

# #EMPOWER2026: Human Purpose Meets AI

Annual Nonprofit Virtual Conference



# Welcome to #Empower2026



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# Agenda



**#EMPOWER2026**

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**11:00–11:30 AM**

Keynote: The AI Landscape

**11:30–12:00 PM**

Building Human Connection at Scale in the Age of AI

**12:00–1:00 PM**

Customer Fireside Chat: Inside the AI Journey

**1:00–1:30 PM**

Copilot 101: Your Everyday AI Assistant

**1:30–2:00 PM**

Agents 101: Automating Complex Workflows



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## Keynote: The AI Landscape



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# Speakers



**Jaime McMahon**

CTO, ProServeIT

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# AI Maturity Matrix

## Level 1 - Exploratory

## Level 2 – Early results

## Level 3 – Tangible Impact

### Productivity

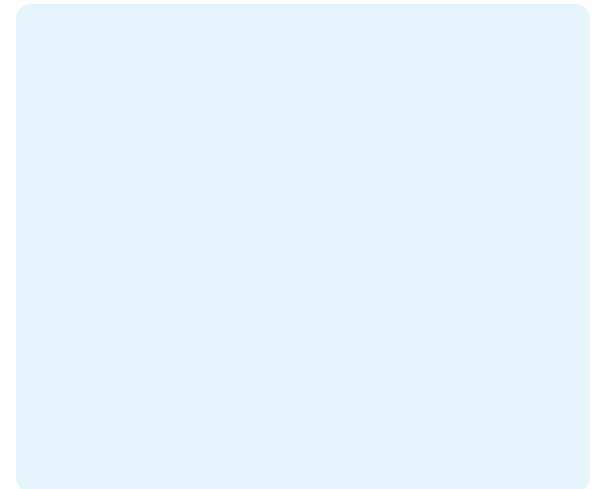
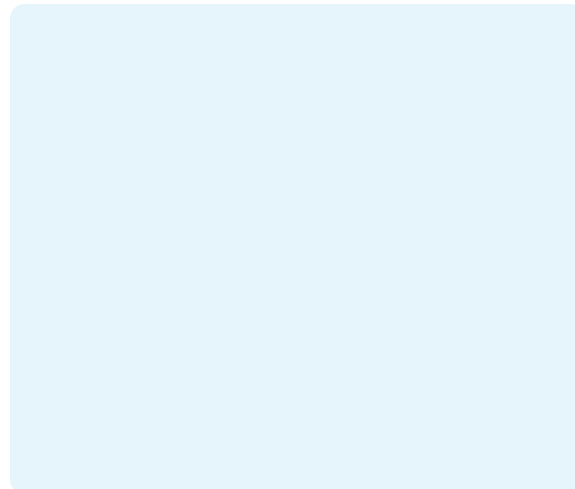
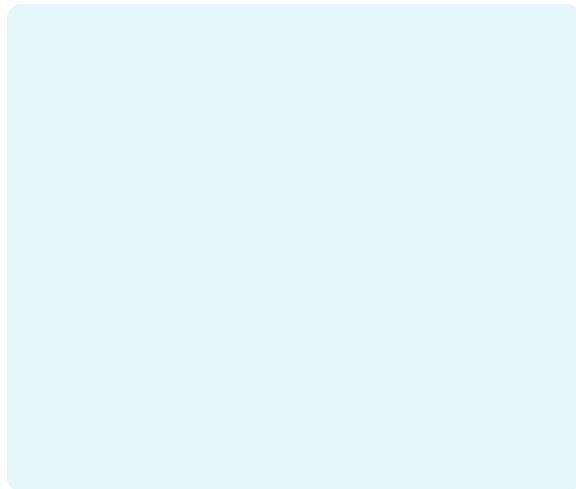


- AI not delivering true value
- No clear direction or use cases for AI
- Unclear how to measure impact
- <15% Copilot / ChatGPT user

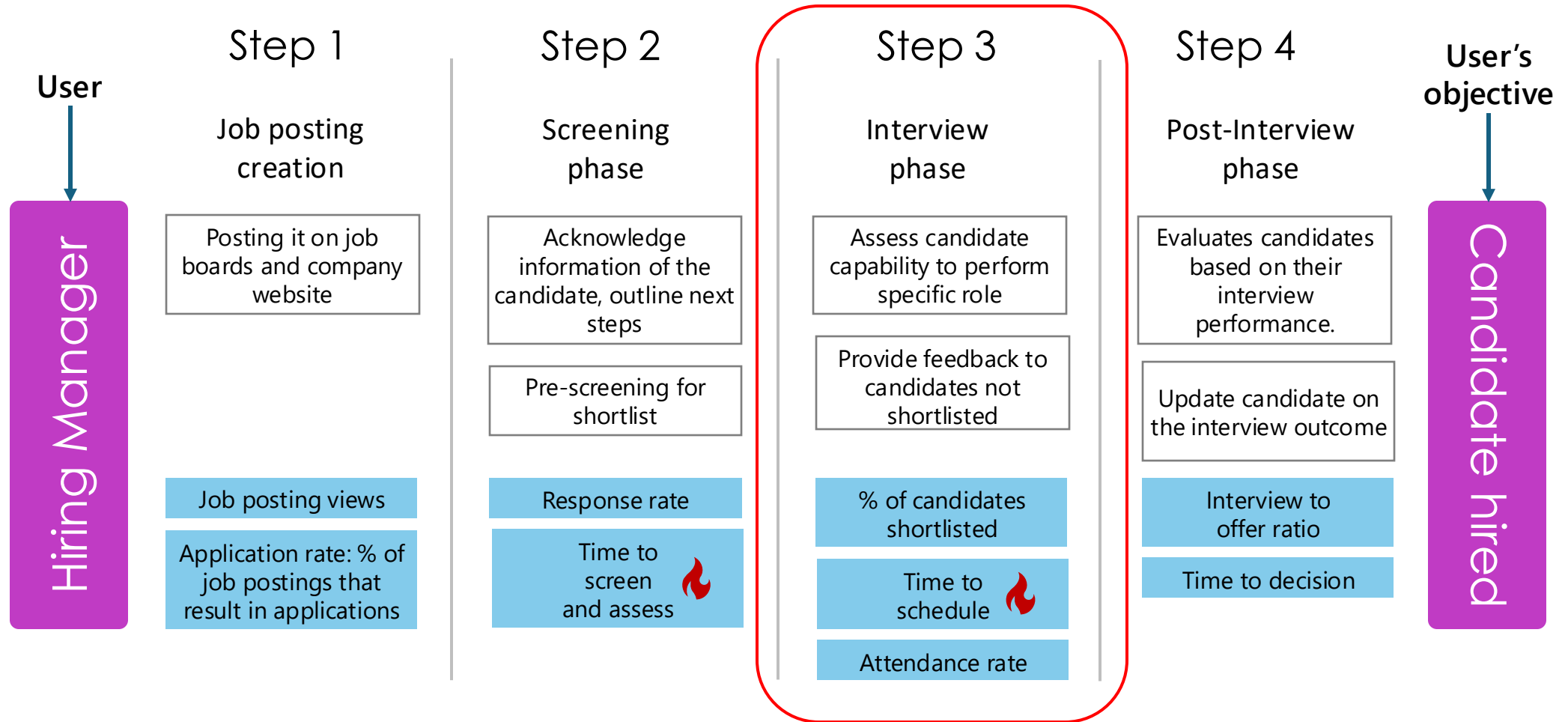
- Pockets of high value use cases
- Expanded beyond pilot users
- Unclear how to institutionalize into business process

- Critical productivity driver
- Multiple high value use cases per team
- Standard operating prompts (SOPs) adopted
- Custom Copilots created and leveraged

### Innovation



# Example – Talent Acquisition



# Example – Talent Acquisition

You are an experienced hiring advisor and interview designer for professional roles.

**GOAL**  
Help me design a structured interview for the role described below, with questions grouped into:

- 1) Hard skills
- 2) Soft skills
- 3) Culture fit / values alignment

The interview should help me assess whether the candidate can succeed in the role, work effectively with the team, and support our broader organizational goals.

**CONTEXT**  
**I am interviewing candidates for this role:**

- Role title: [INSERT ROLE TITLE]
- Seniority level: [e.g., junior, intermediate, senior, director]
- Type of role: [e.g., technical, sales, operations, leadership, hybrid]
- Key outcomes or success measures for this role: [ADD 3–5 BULLET POINTS]

**Here is the job description and/or role profile:**  
[PASTE JOB DESCRIPTION OR ROLE SUMMARY HERE]

**Here are our core values / culture principles that I care most about when hiring:**  
[PASTE VALUES, LEADERSHIP PRINCIPLES, OR CULTURE STATEMENTS HERE]

**Avoid:**

- Any questions that could be discriminatory or that touch on protected characteristics
- Overly theoretical questions that don't connect to real work scenarios

**EXPECTATIONS – WHAT I WANT YOU TO PRODUCE**

- 1) **\*\*Hard skills / job-specific questions\*\***
  - Propose 6–10 hard skills questions tailored to this specific role.
  - Focus on practical, scenario-based or past-behaviour questions.
- 2) **\*\*Soft skills / behavioural questions\*\***
  - Propose 6–10 soft skills questions that help me assess:
    - Communication and stakeholder management
    - Problem-solving and learning agility
    - Collaboration and conflict management
    - Ownership, accountability, and resilience
- 3) **\*\*Culture fit (culture add) and values alignment questions\*\***
  - Propose 5–8 questions that assess:
    - How the candidate works in teams
    - How they align with or positively contribute to our values and culture
    - Frame this as **\*\*“culture add”\*\*** (how they can enrich and strengthen the culture), not “culture sameness.”
  - For each question, include:
    - The question
    - What a strong answer looks like (bullet points)
    - Common red flags to watch for
    - Which competency or behaviour it is testing



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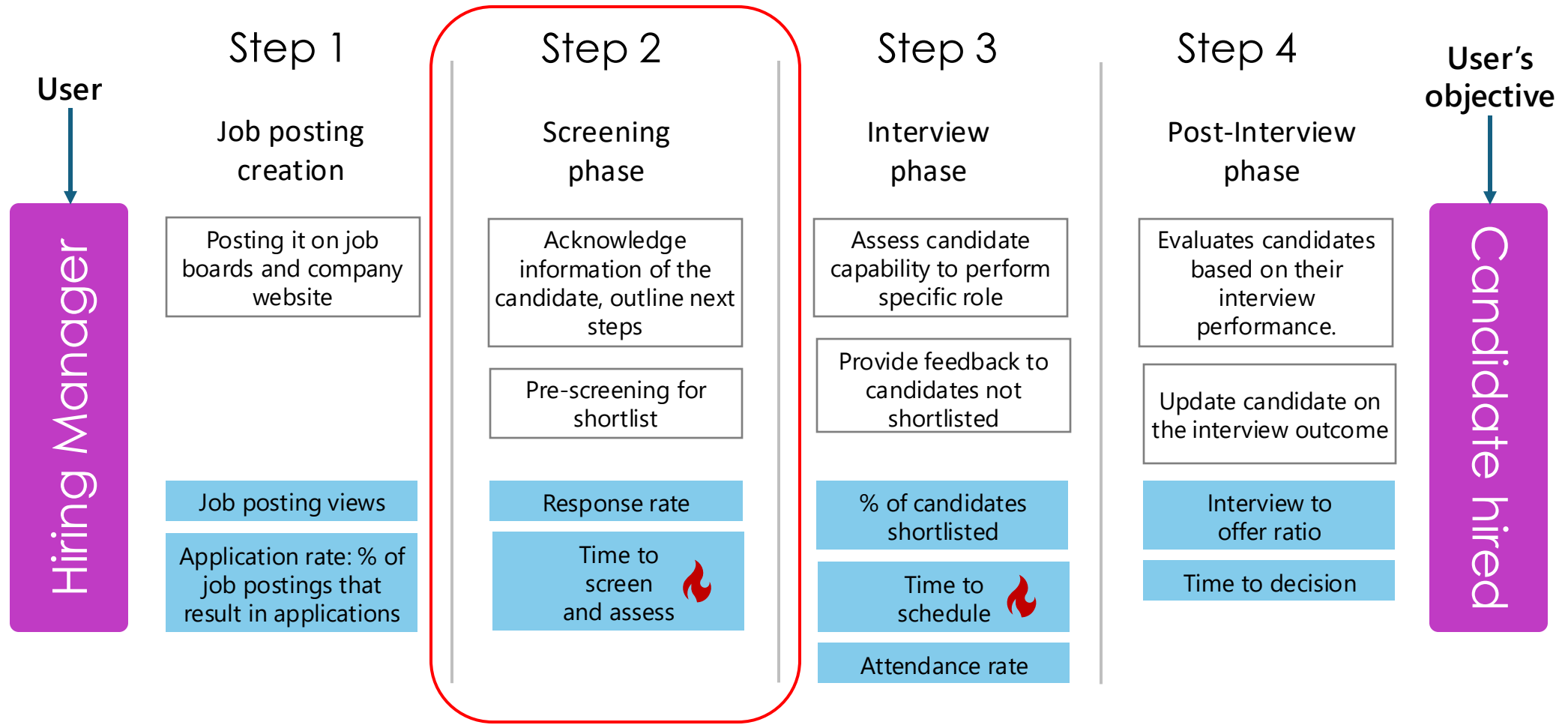


- No AI usage beyond productivity
- No clarity in how AI can drive customer value creation or internal strategic differentiation

- At least 1 AI innovation use case proved out
- Backlog of ideas identified and prioritized
- Execution plan not developed or resources/knowledge lacking to execute

- At least 1 AI innovation use case in production actively delivering business results
- Innovation factory created to tackle all high impact use cases in an intentional manner

# Example – Talent Acquisition



# Example – Innovation Capabilities



## Speech

Enhance customer experiences through speech to text, text to speech, and speech translation.



## Language + Translator

Analyze, summarize and translate using LLM-powered natural language processing capabilities



## Vision + Document

Discover information and insights from documents, images and video with OCR and AI.



## Content Safety

Detect harmful, offensive or inappropriate user-generated or AI-generated context.

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# Microsoft 365 Copilot Private Executive Briefing Session

Empower your leadership team with a **condensed version of today's presentation**, designed to highlight the business benefits of Copilot for Microsoft 365.

This **complimentary in-person session** will **help your executives understand how AI can enhance productivity**, identify actionable use cases, and calculate potential ROI for your organization.

## Highlights



**Tailored Insights:** Understand the business value and productivity gains from Microsoft Copilot.



**Strategic Alignment:** Identify use cases that fit your organization's unique business strategy.



**ROI Focus:** Evaluate the financial impact and return on investment for your organization.



**Complimentary Session:** In-person executive briefing at your office, customized for your leadership team.

# Enter to Win!

5 lucky winners will win a **complimentary Private EBS** (value of \$2,500)



## About ProServeIT

ProServeIT, founded in 2002, is a global award-winning Microsoft Solutions Partner with all six Microsoft Business Solution designations. As a modern IT specialist and trusted advisor, ProServeIT helps industries unlock their digital future, applying a security lens to every engagement and ensuring ROI on tech investments.

As a Certified B Corporation, ProServeIT values people and lives by its core values: People Matter; Be Like Gumby; Do It Right. Partner with ProServeIT to unlock your digital future.



Interested?  
Let us know!

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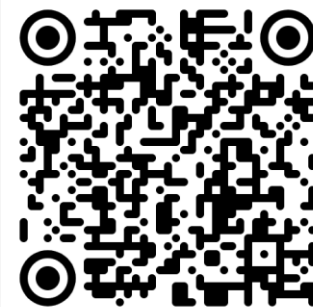
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# AI Prototype

## Functional AI Proof of Concept – Customized for You

Jumpstart your AI journey with a hands-on proof of concept. Identify your high-impact use case, build a custom AI prototype, and validate its effectiveness – **all in just 3 days**.

**\$3,000 investment from you + \$3,000 investment from us** for your business.



[Scan Now To  
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### How It Works

#### Day 1: Brainstorm

Brainstorm and select a high-impact use case



#### Day 2: Build

Build the AI-powered proof of concept



#### Day 3: Test

Test drive the solution with your real data

### What You'll Receive

#### ☐ Customized AI Solution

Tailored to your documents, workflows and business goals

#### ☐ Performance Metrics

Accuracy, extraction rates, and time savings - quantified

#### ☐ Test Results

See your data in action with real-time validation results

#### ☐ Impact Analysis

Joint impact analysis from full implementation to measure success

#### ☐ Implementation Roadmap

Clear next steps for scaling the AI solution across your organization

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# Building Human Connection at Scale in the Age of AI



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# Speakers



**Amanda Hajjarah**

ASSOCIATE DIGITAL  
COMMUNITY MANAGER

LINEZERO



**Sandra Dillon**

VP OF ADMINISTRATIVE  
SERVICES & ENGAGEMENT

HOSPICE OF THE CHESAPEAKE



**Joy Fajardo**

BRAND EXPERIENCE  
MANAGER

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# How Connected Is Your Team? Find Out.

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The Starter  
The Experience Builder  
The Emerging Connector  
The EX Trailblazer

Which one are you?

Find out in our  
**Team Connection Health  
Check Quiz.**

In just **2 MINUTES**, you will:

- ✓ Get your personalized EX profile.
- ✓ Walk away with practical tips you can use right away.
- ✓ Discover your biggest opportunity for impact.

**COMPLETE THE QUIZ AND YOU'LL BE ENTERED  
INTO A RAFFLE.**

Three (3) winners will receive their recommended  
& personalized engagement for **FREE**.



**SCAN NOW TO  
GET YOUR RESULTS  
INSTANTLY**





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# Customer Fireside Chat: Inside the AI Journey



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# Customer Fireside Chat Panel Speakers



**Mihae Ahn**

VP of Marketing  
ProServeIT



**Mike Prime**

VP of IT,  
Right to Play



**Frank Lombardo**

VP of IT and Digital Innovation,  
March of Dimes



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# Copilot 101: Your Everyday AI Assistant



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# Agenda



- **Understand Copilot vs. Microsoft 365 Copilot**
- **How to Use Microsoft 365 Copilot**
  - Copilot Chat
  - Word
  - PowerPoint
  - Teams
- **Homework**
- **Next Steps**

**Questions? Put them in the chat!**

# Speakers



**Kaavya Shah**

Marketing Assistant

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# Understanding

## Microsoft 365 Copilot vs. Copilot

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# The difference...



## Microsoft 365 Copilot

Embedded across Microsoft  
365 apps



## Copilot

Available across your devices  
and the web



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# The difference...



## Microsoft 365 Copilot

Access to your business  
content & context



## Copilot

Uses public knowledge, not  
your business data



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# How to Use Microsoft 365 Copilot

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## Copilot Chat

Brainstorm, refine  
and compare  
ideas



## Copilot in Word

Turn information  
into clear, usable  
writing



## Copilot in PowerPoint

Transform content  
into a presentation



## Copilot in Teams

Stay aligned with  
meeting recaps  
and summaries

# Let's learn how, together...

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# Try This!

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## Copilot in Outlook

### With Microsoft 365 Copilot

"Draft a professional reply to this email. Keep it friendly, offer two possible next steps, and match my writing style."

### With Copilot

Paste the email and then try the same prompt.



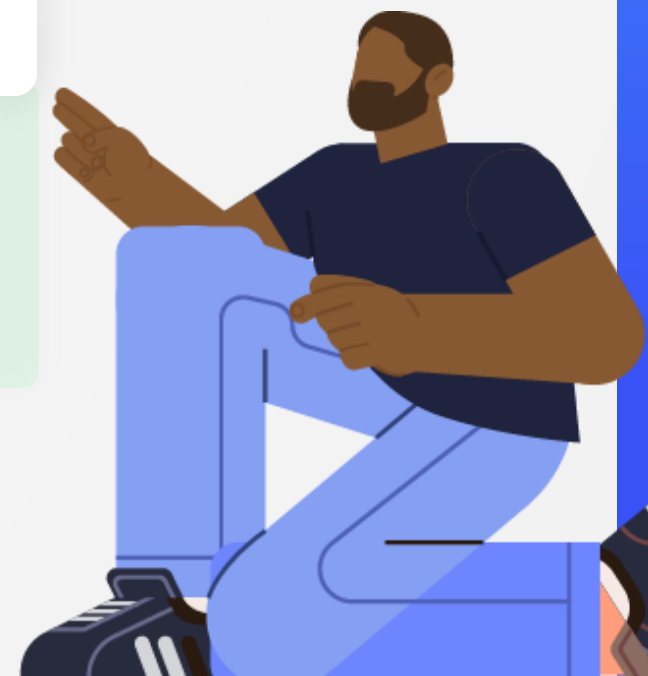
## Copilot in Excel

### With Microsoft 365 Copilot

"Explain the trends in this table, identify anything unusual, and summarize the top 3 insights for a manager."

### With Copilot

Paste the table and then try the same prompt.



# What's Next?

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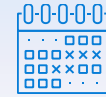
# Microsoft 365 Copilot Starter Kit



\$5,000 USD  
\$7,000 CAD



SMBs (with less than  
300 employees)



2 Months

Everyone is experimenting with AI. Are you? If so, are you seeing successful adoption? Let us help! The success of our Starter Kit is measured by your champions' full adoption of Microsoft 365 Copilot within 2 months.

## Engagement Outcomes



**User-centric champion empowerment:** Ensure successful adoption of Copilot by working with a Prosci certified change management and adoption specialist.



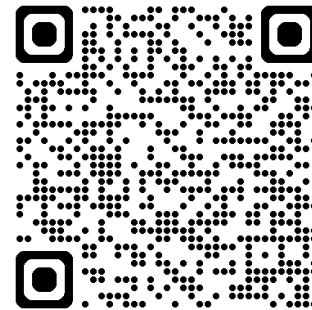
**AI roadmap via executive enablement sessions:** A dedicated senior consultant will be assigned to co-author a roadmap that is aligned with your business strategy.



**Copilot champion adoption within 2 months:** Harness metrics to guide progress and evolve strategies.



**Security and data review:** Review your data and security and provide recommendations.

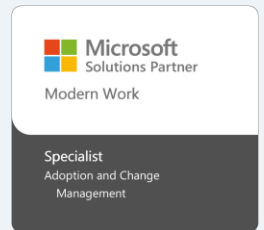


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# Agents 101: Automating Complex Workflows



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# Speakers



**Katherine Quon**

Marketing Coordinator, ProServeIT

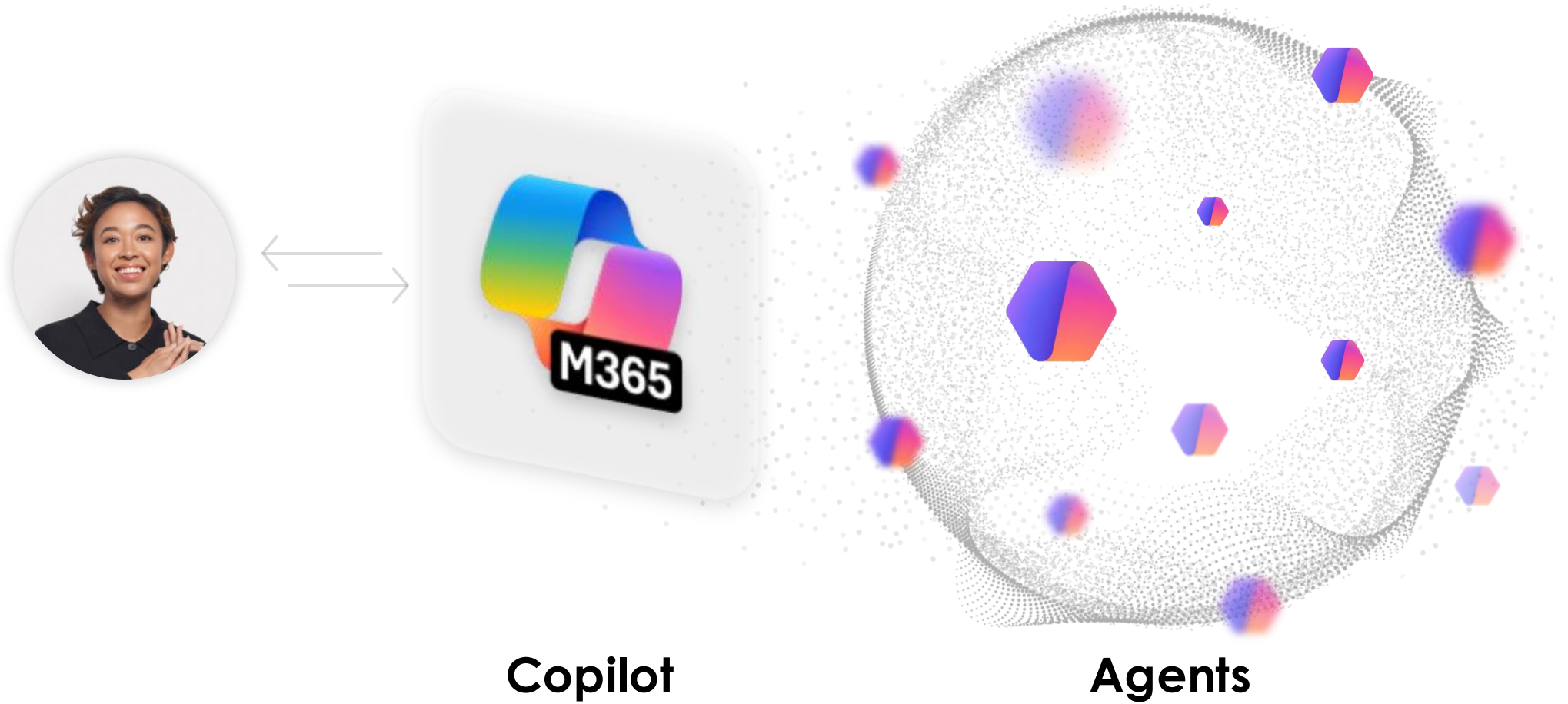
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# Copilot is the Gateway to Enterprise Agents



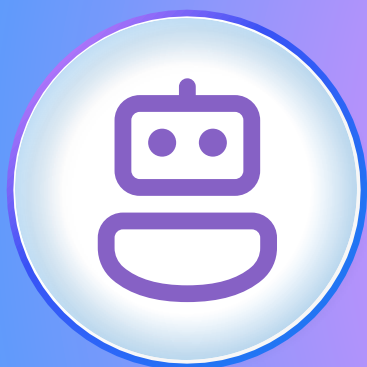
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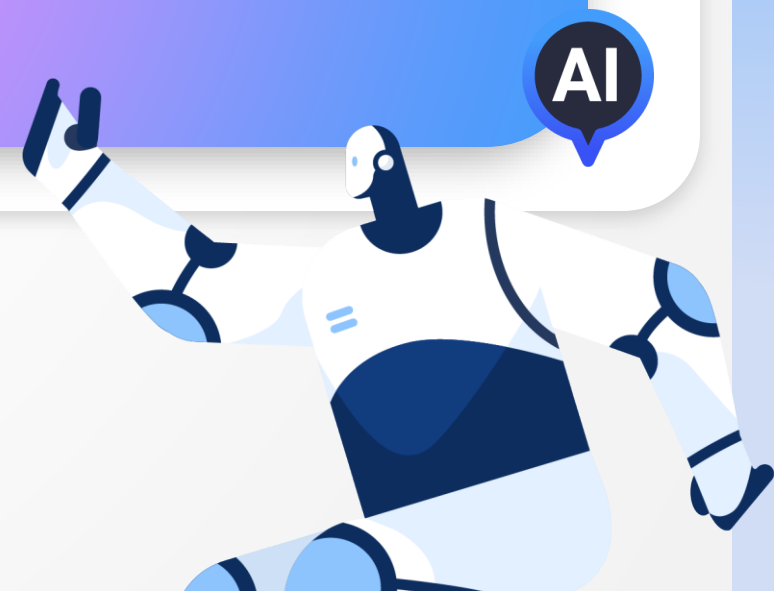
# 1.3 Billion

AI agents by 2028

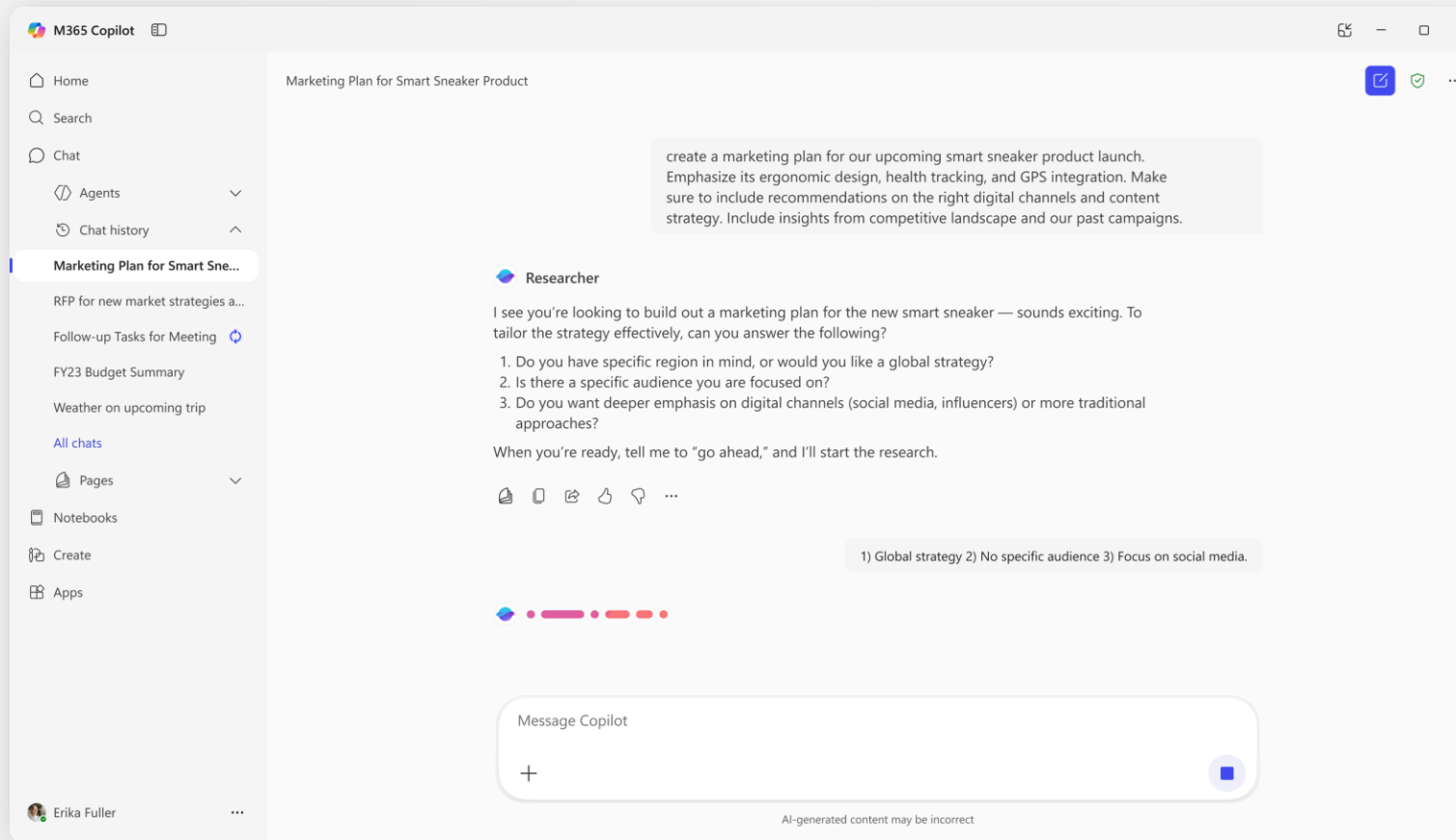
Source: IDC Info Snapshot, 1.3 Billion AI Agents by 2028, doc #US53361825, May 2025

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# What is an Agent?



Agents are specialized AI tools built to handle specific processes or solve business challenges.

Think of Agents as the apps of the AI era, with Copilot as the interface.



# Types of Agents

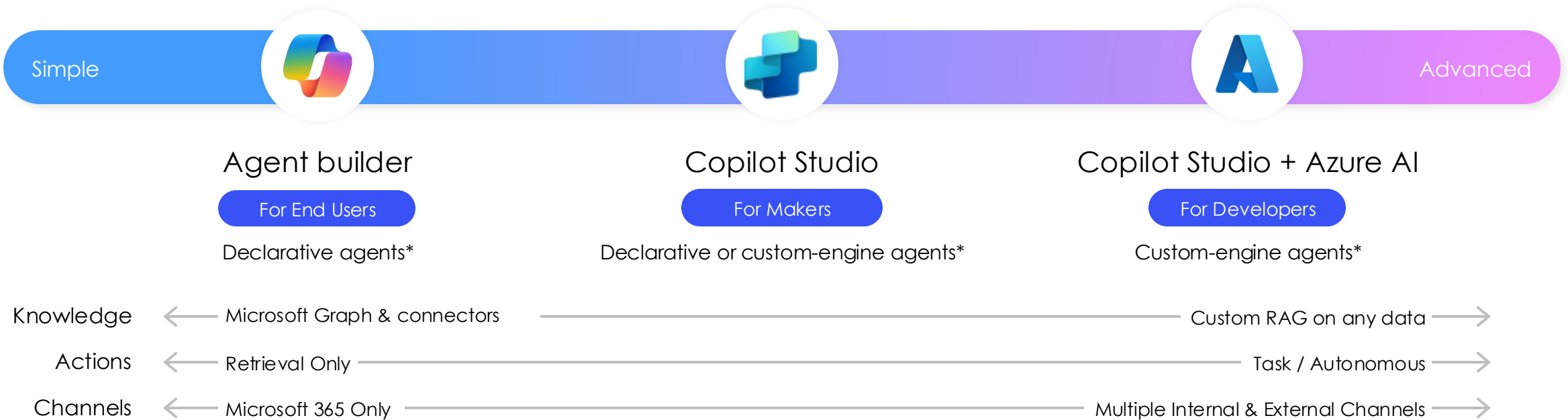
You can build your own agents to help you while staying secure, without ever writing a single line of code.



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

# Types of Agents

Here are the different ways you could build an agent for yourself or your company



Agents can perform different functions and access different sources of data, including the public web, work data in the Microsoft Graph (SharePoint, OneDrive etc.), and data stored in other business apps and tools.

\* Declarative = prompts handled by Microsoft 365 Copilot; Custom-engine = prompts handled by custom AI engine (i.e., orchestrator and foundation models)

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# Microsoft Pre-Built Agents

M365 Copilot

Search

Chat

Agents

Conversations

Pages

Notebooks

Create


Apps

OneDrive


## Agent Store

Find agents with the expertise to help you complete complex tasks


Search agents

**Researcher**


With Researcher, now every employee has access to expertis...

**Analyst**


Perform complex data analysis over files in a variety of formats.

**Prompt Coach**


Write and improve your prompts

**Writing Coach**


Take your writing to the next level with Writing Coach

**Idea Coach**


Plan and navigate the brainstorming process

**Career Coach**


Elevate your career with Career Coach

**Learning Coach**

Unlock your potential with Learning Coach

**Surveys (Frontier)**

Surveys agent automates survey creation, distribution, and analysis.

**Flow Builder (Frontier)**

Build agent flows with natural language, no code needed.

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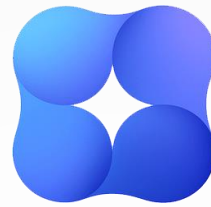


# Let's Explore Some Agents



## Researcher

Finds and cites sources for you



## Facilitator

Guides and organizes meetings with AI notes and agendas.



## Agent Mode Word

Edits & rewrites your document for you.

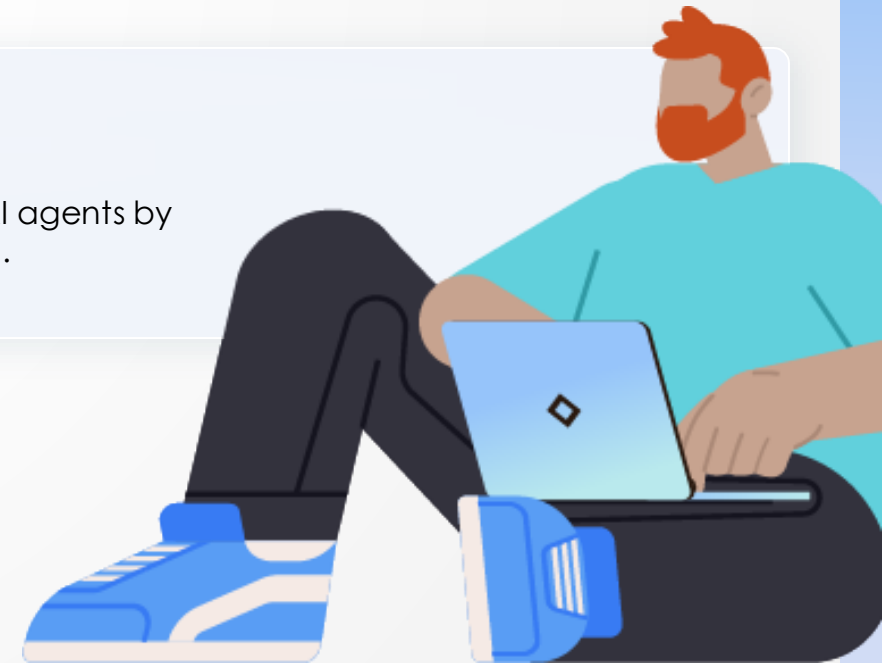


## Agent Builder

A no-code tool inside Microsoft 365 Copilot that lets anyone create simple, custom AI agents by describing what they want the agent to do and adding relevant knowledge sources.

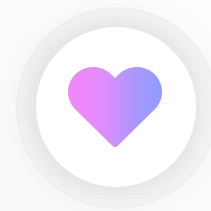
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# Agents are redefining work today



**You build them.**

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# What's Next?



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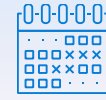
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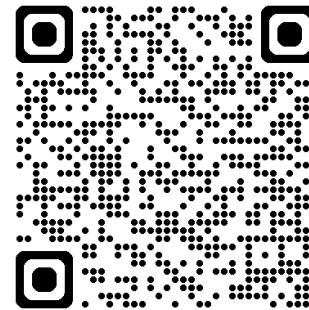
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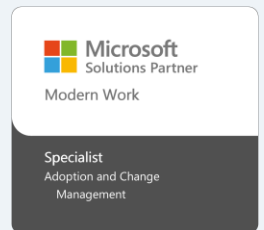


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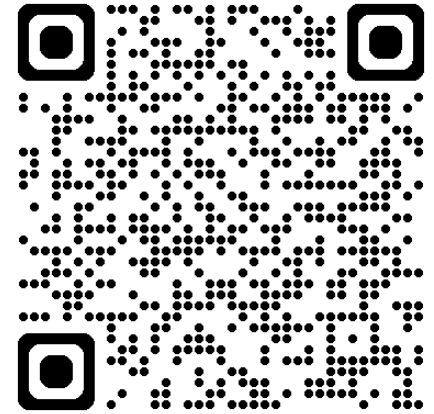
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**Private Executive Briefing Session**



**AI in a Day**



**Team Connection Health Check Quiz**

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**Thank you!**