



# Microsoft Copilot Training

Maximize Your Prompts for Peak Productivity




More: <https://sibasi.academy>



# Agenda



Edwin Oloo – Sibasi Ltd

1. Welcome Key-Note
  2. Operational Efficiency & Impact Maximization
  3. Compliance, Ethics & Security
  4. Your AI Readiness Roadmap
  5. Closing - Key Take Aways
- 

# Housekeeping



## Recording

This session will be recorded and once our marketing team has worked their magic, it'll be sent to your inboxes within 6 business days.



## Q&A

Ask questions throughout the presentation using the Q&A feature within Teams.

# Navigating economic turbulence in the Age of AI

## Worldview

### Stalling growth

World Bank predicts worst decade for global growth since 60s

**BBC**

**“With broad trade uncertainty, growth has stalled,’ Delta Air Lines CEO warns.”**

**AP**

“Higher tariffs will result in higher prices,’ Walmart CEO says.”

**Forbes**

### Looming uncertainty

GenAI-Enabled Supply Chain: Predicting Disruption Is The New Competitive Edge **Forbes**

**U.S. Tariffs Pose ‘Significant Risk’ to Global Economy, IMF Chief Says**

THE WALL STREET JOURNAL

Manufacturers cut outlooks on “heightened uncertainty” from tariffs.

**Forbes**

### AI reshapes everything

**The AI Agent Arms Race: Why Orchestration Matters More Than Numbers**

**Forbes**

AI is changing work - the time is now for strategic upskilling.

WORLD ECONOMIC FORUM

**Workers optimistic but overwhelmed by AI - study**

**BBC**

# Human labor is reaching its limits

## Capacity Gap

**80%**

of global  
workers agreed  
they lacked  
enough time/  
energy to do  
their work

**53%**

of leaders  
agreed  
productivity  
must increase



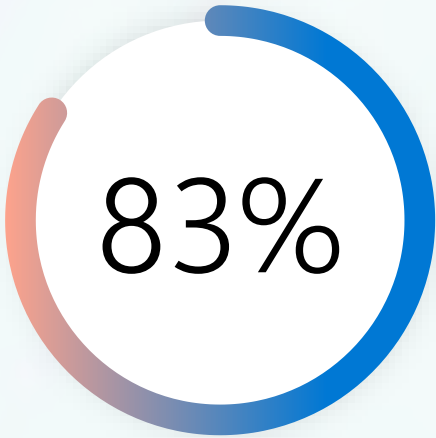
Copilot is a **force multiplier**.  
AI does a lot of the heavy  
lifting so the people we help  
don't fall between the cracks

Joel Ramjohn

President, Agape Source

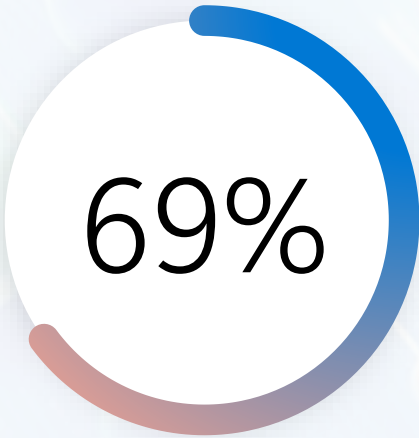


# AI is only as good as the data it's grounded on



83%

of senior business leaders said their organization's AI adoption would be faster if they had stronger data infrastructure in place



69%

of top-performing companies have implemented data modernizations

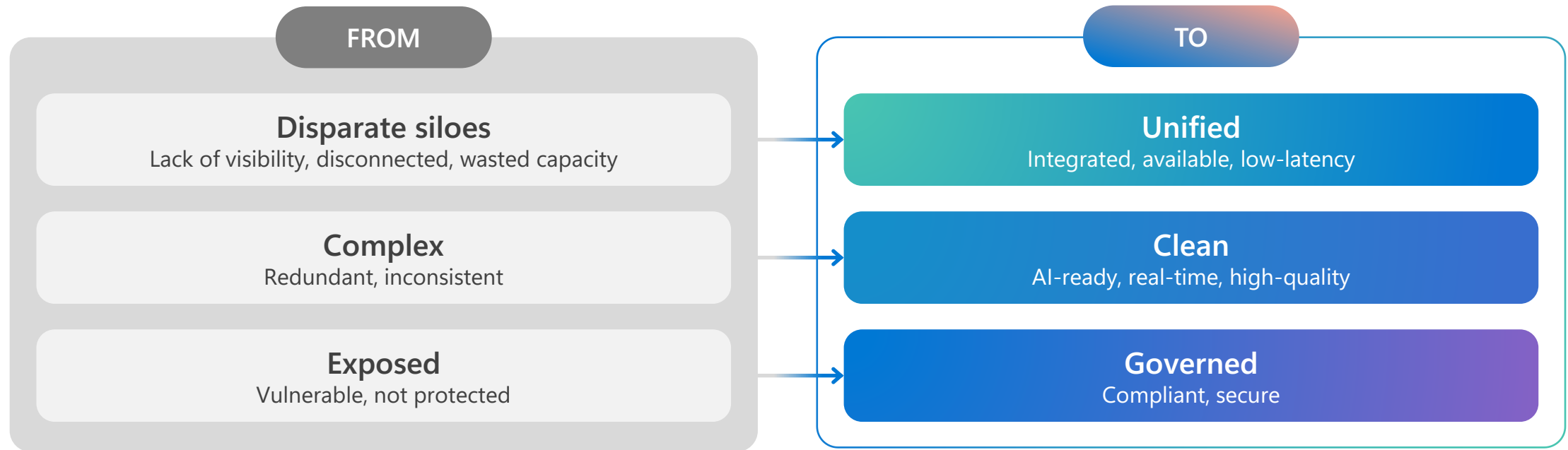
Sources: [Gartner](#), [EY](#)

# Unlock AI with unified data

## AI is only as good as the data it trains on

**90%** believe that unifying data on a single platform is critical for AI

**72%** agree that data issues are the most likely factor to jeopardize AI goals

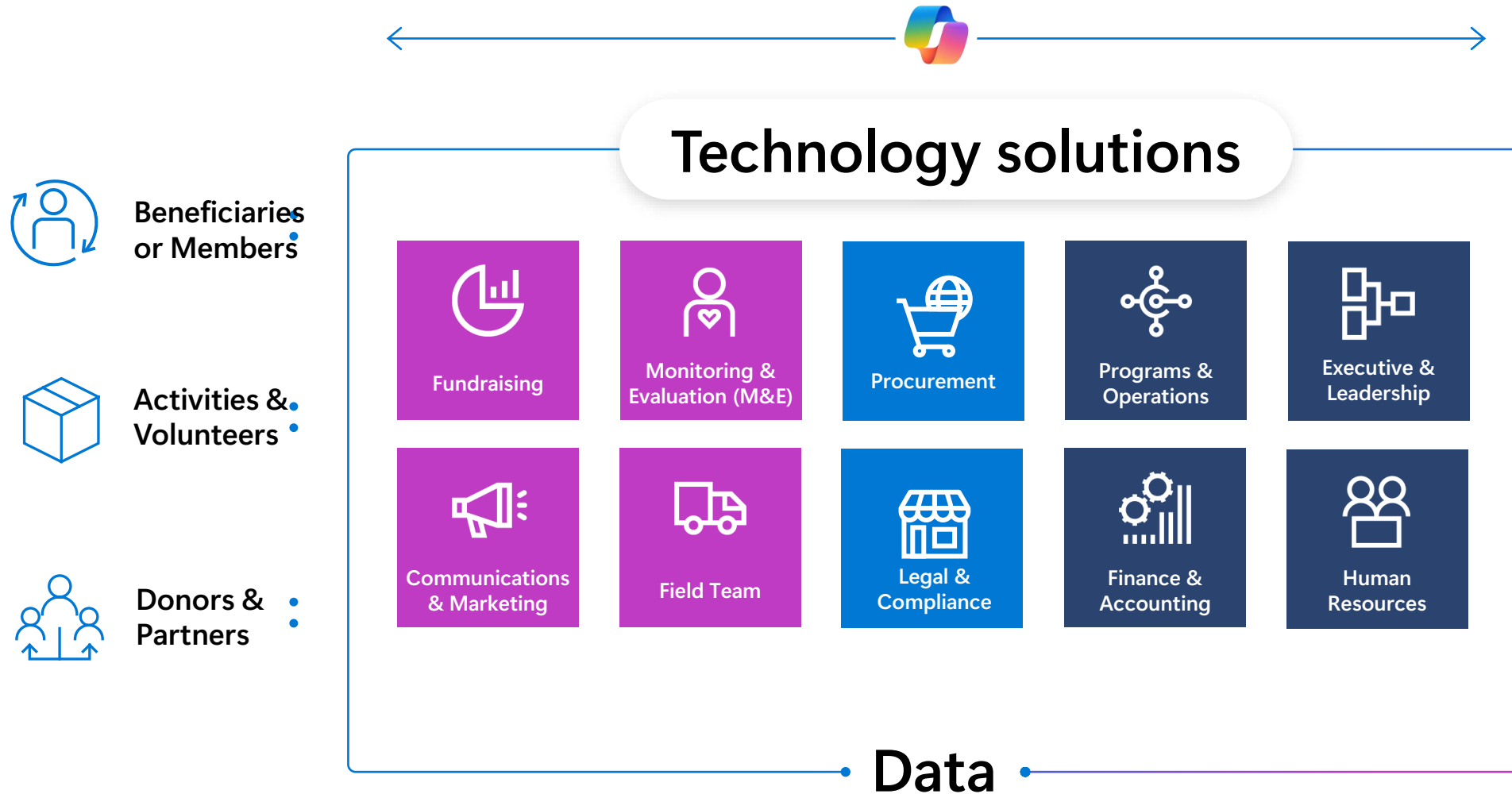


1. [Cloudera](#)
2. [Databricks](#)

# Break down data silos across every department...



# to drive impact centricity across departments...



and unify your data to build a base for AI innovation.



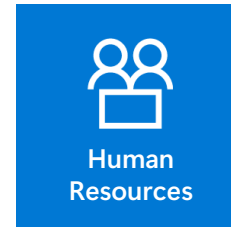
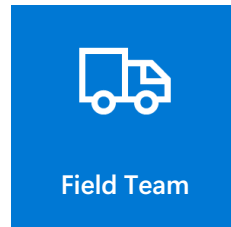
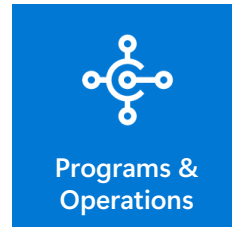
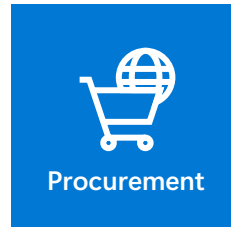
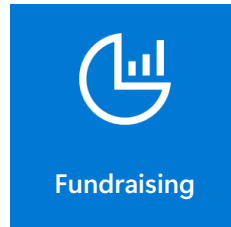
## Optimized for AI-first processes

Improved Efficiency & Productivity

Better Donor & Fundraising Management

Improved Collaboration Across Teams

Stronger Impact Measurement & Storytelling



Deliver projects on time

Enhanced Transparency & Accountability

Cost Savings

Improved Governance & Decision-Making

**Data + Intelligence + Security**





# Operational Efficiency

Streamline Processes • Save Time • Reduce Costs

# AI-Powered Operational Wins



## Document & Report Automation

Auto-generate grant reports, board papers, and compliance documents. What took days now takes minutes.

3 days



3 min



## Meeting & Communication AI

AI transcribes, summarises, and assigns action items from meetings automatically via Microsoft Teams + Copilot.

2 hrs/week



5 min



## Data Entry & Processing

Eliminate manual data entry. AI reads forms, invoices, and field data — routes it to the right system instantly.

Manual



Automated



# Impact Maximization

Data-Driven Decisions • Stronger Programmes • Greater Reach

# From Data Overload to Actionable Insights



## Real-Time Dashboards

Power BI dashboards that update automatically — see programme performance at a glance, not after month-end.



## Beneficiary Analytics

AI identifies which communities need the most support, predicts dropout risks, and suggests interventions.



## Predictive Planning

Forecast resource needs, budget burn rates, and programme outcomes before they happen — not after.



## Donor Reporting

Auto-generated impact reports with visualisations that tell your story compellingly to funders and stakeholders.

W O W M O M E N T

# From Months of M&E Work to Minutes

## BEFORE AI

- ✗ Manual Excel-based M&E tracking
- ✗ 3-6 months to compile annual report
- ✗ Data inconsistencies across field offices
- ✗ Donor reports are reactive, not strategic
- ✗ Staff burnt out on data collection

## AFTER AI

- ✓ Automated real-time M&E dashboards
- ✓ Reports generated in minutes, not months
- ✓ Single source of truth across all offices
- ✓ Proactive insights drive programme design
- ✓ Staff focused on mission, not paperwork

*Sibasi's Monival™ platform makes this transformation real — purpose-built for non-profits and development organisations.*



W O W M O M E N T

# See It In Action

Live: Generating a grant progress report in under 60 seconds  
using Microsoft Copilot + Sibasi automation

1

AI reads your project data

2

Generates narrative + charts

3

Formats to donor template

4

Ready for review & send

# Spectrum of solutions



←..... Solutions vary in levels of complexity and capabilities depending on your need .....→

# Explore a continuum of solutions

## Productivity & Collaboration Tools

Use Teams, Word, Excel, SharePoint which provide basic tools and secured Documents with CRM



## Workflows Automation

Automate key processes through easy to configure tools on Power Platform e.g. Expense Claims or Contracts management



## Monitoring, Evaluation & Analytics

Easy Automated Field data collection, Case tracking, Beneficiary data, & Programs Delivery Frameworks



Outreach



Execution

## Stakeholder Engagement

eLearning tools such as Open edX provide MOOCs and lead Volunteer & Donor Engagement with Dynamics 365



## Finance & HR Management

Dynamics 365 manages accounting, budgeting, and procurement, & HR staff onboarding, leave tracking etc



## Impact Story Telling

Power BI and AI CoPilot to generate and tell your impact story; eBoard for your Board engagement



Welcome to the Frontier


Finance has to  
move faster



# Evolving operations with AI


Before 2023

Knowledge workers



2023–2025

Knowledge workers + Copilot



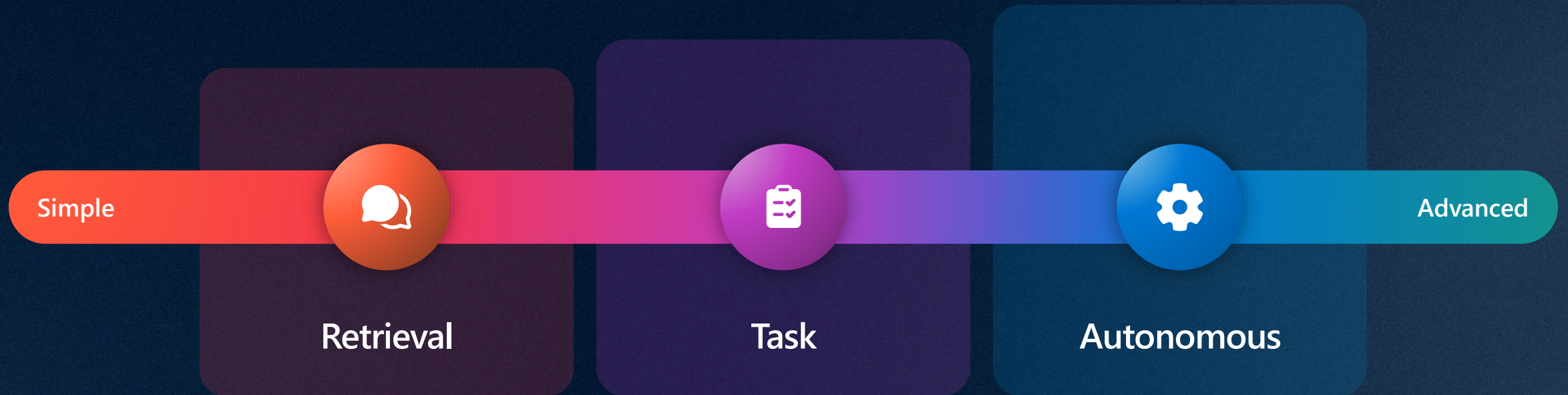
2026

Knowledge workers with Copilot managing Agents



# What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team or organization



← Agents vary complexity and capabilities depending on your need →

Example

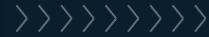
# Autonomous

## HOW IT WORKS

1 - Trigger



2 - Instructions



3 - Plan



4 - Outcome

Agent automatically reacts to triggers








When a new email arrives  
Office 365 Outlook



Agent follows your instructions

- You are an agent that helps to evaluate and staff incoming engagement requests from clients.
- First, analyze the incoming email to extract key client details. Verify the engagement information and confirm the industry sector. Assess historical data and identify the required expertise. Assign a suitable partner and notify them. Log the engagement details and inform the engagement director.

Agent completes the ask using your data and knowledge

-  Engagement staffing logic
-  Submit engagement
-  Send an email
-  Retrieve partner
-  Message in Copilot



Agent generates a response



Agent

You have been assigned to a new engagement requiring your expertise in Technology Solutions.



# The problems agents address will continue to expand

## User-led

Unlock innovation at every level, department & function

Apply new technology to existing problems to optimize

Fast and iterative

## Today

Apply existing technology to an **existing problem** to optimize existing processes

## Org-led

Create business-changing agents

Apply new technology to new opportunities

Top-down approach



# Ethics & Security

Protect Your Organisation • Safeguard Communities • Build Trust

# Responsible AI: Your Non-Negotiables



## Data Privacy & Compliance

- ✓ GDPR/DPA compliance built in
- ✓ Beneficiary data anonymisation
- ✓ Role-based access controls
- ✓ Audit trails for all AI decisions



## Bias & Fairness

- ✓ Test AI outputs for bias regularly
- ✓ Diverse training data requirements
- ✓ Human-in-the-loop review
- ✓ Transparent decision-making



## Trust & Accountability

- ✓ Clear AI usage policies
- ✓ Staff and stakeholder training
- ✓ Donor transparency on AI use
- ✓ Regular ethical reviews



## Deliver more effectively

Improve field visibility, streamline workflows, and use data to maximize impact across diverse and often distributed teams

# Core Areas

for a *Frontier Firm* in this era



## Better Stakeholder Engagement

Connect with your stakeholders and meet expectations, improve field visibility, streamline workflows, and use data to maximize impact and achievement of your goals



## Operational Efficiency & Security

Strengthen internal systems with secure, modern, and cost-effective tools that support compliance and resilience despite infrastructure constraints



# About Us



**Who we are**

*About us*

Our Mission

***Services. Solutions. Success***

Our Services & Solutions

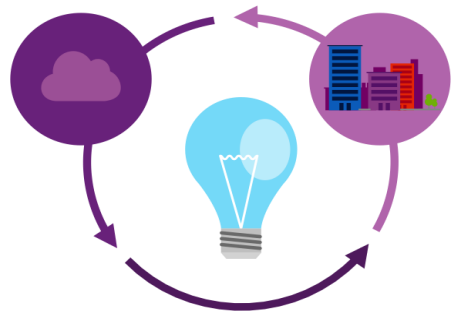
*What we can do for you*

Partners & Clients

*For your success!*



We are an  
**AI-Native & Innovative  
Technology Company**



Passionate about  
delivering **Excellence  
and Quality**



**With Services and  
Solutions** provided at  
digital-era **velocity**



**empowering** you to  
achieve measurable  
**Success & Impact!**



# Our Mission



Who we are  
*About us*

**Our Mission**  
*Services. Solutions. Success!*

Our Services & Solutions  
*What we can do for you*

Partners & Clients  
*For your success!*



Our mission... is at the heart of our name



S

Services and  
Solutions

I

Invested and  
Integrated  
into your

B

Business, for  
you to

A

Achieve your

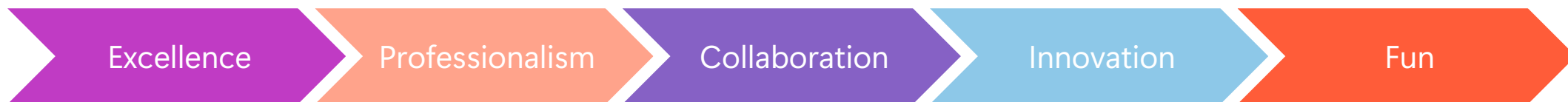
S

Success and

I

Impact.

Our Values:



# Our Partners



Who we are  
*About us*

Our Mission  
*Services. Solutions. Success*

**Our Services & Solutions**  
*What we can do for you*

Clients & Testimonials  
*For your success!*



Sibasi | Gold Microsoft Partner



Microsoft Solutions Partner

<https://siba.si/appsource>

Microsoft Premier Partner

aws Partner

Google Partner

# Our Services & Solutions



## Powering the AI Digital Age



### Intelligent Business Platforms



Board Management



Smart Memo



CRM, ERP, EDMS



M&E and Reporting



### Microsoft Digital Transformation



Enterprise Systems



Productivity Systems



Business Process Automation



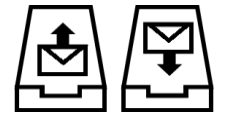
Robotics & Data Analytics Systems



### Advisory, Consulting & Support



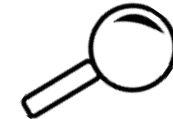
24/7 Support & Managed IT Services



Training Services & Capacity Building



IT Strategy & Roadmap



Security Assessments



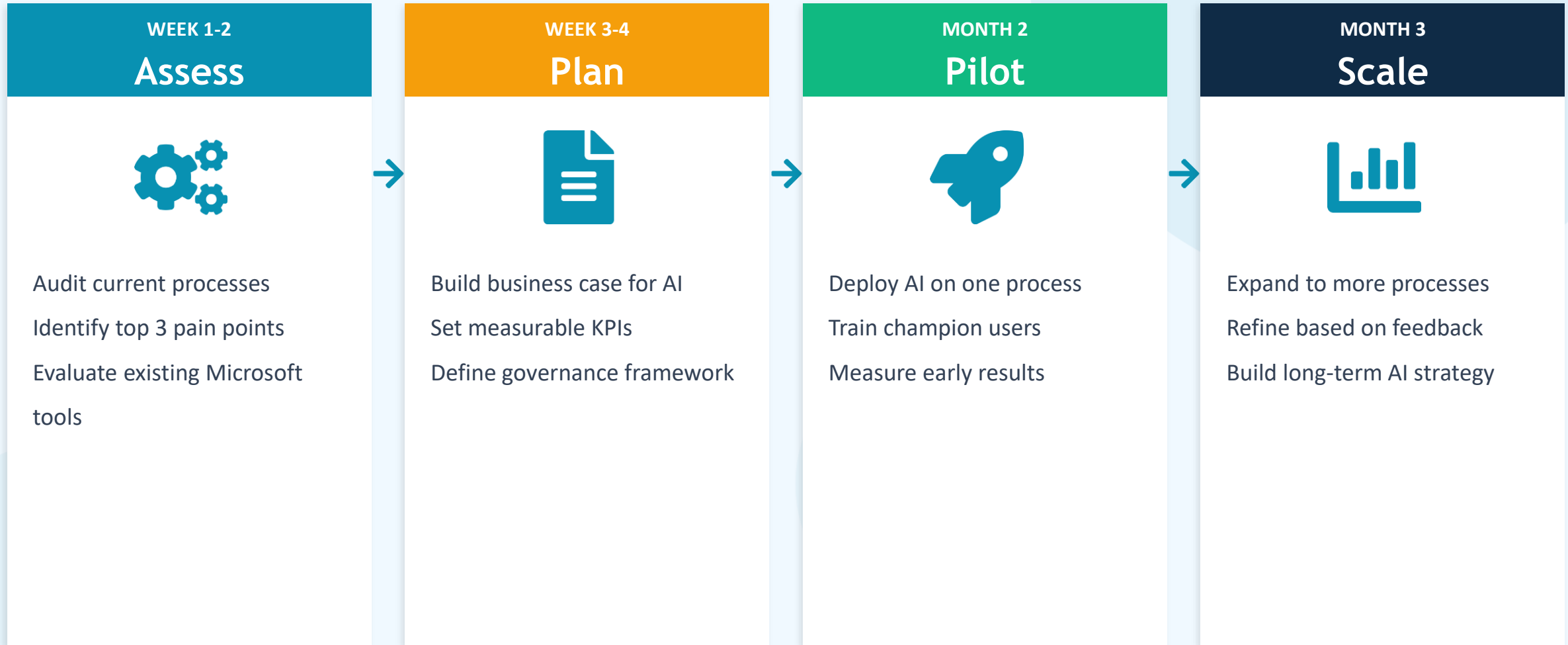
Cloud Management



# Your AI Readiness Roadmap

A Clear, Actionable Plan to Start Leveraging AI Today

# Your 90-Day AI Transformation Journey





# Let us help you find the right solution

Business Processes  
Automation

Board Management  
*eBoard*

Memo Management  
Smart Memo

Report

**Change summary**  
You received an email with request to change purchase order details.

Purchase order	Line number	Line name	Fields	Original value	New value
PO123	1	Water heater	Delivery date	Friday, Nov 11, 2024	Next week
PO123	1	Water heater	Quantity	400	300
PO123	2	Pump	Delivery date	Friday, Nov 11, 2024	Next week

**Impact analysis**  
No stockout predicted within the lead time.

Classification needed  
Erik wrote "For lines 1 and 2, we can get them to you next week" in the email. Can we consider this as confirmation of the delivery date, Friday, November 11, 2024?

Yes No

**Reference**  
Urgent: Change in PO-123  
Hi Inga,  
Hope you are doing well. I wanted to touch base with you regarding PO123.  
For lines 1 and 2, we can get them to you next week. For line 1, could we adjust the quantity to 300 units? If you could confirm the change when you get a chance, that would be great. Let me know if you have any questions.  
Thank you!  
Erik

**Chat**  
Unread Chats Channels

**Time Entry Agent**  
This 14 hour draft entry of 8 hours on 2 project tasks for Catholic Coffee project  
Hi, 14 New draft entries of 8 hours on 2 project tasks for Catholic Coffee project  
Draft 14 go ahead and submit the draft entries for this week, totaling 48 hours to Robin for approval?

**Time Entry Agent**  
Here are the details of the entries for Tuesday

Project	Task	Category	Hours	Creator	Source
Catholic Coffee	Design kitchen front	Project	6.00	Capitol	Alignments
Catholic Coffee	Research requirements	Project	2.00	Capitol	Alignments

Task: Visit the new location to understand design requirements for the kitchen

Staff go ahead and submit these entries to Robin for approval?

Submit entries Save changes

Leads > Wanda Jones > Lead insights

**Wanda Jones from Catholic Social Services**  
Topic: Northeast Q2 Campaign  
Title: Purchasing director  
Email: wjones@css.org

**Suggested action**  
Draft an email to engage with Wanda

- The lead is from a non-profit organization.
- The lead has 15-50 employees, which qualifies as a small to mid-sized organization.
- The lead's budget is \$1,000,000, which is above the required 500k USD.

**About Wanda Jones**  
Expected to see contact record, lead summary, who can make an introduction and more insights.

**About Catholic Social Services**  
Account record  
Catholic Social Services  
5 open opportunities - Rev: \$11,000,000

**Account summary**  
Catholic Social Services has been a customer since 2020 and have spent over \$90,000 with us in total.  
It is a United States-based company with employ around 2,000 people.  
Catholic Social Services operates in the non-profit industry sector.  
Their most recent purchase was for 10,000 widgets for \$1,000,000 months ago.

**Project Operations**  
Home Recent Save & Share

**Jeremy Robbins - Time entry - Approv**  
Time and Expense Agent received

**Summary**  
Status Submitted  
Approver Robin Courts  
Owner Robin Courts

**Projects**  
Project reports  
Schedule board  
Resource utilization  
Resource  
Billing type Chargeable  
Billed quantity 1000  
Sales price \$100.00

**Purchasing**  
Sales price \$100.00  
Purchase price lines  
Subcontract  
Material usage (No item)  
Subcontract resources  
Approval set

..... Solutions vary in levels of complexity and capabilities depending on your need .....



<https://ai.sibasi.com/>

Get started with AI



EXCLUSIVE WEBINAR OFFER



# Free AI Readiness Assessment

For the first 10 organisations that book a consultation within 7 days

- ✓ 1-hour AI readiness workshop with your leadership team
- ✓ Custom report on your top 5 AI opportunities
- ✓ Microsoft licensing optimisation review
- ✓ Personalised 90-day AI roadmap for your organisation



[siba.si/webinar-feedback](https://siba.si/webinar-feedback)

# Key Take Aways

Thank You



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CHANNEL  
PARTNER

