

Microsoft 365 Supercharging CPA Productivity



Authored and Presented By
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Rochester, Michigan

Learning Objectives



- Identify hidden features of Microsoft 365 to boost your productivity
- Identify specific, actionable initiatives to do more across the Microsoft 365 ecosystem

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

John H. Higgins, CPA.CITP

Strategic Technology Advisor



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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

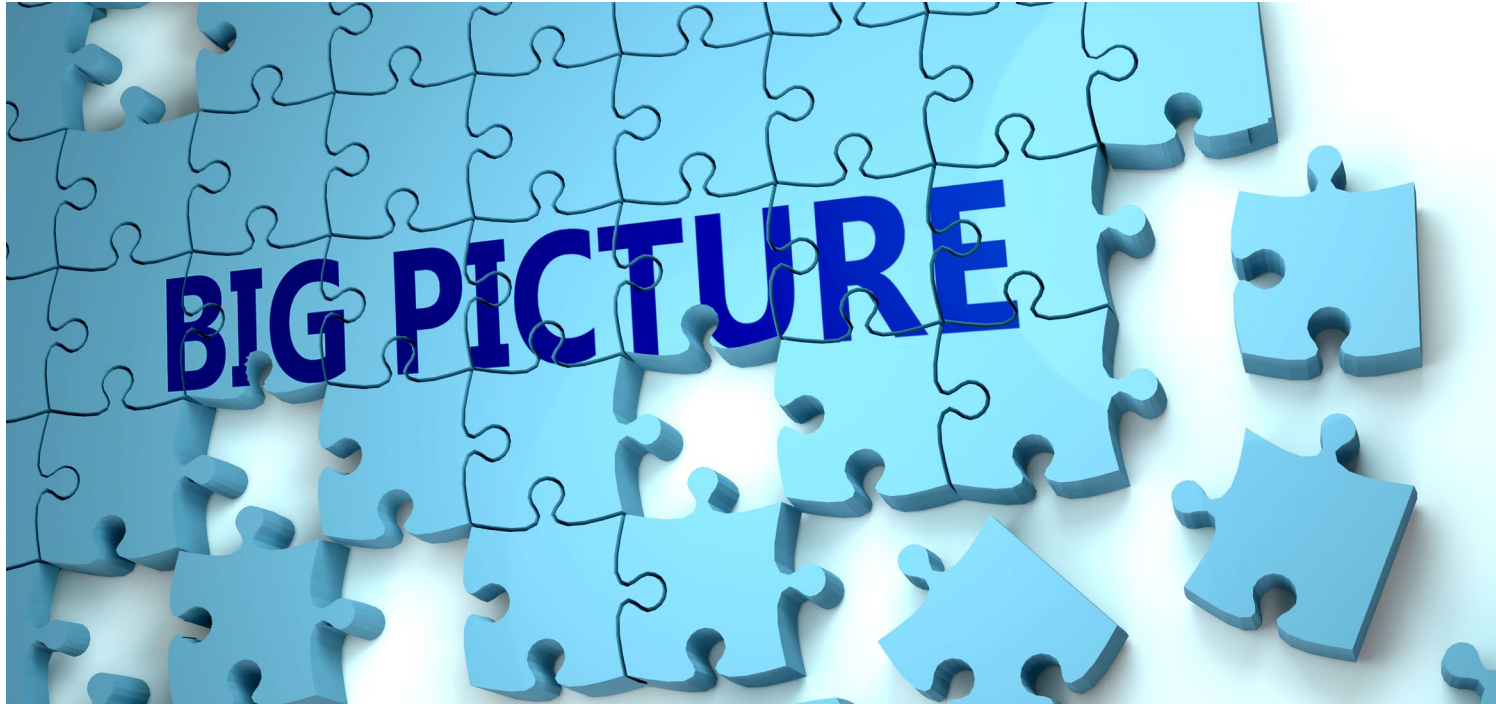
Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!

Presentation Outline

- [Microsoft 365 – The Big Picture](#)
- [Hidden Gems in the Microsoft 365 Ecosystem](#)
- [Additional Resources](#)
- [Wrap-up](#)

MICROSOFT 365 – THE BIG PICTURE



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
- Sway
- Teams
- To-Do
- Viva Insights
- Whiteboard
- Word

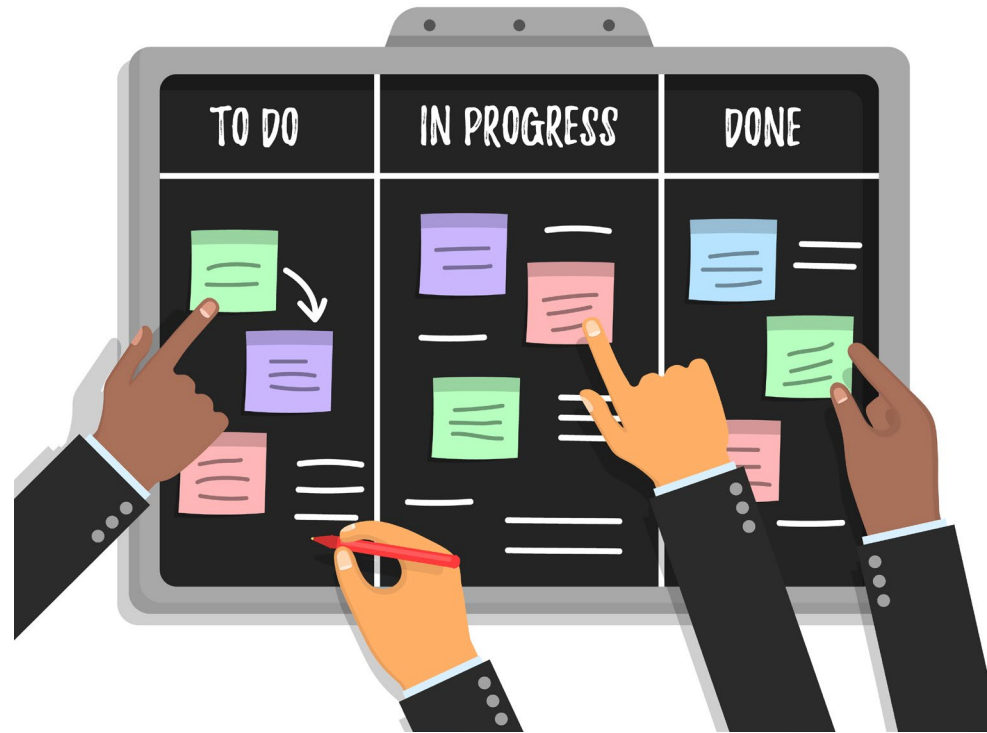
AI Add-in



TEAMS' ROLE IN THE MICROSOFT 365 ECOSYSTEM



HIDDEN GEMS IN MICROSOFT 365 ECOSYSTEM



Tips for Getting The Most Out of M365

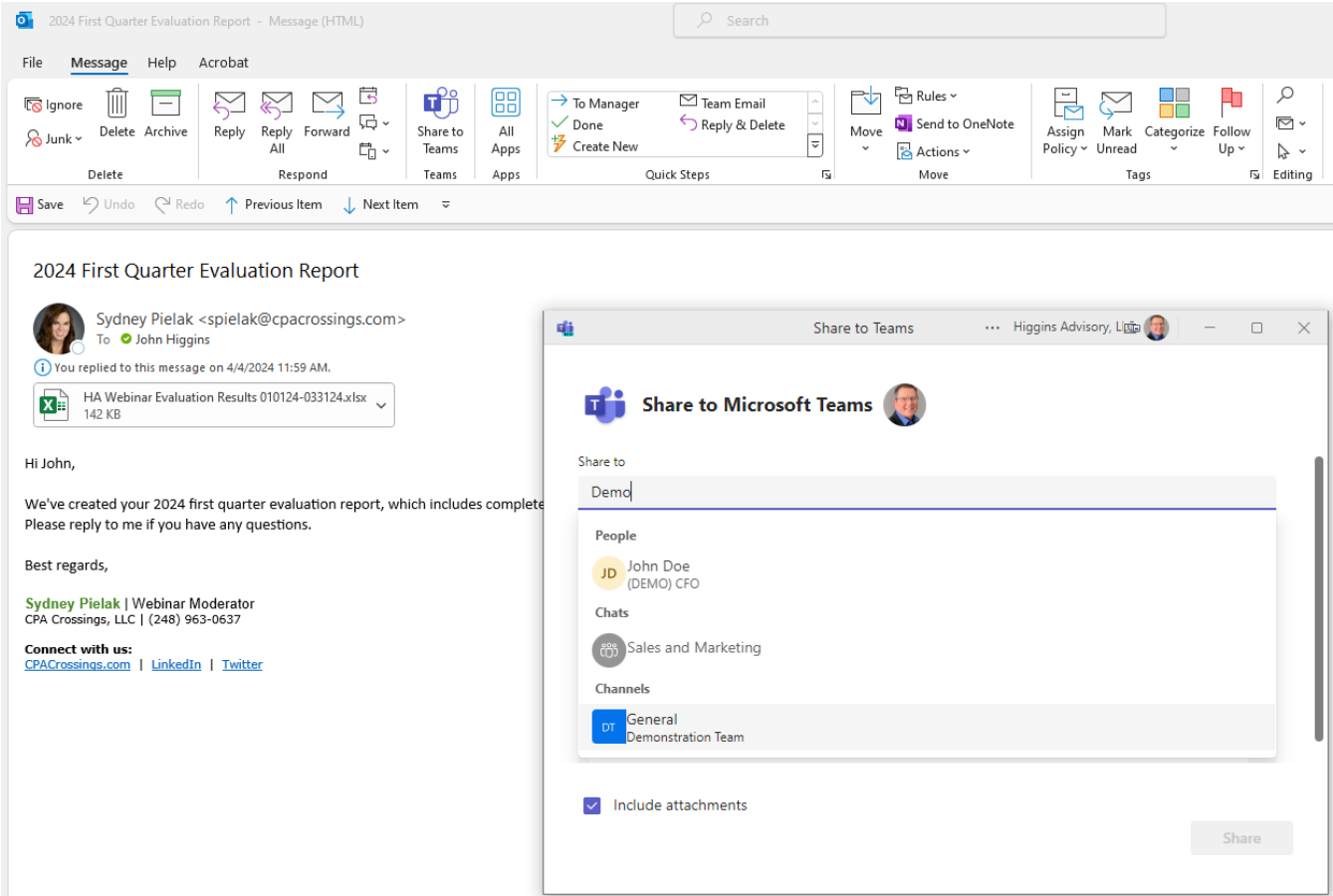
- ✓ Make Teams the priority
- ✓ Store shared files in SharePoint
- ✓ Manage engagements and projects with Planner
- ✓ Get organized with OneNote
- ✓ Manage lists with Lists app
- ✓ Document processes and meeting with Clipchamp
- ✓ Create surveys and quizzes with Forms app
- ✓ Streamline appointment scheduling with Bookings app
- ✓ Communicate financial data visually with Power BI
- ✓ Manage your time with To Do app
- ✓ Automate processes with Power Automate / Copilot Cowork

Top Teams Tips

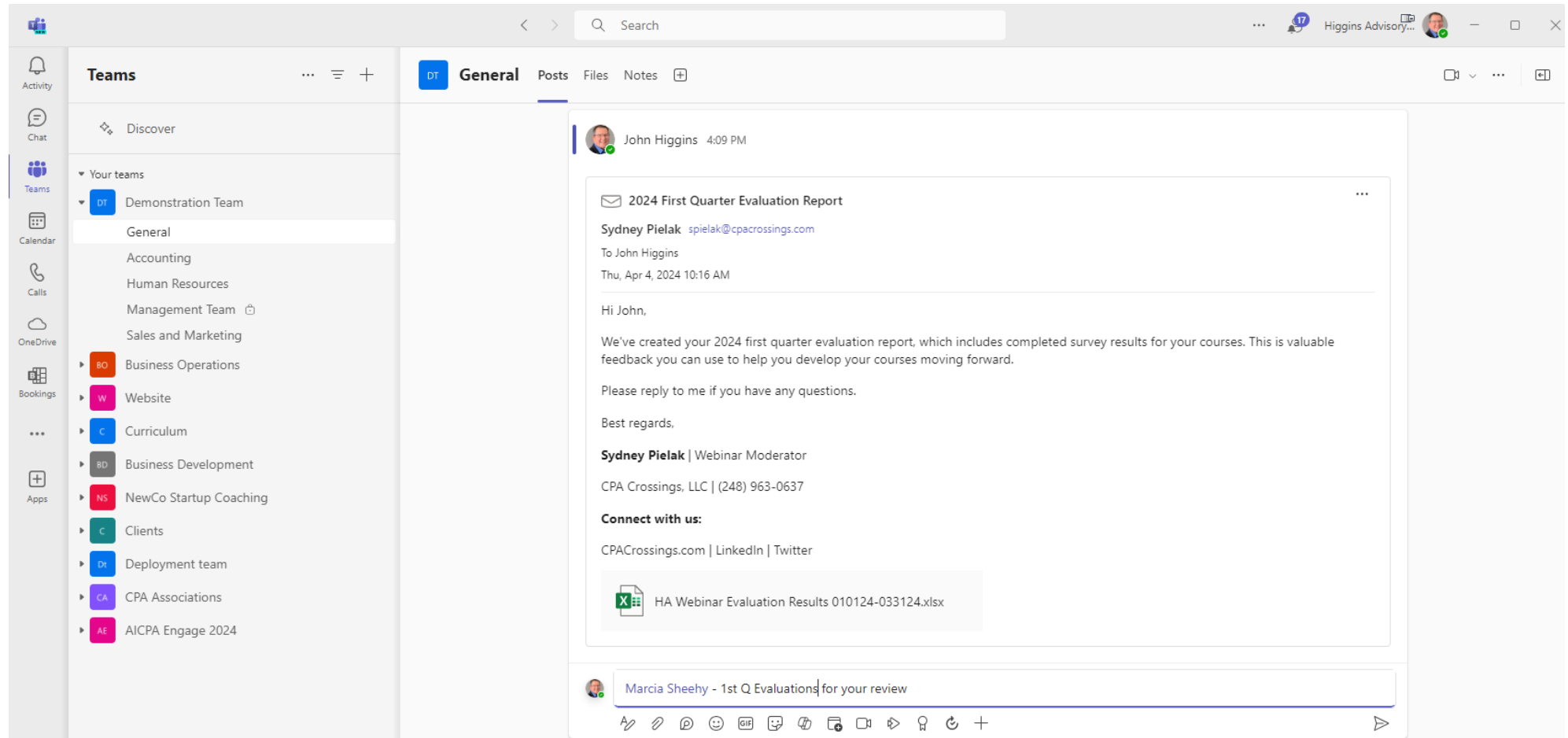


- ✓ Converse in channels not chat
- ✓ Use Channel tabs for efficient access
- ✓ Use Teams for phone calls (internal / external)
- ✓ Transfer email conversations to Teams
- ✓ Conduct and record all meetings in Teams
- ✓ Use Copilot to recap meetings

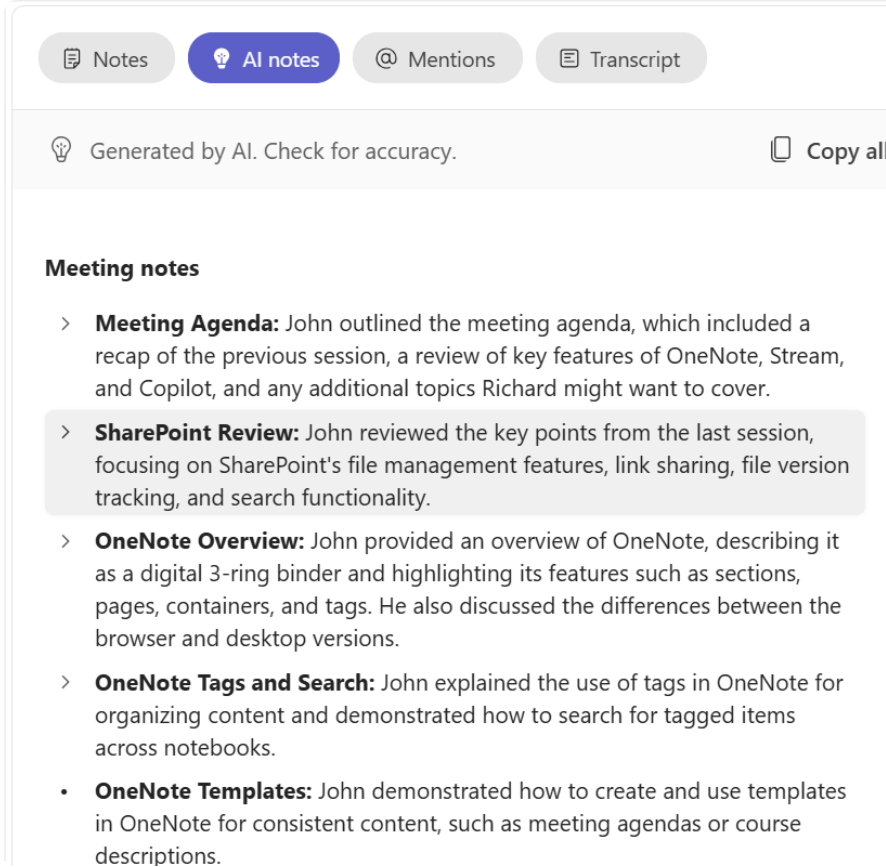
Eliminate Internal Emails



Eliminate Internal Emails (continued)



Recap Teams Meetings Example



The screenshot shows the Microsoft Teams interface for AI-generated meeting notes. At the top, there are four tabs: 'Notes', 'AI notes' (which is selected and highlighted in blue), 'Mentions', and 'Transcript'. Below the tabs, a light gray bar contains a lightbulb icon, the text 'Generated by AI. Check for accuracy.', and a 'Copy all' button. The main content area is titled 'Meeting notes' and contains a bulleted list of meeting highlights. The second item, 'SharePoint Review', is highlighted with a light gray background.

Notes AI notes Mentions Transcript

Generated by AI. Check for accuracy. Copy all

Meeting notes

- › **Meeting Agenda:** John outlined the meeting agenda, which included a recap of the previous session, a review of key features of OneNote, Stream, and Copilot, and any additional topics Richard might want to cover.
- › **SharePoint Review:** John reviewed the key points from the last session, focusing on SharePoint's file management features, link sharing, file version tracking, and search functionality.
- › **OneNote Overview:** John provided an overview of OneNote, describing it as a digital 3-ring binder and highlighting its features such as sections, pages, containers, and tags. He also discussed the differences between the browser and desktop versions.
- › **OneNote Tags and Search:** John explained the use of tags in OneNote for organizing content and demonstrated how to search for tagged items across notebooks.
- **OneNote Templates:** John demonstrated how to create and use templates in OneNote for consistent content, such as meeting agendas or course descriptions.

Follow-up tasks

- **Copilot Feature:** Post information in the Teams channel about the current status and functionality of the bookmark feature in Teams. (John)
- **Copilot Feature:** Check and confirm the availability of the bookmark feature in Teams and update the team accordingly. (John)
- **Copilot Access:** Ensure that the Copilot button is enabled for all team members in the Edge browser and provide necessary instructions for access. (Richard)
- **Copilot Training:** Offer training sessions or resources for team members interested in learning more about Copilot for Office 365 and its applications. (Richard)
- **Power BI Training:** Identify a team member to become the expert in Power BI and provide them with necessary training resources. (Lisa)

Storing and Sharing Files



Store Shared Files in SharePoint & Personal Work Files in OneDrive

OneDrive = your personal (business) files

SharePoint = shared file sites

Share files internally & externally

Simultaneous Office file editing

Eliminate email file attachments

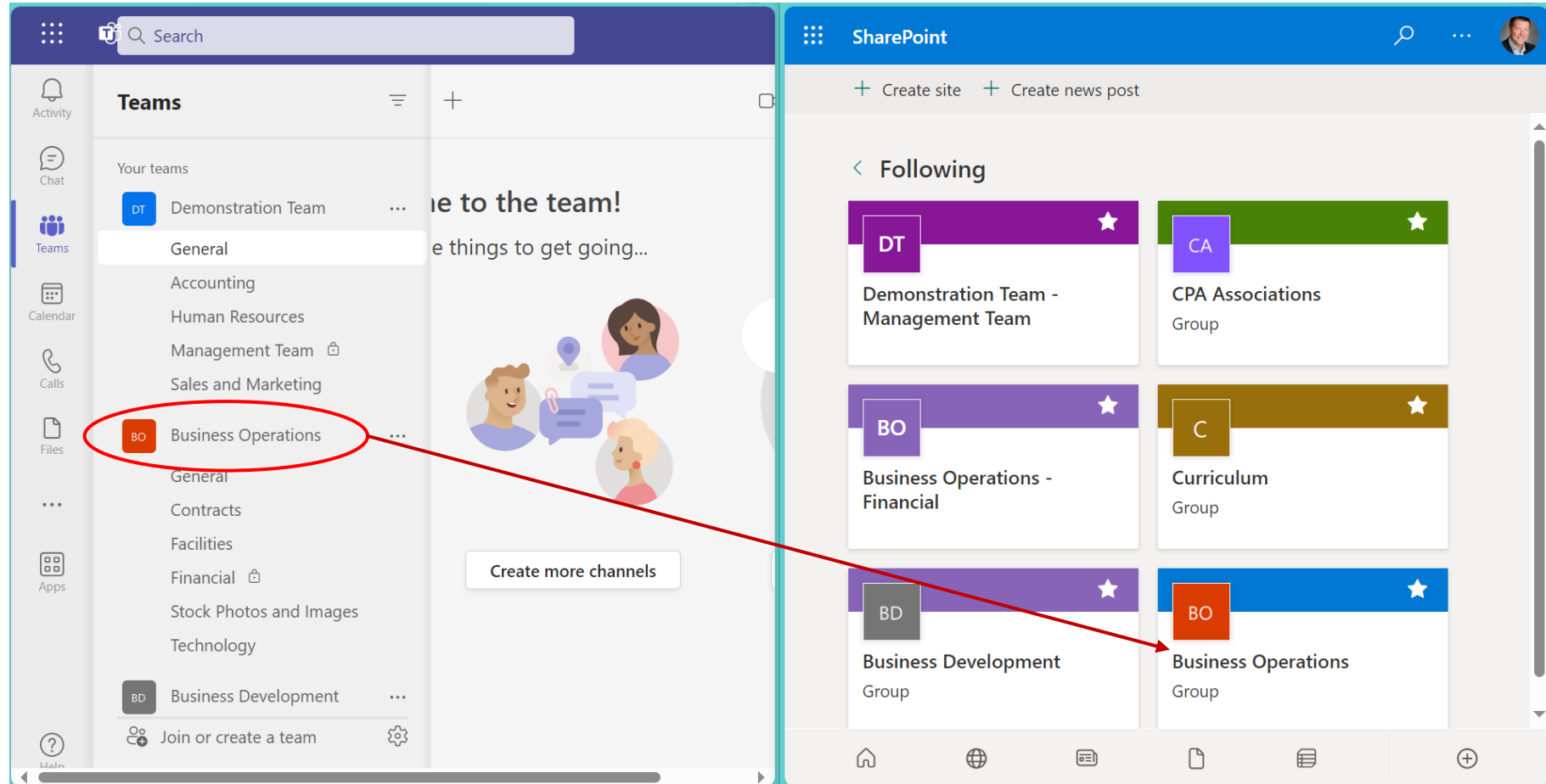
Synchronize with local PC

Maintain file version history

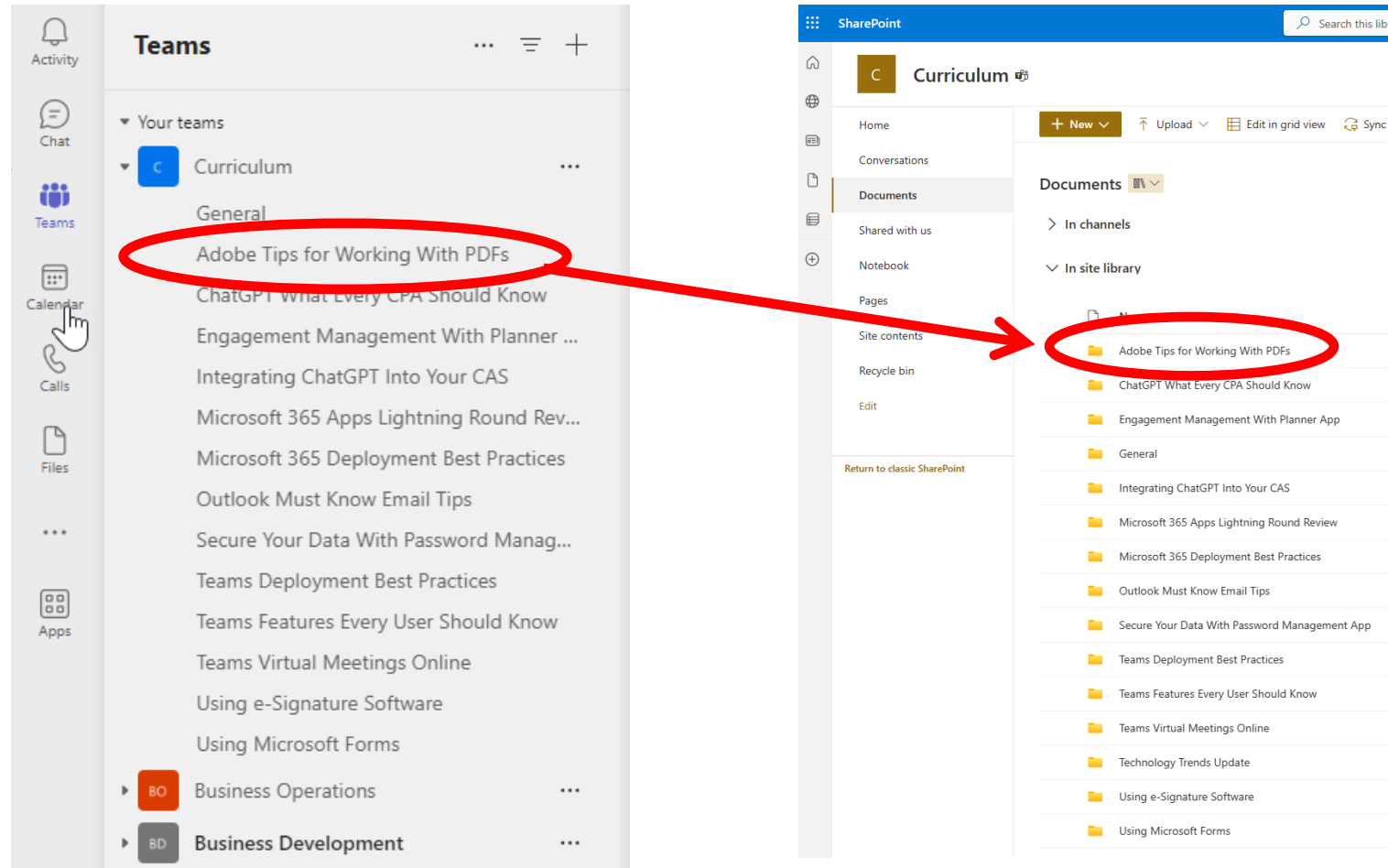
SharePoint Best Practices

- ✓ Manage SharePoint site creation and folder management through Teams
- ✓ Learn how file versioning works and manage appropriately
- ✓ Minimize the use of OneDrive
- ✓ Use Teams & SharePoint as a client portal for communication and file exchange
- ✓ Share files via email links, not attachments
- ✓ Automate routine file processing with Power Automate and Copilot

Teams / SharePoint Relationship



Teams Channels & SharePoint File Folders



Sending Files Securely: Use File Link

The screenshot shows the Microsoft Word interface with the 'Share' dialog box open. The dialog box has a title bar 'How do you want to attach this file?' and two options: 'Share link' (highlighted) and 'Attach as copy'. The 'Share link' option includes the text 'Recipients can see the latest changes and respond in real time.' A yellow callout bubble points to the 'Share link' option with the text 'Requires file to be stored in OneDrive or SharePoint'. The background shows the Word ribbon with the 'File' tab selected, and the 'Attach File' dropdown menu is open, showing 'Share link' as the selected option. The document is titled 'Untitled - Message (HTML)' and the email address 'john@higginsadvisoryllc.com' is visible in the 'From' field.

File Message Insert Draw Options Format Text Review Help

Clipboard Basic Text Names Include Adobe Acrobat Collaborate Tags Voice

Send From john@higginsadvisoryllc.com To Cc Bcc Subject

Regards, John

HIGGINS ADVISORY, LLC

John Higgins, CPA.CITP
Strategic Technology Advisor
248-390-9754
higginsadvisoryllc.com

How do you want to attach this file?

Share link
Recipients can see the latest changes and respond in real time.

Attach as copy
Everyone receives a separate copy of this file.

Higgins Advisory LLC W9.pdf

Anyone with the link can view

Manage access

Open link

Copy Link

Requires file to be stored in OneDrive or SharePoint

Establish File Link Access Controls

Sharing settings
Higgins Advisory LLC W9.pdf

Share the link with

- ☒ **Anyone**
Share with anyone, doesn't require sign-in
- ☐ People in Higgins Advisory, LLC ⓘ
- ☐ Recipients of this message
- ☐ People with existing access ⓘ


More settings

- ☐ Can view ▾
- ☐ Expires Sunday, Apr 6, 2025 ⓘ
- ☐ Set password

Apply **Cancel**

Establish file sharing
link permissions

MANAGE ENGAGEMENTS AND PROJECTS WITH THE PLANNER APP



Planner App Home Screen

Plans

Planner

Create a plan

My day

My tasks

My plans

Pinned

Audit Engagement - Premium Demonstration Team

BI Conference - 2027

Audit Engagement Demo
Demonstration Team

Audit Engagement Demo - Standard Demonstration Team

1040 Engagements - Premium Demonstration Team

Courseware Development
Courseware Development

Tax Engagement Demonstration Demonstration Team

MMO

My plans > Audit Engagement Demo

GoalsGridBoardCalendarReportsCharts

Group by: Bucket

Planning

+ Add task

Planning & Risk... Scope Important

Develop Audit Plan

Add to audit engagement software

04/03

Planning & Risk... Important

Assess inherent risks

Potential incentives for misreporting

04/29

Fieldwork

+ Add task

Deliverables

Workpaper completion

Workpapers documenting all testing and recalculations.

07/22

Reporting

Summarize testing results

Identify root causes for inaccuracies

Provide recommendations

07/15

Review

+ Add task

Compliance Tes...

Verify measure alignment

Verify that reported measures align with statutory requirements, legislative mandates, or agency strategic goals.

07/01

Analytical Proc...

Assess reasonableness

Assess reasonableness in context of operations.

06/24

Reporting

+ Add task

Deliverables

Management Response

Management response and corrective action plan.

08/05

Deliverables

Draft audit report

Draft audit report with findings, conclusions, and recommendations.

07/29

Objective

Define Audit Objective



22

Project Plan Board View

My plans > Audit Engagement Demo

Goals

Grid

Board

Calendar

Reports

Charts

Planning

+ Add task

Planning & Risk...

Scope

Important

○ Develop Audit Plan

○ Add to audit engagement software

04/03

Fieldwork

+ Add task

Deliverables

○ Workpaper completion

Workpapers documenting all testing and recalculations.

07/22

Review

+ Add task

Compliance Tes...

○ Verify measure alignment

Verify that reported measures align with statutory requirements, legislative mandates, or agency strategic goals.

07/01

Individual Tasks

Organizing Buckets



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Task Card Details

The screenshot displays a task card for "Develop Audit Plan" within an "Audit Engagement Demo" environment. The card includes a title, creation information, a goal connection, classification labels ("Planning & Risk Assessment", "Scope", "Important"), and an assignee (Marcia Sheehy). A red circle highlights the "Task details" button. The card also features fields for Status ("In progress"), Priority ("Medium"), Start date ("03/29/2026"), Due date ("04/03/2026"), Repeat ("Does not repeat"), and Bucket ("Planning"). A checklist with four items is shown, with the first three marked as complete. A "Task chat" panel on the right includes a "Start the conversation" prompt and a message input field. Yellow callout boxes with black borders point to various elements: "Task Name" points to the title; "Task classification labels" points to the colored tags; "Assigned to" points to the assignee's name; "Task Detailed Description / Notes" points to the "Task details" button; "Task Checklist Items" points to the checklist section; and "Loop conversation" points to the chat panel.

Task Card Details (continued)

Audit Engagement Demo

○

Develop Audit Plan

Created Apr 1 by you · Last changed 1m ago by you ⓘ

🏆 Connect to a goal

🏷️ Planning & Risk Assessment ✕ Scope ✕ Important ✕

👤 Marcia Sheehy

📄 Task details

📎 Attachments (2)

💬 Comments

Attachments

GAO 2024 Auditing Standards Update.pdf

<https://higginsadvisoryllc.sharepoint.com/sites/DemonstrationTeam/Shared%20C>

⋮

☐ Show in board view

sample audit program for performance measures.xlsx

<https://higginsadvisoryllc.sharepoint.com/sites/DemonstrationTeam/Shared%20C>

⋮

☐ Show in board view

📎 Add attachment

File attachment links

Task Card Details (continued)

Audit Engagement Demo

○ Develop Audit Plan

Created Apr 1 by you · Last changed 6m ago by you ⓘ

🏆 Connect to a goal

📁 Planning & Risk Assessment ✕

Scope ✕

Important ✕

👤 +

 Marcia Sheehy

📄 Task details

📎 Attachments (2)

💬 Comments

ⓘ We have upgraded the comment experience to a Task chat on the side panel. Previous comments are available as read-only below.

JH John Higgins

Reviewed PY plan and updated for current year

4/1/2026, 12:53:23 PM

JH John Higgins

Reviewed the updated 2024 GAO standards.

4/1/2026, 12:52:52 PM

Task notes journal



26

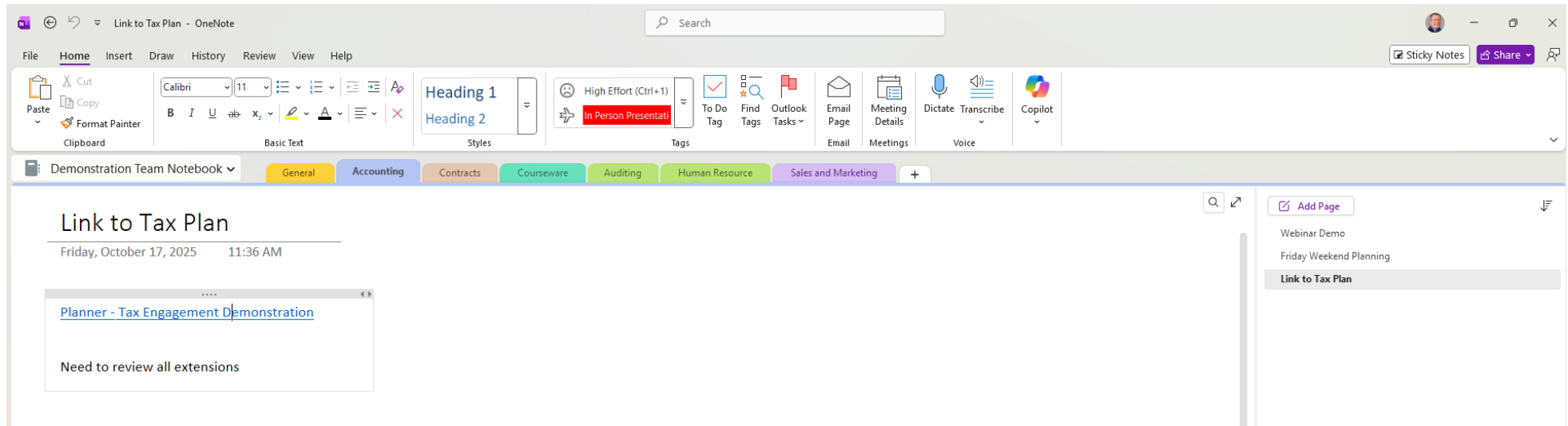
ORGANIZING NOTES AND IDEAS WITH ONENOTE



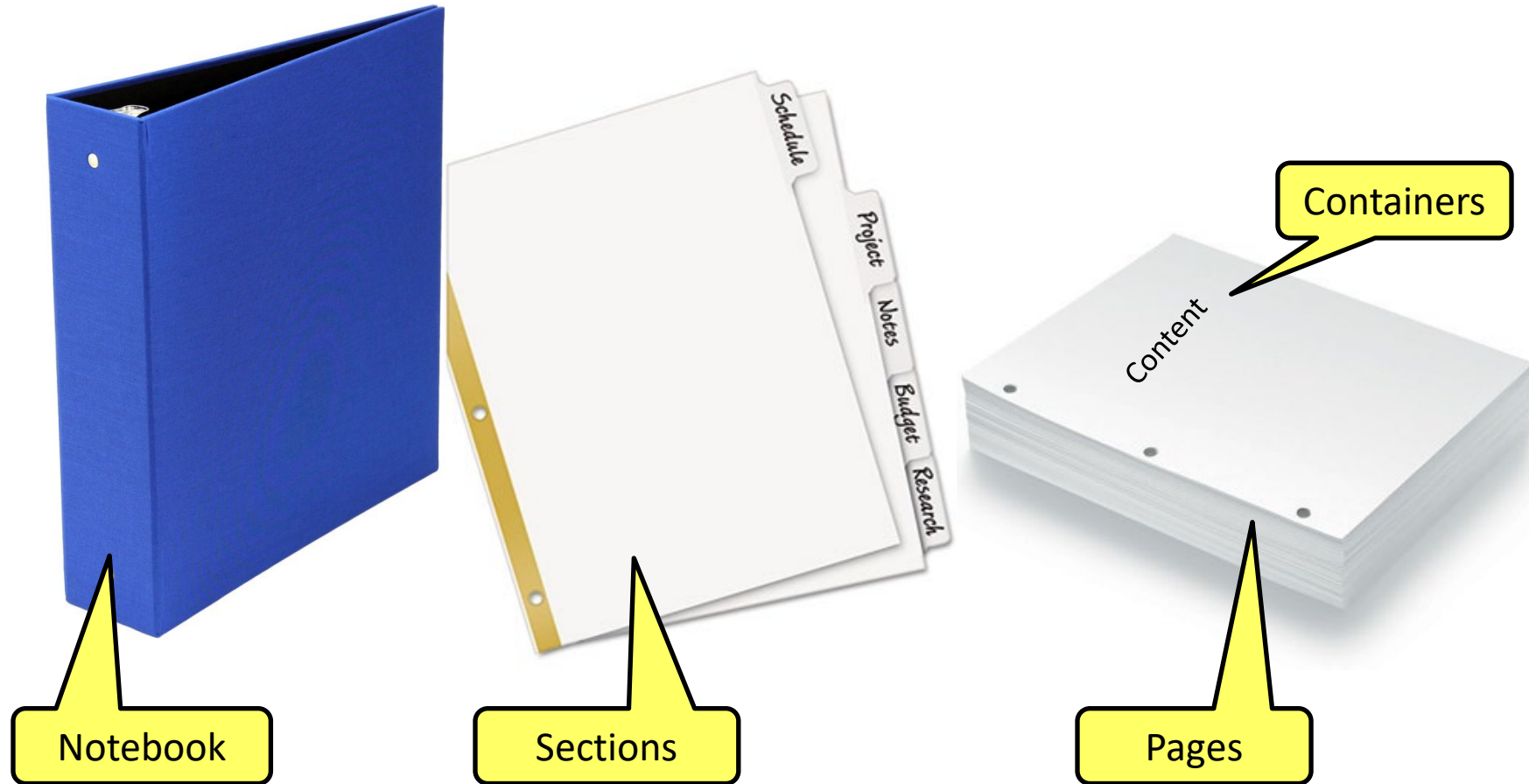
Top Applications for OneNote

- Document and organize notes
- Create and standardized meeting agendas
- Document and share meeting notes
- Maintain working documents
- Replace internal use of Microsoft Word
- ***Replace your paper notepad!***

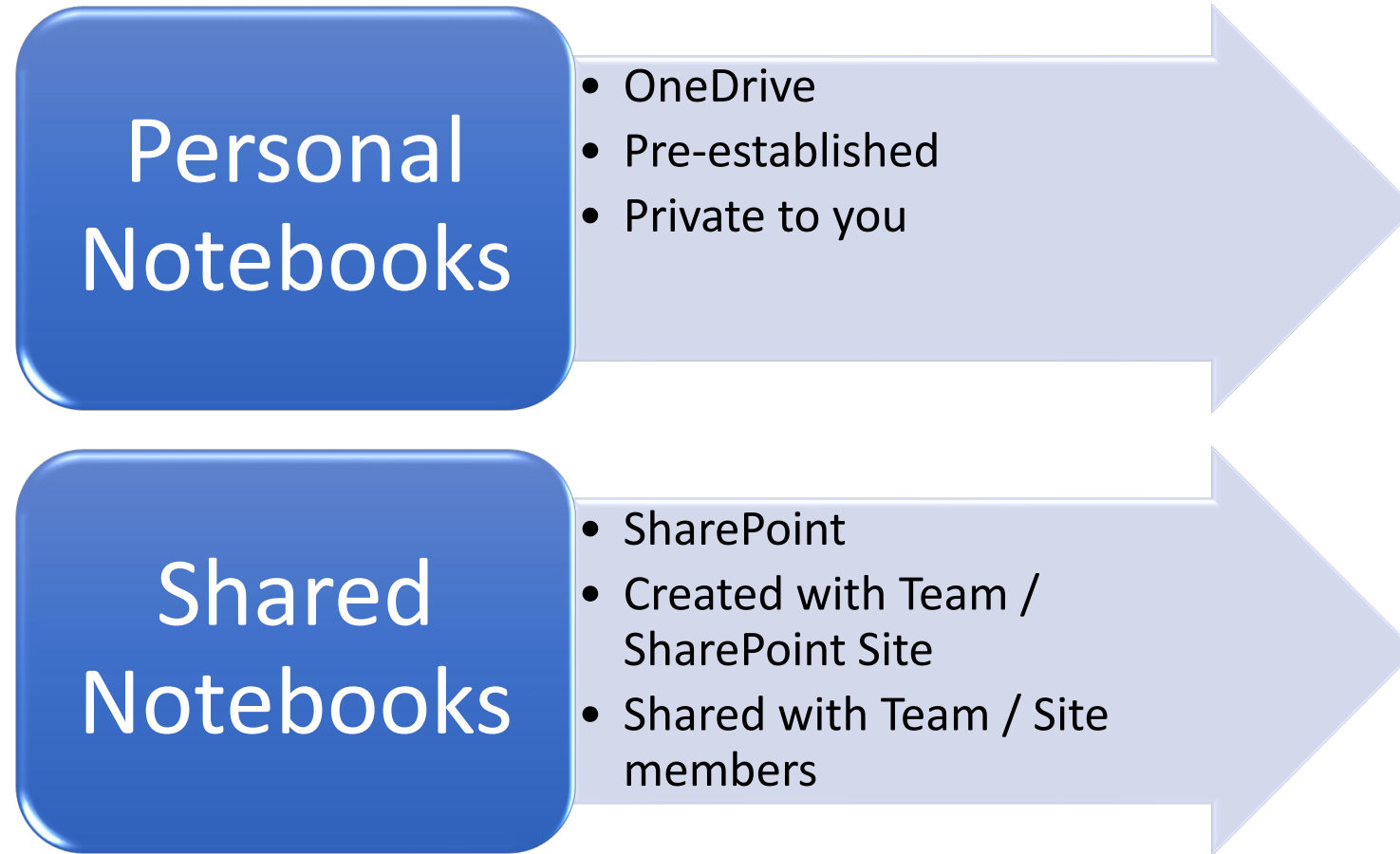
OneNote Home Screen



OneNote Content Organization



OneNote Notebook Storage



Lists App - Create and Manage Custom Lists



Microsoft Lists

+ Add new item

Edit in grid view

Undo

Share

Copy link

Export

Forms **New**

Automate

Integrate

My lists

Higgins Advisory, LLC Expense Tracker ☆

Item	Date	Amount	Category	Description
Postage stamps	September 29, 2023	\$15.00	Postage	20 Forever stamps
Lunch with ABC Co	December 15, 2023	\$45.00	Meals / Entertainmer	
Dinner	July 17, 2024	\$50.00	Meals / Entertainmer	
		Sum 110.00		

New item

Item *

Enter value here

You can't leave this blank.

Date

Enter a date

Amount

\$ Enter a number

Category

Description

Enter value here

Receipt

Add an image

Attachments

Add attachments

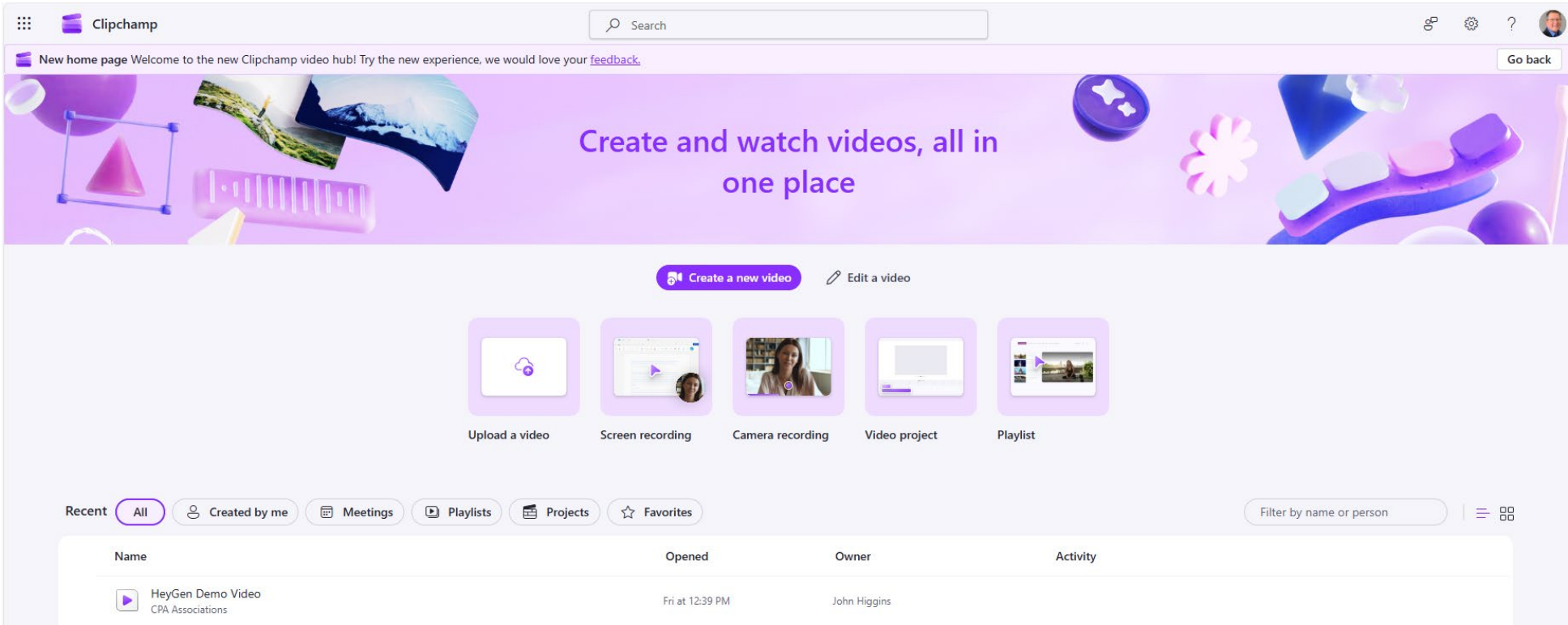
Recording and editing videos with Clipchamp (formerly stream)



Applications for Clipchamp

- ✓ Manage Teams meeting recordings
- ✓ Document internal business processes
- ✓ Create promotional videos
- ✓ Create on demand learning videos
- ✓ Use Copilot to create, summarize and query videos

Clipchamp Home Screen



Document Processes

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

05/09

Live In person 100 minutes

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

0 / 4

05/09

Live virtual 150 Minutes

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

0 / 4

05/01/2026

Live virtual 150 Minutes

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

0 / 4

05/01/2026

Live virtual 50 minutes

WICPA School District Conference - Virtual 5/29/25

3 / 4

05/23

Webinar rebroadcast 50 minutes

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

1 / 5

08/31

Webinar rebroadcast 50 minutes

CPAx Update - Microsoft 365 Applications Lightning Round

2 / 5

08/31

Webinar rebroadcast 50 minutes

CPAx Update - Microsoft Outlook Must Know Email Tips

2 / 5

05/23

Webinar rebroadcast 100 minutes

Pre-recorded Presentation Task Template

2 / 5

12/31

Task Templates

Add task

Live virtual 100 minutes

Live Virtual Template

2 / 4

12/31

Webinar rebroadcast 100 minutes

Pre-recorded Presentation Task Template

2 / 5

12/31

Completed tasks 1

Camera Mic Screen Script Draw Effects

Record again

Review

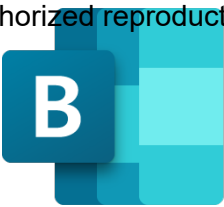
By recording, you agree to comply with your organization's terms, that you have the necessary permissions from people in your video, and that you will respect the copyright and privacy rights of others.

CREATE FORMS, SURVEYS AND QUIZZES WITH FORMS



Applications for the Forms App

- ✓ Training / meeting evaluations
- ✓ Performance appraisals
- ✓ Customer / client satisfaction surveys
- ✓ Skills assessment quizzes (internal / client)



Streamline Appointment Scheduling With Bookings App



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SELECT A SERVICE

1-hour meeting

Schedule a one-hour meeting

1 hour

30-minute meeting

Schedule a 30 minute meeting

30 minutes

Select a service to see available dates and times

SELECT STAFF (OPTIONAL)

Anyone

DATE

< > September 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23

TIME

Select a service and date to see available times.



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Things to Know About the Bookings App

Bookings app is included with all Microsoft 365 subscription plans

Streamlines and automates internal and external appointment scheduling

Directly integrates with Outlook and Teams

Personal or group booking page option

Detailed setup instructions provided by Microsoft [Bookings support page](#)

Personal Booking 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

November 2023

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29

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31

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10

11

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Today

Tuesday, November 28

10:10 AM

✓

10:40 AM

✓

11:10 AM

✓

11:40 AM

✓

12:10 PM

✓

Next

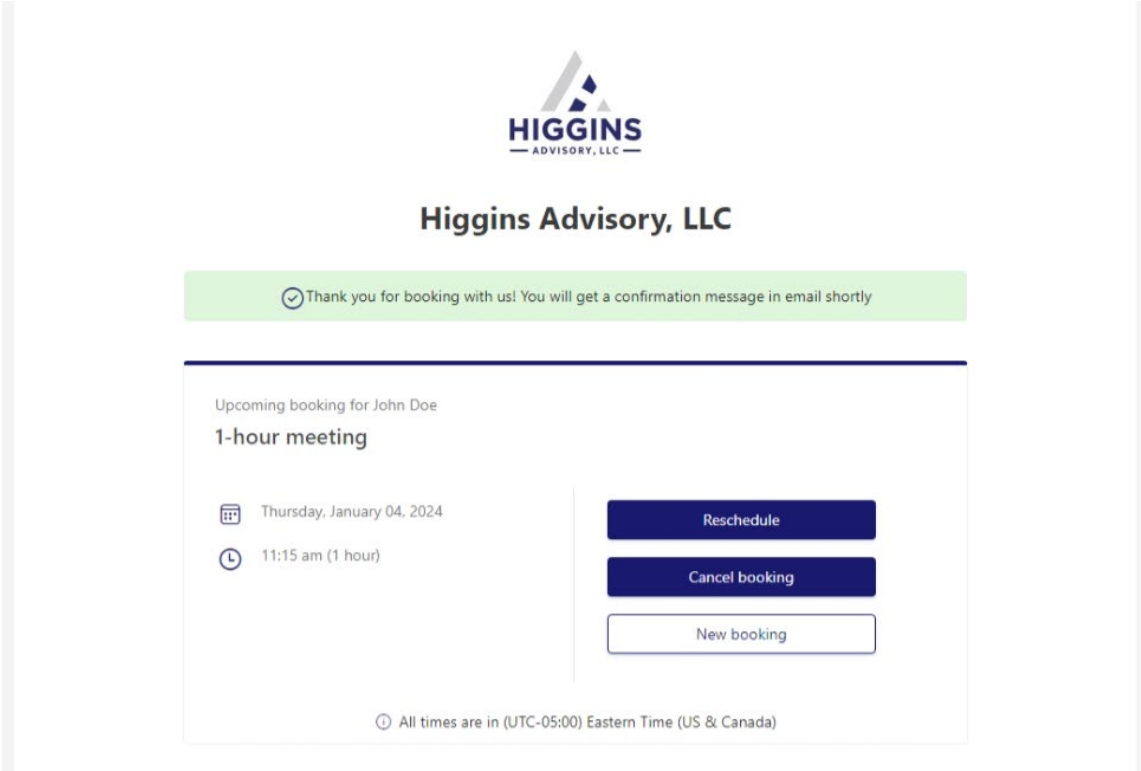
>



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Web Page Booking Confirmation



Client / Customer Booking Email Confirmation



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248.390.9754
<http://www.higginsadvisoryllc.com/>

Hi John Doe,
Your booking is updated.

Booking details

Service Name	1-hour meeting
When	Thursday, January 4, 2024 12:15 PM - 1:15 PM (UTC-05:00) Eastern Time (US & Canada)

 Reschedule

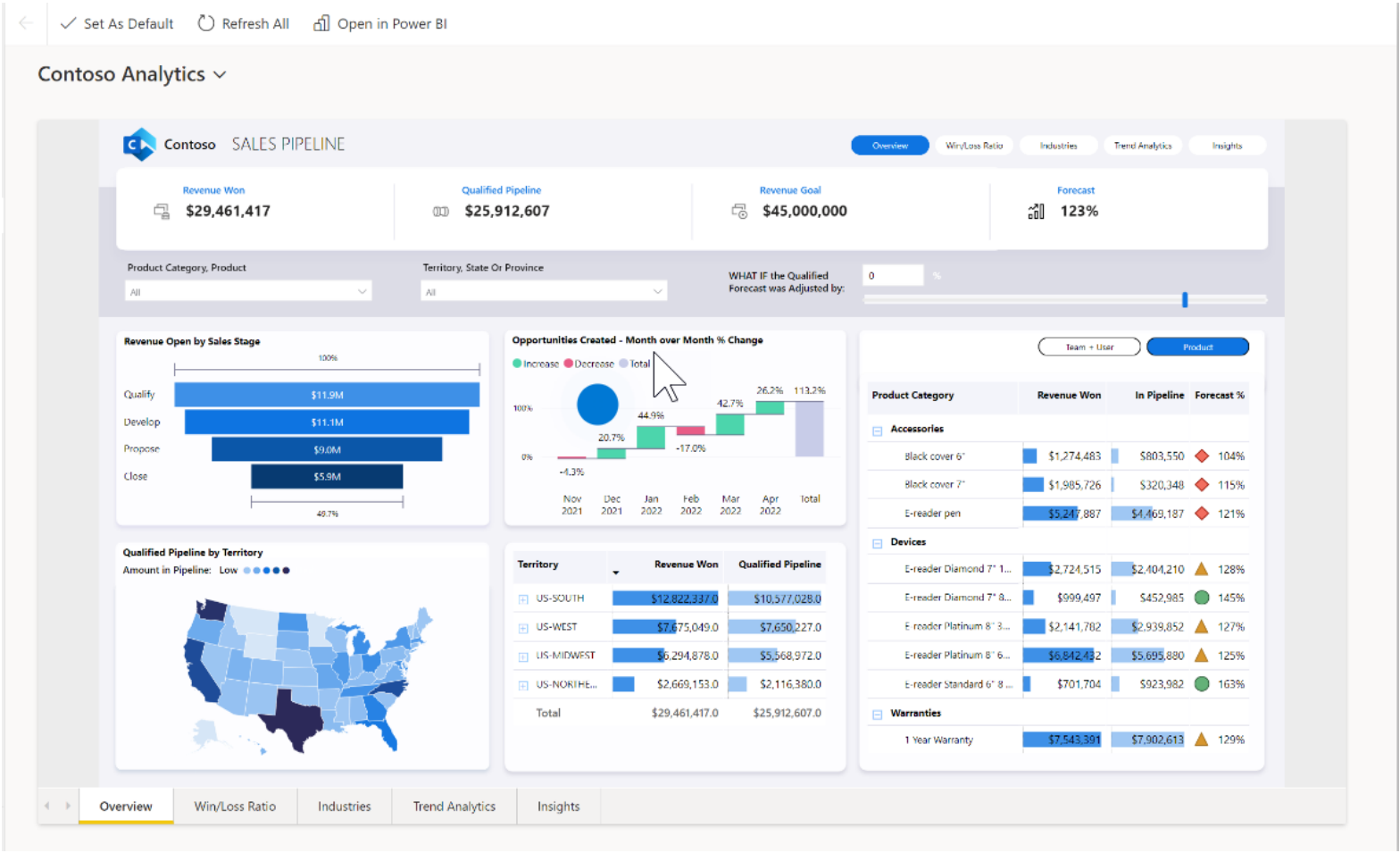
 Join your appointment

Higgins Advisory, LLC

The Policies and Practices of Higgins Advisory, LLC apply to the use of your data



Communicate Financial Data Visually With Power BI



Manage Your Time With To Do App



Unified Task Management Through Integration

To Do App Interface

To Do

My Day1

Important7

Planned105

All157

Completed

Assigned to me46

Flagged email105

Tasks5

JHH Personal

Higgins Advisory, LLC1

New list

TasksGridList

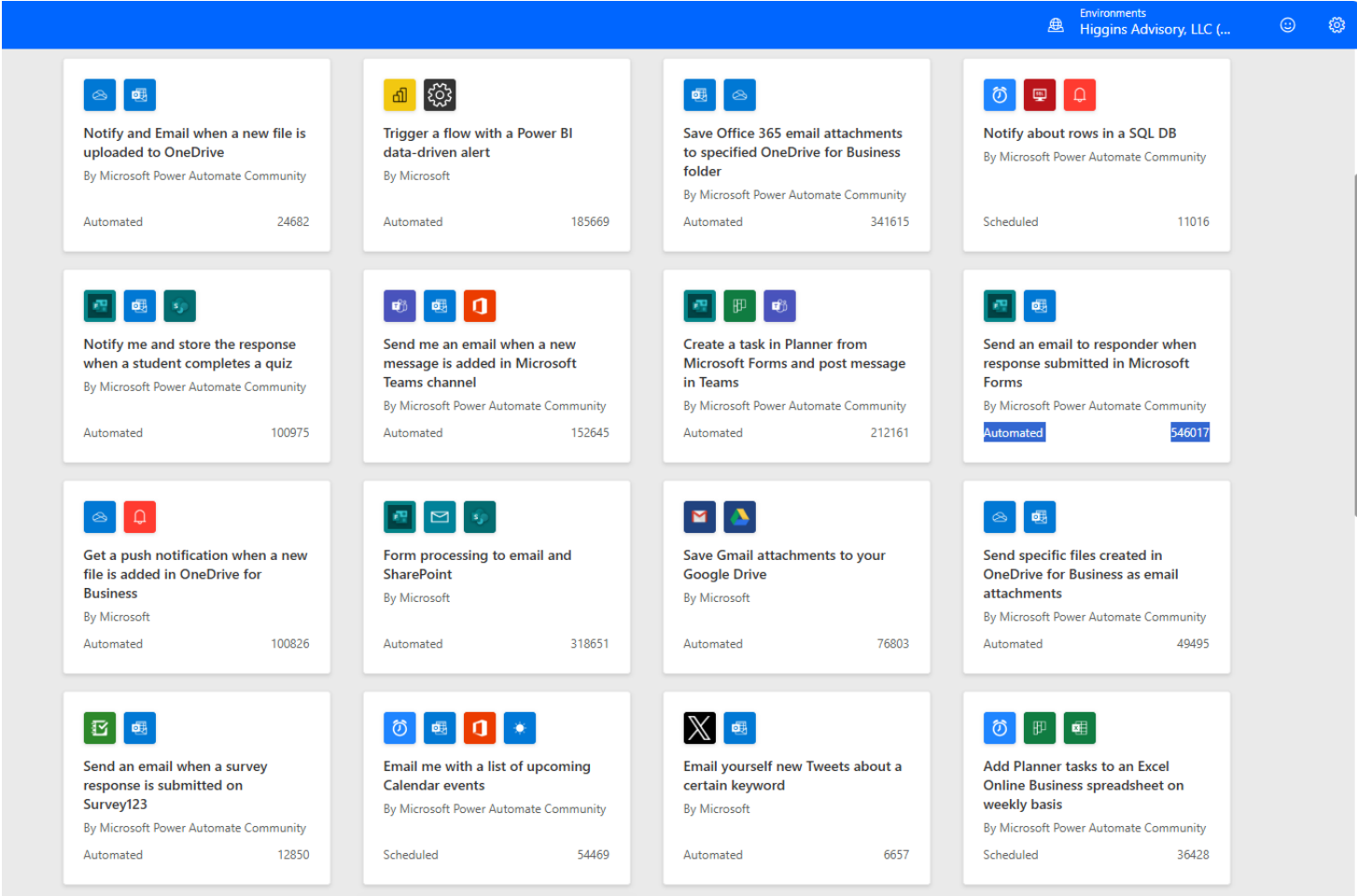
SortGroup

+ Add a task

Title	Due Date	Importance
☐ Get conference room reserved	03/02/2026	☆
☐ 9:15 Teams & SharePoint Deep Dive	04/06/2026	☆
☐ Pick up milk on way home		☆
☐ Webinar and Conference list for 2027 (catalog to go out first 10 days in November)	10/16/2026	☆
☐ Pick up milk today		☆

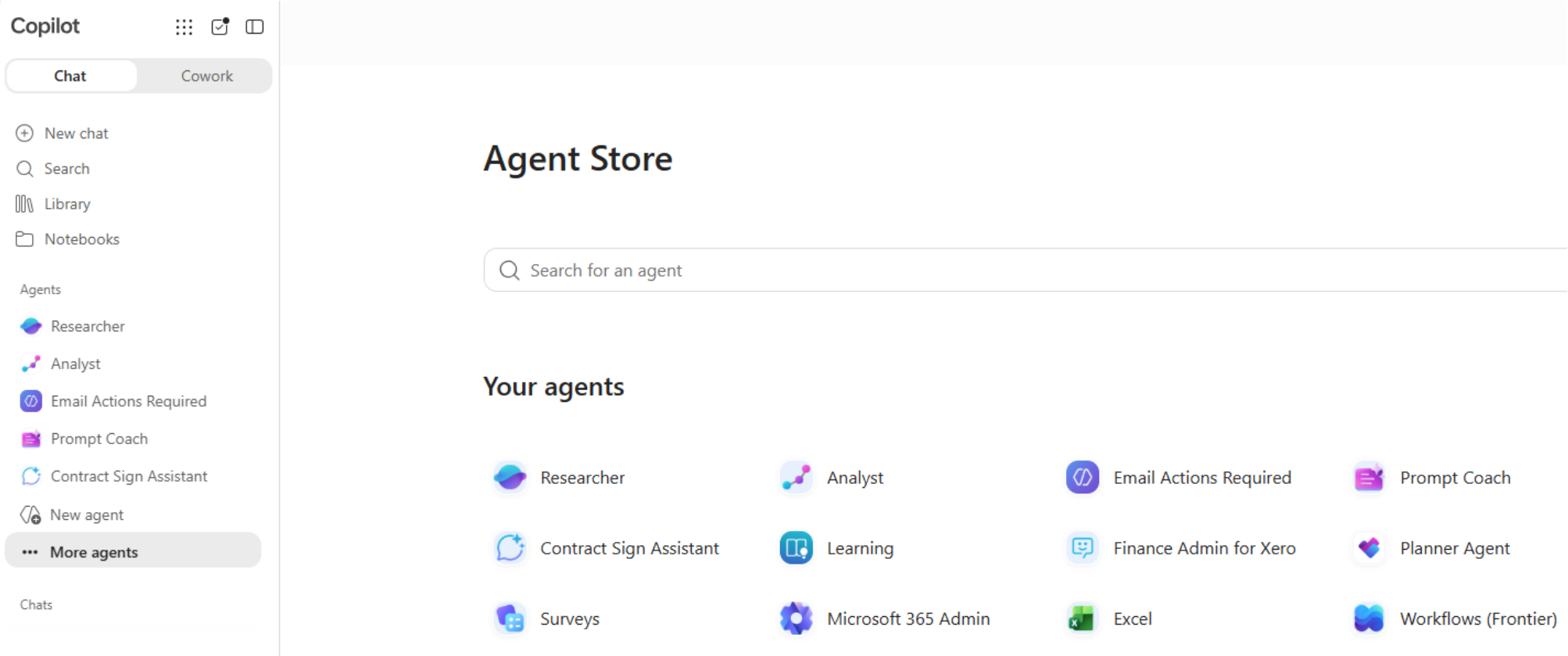
> Completed4

Automate Business Processes With Power Automate





Copilot Home Page



ADDITIONAL RESOURCES



Microsoft Self-service Support

 Help & support

 Give Feedback

Help

Support History

How can we help?

Tell us your problem so we can get you the right help and support.

How do I configure to allow guest users in Teams

How do I enable Teams Guest Access

Cannot add guest to teams

How do I allow Skype for Business users to communicate with people with regular Skype

Guest user is unable to access files in Teams

How do I configure Teams Direct Routing

Self Help

Contact Support

Support History

How can we help?

Tell us your problem so we can get you the right help and support.

How do I configure to allow guest users in Te...

Adding external guest users to Teams is a powerful collaboration tool. Lets learn more about the problem you are having so we can provide the best solution.

Note that in many cases, the best step is to run the support diagnostic we offer which will run comprehensive tests on your configuration and offer the most accurate solution.

Is your Guest access issue affecting specific guests, or all guest accounts?

Issue is with all guest accounts

Only happens to specific guests

More Help

Guest access in Microsoft Teams - Microsoft Teams

Guest access in Teams requires configuring other settings in Microsoft 365, including settings in Microsoft Entra ID, Microsoft...

Turn guest access in Microsoft Teams on or off

Configure guest access in the Teams admin center. Sign in to the Microsoft Teams admin center. Select Users > Guest access. Set...

Use guest access and external access to collaborate with p...

1 Provided that the user has been added as a guest and is signed in with the guest account. 2 Only by email or Session Initiation...

Contact support

Legal | Privacy & Cookies

Back

Self Help

Contact Support

Support History

Get support from an agent

Please include #M365Copilot in the Title if you are contacting us for a Copilot issue

Title*

How do I configure to allow guest users in Teams

Description ⓘ (Stronger descriptions result in quicker resolutions)

Describe your issue in detail

Confirm your number*

+1

Please enter a valid phone number

Confirm email addresses of authorized contacts* ⓘ

Microsoft will work directly with contacts listed to resolve this service request.

Please enter a valid email address

Consent to the recording of all calls necessary to resolve this service request. This can be changed at any time.* ⓘ

--choose one--

Attachments ⓘ

Add a file or screenshot or video

Contact me

Legal | Privacy & Cookies

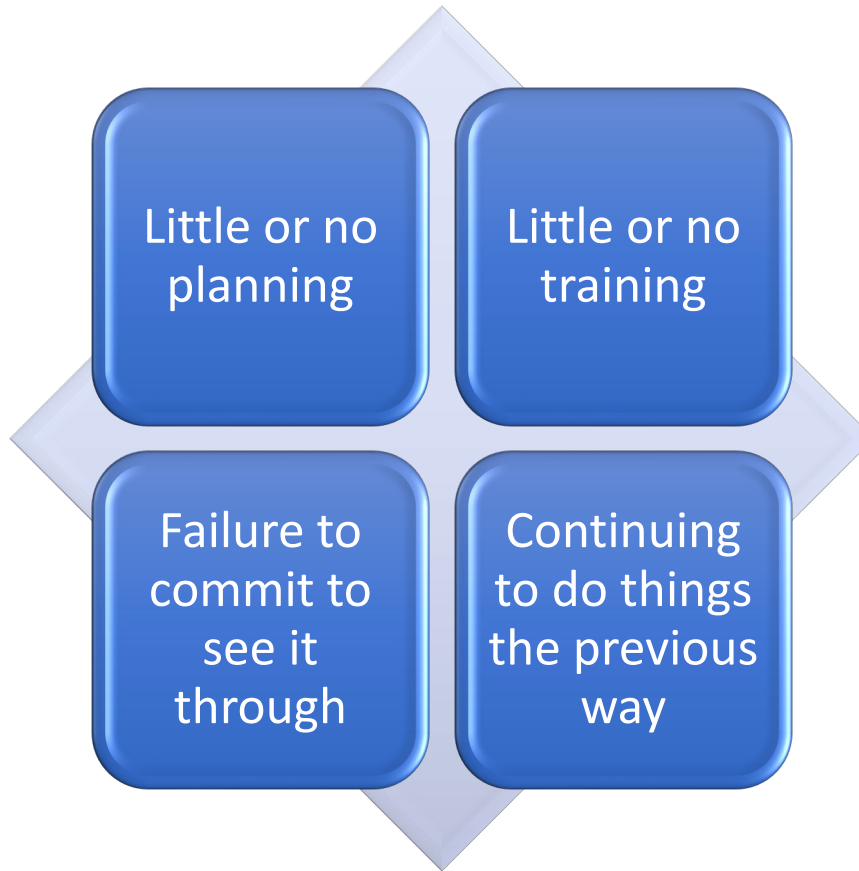
Microsoft Business Partners

The screenshot displays the Microsoft AppSource Partners interface. At the top, the Microsoft logo and 'AppSource' are visible. A search bar contains the text 'cygnus'. Below the search bar, navigation tabs include 'All', 'Apps', 'Categories', 'Industries', 'Consulting Services', and 'Partners'. The main heading is 'Browse partners' with a subtext 'Filter and sort partners to refine the results.' On the left, a 'Filters' sidebar shows options like 'Clear all', 'Search filters', and a location filter set to '48306, Rochester, Michigan, United States (100 mi radius)'. Below this, a list of filter categories is shown with expandable arrows: 'Microsoft Customer Size', 'Partner capabilities', 'Industries', 'Products (1)', 'Solution category', 'Services', and 'Environmental, Social, Govern...'. The main content area, titled 'All results', shows a grid of partner cards. Each card includes a logo, the company name, location, Microsoft services (e.g., Azure, Teams, Microsoft 365), a brief description, and a 'Contact me' button. The partners listed are: Red Level, TMR Consulting (Private) Limited, Apex Digital Solutions, Worklighted LLC, OnPar Technologies, CrucialLogics Inc., Sentinel Technologies Inc., Communication Square, TechHouse, and EEC Services FZ LLC. A 'Sort by: Best match' dropdown is located at the top right of the results grid.

WRAP-UP



Common Deployment Failures



In Summary

- Microsoft 365 is one of the most underutilized software investments in business
- The full value of Microsoft 365 is based in the integration of the apps
- Copilot will exponentially accelerate the value of your Microsoft 365 deployment

Thank you!!!

Let's connect on LinkedIn →

