



MICROSOFT 365 HIDDEN GEMS

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SESSION AGENDA

- *Most organizations use less than 40% of the tools they already pay for.*
- **Why This Matters** — There's untapped value sitting in your subscription. You might be paying for a different tool that does the same thing.
- **Seven Hidden Gems** — Tools you didn't know you had that could replace ones you're paying for
- **Key Takeaways** — Start small, unlock more value

THE HIDDEN GEMS

Seven tools that can transform how your team works:



OneNote



To Do



Bookings



Forms



Clipchamp



Loop



Planner

ORGANIZE YOUR WORLD

Turn ideas into action—organize your thoughts in **OneNote** and stay on track with **To Do**.





Microsoft OneNote

Your digital notebook

Stay Organized

- Notebooks, sections, and pages — organize everything from work projects to personal notes in a structure that makes sense

Templates & Tags

- Use built-in templates for meeting notes, to-do lists, and more — plus custom tags to flag and find key items fast

Voice Transcription

- Capture notes hands-free, focus on what's important, and review your content later

AI-Powered Notes

- Copilot in OneNote uses your prompts to draft plans, generate ideas, create lists, and organize information



Copilot prompting essentials - OneNote

Search

File Home Insert Draw History Review View Help Picture Format

Clipboard: Paste, Copy, Format Painter

Basic Text: B, I, U, x₂

Styles: Heading 1, Heading 2

Tags: To Do (Ctrl+1), Important (Ctrl+2), To Do Tag, Find Tags

Email: Email Page, Meeting Details

Voice: Dictate, Transcribe

Copilot

Sticky Notes Share

Copilot Notebooks: Home, Recent (Microsoft APIs, Copilot Studio, etc.), Favorites, Notebooks (Aaron @ Kelley Create, Scott Anderson, etc.), Copilot Prompting

Copilot for Microsoft 365: The art and science of prompting

Prompts are how you ask Copilot for Microsoft 365 to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- Learn about projects and concepts:** "What is [Project X] and who are the key stakeholders working on it?"
- Summarize information:** "Write a session abstract of this [presentation]."
- Edit text:** "Check this product launch rationale for inconsistencies."
- Create engaging content:** "Create a value proposition for [Product X]."
- Transform documents:** "Transform this FAQ doc into a 10-slide onboarding guide."
- Catch-up on missed items:** "Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal: What response do you want from Copilot?

Context: Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or context should Copilot use?

How should Copilot respond to best meet your expectations?



Microsoft To Do

Plan your day, manage your life

My Day

- A personalized daily planner with intelligent task suggestions to keep you focused on what matters

Syncs with Outlook

- Flagged emails become tasks, due dates sync with your calendar — one connected system across all your devices

Available Everywhere

- Get your lists on any device, whether it's for work, school, or home — your tasks are always with you

Never Forget

- Set one-time or recurring reminders, add notes and file attachments — nothing falls through the cracks

The screenshot displays the Microsoft To Do application interface. At the top, there is a search bar labeled "Search To Do" and standard window controls. The left sidebar contains navigation options: "My Day", "Important", "Planned", "Assigned to me", "Flagged email", "Tasks" (selected), "Getting started", and "New list". The main area is titled "Tasks" and shows a list of 12 completed tasks. Each task entry includes a blue checkmark, the task title, a due date with a calendar icon, and a star icon for marking as important.

Task Title	Due Date
Automate Copilot usage reports for Scott on monthly recurrence	Due Tue, May 26
Automate Copilot usage reports for Scott on monthly recurrence	Overdue, Sun, April 26
Automate Copilot usage reports for Scott on monthly recurrence	Overdue, Thu, March 26
Automate Copilot usage reports for Scott on monthly recurrence	Overdue, Thu, February 26
Matt Stone follow up - Email fine tuning	
Matt Stone follow up - Outlook Copilot tips & tricks for efficiency	
Matt Stone - follow up Copilot prompting tips & tricks	
Create Brainstorm account for Alaska Fuel holdings	Overdue, Mon, December 29, 2025
Refine suggested prompts for RFP agent	
Refine RFP agent instructions	Overdue, Tue, December 23, 2025
Prep for 12/23 Training with ECWO staff	Overdue, Mon, December 22, 2025
Prep 1 - ECWO Training	Overdue, Tue, December 16, 2025

CONNECT & COLLECT

Reach people and gather insights with **Bookings** and **Forms**.



 **Microsoft Bookings**

A simpler way to organize schedules and manage appointments

Smart Scheduling

- Syncs with your Microsoft 365 calendar so customers find available times instantly — no double-booking

Flexible & Customizable

- Create multiple booking calendars with unique setups for different departments, staff, and appointment types

Self-Service for Customers

- Customers book, reschedule, or cancel online — they get confirmations and reminders automatically

Less Scheduling, More Meeting

- Customize appointment details and requirements, specify service providers, and track all changes in one place

Outlook

Bookings Bookings

Welcome Aaron Kelly

Work smarter with Bookings and skip the back and forth. 0/3 Get Started

Personal booking page

Easily share your availability with your own booking page. + Create meeting type Share ...

1 hour meeting

Book time to connect with me.

Public 1 hr

30 minutes meeting

Book time to connect with me.

Public 30 min


15 minutes meeting

Let's have a quick conversation.

Public 15 min

Shared booking pages

Invite your team and get people to book time with you and your team. + Create booking page Search



Create booking page

Feedback



Microsoft Forms

Create surveys and quizzes in minutes — get insights that matter

Surveys, Quizzes & Polls

- Create forms in minutes and easily see results as they come in

Respond Anywhere

- Invite others to respond using any web browser or mobile device

Copilot-Powered

- Describe what you need and Copilot drafts the form for you — questions, options, and all

Export to Excel

- Export form data like quiz results for additional analysis or grading



Overview - MSP Enal x Power Apps x Microsoft Power Aut x Microsoft Enableme x Microsoft 365 Self-H x Balance Board for St x Microsoft Forms x M365 Copilot Premi x M365 Copilot Premi x M365 Copilot Premi x

https://forms.office.com/Pages/ResponsePage.aspx?id=MtFAf8Y2mk689IRTQcc0cEmswjcoD9LgOxaki36L5pUMDRWWWVlyWIRBVTIVqjZUV0Q1U0JWU0hPSi4u

Admin & Applicati... Azure / M365 Hardware and peri... Human Resources Image resources Knowledge Base MS Apps New Charter Techn... Partner Portals Support Portals KC Resources My LastPass Vault Chat | M365 Copilot Sherweb

M365 Copilot Premium Use Cases & Training Needs Survey

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

* Required

About You

1. Department *

Select your primary department.

Select your answer

2. Primary Role Type *

Choose the role that best describes your main work responsibility.

Select your answer

3. Self-rated Familiarity with Copilot *

How familiar are you with M365 Copilot Premium? (1=Not familiar, 5=Very familiar)

1 - Not familiar ☆ ☆ ☆ ☆ ☆ 5 - Very familiar

Next

Never give out your password. [Report abuse](#)

CREATE & COLLABORATE

Build content together in real time with **Clipchamp**, **Loop**, and **Planner**.





Microsoft Clipchamp

Create, edit, and share — all in one place

Copilot AI Voiceovers

- Turn text into lifelike speech — choose from global languages, unique voices, and adjust pitch and pace

Copilot AI Audio Cleanup

- Remove background noise, filler words, and awkward pauses — instantly polish meeting recordings and presentations

Screen & Webcam Recording

- Record your screen, webcam, or both with unlimited retakes and export in HD quality

Stock Content Library

- Access royalty-free videos, images, music, and sound effects for any project

The screenshot displays the Microsoft Clipchamp interface. The main workspace shows a video project with the following elements:

- Title:** How Custom Copilot Agents Are Billed: Credit Packs vs. Pay-As-You-Go
- Thumbnail:** A video thumbnail featuring the Kelley Create logo and the title text overlaid on a background image of people working at a computer.
- Timeline:** A video timeline at the bottom with a playhead at 0:00.00 and a total duration of 8:30.17.
- Media Library:** A sidebar on the left titled 'My media' containing 16 slide images labeled 'Slide 3.png' through 'Slide 16.png'.
- AI Copilot Panel:** A panel on the right titled 'Create a video with Copilot' with a 'Preview' button and a text input field for describing the video.
- Transcript:** A transcript window at the bottom of the video player showing the text: 'Welcome everyone to today's session on how custom Copilot agents are billed. We'll be covering Credit Packs versus Pay-As-You-Go billing models. I'm from Kelley Create. Over the next 30 minutes, we'll demystify Copilot Credits and help you understand exact'.



Microsoft Loop

Real-time co-creation that stays in sync across Microsoft 365

Build Pages Fast

- Insert components, @mention teammates, add emojis and dates — everything you need in the flow of your page

Copilot Built In

- Co-create with AI, stay informed, and pick up where others left off with Copilot in Loop

Work Together Anywhere

- Communicate ideas and collaborate in real time regardless of time zone, commute, or work style — everyone stays in the loop

Loop Components

- Create portable content blocks that sync live across chats, emails, and documents — edit in one place, updated everywhere

Microsoft Loop

Loop

+ Create new

M365 Quick Refer... 4

Status

Sorted by hierarchy

- vCIO Meeting 5,4,2026
- Start Here
- Built-In Copilot Agents (licens...
- Copilot Versions
- Copilot Prompting Best Practice
- Copilot Studio
- M365 Copilot
 - M365 Declarative Agent
 - How does Copilot safeguar...
 - M365 Copilot Adoption Ro...
 - Extend M365 Copilot
 - Compare AI agent solutions
- Microsoft Approvals
- Microsoft Edge
- Microsoft Loop
- Microsoft Outlook

Recycle bin

Microsoft Loop

Add icon Add cover

Microsoft Loop

Overview

This Wiki is designed to help you understand what Microsoft Loop is and how to leverage it in the Microsoft environment.

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 - [Details about supported Apps](#)
 - [Goal 6: Common Loop business use cases](#)
 - [Loop videos and documentation](#)

Goals

1. Understand what Microsoft Loop is designed for.
2. Understand How to access Microsoft Loop.
3. Understand the key features of Loop.
4. Understand basic Loop functionality.
5. Understand how to collaborate in real time by creating a Loop component and adding it to Outlook, Word, or Teams.
6. Common Loop business use cases.



Microsoft Planner

Stay on track and achieve more with intelligent planning

One Place for All Your Work

- Manage tasks, to-do lists, plans, and projects in a single intelligent planning solution to stay on track and achieve more

Accomplish More Today

- Stay on top of your daily tasks with a view that helps you focus on what needs to get done today

Access Work Faster

- Simple navigation with three main views — My Day, My Tasks, and My Plans — so you get to your work instantly

Built Into Microsoft 365

- No extra licenses needed — Planner connects with Teams, Outlook, and your existing workflows out of the box



Browser tabs: Microsoft Copilot Studio X, Microsoft Copilot Studio X, Power Apps X, Manage your custom cc X, Enablement Library - Hc X, Marketing - HIDDEN GE X, Microsoft 365 Self-Help X, Balance Board for Stand X, My Plans X

URL: https://planner.cloud.microsoft/webui/myplans/recent?tid=7f40d132-36c6-4e9a-bcf4-845341c73470

Navigation: Admin & Applicati..., Azure / M365, Hardware and peri..., Human Resources, Image resources, Knowledge Base, MS Apps, New Charter Techn..., Partner Portals, Support Portals, KC Resources, My LastPass Vault, Chat | M365 Copilot, Sherweb

Planner

My plans + New plan

Recent Shared Personal Pinned Recommended

Name	Privacy	Last accessed by you	Shared with
RFP test plan	Shared	Apr 14	AK Teams & channels functionality tes...
2026 AI Strategy	Only you	Apr 14	
January Webinar Prep	Only you	Apr 14	
Jefferson Project Management	Shared	Apr 8	Jefferson Team
Rainier Projects	Shared	Apr 7	Rainier Team
PSS Planner	Shared	Mar 23	PSS Shared Planner
Brainstorm Platform	Only you	Mar 23	
KC Copilot declarative agent creation	Only you	Mar 23	
App Testing	Shared	Jan 23	AK Teams & channels functionality tes...

[Show more](#)

+ New plan

WHAT COULD YOU REPLACE?

- *You may already be paying for tools that are included in your subscription.*
- Calendly → **Bookings**
- SurveyMonkey → **Forms**
- Trello → **Planner**
- Camtasia → **Clipchamp**
- Evernote → **OneNote**



KEY TAKEAWAYS

- **You may already own these tools**
- **They integrate natively** — less context-switching, more seamless workflows
- **Small changes, big impact** — adopting even one new tool can measurably improve how your team works
- **Several of these** already have Copilot features built in
- **Challenge:** Pick one **Hidden Gem** from today's session and try it this week

 **KELLEY CREATE**

WEBINAR SERIES

Work It: AI "Supermodels" in Copilot

Thursday, May 21, 10 AM PT



REGISTER HERE



THANK YOU

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