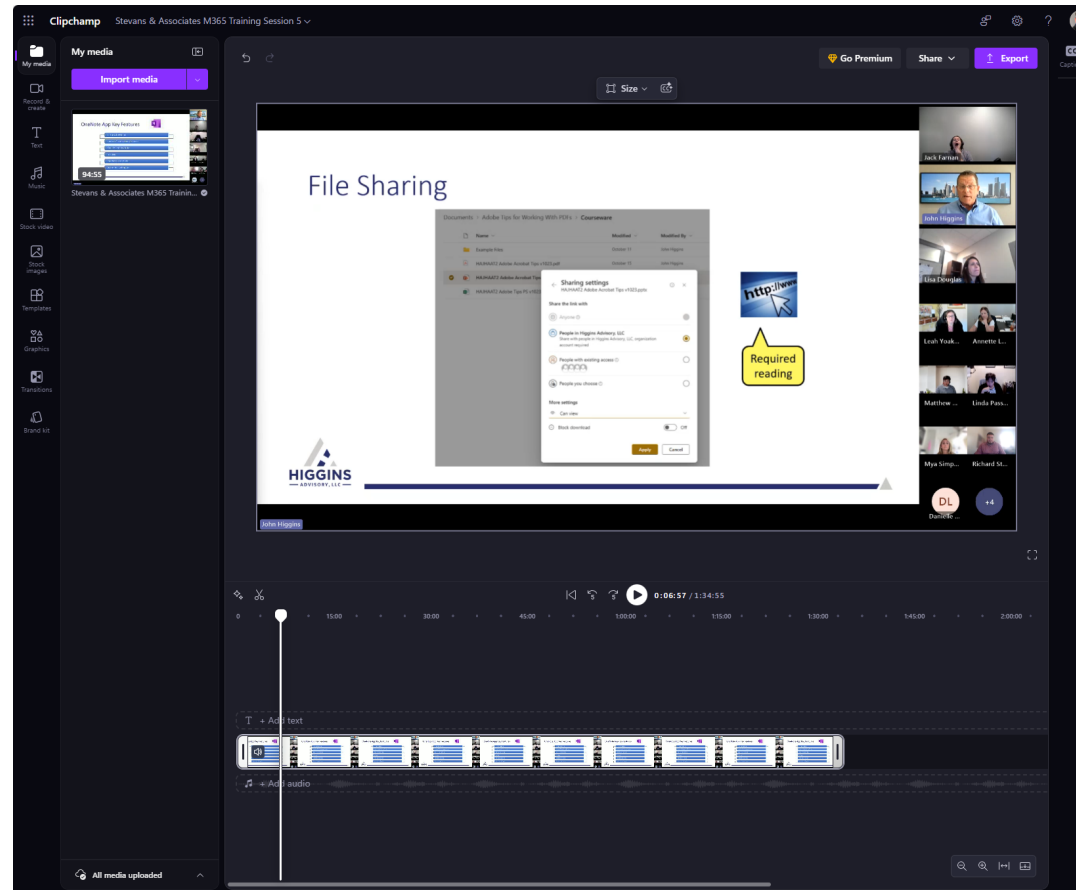
Pre-recorded Presentation Task Template

Record again

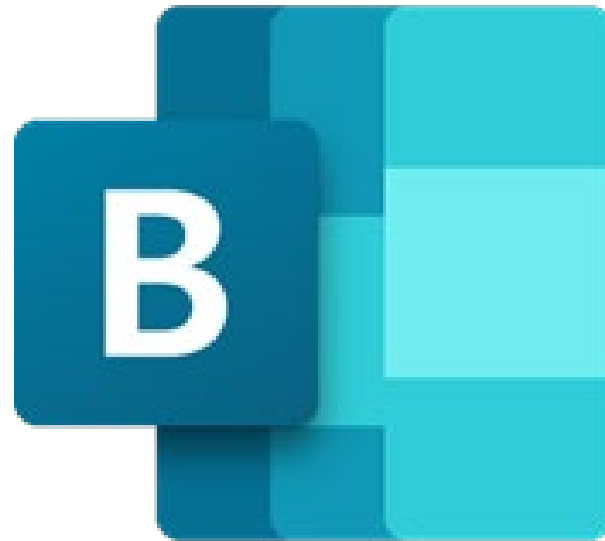
Review

By recording, you agree to comply with your organization's terms, that you have the necessary permissions from people in your video, and that you will respect the copyright and privacy rights of others.

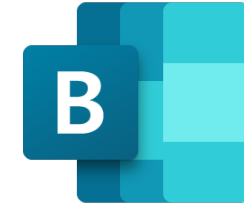
# Edit Stream Recordings with Clipchamp




# USE BOOKINGS TO MANAGE YOUR APPOINTMENTS



# Personal Bookings Page




Bookings with me My Bookings page ?




**John Higgins**  
Booking Page

Choose a meeting type



**60 Minute Meeting**  
1 HR  
Appointment for up to 1 hour meeting



**30 Minute Meeting**  
30 MIN  
Appointment for a 30-minute meeting


Available times You are available

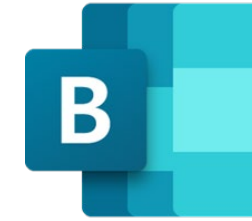
April 2024

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today

Monday, April 08

11:30 AM 



# Bookings App Things to Know

Streamline meeting scheduling

Direct integration with Outlook & Teams

Create custom booking page website

Define meeting / service types

Individual or team bookings page

# Streamline the Bookings App with Quick Parts

Untitled - Message (HTML)

File Message **Insert** Draw Options Format Text Review Help

Attach File Outlook Item Poll Business Card Calendar Signature Loop Components Table Reuse

Send

From john@higginsadvisoryllc.com

To

Cc

Bcc

Subject

Please use this [link](#) to book a meeting time that is convenient for you.

Regards,  
John

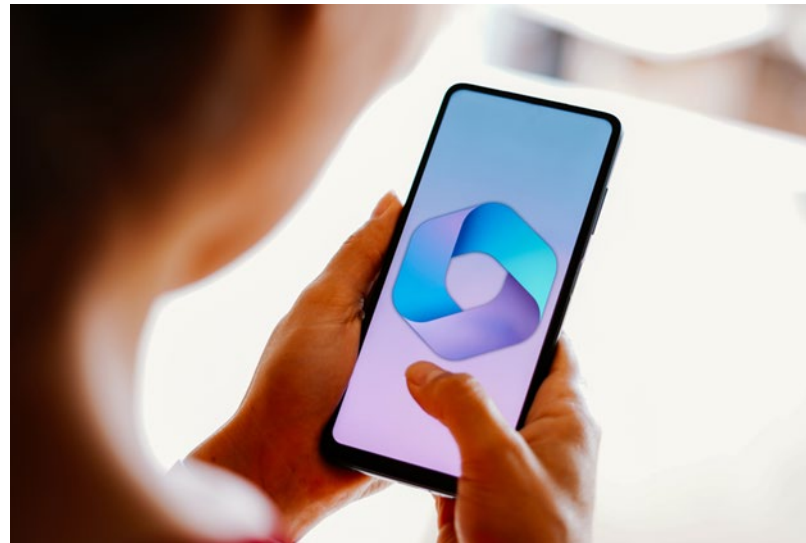
Text Box Quick Parts WordArt Drop Cap Date & Time Object Equation Symbol Horizontal Line

**General**

**Appointment Booking**

Please use this [link](#) to book a meeting time that is convenient for you.

# USE COPILOT AI TO SUPER CHARGE YOUR PRODUCTIVITY





# Things to Know About Copilot Ecosystem

Copilot is ChatGPT technology embedded into Microsoft applications

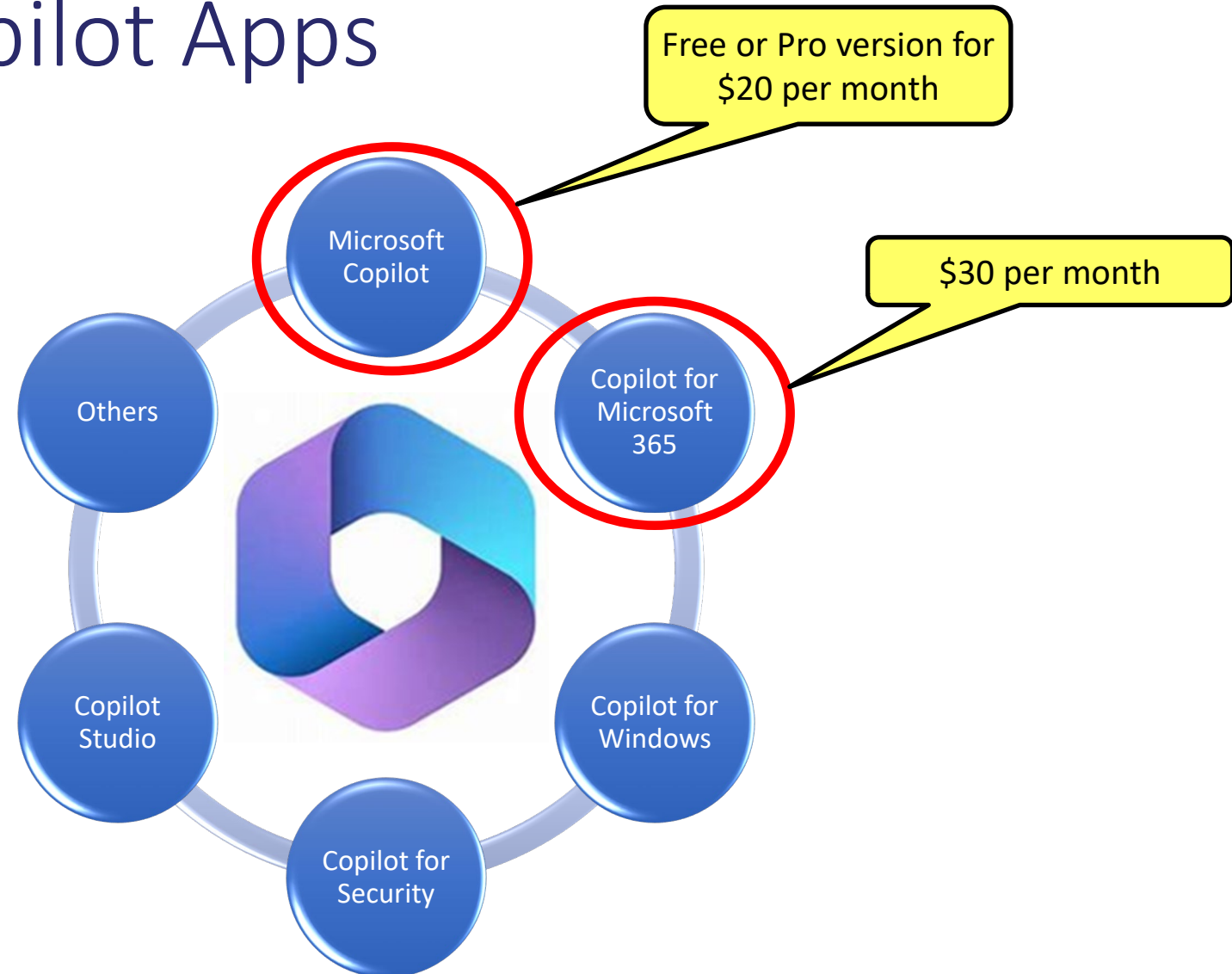
Microsoft owns a 49% stake in OpenAI the creator of ChatGPT

There are multiple Copilot products

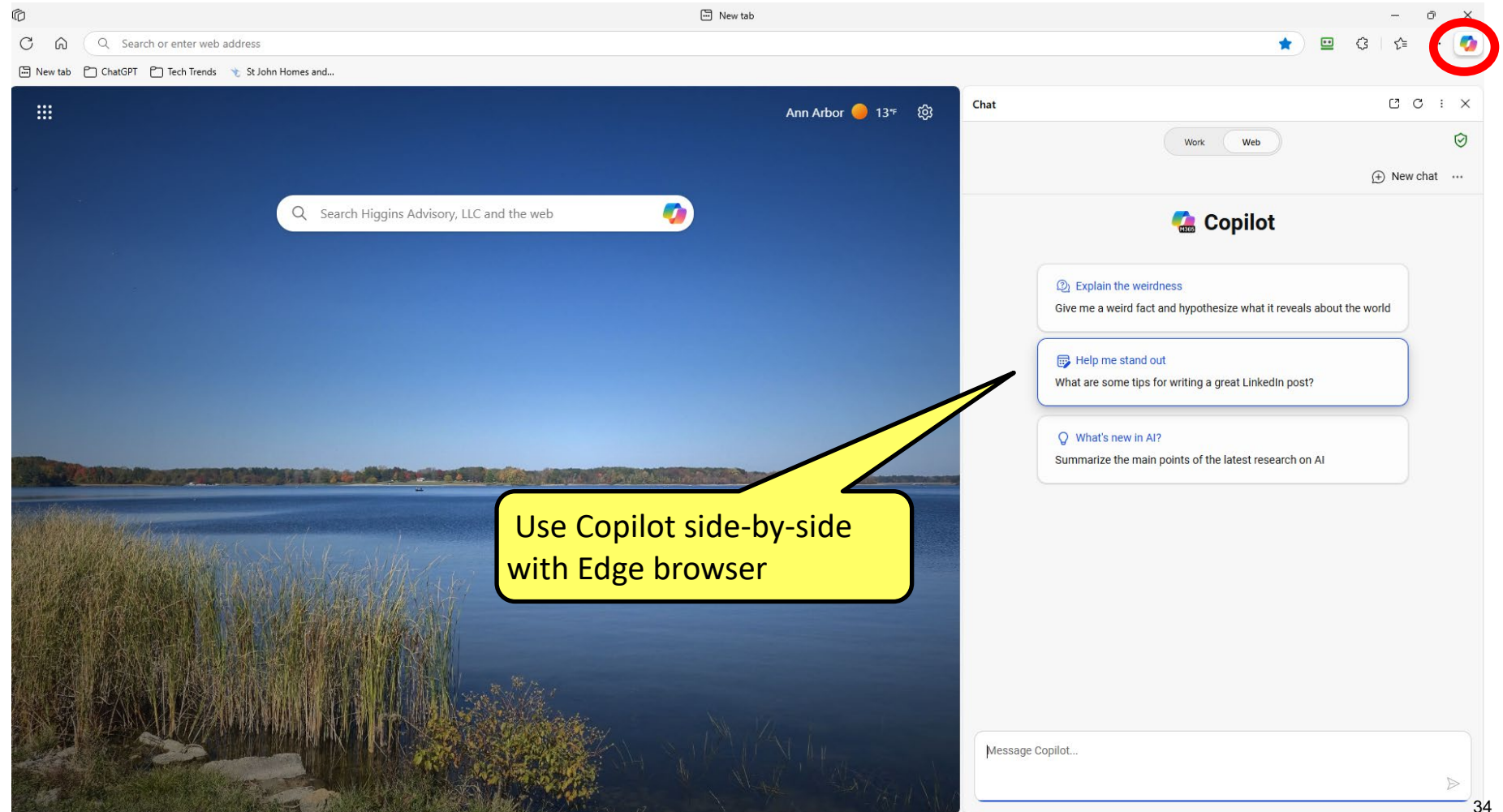
Copilot for Microsoft 365 is \$30 per user, per month license fee

Microsoft [Commercial Data Protection](#) secures your data privacy in Copilot

# Microsoft Copilot Apps



# Accessing Copilot





# Copilot Prompt Screen - Web

Copilot “Web” is free  
Copilot Pro is \$20 monthly  
Copilot “Work” requires Microsoft  
365 Copilot is \$30 monthly

Work Web

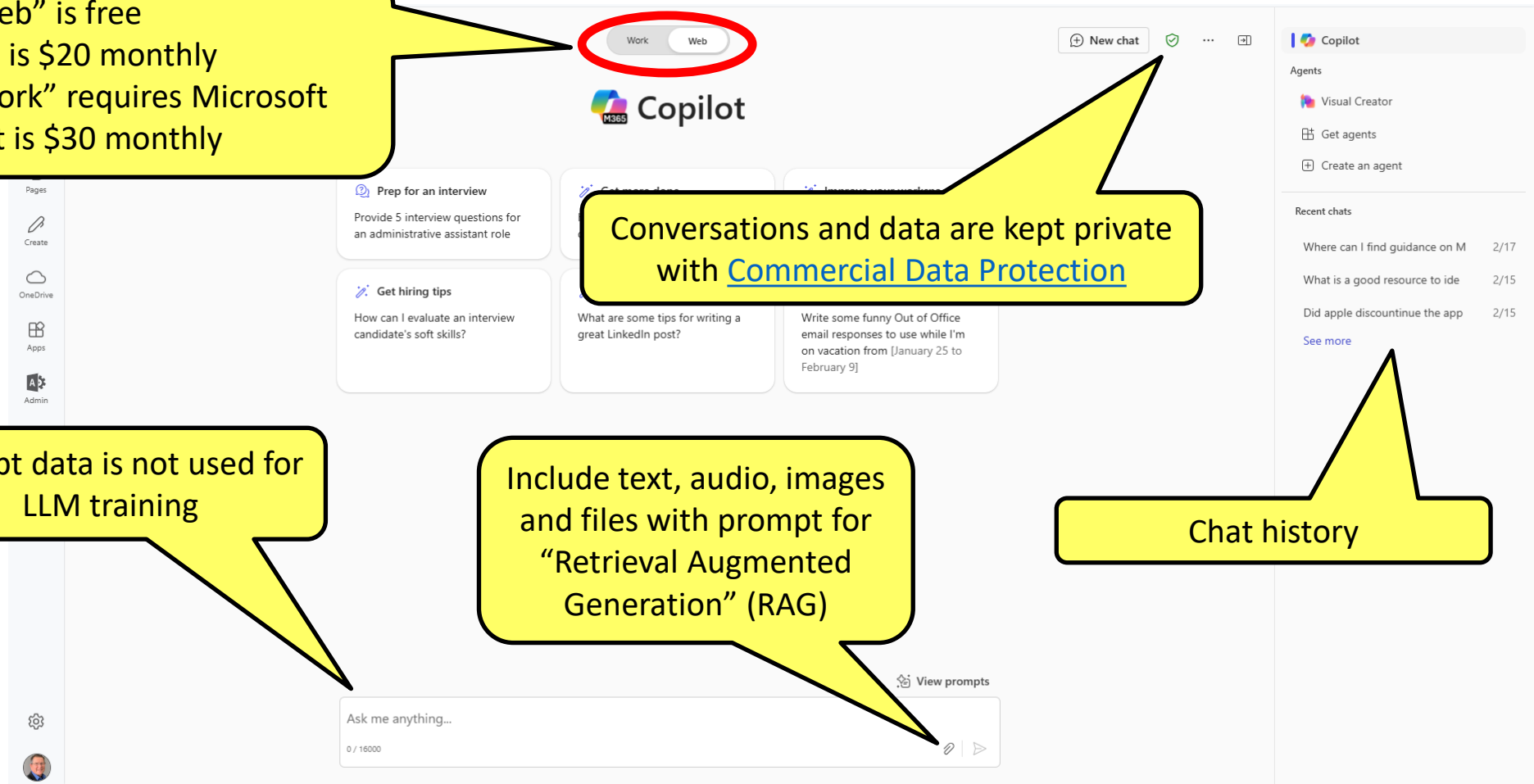


Conversations and data are kept private  
with [Commercial Data Protection](#)

Prompt data is not used for  
LLM training

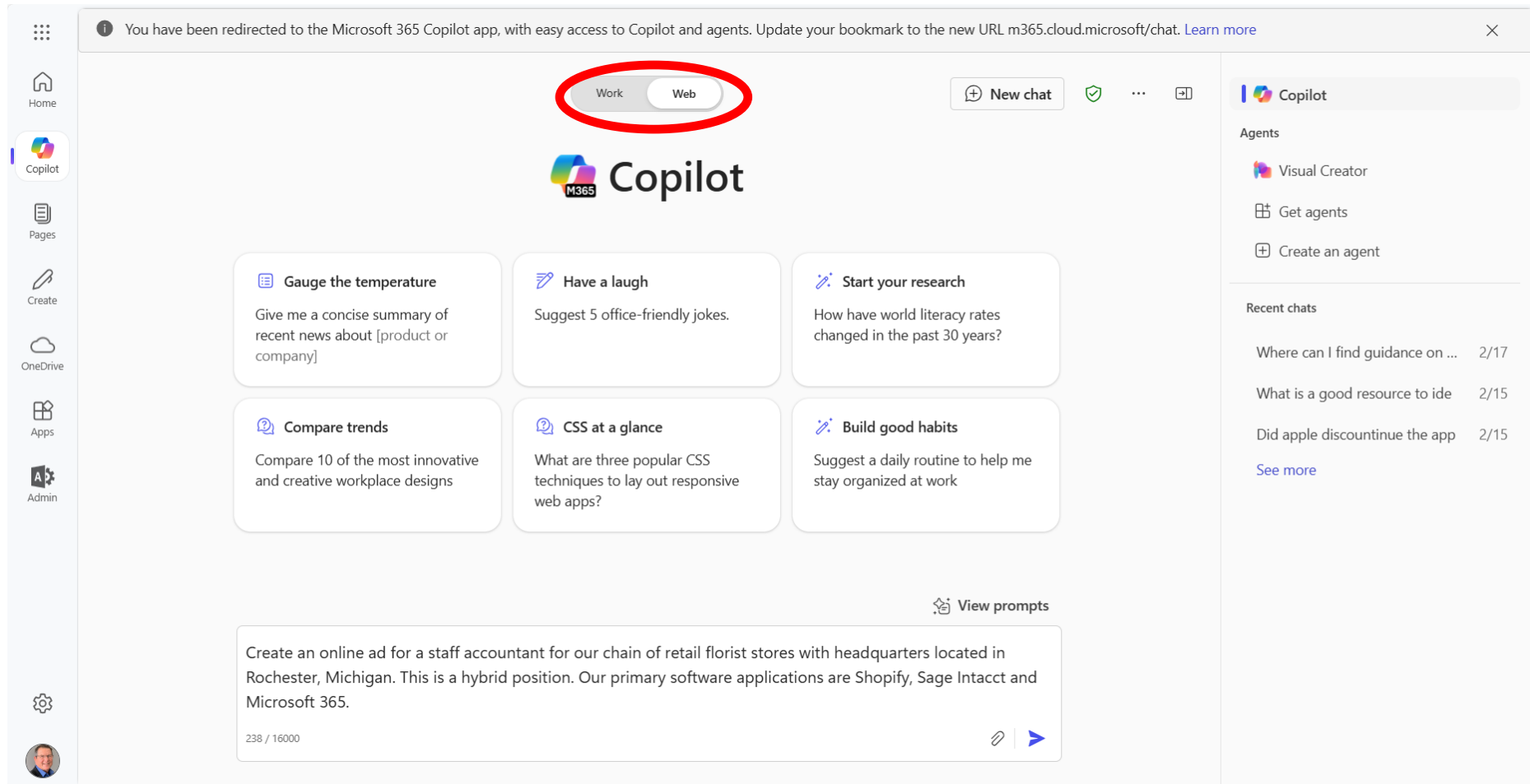
Include text, audio, images  
and files with prompt for  
“Retrieval Augmented  
Generation” (RAG)

Chat history





# Copilot Web Example



You have been redirected to the Microsoft 365 Copilot app, with easy access to Copilot and agents. Update your bookmark to the new URL [m365.cloud.microsoft/chat](https://m365.cloud.microsoft/chat). [Learn more](#)

Work Web

**Copilot**

- Gauge the temperature**  
Give me a concise summary of recent news about [product or company]
- Have a laugh**  
Suggest 5 office-friendly jokes.
- Start your research**  
How have world literacy rates changed in the past 30 years?
- Compare trends**  
Compare 10 of the most innovative and creative workplace designs
- CSS at a glance**  
What are three popular CSS techniques to lay out responsive web apps?
- Build good habits**  
Suggest a daily routine to help me stay organized at work

[View prompts](#)

Create an online ad for a staff accountant for our chain of retail florist stores with headquarters located in Rochester, Michigan. This is a hybrid position. Our primary software applications are Shopify, Sage Intacct and Microsoft 365.

238 / 16000

[Copilot](#)

**Agents**

- Visual Creator
- Get agents
- Create an agent

**Recent chats**

- Where can I find guidance on ... 2/17
- What is a good resource to ide 2/15
- Did apple discontinue the app 2/15

[See more](#)



# Copilot Web Example

Create an online ad for a staff accountant for our chain of retail florist stores with headquarters located in Rochester, Michigan. This is a hybrid position. Our primary software applications are Shopify, Sage Intacct and Microsoft 365.

Copilot

Sure, I'd be happy to help with that! Here's a draft for your online ad:

---

**Job Title:** Staff Accountant

**Location:** Rochester, Michigan (Hybrid Position)

**Company:** [Your Company Name]

**About Us:** We are a thriving chain of retail florist stores with our headquarters located in Rochester, Michigan. Our mission is to bring joy and beauty to our customers through our exquisite floral arrangements. We are looking for a dedicated and detail-oriented Staff Accountant to join our team and support our financial operations.

**Position Overview:** As a Staff Accountant, you will play a crucial role in maintaining our financial records, ensuring accuracy, and supporting our financial planning and analysis. This is a hybrid position, allowing you to work both remotely and from our headquarters in Rochester, Michigan.

**Key Responsibilities:**

- Manage and maintain financial records, including accounts payable and receivable, general ledger, and payroll.
- Prepare and analyze financial statements and reports.

Add more details about benefits.

Include application deadline.

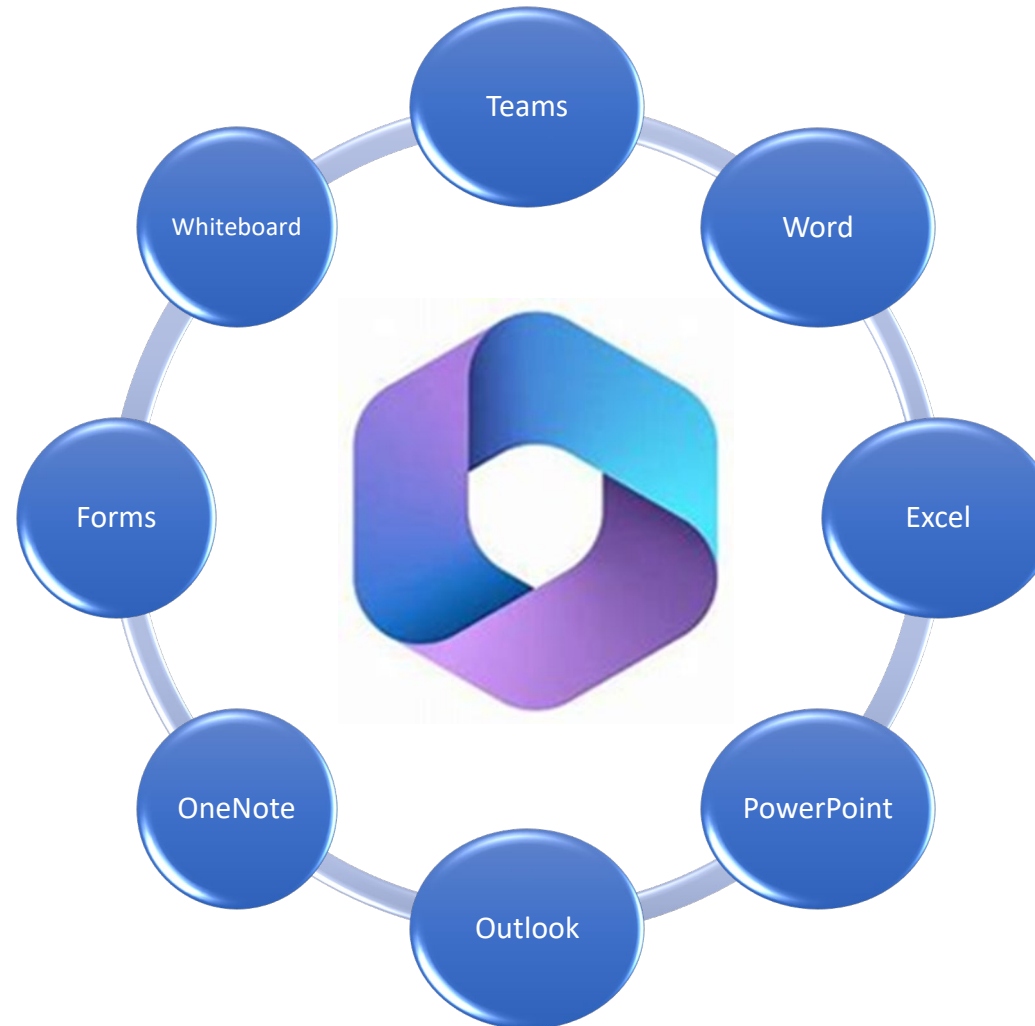
Specify required certifications.

View prompts

Ask me anything...

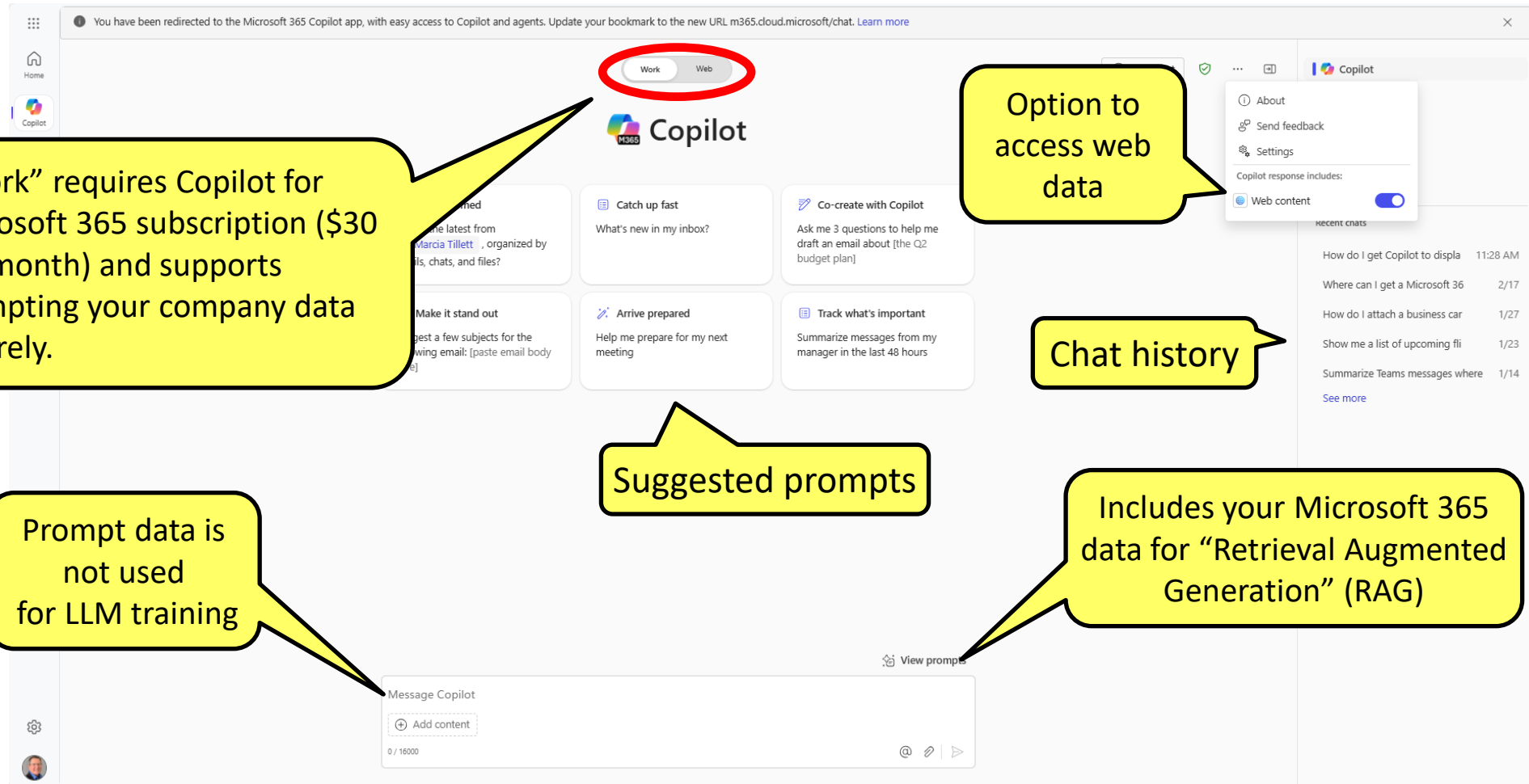
0 / 16000

# MICROSOFT 365 COPILOT DEEP DIVE





# Copilot Prompt Screen - Work





# Copilot Work Example

WorkWeb

Today

Review my Outlook inbox for any emails received in the past 30 days that are flagged for follow-up

Copilot

Sure, John! Here are the emails from your inbox that were flagged for follow-up in the past 30 days:

- MNCPA EPFP Conference - Confirmation & Marketing Details** from [Emily Stamp](#) (last Wednesday): This email confirms your participation as a speaker at the MNCPA Estate & Financial Planning Conference on June 4 and June 5, 2025. It includes session details, deadlines for marketing information, and materials submission <sup>1</sup>.
- Re: Contract** from [Marcia Sheehy](#) (last Monday): Marcia mentioned that she hasn't had any discussions with you regarding the contract and cc'd you in the email to get your input while you are traveling <sup>2</sup>.
- Fwd: 3 Conference Sessions for March 20, 2025** from [Marcia Sheehy](#) (last Monday): This email confirms your session details for the WICPA Business & Industry Spring Conference on March 20, 2025. It includes session titles, speaking times, and a reminder to send presentation materials by February 20 <sup>3</sup>.
- Final Details: CPA Educator's Conference** from [Kate Eacho](#) (on Wednesday the 5th): This email provides final details for your session at the CPA Educator's Conference scheduled for February 19-21, 2025. It includes session time.

Provide more details on the MNCPA EPFP Conference email.

Summarize the key points from the Contract email.

Can you list the deadlines mentioned in these emails?

View prompts

# Copilot for Excel



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AutoSave On Sales History Data File.xlsx • Last Modified: 8/29/2024

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

Clipboard Font Alignment Number Styles Cells Editing Sensitivity Add-ins

Calibri 11 A A B I U Conditional Formatting Format as Table Cell Styles Insert Delete Format Sort & Filter Find & Select Sensitivity Add-ins Analyze Copilot Create PDF Create PDF and Share via Outlook Document Cloud

G9 Classic Vest, M

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Cust#	Customer Name	Location	Region	Country	Group	Product Name	Product Category	Order date	Order Quantity	Unit Price	Total Product Cost	Sales Amount	Tax Amt
1	35560	Kelli L Xu	110	Germany	Germany	Europe	Classic Vest, L	Vests	11/8/2011	1	63.5	23.749	63.5	5.0
2	22760	Donald Chandra	120	United Kingdom	United Kingdom	Europe	Classic Vest, L	Vests	8/31/2011	1	63.5	23.749	63.5	5.0
3	20560	Dale Shen	100	France	France	Europe	Classic Vest, L	Vests	3/17/2011	1	63.5	23.749	63.5	5.0
4	44870	Preston Rodriguez	160	Northwest	United States	North America	Classic Vest, L	Vests	12/19/2010	1	63.5	23.749	63.5	5.0
5	18630	Christian A Thomas	160	Northwest	United States	North America	Classic Vest, L	Vests	11/6/2010	1	63.5	23.749	63.5	5.0
6	33150	Jose J Hall	130	Canada	Canada	North America	Classic Vest, L	Vests	10/22/2010	1	63.5	23.749	63.5	5.0
7	21080	Darrell Goel	100	France	France	Europe	Classic Vest, M	Vests	12/5/2011	1	63.5	23.749	63.5	5.0
8	43610	Nicole J Williams	160	Northwest	United States	North America	Classic Vest, M	Vests	11/7/2011	1	63.5	23.749	63.5	5.0
9	24570	Erick E Gonzalez	110	Germany	Germany	Europe	Classic Vest, M	Vests	10/10/2011	1	63.5	23.749	63.5	5.0
10	43910	Olivia K Cox	100	France	France	Europe	Classic Vest, M	Vests	4/8/2011	1	63.5	23.749	63.5	5.0
11	40240	Marissa Price	130	Canada	Canada	North America	Classic Vest, M	Vests	3/24/2011	1	63.5	23.749	63.5	5.0
12	52430	Tyler C Lewis	160	Northwest	United States	North America	Classic Vest, M	Vests	3/12/2011	1	63.5	23.749	63.5	5.0
13	17460	Carrie D Ruiz	130	Canada	Canada	North America	Classic Vest, M	Vests	2/8/2011	1	63.5	23.749	63.5	5.0
14	26260	Gary G Serrano	100	France	France	Europe	Classic Vest, M	Vests	1/15/2011	1	63.5	23.749	63.5	5.0
15	26440	Gerald Alonso	110	Germany	Germany	Europe	Classic Vest, M	Vests	12/1/2010	1	63.5	23.749	63.5	5.0
16	36020	Kenneth Rajee	120	United Kingdom	United Kingdom	Europe	Classic Vest, M	Vests	11/27/2010	1	63.5	23.749	63.5	5.0
17	37880	Levi J Suri	110	Germany	Germany	Europe	Classic Vest, M	Vests	8/12/2010	1	63.5	23.749	63.5	5.0
18	12830	Andrew T Wedge	130	Canada	Canada	North America	Classic Vest, M	Vests	5/2/2010	1	63.5	23.749	63.5	5.0
19	39150	Madison Jones	130	Canada	Canada	North America	Classic Vest, M	Vests	2/4/2010	1	63.5	23.749	63.5	5.0
20	15830	Brianna D Morgan	130	Canada	Canada	North America	Classic Vest, M	Vests	12/16/2009	1	63.5	23.749	63.5	5.0
21	41000	Meagan C Fernandez	120	United Kingdom	United Kingdom	Europe	Classic Vest, S	Vests	11/6/2011	1	63.5	23.749	63.5	5.0
22	20200	Craig Romero	110	Germany	Germany	Europe	Classic Vest, S	Vests	2/27/2011	1	63.5	23.749	63.5	5.0
23	45630	Rebecca Hernandez	100	France	France	Europe	Classic Vest, S	Vests	1/26/2011	1	63.5	23.749	63.5	5.0
24	48770	Shannon J Romero	110	Germany	Germany	Europe	Classic Vest, S	Vests	10/1/2010	1	63.5	23.749	63.5	5.0
25	17680	Casey S Diaz	110	Germany	Germany	Europe	Classic Vest, S	Vests	7/31/2010	1	63.5	23.749	63.5	5.0
26	13690	Arthur Diaz	100	France	France	Europe	Half-Finger Gloves, L	Gloves	12/20/2011	1	24.49	9.1593	24.49	1.95
27	25370	Fernando Lewis	160	Northwest	United States	North America	Half-Finger Gloves, L	Gloves	12/17/2011	1	24.49	9.1593	24.49	1.95
28	35410	Kaylee S Young	130	Canada	Canada	North America	Half-Finger Gloves, L	Gloves	11/24/2011	1	24.49	9.1593	24.49	1.95
29	41380	Melissa W Blue	160	Northwest	United States	North America	Half-Finger Gloves, L	Gloves	11/2/2011	1	24.49	9.1593	24.49	1.95
30	45150	Rachel E Simmons	100	France	France	Europe	Half-Finger Gloves, L	Gloves	10/17/2011	1	24.49	9.1593	24.49	1.95
31	18860	Christy Nara	160	Northwest	United States	North America	Half-Finger Gloves, L	Gloves	9/29/2011	1	24.49	9.1593	24.49	1.95
32	42400	Molly Malhotra	100	France	France	Europe	Half-Finger Gloves, L	Gloves	9/11/2011	1	24.49	9.1593	24.49	1.95
33	51600	Tina Subram	100	France	France	Europe	Half-Finger Gloves, L	Gloves	7/27/2011	1	24.49	9.1593	24.49	1.95
34	34340	Karen M Liang	100	France	France	Europe	Half-Finger Gloves, L	Gloves	6/8/2011	1	24.49	9.1593	24.49	1.95
35	25020	Eugene A Xu	120	United Kingdom	United Kingdom	Europe	Half-Finger Gloves, L	Gloves	5/29/2011	1	24.49	9.1593	24.49	1.95
36	11340	Alexandra E Washington	130	Canada	Canada	North America	Half-Finger Gloves, L	Gloves	5/11/2011	1	24.49	9.1593	24.49	1.95
37														

Ready Accessibility: Good to go

Copilot

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

Show data insights  
Show a suggestion for a formula column  
Suggest detailed formatting

Ask a question, or tell me what you'd like to do with A1:R6216

# Preparing Your Organization for Copilot

- Get your Microsoft 365 data governance managed
- Store files in SharePoint and OneDrive
- Use Teams & Channels vs. Chats
- Use Teams Meetings vs. Zoom
- Educate your staff on Generative AI & Copilot

# WRAP-UP



# In Summary

- The lesser know Microsoft 365 apps can significantly increase your ROI
- Focus on Teams and SharePoint as the foundation
- Copilot is your Microsoft 365 jet pack
- Make the effort to explore all the apps!

# Questions ?



# Thank you!!!

Let's connect on LinkedIn →

