

Title Slide

Empowering Productivity with AI

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Welcome & Agenda

- Welcome & Introductions
- What is Copilot?
- Practical Use Cases
- Prompting for Results
- Addressing Concerns
- Q&A and Next Steps

What is Microsoft Copilot?

- AI-powered assistant integrated into Microsoft 365
- Works across Word, Excel, Outlook, Teams, and more
- Helps draft, summarize, analyze, and automate tasks
- Built on large language models (LLMs) like GPT

Why It Matters for SSCF

- Save time on repetitive tasks
- Improve communication and documentation
- Enhance donor engagement and reporting
- Support strategic planning and grant writing

Prompting Copilot Effectively

6 Key Elements of a Good Prompt (from your workshop):

1. **Clarity of Task** – What do you want it to do?
2. **Context** – Background info or goals
3. **Examples** – Show what success looks like
4. **Persona** – Who should Copilot act like?
5. **Format** – Email, table, bullet points, etc.
6. **Tone** – Professional, casual, persuasive, etc.

SSCF Use Case Examples

- **Grant Writing:** “Draft a proposal summary for a \$50K grant focused on youth mental health.”
- **Donor Reports:** “Summarize Q2 donor activity and highlight major gifts.”
- **Board Prep:** “Create a briefing note from last month’s meeting notes.”
- **Email Drafting:** “Write a thank-you note to a donor who gave \ \$5,000.”

Overcoming Common Concerns

- **“It feels like cheating”** → It’s a tool, not a replacement
- **“What about data privacy?”** → Copilot respects Microsoft 365 security
- **“Will it replace jobs?”** → It enhances roles, not eliminates them
- **“Too complex”** → Start small, build confidence

Getting Started with Copilot

- Start with Outlook or Word
- Use action verbs: “Summarize,” “Draft,” “Analyze”
- Use your own documents as context
- Ask Copilot to improve your drafts

Resources & Next Steps

- AI Productivity Introduction presentation
- TR Leadership AI workshops
- Microsoft Copilot Training
- AI 1:1 Coaching

Q&A

Open floor for questions and discussion.