Qlic IT | CHARITY DIGITAL

Copilot in Apps



Speaker



Pavan Sawhney

Qlic IT

Introduction to Qlic IT

No 1 Microsoft Provider for Not-for-Profits

- Managed IT Support
- Cyber Security
- Cloud Solutions
- Telecoms

With over 20 years of expertise as a Managed Service Provider, we leverage our vast experience to offer top-notch IT services and consultancy to both businesses and charities at competitive prices.

Recognising the unique hurdles faced by charity and educational sectors, we provide customised solutions tailored specifically to meet the individual needs of your organisation. Our goal is to help you optimise your IT environment through flexible and personalised packages.

We're more than just 'the IT guy', we're your partners!

The Everyday Challenge for Charities

Copilot can reduce everyday admin, giving teams more time for high-impact work.

Small teams managing growing workloads: Teams are expected to deliver more with limited capacity.

Limited time and resources: Tight budgets leave little time for planning and improvements.

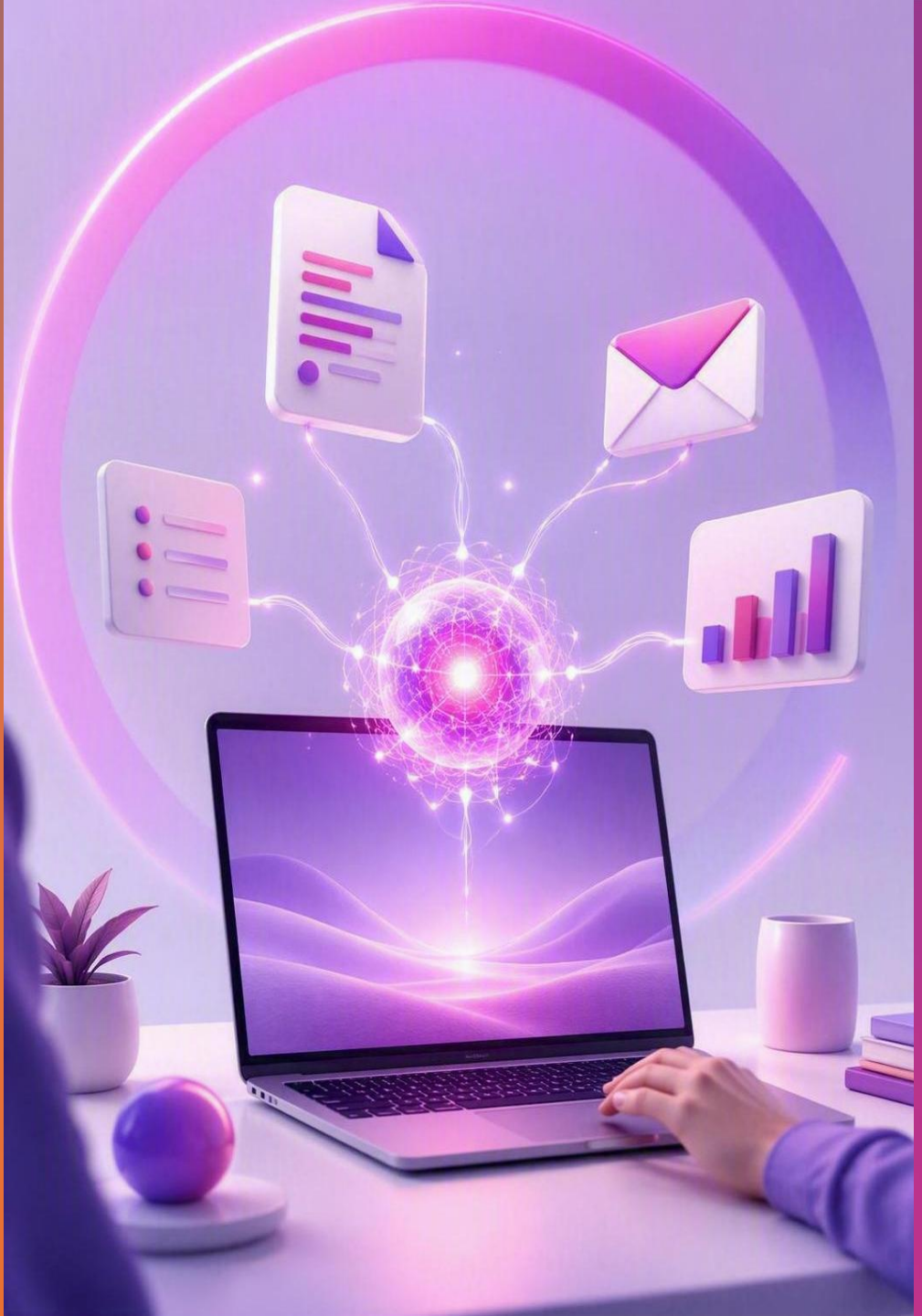
Repetitive administrative tasks: Emails, reports and meeting notes take up valuable time.

Information spread across different places: Key information is scattered across emails, meetings and documents.

Content needed for different audiences: Content must be adapted for staff, trustees, funders and supporters.

Less time for high-impact work: Administration takes time away from services and communities.





What Is Microsoft Copilot?

Microsoft Copilot is an AI assistant built into Microsoft 365. It helps you work more efficiently using the apps and information your organisation already uses.

It can help you:

- Create first drafts of emails, reports and documents
- Summarise meetings, conversations and lengthy information
- Rewrite content to improve its clarity and tone
- Find key details more quickly
- Generate ideas and starting points
- Organise information into a clear structure
- Prepare for meetings and everyday tasks

You provide the knowledge, context and judgement. Copilot provides a starting point that you can review, refine and approve.

Better Prompts, Better Results

A useful prompt can include:

- **Goal**: What do you want Copilot to do?
- **Context**: Why do you need it?
- **Expectations**: What should the result look like?
- **Source**: What information should it use?



Basic prompt:

- “Write a volunteer update.”

Improved prompt:

- “Draft a friendly email update for our volunteers using these meeting notes. Keep it under 200 words, avoid technical language and finish with three clear actions.”

The Journey We're Going On Today

One meeting transcript. Five apps. One finished piece of work.

It starts with a Teams meeting: We take the transcript from a real team meeting.

Word writes the report: Copilot turns that transcript into a report for trustees.

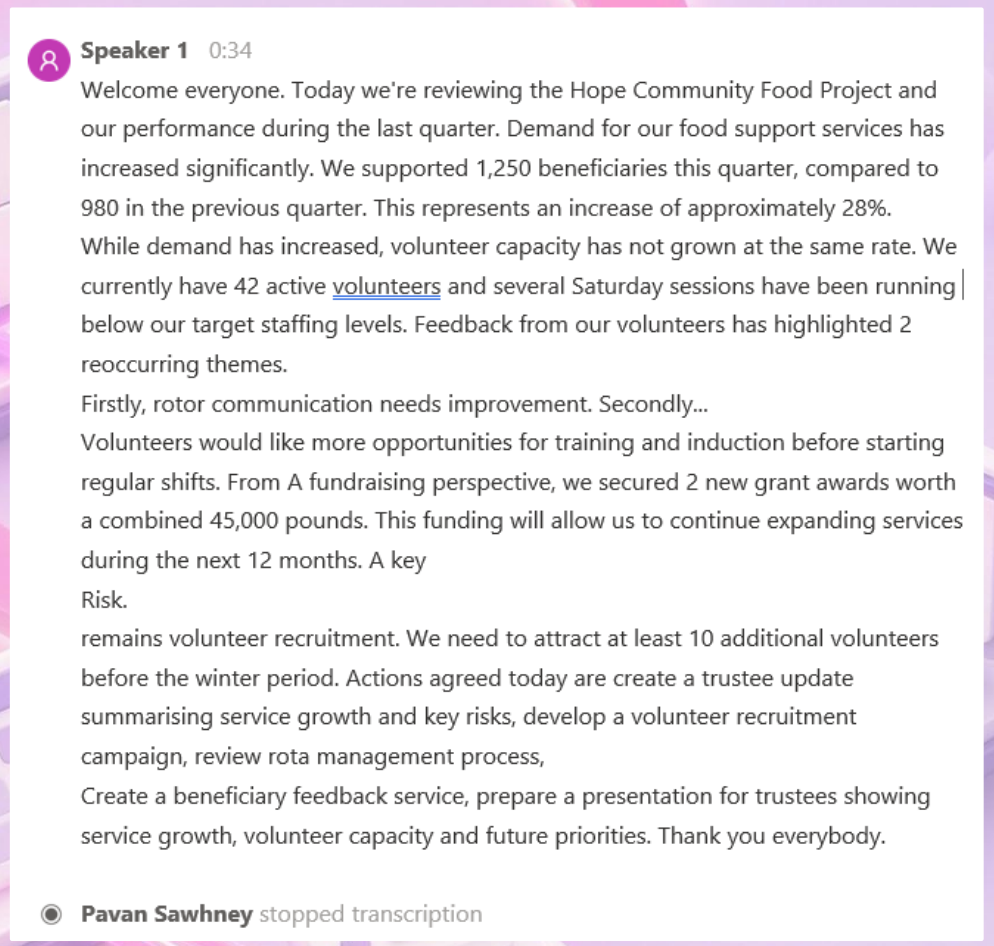
Outlook sends it: Copilot drafts the email that puts the report in front of the board.

PowerPoint presents it: The same report becomes a deck to present the findings.

Excel evidences it: A spreadsheet showing the numbers behind what the report claims.

Forms closes the loop: A feedback form on what evidence was missing or could be better.

Where It All Starts





Copilot in Word: 5 Ways to Start

Draft from what you already have: Turn notes, a report or a transcript into a first draft.

Rewrite for a different audience: Reword a funder report for trustees, staff or supporters.

Summarise a long document: Get key points from a policy, tender or annual report.

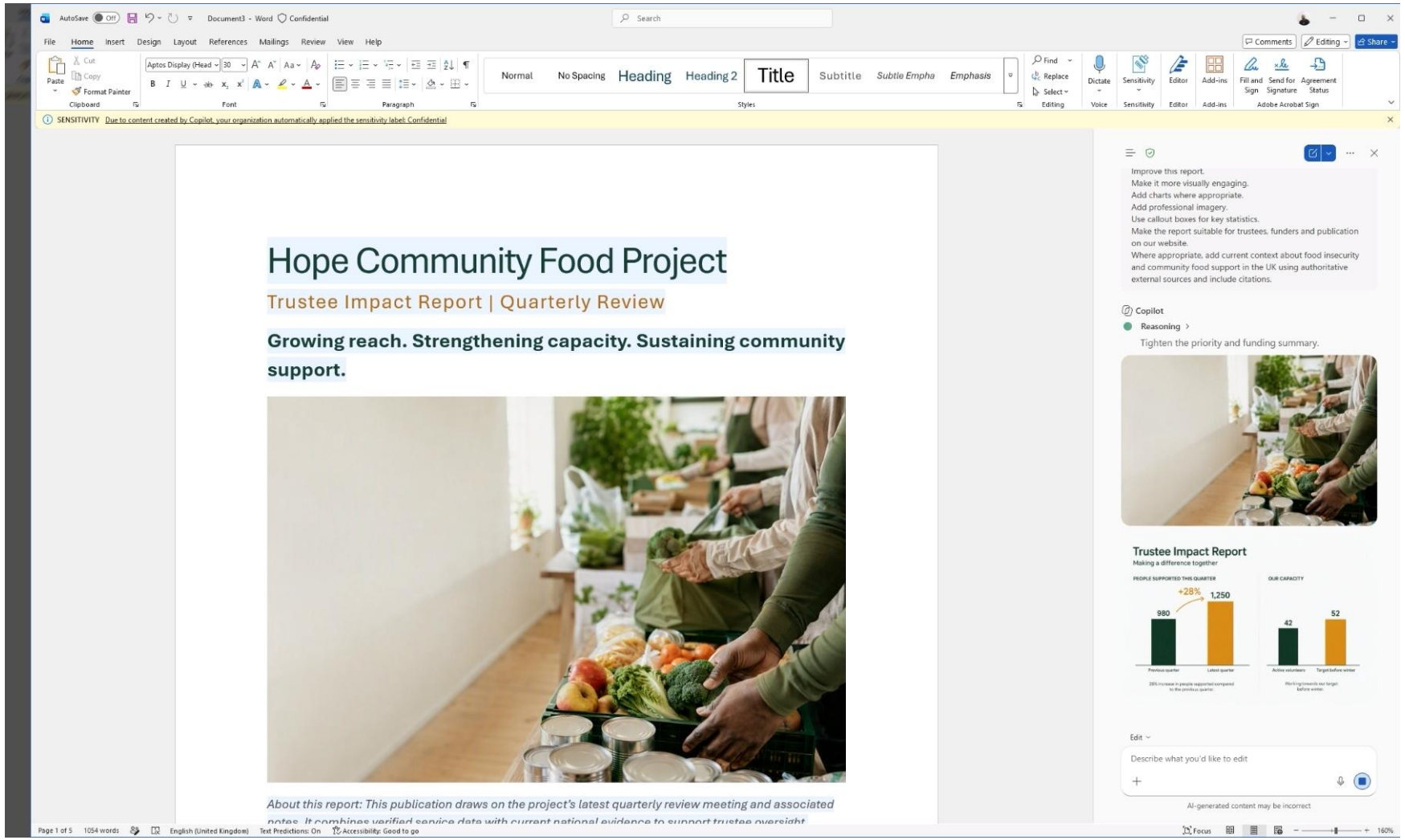
Ask questions of your document: Query a long file instead of scrolling through it.

Tighten and shorten: Cut a wordy section to a set word count without losing meaning.

TRY THIS PROMPT

Using the attached report, draft a two-page update for our trustees. Plain English, no jargon, under 800 words, with three clear recommendations at the end.

Copilot in Word

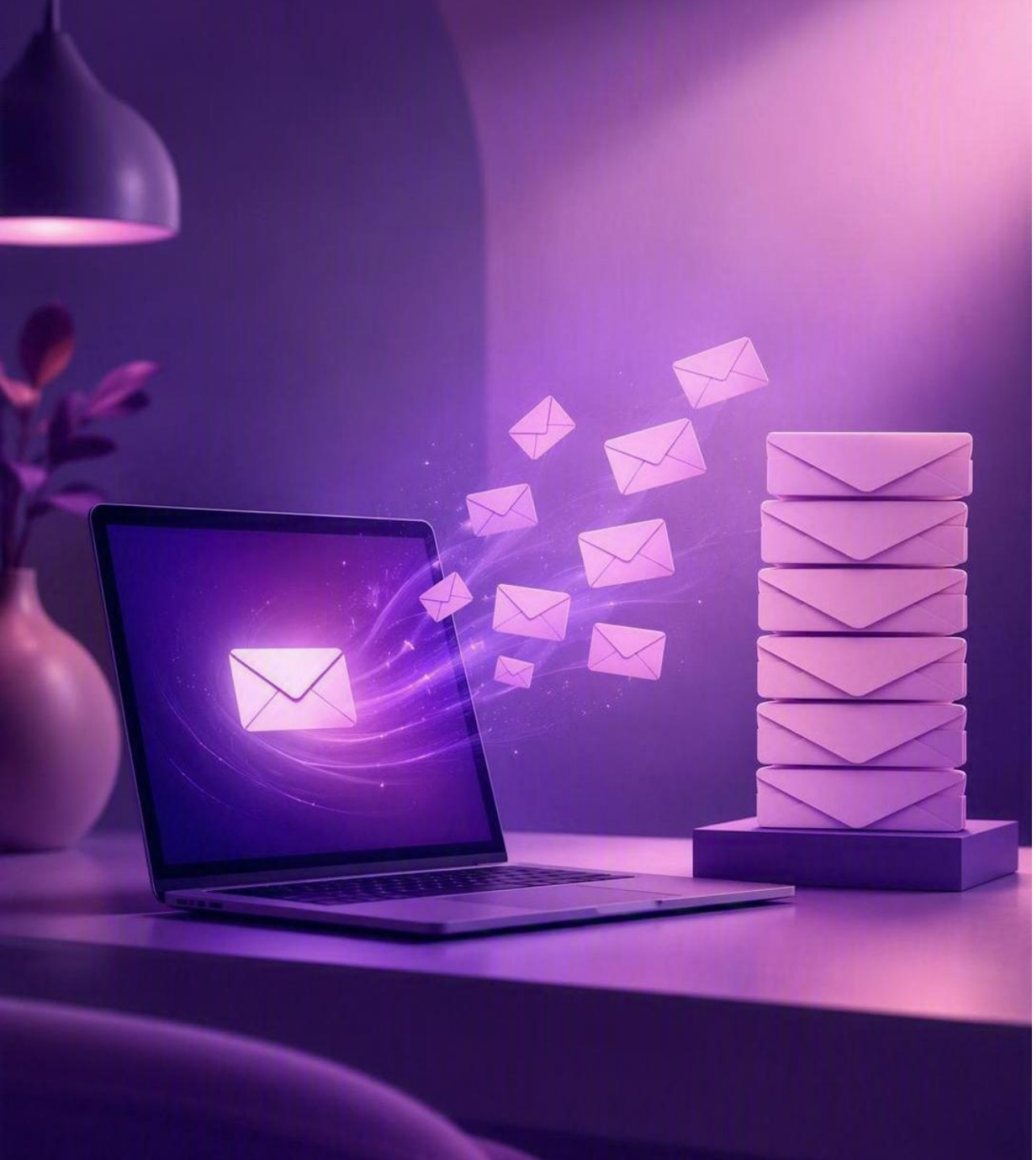


FIRST PROMPT

"Find the transcript and meeting notes from my most recent Hope Community Food Project review meeting. Create a detailed trustee report using information from the meeting."

SECOND PROMPT

Improve this report.
Make it more visually engaging.
Add charts where appropriate.
Add professional imagery.
Use callout boxes for key statistics.
Make the report suitable for trustees, funders and publication on our website.
Where appropriate, add current context about food insecurity and community food support in the UK using authoritative external sources and include citations.



Copilot in Outlook: 5 Ways to Start

Summarise a long thread: Get decisions, questions and actions from 30 replies.

Draft a reply in seconds: Choose the tone and length, then edit before sending.

Coach your tone before sending: Check a sensitive email reads as intended.

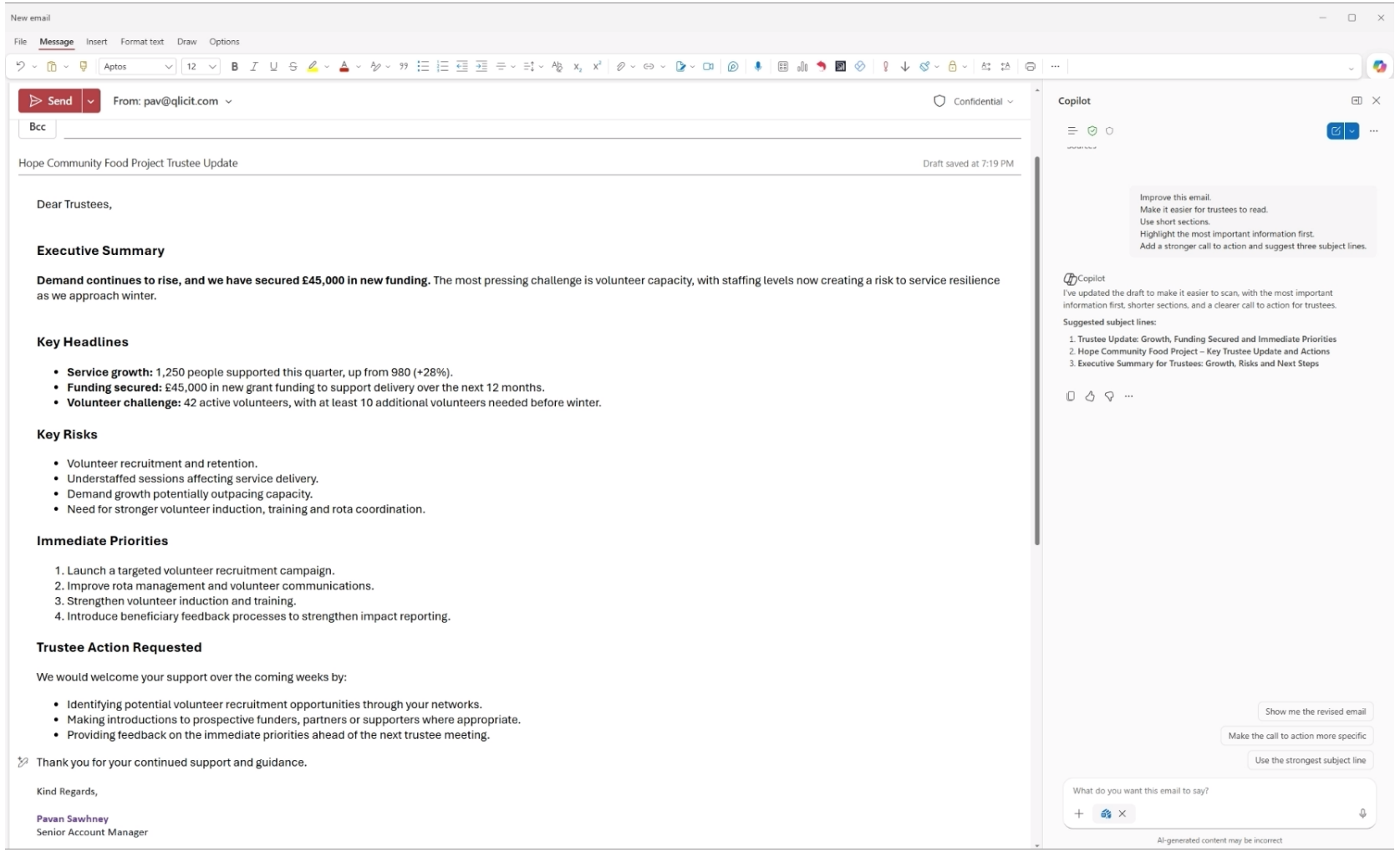
Turn an email into actions: Pull out who needs to do what and by when.

Catch up after leave: Ask what you missed and what needs a response.

TRY THIS PROMPT

Summarise this email thread. List the decisions made, the questions still open, and any actions assigned to me with deadlines.

Copilot in Outlook



FIRST PROMPT

"Locate the Hope Community Food Project trustee impact report that was recently created. Using the report as your source, draft an email to trustees. Keep it concise and professional. Summarise service growth, funding secured, volunteer capacity challenges, key risks and immediate priorities. Keep the email under three hundred words and include a short executive summary."

SECOND PROMPT

"Improve this email. Make it easier for trustees to read. Use short sections. Highlight the most important information first. Add a stronger call to action and suggest three subject lines."



Copilot in PowerPoint: 5 Ways to Start

Build a deck from a document: Turn an existing report into a first slide structure.

Add a slide where you need one: Ask for a slide on a specific point, on brand.

Summarise a deck you were sent: Get the key points without reading 60 slides.

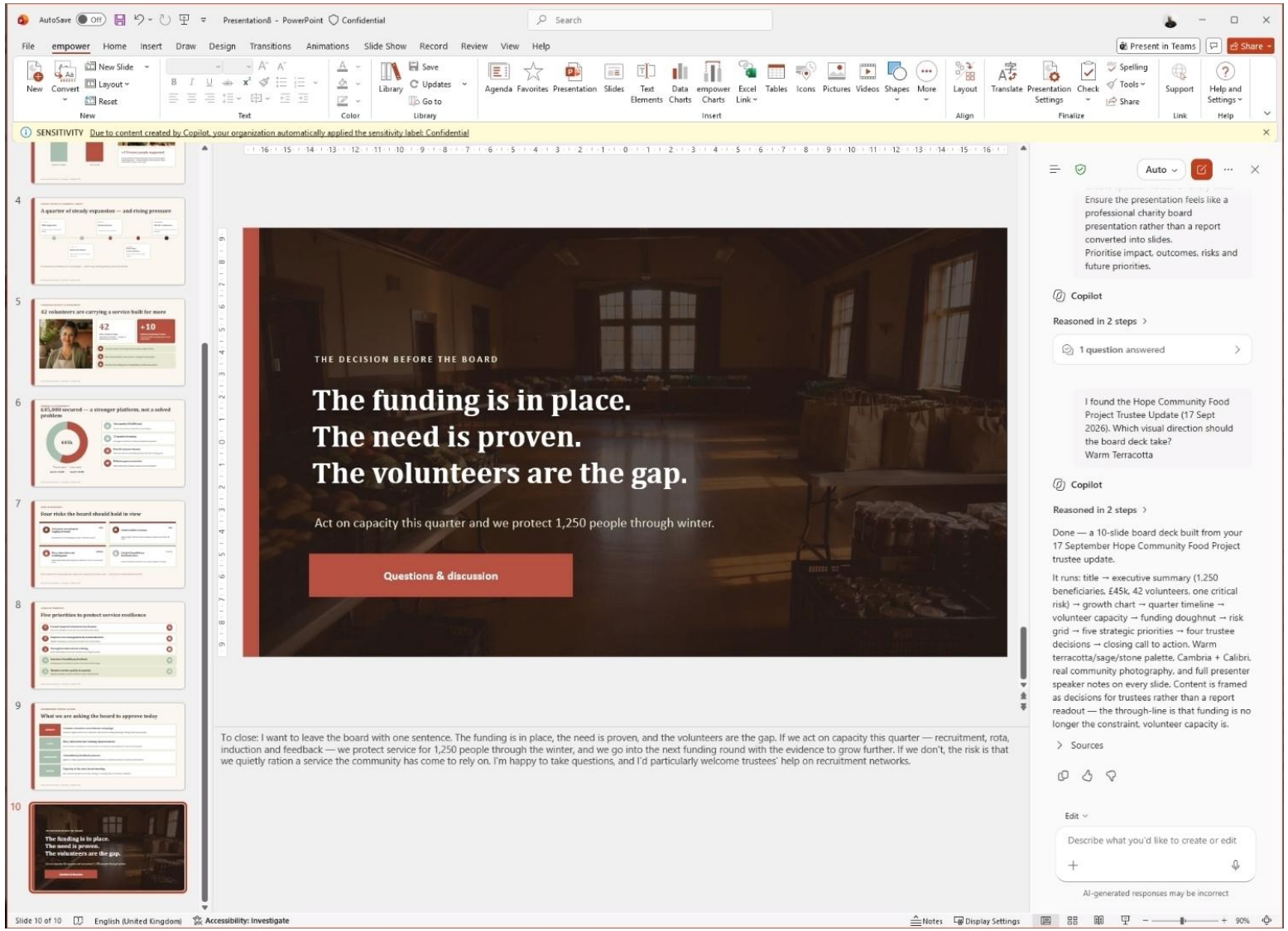
Tidy up the layout: Use Designer to make a rough slide presentable.

Draft your speaker notes: Turn a slide into talking points for a volunteer.

TRY THIS PROMPT

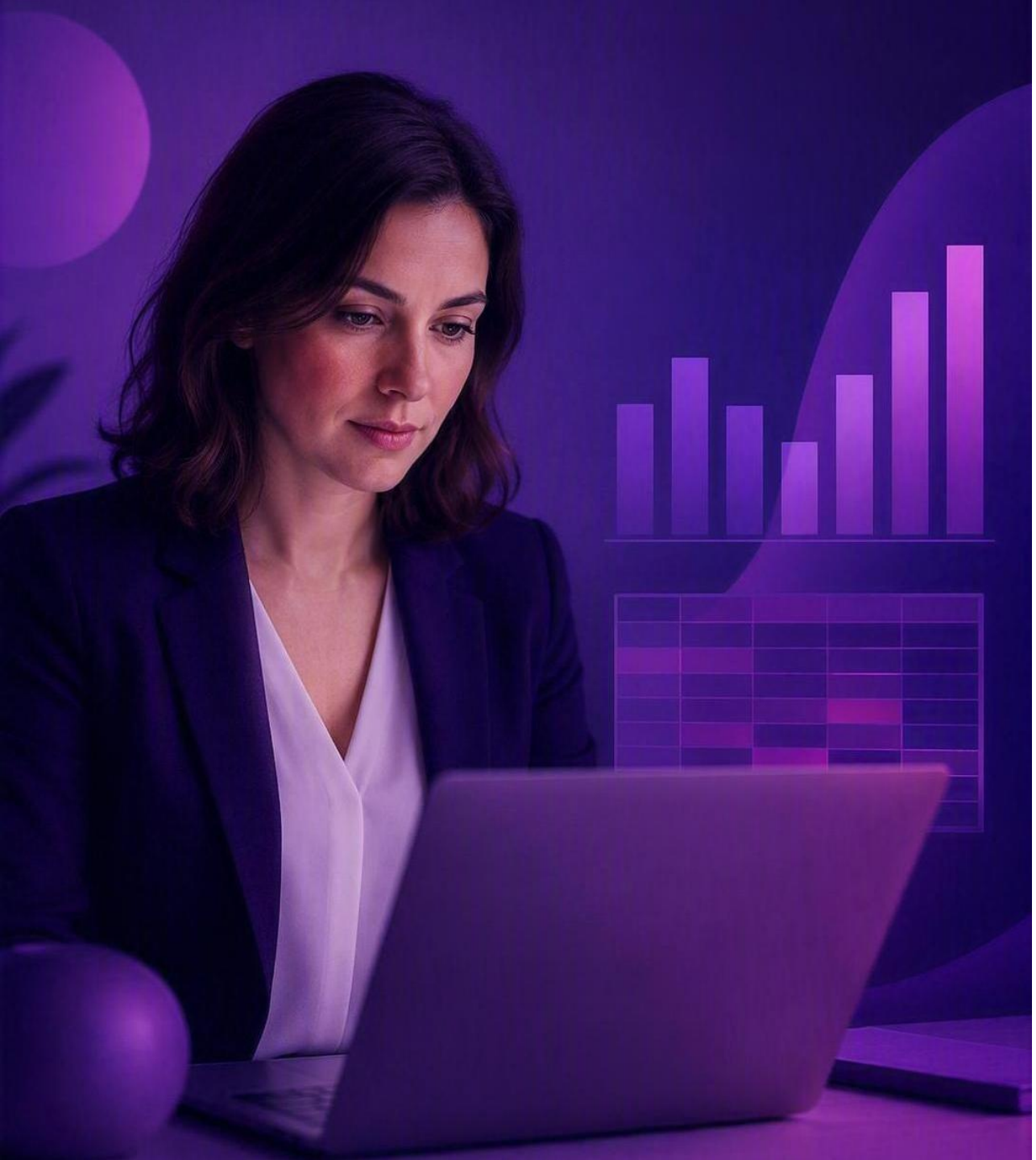
Create a 10-slide presentation for our AGM from the attached annual report. Focus on impact, income and next year's priorities. Keep the text light.

Copilot in PowerPoint



THE PROMPT

"Locate the most recent Hope Community Food Project document. Create a professional board-level presentation based on the report. The audience is trustees, funders and senior stakeholders. Use visual storytelling rather than text-heavy slides. Include an executive summary, service growth and community impact, volunteer capacity, funding and sustainability, risks, strategic priorities and recommended trustee actions. Use charts and relevant imagery. Create speaker notes for every slide."



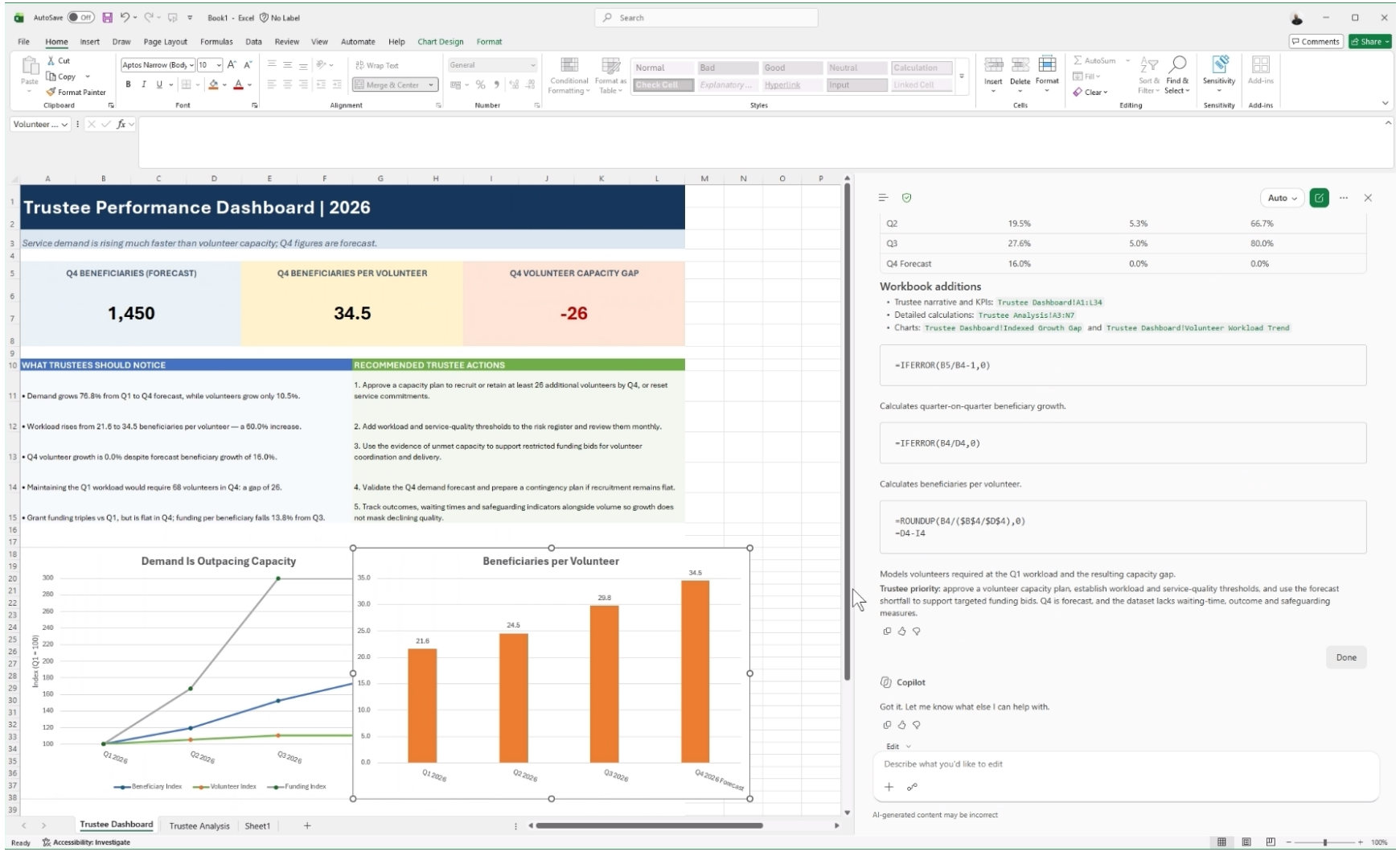
Copilot in Excel: 5 Ways to Start

- **Ask questions in plain English:** Query your data without writing a formula.
- **Explain and write formulas:** Understand an inherited sheet or build a new column.
- **Spot trends and outliers:** Highlight patterns in donations, attendance or spend.
- **Create charts instantly:** Visualise data for a board pack or funder report.
- **Clean and organise data:** Sort, filter, format and tidy messy exports.

TRY THIS PROMPT

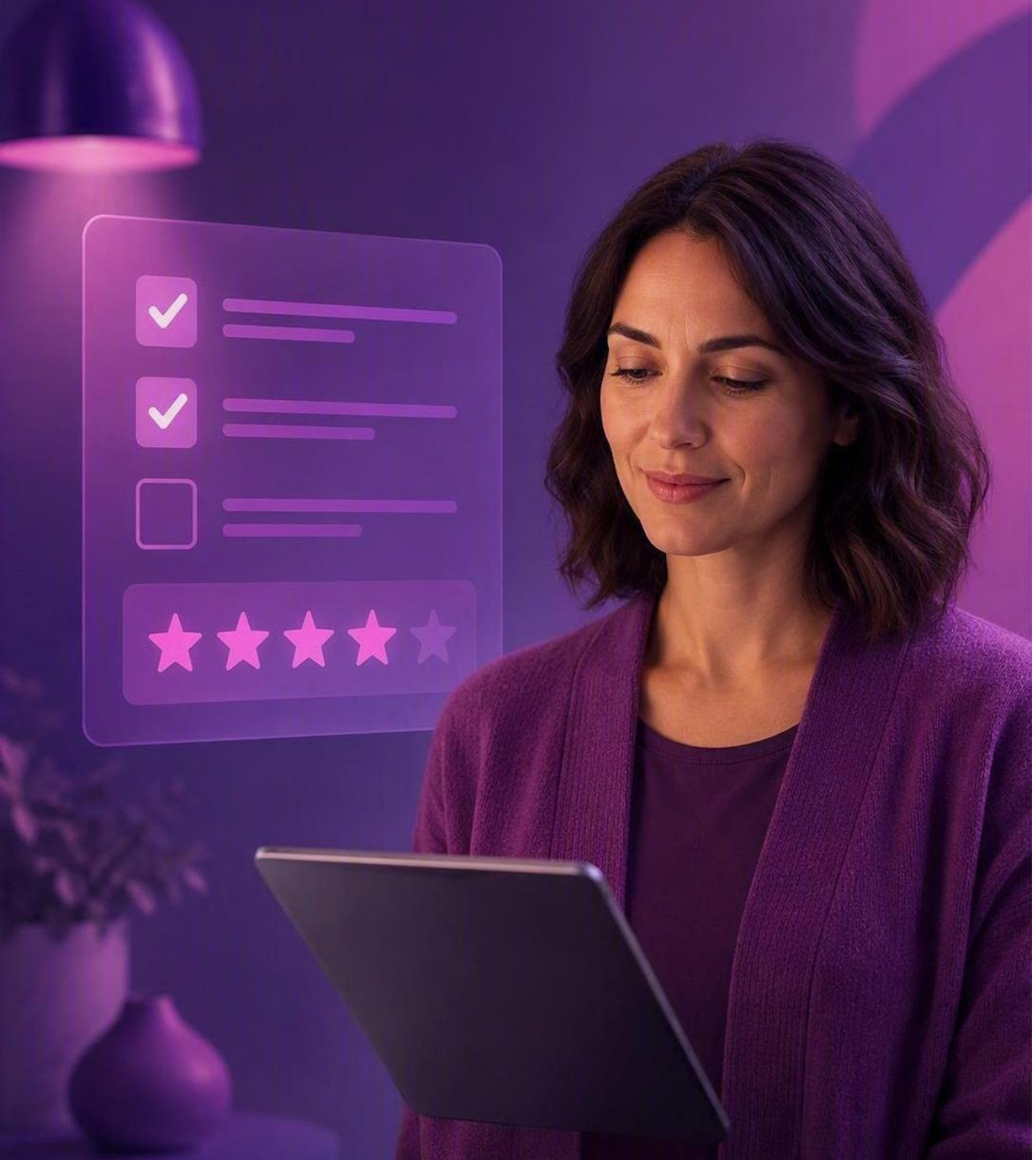
Analyse this donations table. Show total income by month, highlight the three largest changes, and add a chart I can paste into a trustee report.

Copilot in Excel



THE PROMPT

"Analyse this data as if you were preparing information for charity trustees. Identify trends, risks and opportunities. Create charts that best communicate the story. Calculate quarter-on-quarter growth. Assess whether volunteer capacity is keeping pace with service demand. Provide recommendations that trustees should consider."



Copilot in Forms: 5 Ways to Start

Create a form from a sentence: Describe the purpose and get a full draft form.

Generate better questions: Get suggested questions you had not thought of.

Build feedback and evaluation forms: Capture outcomes evidence for funders.

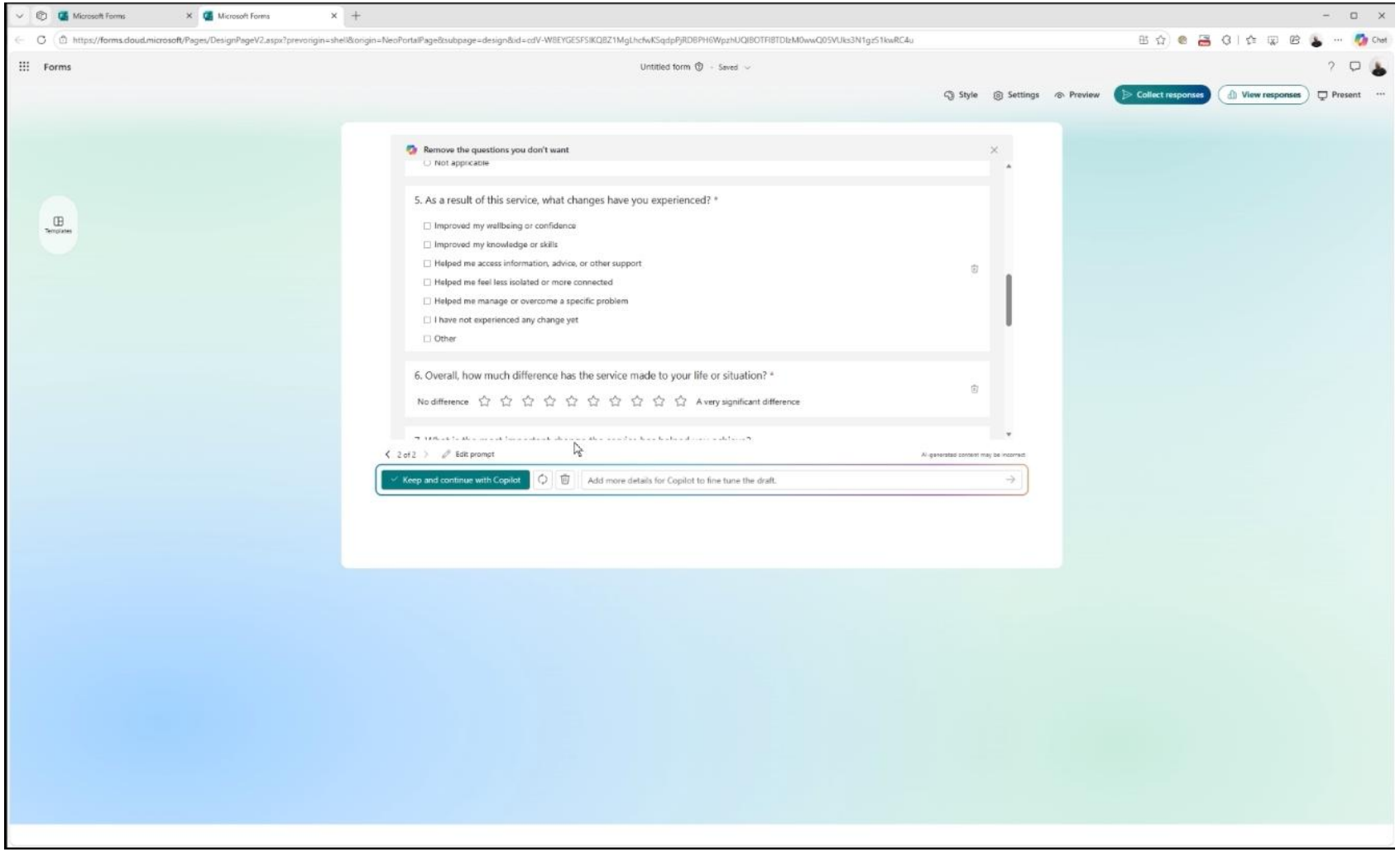
Run event and training sign-ups: Collect registrations with the right fields.

Summarise the responses: Get themes from free-text answers quickly.

TRY THIS PROMPT

Create a feedback form for a six-week wellbeing programme. Include questions on confidence, wellbeing and what could be improved, using a 1-5 scale plus two open questions.

Copilot in Forms

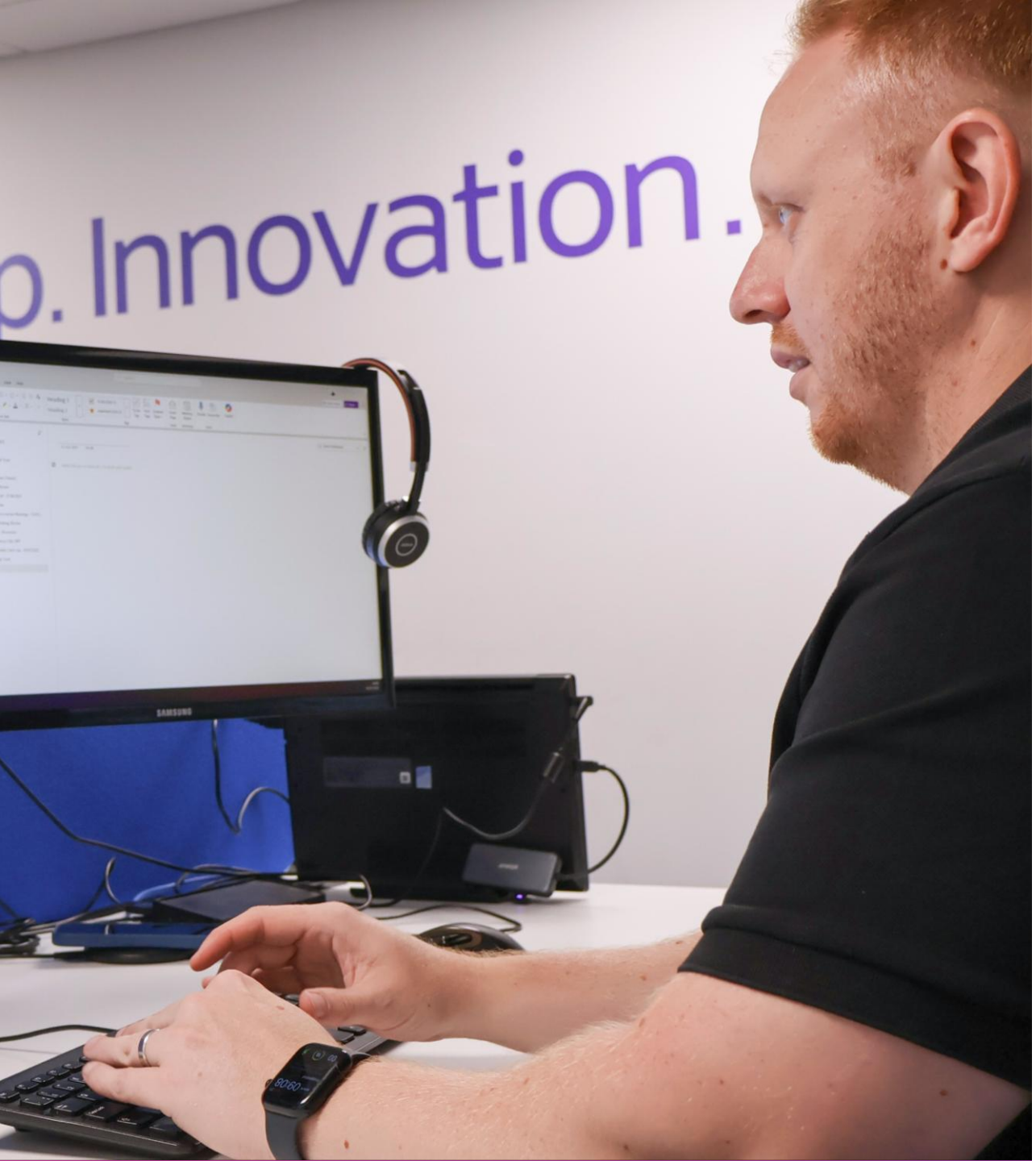


FIRST PROMPT

"Create a beneficiary feedback survey for the Hope Community Food Project. The purpose is to understand overall satisfaction, how easy the service was to access, the quality of support received and how helpful our volunteers were."

SECOND PROMPT

"Improve this survey. Ensure the questions align with Charity Commission expectations for measuring impact and service quality. Suggest one or two outcome-focused questions that would help demonstrate the difference the service makes."



5 Practical Copilot Wins

Summarise an email chain: Identify decisions, questions and actions.

Draft a stakeholder update: Turn rough notes into a clear first draft.

Create actions from a meeting: Organise tasks, owners and deadlines.

Simplify a long document: Create a short briefing for trustees or colleagues.

Build a presentation outline: Turn an existing report into a clear slide structure.



Copilot Safety

Check what your licence includes: Free Copilot Chat differs from the paid M365 Copilot.

Copilot respects your permissions: It only sees what the user can already access.

Tidy permissions before you roll out: Over-shared files become over-shared answers.

Write a short AI use policy: One page on what staff can and cannot put into AI.

Keep a human in the loop: Never send funder, HR or safeguarding output unchecked.

TRY THIS PROMPT

Draft a one-page AI acceptable use policy for a UK charity with 25 staff, covering approved tools, personal data, confidentiality and human review.

What Have We Learned?

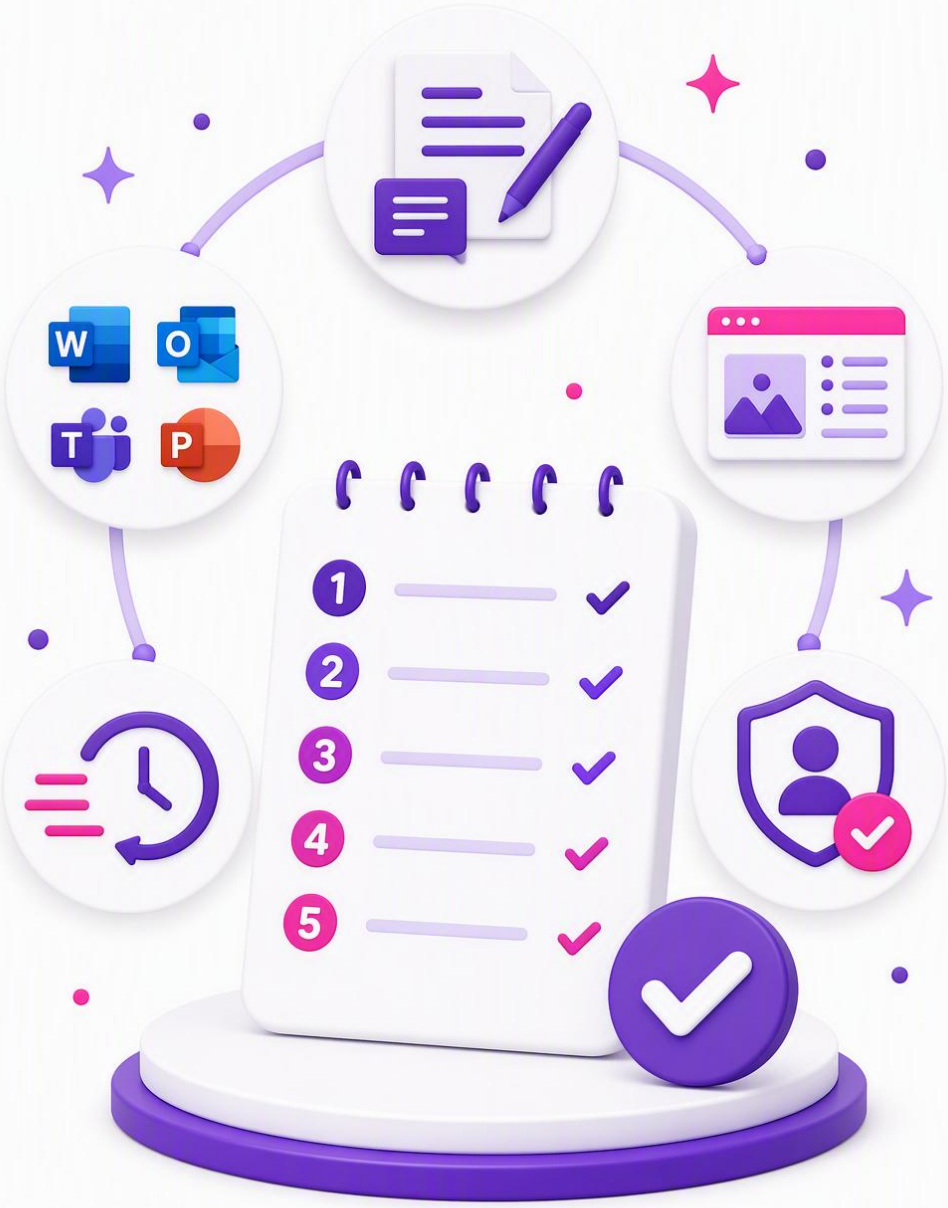
- **Works across Microsoft 365**
Use Copilot within familiar apps such as Word, Outlook, Teams and PowerPoint.

- **Supports everyday content tasks**
Create first drafts, summarise information, rewrite content and organise ideas.

- **Makes presentations easier to start**
Turn existing documents and information into a starting presentation.

- **Helps reduce everyday administration**
Begin with repetitive, time-consuming tasks that slow your team down.

- **Keeps people in control**
Always review, edit and check Copilot’s output before using or sharing it.



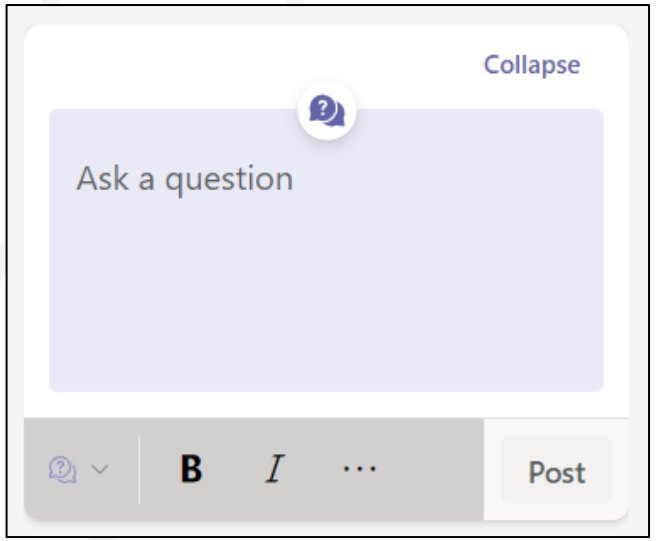
Q&A

The Q&A button can be found in the top navigation during the webinar



Questions in the Chat

You can type your question into the ask a question box, and then click post when ready



Ask a Question

To ask a question during the session, simply click the Q&A button and your question will be addressed at the end



Thank you for joining!

Upcoming Webinars:

- Brunch Bites: Quick Wins with Microsoft Forms – **7th Oct**
- Win More Funding, Contracts & Trust: Why Cyber Security Now Matters to Your Stakeholders – **15th Oct**
- Brunch Bites: The All-in-One Telephony Solution **- 3rd Nov**

Sign up here – QlicNFP.com/charity-events

Join our newsletter for a monthly dose of insights, events and useful updates – QlicNFP.com/#newsletter