



MODERN WORKPLACE READINESS GUIDE

**Secure Your Mission. Empower Your Team.
Start with Confidence.**

*Brought to you by
Diamond Business Communications –
Trusted Microsoft 365 Experts*

CUT THROUGH THE HYPE – 3 KEY REASONS YOU MUST MIGRATE

Many organizations are still working with **outdated IT infrastructure** that slows productivity and limits innovation. At the same time, leaders are under pressure to **strengthen cybersecurity without breaking the budget** – especially when sensitive client or donor data is at stake. And across the board, the demand for **greater operational efficiency** is rising, with teams needing streamlined tools and smarter workflows just to keep pace.

SECURITY FIRST – WHAT YOU MUST DO BEFORE USING COPILOT

Copilot inherits your Microsoft 365 security and compliance settings – it does not override them. But **if your environment isn't buttoned up, Copilot may expose more than you intend.**

READINESS CHECKLIST

- ☐ Confirm file/folder/Teams/OneDrive permissions are current
- ☐ Set up Sensitivity Labels and data classification
- ☐ Review DLP (Data Loss Prevention) policies
- ☐ Use Microsoft Purview for audit & governance
- ☐ Configure Information Barriers (if required) before rollout

Your Mission Deserves More Than Duct-Tape IT

1542 Kuser Road, Suite B-1
Hamilton, NJ 08619
www.DiamondBC.net

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Cora Park, CEO
Cora@DiamondBC.net
609-642-9300



DIAMOND
365

10 AI PROMPTS YOU CAN USE TODAY

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OUTLOOK

“Summarize this email thread.”
“Draft a reply confirming the meeting.”
“Schedule a follow-up appointment.”



TEAMS

“Summarize what I missed in today’s meeting.”
“Create action items from this chat.”
“List key points from this conversation.”



WORD / POWERPOINT

“Write a one-pager on our Q3 goals.”
“Turn this text into a slide deck.”
“Make this paragraph sound more formal.”
“Summarize this document in bullets.”



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THE AI ADVANTAGE FOR NONPROFITS

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WHAT NONPROFIT TEAMS LOVE ABOUT COPILOT

1. **Summarization Superpower** – Recaps meetings, emails, and chats in seconds.
2. **Writing Assistant** – Improves tone, clarity, and professionalism
3. **Time Saver** – Automates busywork so your team can focus on impact.
4. **Works Where You Do** – Built into Outlook, Teams, Word, Excel.
5. **Understands Your Mission** – Context-aware support using your files and data.

COMMON COPILOT MISCONCEPTIONS BUSTED

1. **"It's just ChatGPT."** – Copilot connects to Microsoft and understands your data.
2. **"It'll replace our staff."** – It empowers your people, not replaces them.
3. **"It needs training"** – It learns from your existing tools, no extra setup needed.
4. **"It's plug-and-play"** – It's powerful, but you'll need to prep security, permissions, and training to roll it out safely and successfully.

4 PRACTICAL WAYS TO GET STARTED

1. **Begin with Outlook, Word, or Teams** – Let Copilot summarize emails and improve clarity in donor communications or grant writing.
2. **Start Internal First** – Use it to draft board updates, program summaries, or reports
3. **Set Simple Guardrails** – Be clear with staff about what's OK to generate with AI.
4. **Save Time** – Use team feedback to spot where it's making the biggest difference.

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