

6P Marketing and Zantek IT Webinar on AI In Action: Q&A

In the following are questions posed at our AI Webinar on April 29, 2025. Given the time restraints of the session, we were unable to answer all questions. The following are information that are relevant now, and information may change over time, given the fast-paced nature of AI. It is recommended to call your provider for the latest details / specifics on any of the following topics:

Getting Started with AI in Marketing

Using Copilot vs. Other Third-Party LLMs

Comparison of Microsoft Copilot vs. Free Tools

Security and Privacy with Microsoft Copilot

Microsoft Copilot Versions and Costs

Questions on Subscription and Versions

Practical Uses of AI in Marketing

AI-Generated Content and Brand Voice

AI for Financial Statement Analysis

Getting Started with AI in Marketing

1. Q: Where should I start if my team is already experimenting with AI but not using it strategically yet?

Answer:

- First, develop AI standards for your company, considering practical requirements (e.g., protecting client data) and setting loose expectations for team members. Start simple (1 page or less) and add complexity later.
- Second, allow the team to start with small pilot projects focused on one business objective. Support them as they test new tools, define the scope (hours, budgets, etc.), goals, and expectations. For example, testing email creation time or response rates. Use that pilot to define success metrics and involve both marketing and sales teams to build cross-team alignment.

Using Copilot vs. Other Third-Party LLMs

2. Q: I've been playing with ChatGPT for a bit of time. How do you compare using ChatGPT and related "third-party" LLMs and tools versus MS Copilot?

Answer: Great to hear you're experimenting with AI! ChatGPT and similar AI systems are beneficial for general users, but for organizations needing security and protocols for team usage, Microsoft Copilot is built for that. It is tested for security and offers many additional benefits. For businesses, using Copilot in an internally vetted environment provides more security and confidence, particularly around client and company IP.

Comparison of Microsoft Copilot vs. Free Tools

3. Q: How does Microsoft Copilot compare to other tools like ChatGPT that are available for free?

Answer: The Large Language Model (LLM) ChatGPT and image generation model DALL-E by OpenAI are the generative AI models utilized by Microsoft Copilot. Microsoft builds on these generative AI models by including proprietary technology such as the Microsoft 365 Tenant, Microsoft Graph, and Microsoft 365 applications. For business users, Microsoft 365 provides a level of security and a much richer feature set than ChatGPT alone.

Security and Privacy with Microsoft Copilot

4. Q: What are the security concerns with allowing Copilot access to internal inboxes or files?

Answer: The main concern revolves around data security and privacy, especially when dealing with client-specific or proprietary information. It's crucial to consider whether or

not your organization is ready to allow Copilot access to sensitive data and to ensure it complies with your internal data protection policies.

5. Q: Can Copilot assist with subsequent email follow-up or automating email outreach (e.g., sending an email at Day 3, Day 7, and Day 14)?

Answer: Yes, Microsoft Copilot can help automate email outreach sequences, such as scheduling emails for follow-up at set intervals (e.g., Day 3, Day 7, Day 14).

Microsoft Copilot Versions and Costs

6. Q: What versions does Microsoft Copilot come in and how much does it cost?

Answer: Microsoft Copilot is available in three main versions:

- Microsoft Copilot
 - A free version available to anyone who wants to experiment.
 - Cautionary note: If you have an existing Microsoft 365 license/tenant, the queries you enter remain private. If you do not have a Microsoft 365 license, your queries are in the public domain.
- Microsoft Copilot Pro
 - A subscription for home/individual usage.
 - Costs \$27 per month with no term commitment.
 - Does not work with applications provided with a Microsoft 365 Business account.
- Copilot for Microsoft 365
 - A subscription for business users.
 - Requires a one-year term commitment.
 - Pay monthly at \$42.74, or an upfront lump sum payment of \$488.40.

There are also many specialized Copilot products available, such as:

- Microsoft 365 Copilot for Sales
- Microsoft 365 Copilot for Service
- Microsoft Copilot Studio
- Microsoft Security Copilot
- GitHub Copilot

If your organization is ready to take a big step towards automating processes, these specialized products may be of interest.

Questions on Subscription and Versions

7. Q: Could you please confirm whether the version Ron used is free or subscription-based Copilot?

Answer: Copilot for Microsoft 365 is a separate license. If you have a Microsoft 365 Business Standard/Basic license, you can purchase Copilot, which will then activate the Copilot features.

8. Q: Please clarify whether there are things we should not be using Copilot for, in both subscription-based and free versions, with data that might be client-specific.

Answer: For both subscription-based and free versions, it's important to avoid using Copilot with data that is highly sensitive or client-specific unless appropriate safeguards are in place. You should also be cautious when dealing with proprietary information that could be exposed if security protocols are not followed.

Practical Uses of AI in Marketing

9. Q: What are some examples of ways for marketing teams to use AI today?

Answer: AI is excellent for repurposing content (e.g., turning a webinar into blog posts), creating multiple versions of a message for different audiences, or summarizing survey insights. It's also useful for generating ideas (various concepts/approaches), competitor analysis, and SEO support. Be cautious when generating content (blogs, videos, social assets, etc.) with AI. Ensure someone who knows the brand and is skilled in editing and reviewing such materials is involved. The last thing you want is for your audience to think your sales or marketing teams are 'dialing it in' or 'using AI to connect with them.' Famous quote: 'You only get one chance to make a first impression,' and people can generally feel if something is off. Quality brands do quality marketing, and AI can make this easier, but that doesn't mean it's always quality. Shortcuts may be faster and easier but often lead to problems.

AI-Generated Content and Brand Voice

10. Q: How do I avoid generic or “vanilla” AI-generated content?

Answer: Be specific in your prompts; context is everything. Define your audience, tone, and goal clearly. Most importantly, review and refine the output. AI provides a version 0.1, and your team makes it resonate.

11. Q: How can I ensure AI-generated outputs align with our brand voice?

Answer: Train your AI tools using brand guidelines, tone examples, and “do/don't” reference points. Store these as reusable prompts or templates. Always conduct a human review before anything goes live. If you don't have a brand voice or strategy in place,

consider getting one done (ideally by professionals who can map your leaders, customers, and market to your unique brand strategy).

AI for Financial Statement Analysis

12. Q: How is Copilot when it comes to financial statement analysis?

Answer: Copilot can assist with financial statement analysis by helping automate the extraction of key insights and identifying trends. However, its effectiveness depends on the complexity of the financials and the ability to integrate with existing financial software.