



Microsoft Copilot for Business

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Overview

This short document is designed to provide ideas and insights on Microsoft Copilot in a business context. The ideas contained within are possibilities and not recommendations. Information provided is correct at the time of this document's creation – July 2025.

What Is Microsoft Copilot?

Microsoft Copilot is Microsoft's Artificial Intelligence assistant (AI) that works inside Microsoft 365 programs such as Word, Excel, PowerPoint and Outlook.

Think of it as a more sophisticated version of Microsoft's Help Feature, or if you are old enough to remember Clippy, (1996) the paper clip character that you could ask for help.

Copilot combines elements of Microsoft's help and internet searches with a bit of Clippy's personality to create a more user friendly AI assistant who can help streamline, simplify and summarize documents, numbers or create presentations and so much more

Aside from understanding what Copilot is in simple terms, in this article, I want to share some thoughts and provide some things for you to consider as it becomes more mainstream.

But before I start, ***how do you know if you have Copilot available in your business or organisation***

To check whether you have Copilot available, the easiest way is to open Word. At the end of the Home ribbon the Copilot icon should appear in colour with Copilot label underneath it. If it doesn't it's likely it is switched off or not part of Microsoft 365 in your company.

What You Need to Know

Copilot is built into the Microsoft programs such as Word, Excel, PowerPoint and Outlook you already use.

It only provides insights when you ask for them, it doesn't work in the background.

It takes data from your current document, spreadsheet, email or presentation to generate useful suggestions for your tasks.

Additionally, it is *only available if your business or organisation's Microsoft licence includes it* (some business plans don't include it and adding it incurs an additional cost) and even if the licence includes Copilot, the company you work for may choose to disable it... more on that later.

Why Your Business May or May Not Be Using It

Businesses make decisions about how they operate. As a result, a decision will be made as to whether Microsoft Copilot will be utilised in the business, and if so, the framework around it.

So, let's look at some reasons why your business or organisation *might* use Microsoft Copilot.

Aside from ensuring your business is keeping pace with trending technology that is already familiar to the world in various forms, Copilot can help fast track drafting documents, reports and communication, thereby increasing productivity and saving time, stress and frustration.

Now for some reasons why your business may **NOT** have it activated.

Firstly, your business may not have a licence that utilises Copilot which means adding it incurs additional costs.

There may also be privacy concerns, both with data being inputted, who has the ability to use it and where the data might end up.

Additionally, given the infancy of Copilot, increased cyber security breaches and privacy concerns, businesses may be more cautious and have IT policies that may limit, restrict, or completely deactivate Copilot.

It's not a good or bad thing; it's just the way the business has chosen to go.

It may also not be used if staff don't know Copilot is there, or what to do with it or how the business does or doesn't want staff to use it.

What Not to Put into It

Like social media where what you post is there for eternity in general terms, care needs to be taken if you are utilising Copilot.

It is important not to put any confidential data such as staffing information, identifying data, dates of birth or passwords.

Whilst you'd like to think that your data is somewhat sheltered in a Microsoft contained environment, there is no guarantee the data isn't used to develop AI tools further, so be mindful of what you put into it if you are using it.

If you stick to general tasks like cleaning up a report, offering content ideas for slides or brainstorming ideas with little to no specific identifiers that's the best bet.

What To Do with the Output

It can be easy to get excited just copy and paste what Copilot produces, but take care, as it is important any documents you create reflect your own, and/or your business 'voice' or brand. So it is best to think of the information Copilot produces

as a framework to guide you to build out documentation or as a helpful 'draft' and not the final version.

It is also important to think about the tone of the content, whether the data is accurate or not and how relevant it is. It is important not to just assume Copilot is right. Make sure you review, alter and edit information to make it your own, or your business, voice before using it.

Think of Copilot as your support tool to provide framework and guide you with your documentation and not as the finished product!

How To Switch It Off in Programs Like Word

If you have opened Microsoft Word and you have Copilot active, you will know because there is a floating icon that looks like a ball of string, or the Copilot icon on the Home tab is active or appears, and you'd prefer to switch it off (or on if it is enabled at your business) then From the File tab Choose > Options. On the left side of the dialogue box Copilot will appear as a heading. On the right side of the box, take the tick out, or in if you are switching it on, the Enable copilot check box.

When you close Word and reopen it, Copilot should be switched off. If your business has Copilot access enabled, you can switch it on or off anytime via the same steps.

If Copilot is enabled, it will only activate when you ask it to by clicking the Copilot icon on the home tab or clicking the floating "ball of string" icon.

Remember, Copilot only works when you ask it to do something for you!

Summary

Copilot isn't going to replace human ideas and creativity, but it can help reduce your workload. Consider it a digital assistant, like assistants in your phone or home speaker systems (Google Home, Alexa etc) who can help you create a framework and structure to start building documents and concepts, but they still need you to finish the task and put your own voice to it.

It may or may not be activated at your business, depending on what decisions the business has made about its use.

Hoping you found this article gives you a good overview of what Microsoft Copilot is and how it could be used and how to switch it on and off in Microsoft Word.

I'd love for you to share this article with anyone in a business who might be interested in it.

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