SmartDolphins

Microsoft Copilot 365

Beyond the Basics

November 2026

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Microsoft Copilot: Beyond the Basics

Microsoft Copilot for Microsoft 365 is an AI-powered assistant embedded across the apps people already use every day—Word, Excel, PowerPoint, Outlook, and Teams—helping turn natural language into drafts, summaries, analyses, and next steps.

At the basic level, Copilot can save time by generating first drafts, rewriting text, or summarizing a single document or email thread. Beyond the basics, however, is where Copilot becomes a practical business tool: it helps you work with what you already have, connect information across files and conversations, and move from "write this" to "help me decide, prepare, and communicate."

Advanced use means prompting with intent—defining the audience, goal, format, and constraints—so outputs are closer to executive-ready and require less rework. It also means using Copilot iteratively, refining results through follow-up prompts the same way you would collaborate with a colleague, while keeping human judgment in charge of accuracy, tone, and responsibility. In short, Copilot is not just a faster way to type—it is a workflow partner that supports clearer thinking, better synthesis, and more consistent communication across the Microsoft 365 ecosystem.

What You'll Learn

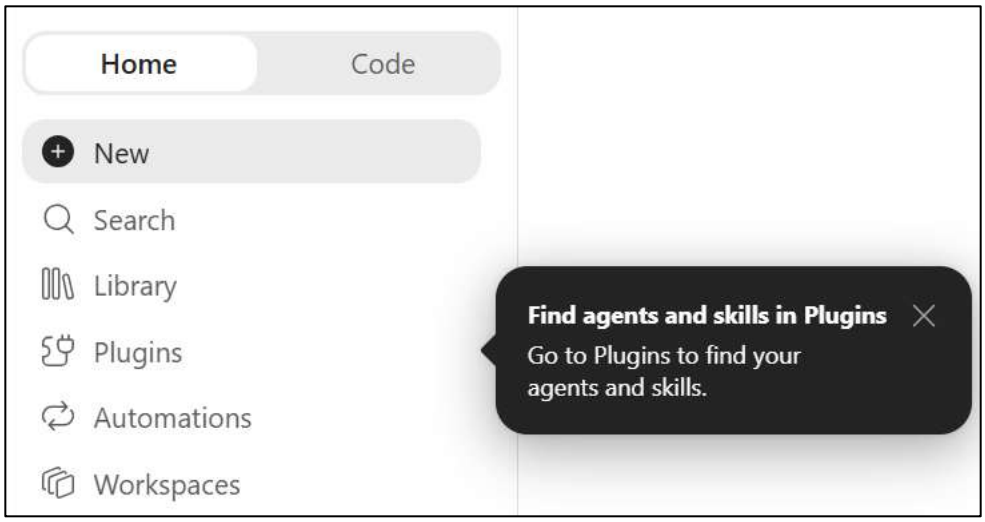
This session is designed for professionals who are already comfortable with the basics of Copilot and want to get more from it. By the end, you will be able to:

- **Better Prompting:** Write clearer, more specific prompts that produce accurate, usable results the first time.
- **Working Across Apps:** Apply Copilot in Word, Outlook, Excel, and Teams to draft, summarize, analyze, and stay organized.
- **Context and Sources:** Guide Copilot to reference the right documents, emails, and files so its output fits your actual work.
- **Responsible Use:** Review, verify, and refine Copilot's output to keep your work accurate and professional.

What's New in Copilot in 2026

Feature review date: November 2, 2026. This handout incorporates the latest October announcements located for Microsoft 365 Copilot, plus relevant earlier updates. Announced, rolling out, Frontier, and generally available do not mean the same thing. Availability varies by license, platform, region, administrator settings, and tenant rollout.

Confirm access before the November 5 webinar; use the fallback workflow when a feature is missing. This is an end-user Microsoft 365 class, not an exhaustive course on GitHub Copilot, Dynamics 365, or Copilot Studio.



- **Projects:** Keep related conversations, tasks, instructions, and references together so conversational and delegated work stay organized around the same goal. Confirm the context available to each task and use Outputs to find project-created files where enabled. Projects availability can differ between capabilities during rollout.
- **Workspaces and Notebooks:** Shared workstream context, file editing, audio updates, and additional references appear in the October update. Microsoft also announced direct Office editing and interactive reports in Notebooks. Interface naming may differ during rollout; show the experience available in your tenant rather than assuming every Notebook has migrated.
- **Skills and Plugins:** Reuse approved instructions and discover specialized capabilities within the combined Copilot experience where enabled. Skills are expanding from Cowork into Chat, but availability may differ during rollout. Role-based finance/accounting and legal capabilities support specialized work; they do not replace qualified review.
- **Cowork Automations, effort, and cost:** Automations bring scheduled and event-triggered tasks together. Effort controls balance depth, speed, and credit usage; /cost provides usage visibility. Start with a supervised task before automating recurring work.
- **Focused refinement, sharing, model choice, and retry:** Refine a selected portion of a response, use Try again to compare results, and find prior work through the combined Chat–Cowork history where available. Share only with the appropriate audience. Models and controls depend on organizational settings; neither a new model nor shared history replaces fact-checking.
- **Word:** The October update includes a document-specific design and legal plugin. Retain source verification and detailed review of revisions; use specialized legal capabilities only with approved material and qualified oversight.
- **Excel:** Change visibility and chart recommendations are joined by October announcements for accounting skills, a clean data skill, and an interactive canvas. Review proposed cleanup, formulas, and source totals before relying on an analysis.
- **PowerPoint:** Brand/template support and slide refinement are joined by October announcements for model updates, brand kit improvements, skills, and interactive slides. Review content, branding, and presentation behavior before delivery.
- **Outlook, Teams, and Planner:** Recent updates include email drafting and management, multilingual meeting recaps, and Planner status-report/task improvements. October adds Cowork Outlook/Planner

enhancements, intelligent recap updates, and Queues app updates. Keep drafts, assignments, and consequential actions under human review.

- **OneDrive, SharePoint, Edge, and connected data:** October announcements include OneDrive Prompt Gallery, a SharePoint knowledge base, an updated Edge experience, and new life sciences connectors. Earlier updates added Power BI report and semantic-model grounding in Chat and Cowork. Use only approved connections and material you are authorized to access.
- **Code and Autopilot—optional preview awareness:** Code supports describing purpose-built apps and dashboards in natural language. Autopilot is an always-on personal agent; the October report describes a November Frontier rollout. Treat these as optional demonstrations only when enabled, not required student exercises. September preview announcements are not proof of current tenant access.

In this session, use the feature-to-workflow activities below to practice with capabilities available in your tenant. When a feature is missing, use referenced files, explicit instructions, and manual review rather than promising an unavailable action.

The practical goal is one connected workflow, not switching between unrelated tools. Begin with the outcome you need: a focused answer, a refined draft, or a completed multi-step deliverable. Use the combined Chat–Cowork experience to clarify, delegate, review, and refine; use Projects or Workspaces for continuity and Skills for repeatable standards where available. Verify the references and resulting files before reuse.

For administrators, the October update also names Insights Agent and Workforce Insights Agent, retention configuration, expanded Cowork data loss prevention coverage, and Government Cloud editing capabilities. These are awareness topics rather than student setup tasks. Ask IT which controls, licenses, connections, and previews are approved.

The New Home and Combined Chat–Cowork Experience

One place to move from a question to a completed result. The new Home brings conversational assistance and delegated work together in the Copilot app, with shared navigation and a combined conversation history. Chat and Cowork are connected ways to work with Copilot—not unrelated tools that require starting over. Home provides the starting point, while Office in Copilot supports editable files where enabled.

Home: Your Starting Point

Home brings Chat and Cowork together, with shared navigation for finding conversations and ongoing work. You can return to recent activity, search the combined history, and access Projects, Workspaces, Plugins, and Automations where enabled. The benefit is continuity: organize the work and its references, then ask for the next useful outcome. A combined interface does not guarantee that every source or instruction carries into every task; confirm the context being used.

Illustrative Home example: Return to the leadership-update project or prior conversation, check that the meeting notes and tracker are current, and ask Copilot to summarize what changed. Then request a leadership brief and draft stakeholder email using those verified findings. Work from the same organized context rather than treating the drafting step as a separate, unrelated session.

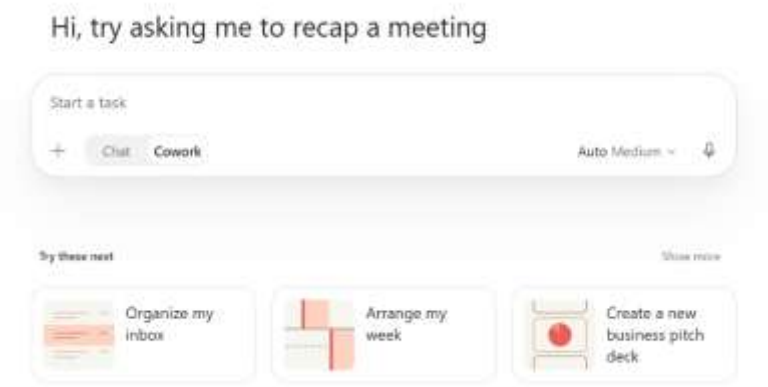
Chat: Conversational Assistance

Use Copilot to explore a question, look up information, summarize material, or refine a draft through follow-up instructions. This is the conversational side of the combined Chat–Cowork experience. Identify the goal, audience, references, and format, then review and adjust the result. Chat is not restricted to answering questions: supported actions and file work may also be available. The distinction is the outcome you request, not a rigid divide between "talking" and "doing."

Illustrative conversational example: "Using the meeting notes I referenced, summarize decisions and unresolved questions for leadership. Identify the support for each point, and do not invent owners or dates." Follow up: "Shorten the unresolved questions." Then build on the verified result: "Use this summary and the current tracker to prepare a leadership-update draft." Check the references again if the experience opens a new task.

Cowork: Delegated Multi-Step Work

Use Cowork in the Copilot app online when you want to delegate a defined, multi-step task and receive a completed result to review—not just discuss a question. Examples include preparing a reporting package, assembling a meeting brief, or adapting approved content into several deliverables. Chat and Cowork are connected parts of the same experience: clarify the goal conversationally, then delegate the work using the controls available in your tenant. Do not assume automatic task routing or that every source carries into a new task.



How to brief Cowork: Specify (1) the finished deliverables and audience, (2) the approved references and reporting period, (3) required sections and format, (4) what to do when information is missing, and (5) actions that are not authorized. Confirm the task's references and instructions before it runs. Where shown, choose an appropriate effort level and review credit usage. Inspect the returned files and refine them through follow-up requests; delegating execution does not transfer accountability. Microsoft's Cowork overview · Combined experience update

Cowork Examples: Delegate a Finished Result

Illustrative practice: Use approved, nonsensitive sample material. These prompts describe assignments to test where the required capabilities are enabled; they do not guarantee access to every source or action.

1. Leadership reporting package—use when several outputs need the same verified facts. "Using these approved meeting notes and the current project tracker for the stated reporting period, prepare a Word leadership update and a draft stakeholder email. Include Progress, Risks, Decisions Needed, and Next Steps. Identify support for each point, preserve stated owners and dates, and flag missing inputs. Return both for review. Do not send messages or assign tasks." **Follow-up:** "Shorten Risks in both drafts without changing the facts."

2. Meeting preparation package—use when background material must become a focused discussion. "Using the referenced agenda, prior meeting notes, and approved project brief, prepare a meeting-preparation document with the purpose, a proposed agenda, key developments, decisions needed, and questions to resolve. Distinguish prior decisions from proposed discussion items. Flag conflicting information and return a draft for review. Do not schedule meetings, invite anyone, or change the calendar." **Review:** Confirm the right meeting and source versions were used.

3. Policy communication kit—use when one approved source needs several audience-ready versions. "Using only this approved policy update, prepare an employee announcement, a manager FAQ, and a short Teams post. Preserve the effective date, scope, and required actions exactly as stated. Flag unanswered questions instead of inventing guidance. Keep terminology consistent across the drafts. Do not publish, post, or send anything." **Review:** Compare every version with the approved policy before distribution.

Before using Cowork's result: Open every requested output; check completeness, source support, figures, dates, and assumptions. Confirm no unauthorized actions occurred. Ask for a targeted correction when needed. If sources, file creation, or Cowork are unavailable, provide approved excerpts and request structured drafts, then complete the remaining steps manually. A supervised task is the starting point; recurring automation is a separate setup and approval decision.

Office Files Within the Combined Experience

Within the combined Copilot experience, Office in Copilot supports creating and editing Word, Excel, and PowerPoint files where enabled. Conversational clarification and delegated work can lead to an actual document, workbook, or presentation—not just text to copy. Refine the file alongside the conversation and continue in the corresponding Office app. Supported edits and access still vary by environment.

Illustrative Office examples: In Word, turn approved notes into a structured leadership brief and refine its executive summary. In Excel, build a budget workbook from supplied figures and review the formulas and source ranges. In PowerPoint, create a briefing from verified findings using an approved template. Review the actual file—not just Copilot's description of what it did—and confirm that names, figures, layout, and required sections are correct.

One connected workflow: Find the work in Home → confirm references and instructions → clarify or summarize → request the completed deliverable → review and refine the file. Chat and Cowork support different levels of assistance within this combined experience; students do not need to memorize them as unrelated destinations. Use the controls shown in your tenant, and do not assume shared history means every task automatically inherits all context.

Availability for this class: The combined Home navigation was announced for Frontier rollout in October and worldwide rollout in November. A rollout window does not guarantee that every attendee will have the same interface on November 5. Demonstrate the combined experience available in your organization. If separate Chat or Cowork controls still appear, use them without implying that users must rebuild their work from scratch. If context does not carry forward, attach the approved references and restate the instructions. Office editing and delegated actions also depend on access and rollout.

Remember: Begin with the outcome, not the tool name. Explain what you need, confirm the context, review the result, and refine it. The combined experience connects the work, but you still control accuracy, permissions, and approval.

Plugins: Bring Specialized Capabilities into Copilot

Plugins provide a place to discover and access agents, skills, and connectors within the combined Copilot experience, where enabled. Instead of treating every request as a generic chat, use an approved capability that fits the work. What appears depends on your organization's permissions, licensing, connections, and rollout.

Understand What You Are Adding

- **Agents:** Specialized assistants for a particular purpose. Review the agent's description and approved use before relying on its output.
- **Skills:** Reusable instructions and expertise for a repeatable task. A skill can help standardize the structure and review rules for recurring deliverables.
- **Connectors:** Connections to approved information sources. A connection can make relevant information available, but it does not mean every user gains permission to every record.

A Practical Plugin Workflow

1. **Start with the outcome:** Decide whether you need information, a specialized analysis, or a repeatable deliverable.
2. **Find an approved capability:** Use Plugins, where available, to review the relevant agent, skill, or connector. Check its purpose and required access rather than selecting it only by name.
3. **Confirm the boundaries:** Identify the material it may use, the intended audience, and actions that require approval. Follow IT guidance for enabling or connecting anything new.
4. **Run a small supervised task:** Start with approved sample information and inspect the answer or file before expanding the workflow.
5. **Verify and refine:** Check facts, assumptions, missing inputs, and the actual deliverable. Specialized capabilities still require human review.

Illustrative Examples

Reusable reporting skill: Where skill creation is enabled, ask: "Create a leadership-update skill that uses Progress, Risks, Decisions Needed, and Next Steps. Use only the references supplied for each run; flag missing owners and dates. Return a draft for review." Test it with sample notes before sharing.

Finance/accounting capability: Where an approved finance capability is available, ask: "Compare the supplied budget and actual expenses. Show the calculation and source range for each variance, and flag unmapped categories." Review the formulas and mapping before using the narrative.

Legal capability: Use an approved sample document to identify clauses needing qualified review. Ask for relevant passages and questions, not a final legal judgment. Do not use confidential contracts in a class exercise without authorization.

Approved knowledge connection: Ask a process question using the connected material and request the supporting passage. Check whether the guidance is current and whether conflicting documents exist.

If Plugins is unavailable: Reference the approved files directly and use a saved prompt template. Do not imply that a prompt alone installs a connector or grants access.

Thinking Beyond "Ask Copilot a Question"

Earlier Copilot adoption in business environments often centered on simple, transactional prompts such as "write an email," "summarize this document," or "create a list." While helpful, this approach limited Copilot's value to surface-level productivity gains. As Copilot has matured, it now supports more complex business workflows by maintaining conversational context, working across Microsoft 365 apps, and transforming existing content instead of starting from scratch. Moving beyond introductory use requires a shift in mindset: Copilot is no longer just a prompt-response tool, but a collaborator that can assist with preparation, synthesis, and decision support.

- **Business Scenario:** A department manager prepares weekly updates for leadership using information scattered across emails, meeting notes, and spreadsheets.
- **Old Way (Manual + Early Copilot Use):**
  - Read emails and meeting notes manually
  - Copy key points into a Word document
  - Ask Copilot: *"Summarize this document"*
  - Rewrite sections for leadership tone
- **New Way (Beyond the Basics):**

- Use Copilot in Word and Teams to reference existing content:
  - *"Using last week's report, recent Teams meeting notes, and the latest Excel data, draft a one-page leadership update focusing on risks, progress, and next steps."*
- Refine with follow-up instructions instead of rewriting manually

This approach reflects how Copilot is now designed to work: across content you already own, with clearer direction and fewer repetitive steps.

General Mindset: From Simple Prompts to Workflow Thinking

Old Way (Early Copilot Use)	New Way (Beyond the Basics)
"Summarize this document."	"Create a one-page executive summary of this document highlighting key risks, decisions required, and next steps."
"Write an email about this."	"Draft a professional email to senior leadership explaining the issue, impact, and recommended action based on this content."
Treat Copilot as a one-question tool	Treat Copilot as a collaborator across multiple steps

Advanced Prompting for Business Outcomes

Role- and Outcome-Based Prompting

Basic Copilot prompts typically focused on tasks, leaving Copilot to guess the audience, tone, and level of detail. Today, stronger results come from framing prompts the same way professionals brief colleagues: by assigning a role and defining a desired outcome. This reduces ambiguity and improves the relevance of Copilot's output.

- **Business Scenario:** HR needs to communicate a policy change to employees.
- **Old Way Prompt:** "Rewrite this policy email."
- **Result:** A generic rewrite that may still sound formal, lengthy, or unclear.
- **New Way Prompt:** "Act as an HR communications specialist. Rewrite this policy update for all employees using clear, plain language, highlighting what is changing, when it takes effect, and what employees need to do differently."

Because Copilot understands the *role* and *goal*, the output aligns more closely with business expectations. Users spend less time editing and more time validating accuracy.

Using Existing Content as Context

Earlier Copilot workflows often required copying and pasting text into prompts or re-explaining background information. Modern Copilot usage relies on referencing content that already exists within Word, Outlook, Excel, or Teams. This allows Copilot to generate responses that are grounded in real business information without duplication.

- **Business Scenario:** A project manager needs to respond to a stakeholder asking for a status update.
- **Old Way:**
  - Read meeting notes
  - Open project spreadsheet
  - Manually summarize progress
  - Ask Copilot: *"Write a project update email"*
- **New Way:** In Outlook or Word, ask Copilot:

"Based on the last two Teams meetings and the current project tracker, draft a status update for the stakeholder summarizing progress, delays, and next milestones."

Copilot now pulls from multiple sources the user already has access to, producing a response that reflects actual project data rather than generic language.

Choose context deliberately: Reference the specific files, emails, or meetings available in your Copilot experience. Where enabled, use a Project for ongoing instructions and context, or a Workspace/Notebook for a shared workstream. Do not assume every new prompt automatically includes every source. Check which references are attached. Save recurring instructions as a Skill where available; otherwise keep a reusable prompt template.

Practice: One Combined Chat–Cowork Workflow

Illustrative activity: Use approved sample meeting notes and a project tracker—not confidential live records.

1. **Organize:** Where Projects is available, add the sample references and instructions: "Use only these sources. Separate confirmed facts from missing information. Never invent owners or dates." Otherwise attach the sources to one chat.
2. **Clarify and draft:** In the combined Copilot experience, ask: "Create a leadership update with Progress, Risks, Decisions Needed, and Next Steps. Identify the support for each point." Review the answer against the attached references before continuing.
3. **Refine a selection:** Select only the Risks portion of the response, then ask: "Make this shorter without losing the stated impact." If selection tools are unavailable, name the exact section. Use Try again or another approved model to compare results, then verify both versions against the references.
4. **Reuse:** Where Skill creation is enabled, ask: "Create a reusable leadership-update skill using this structure and source-verification rule." Otherwise save the approved prompt. Check what information will be reused before sharing the skill or chat.
5. **Build on the verified result:** "Using this reviewed summary and the approved references, prepare a Word leadership update and draft stakeholder email. Flag gaps and return both for review. Do not send anything." Use any delegated-task controls shown in your interface. If a new task opens, confirm its

references and instructions; reattach or restate them if needed. Review effort, cost, and the resulting files where available.

Optional automation: After a supervised run succeeds, define a weekly draft-only update in Automations, where enabled. Review its sources, trigger, permissions, cost, and stop/pause controls before activation. If unavailable, run the approved prompt manually.

Adding Constraints for Better Output

Early Copilot responses often required significant manual editing because they were too long, too detailed, or written for the wrong audience. Experienced users now include constraints directly in their prompts to guide the format and tone from the start.

- **Business Scenario:** An operations leader needs quick talking points for an executive meeting.
- **Old Way Prompt:** "Summarize this report."
- **New Way Prompt:** "Summarize this report into five executive-level bullet points focused on operational risks, financial impact, and decisions needed this quarter."

By defining length, audience, and focus areas, Copilot produces content that is closer to "presentation-ready," reducing rework.

Iterative Refinement as a Normal Workflow

Many early users expected Copilot to deliver a finished product with a single prompt. Modern usage embraces iteration, using follow-up instructions to refine output just as one would with a colleague.

Business Scenario: A manager drafts a performance summary.

Step-by-Step (New Way):

1. Initial prompt:

"Draft a performance summary based on this review document."

2. Follow-up:

"Make the tone more balanced and constructive."

3. Additional refinement:

"Shorten this to one page and highlight strengths before improvement areas."

Copilot retains context throughout the conversation, making refinement faster and more natural than rewriting from scratch.

Advanced Prompting: Role & Outcome Based

Scenario	Old Way Prompt	New Way Prompt
Writing a report	"Write a report on last quarter."	"Act as a business analyst. Write a quarterly performance summary for leadership focusing on outcomes, risks, and recommendations."
Drafting a policy message	"Rewrite this policy."	"Act as an HR communications specialist. Rewrite this policy in plain language for employees, highlighting what's changing and what actions are required."

✅ **Why This Matters:**
The new approach reduces generic content and produces output aligned with business expectations.

Using Existing Content as Context

Scenario	Old Way	New Way
Status update	Copy content from emails and notes into a prompt	Refer directly to existing files, notes, and data
Prompt Example	"Write a project status update."	"Based on last week's Teams meeting notes and the current project tracker, draft a status update highlighting progress, blockers, and next milestones."

✅ **What Changed:**
Copilot now works *with* your Microsoft 365 content instead of requiring you to restate it.

Working in the Copilot App Online

Make the Copilot app online your starting point for connected work. Begin with the outcome you need, bring in approved references, and use the conversation to clarify, draft, and refine. Where Office in Copilot is enabled, create or update an editable Word document, Excel workbook, or PowerPoint presentation alongside the conversation. Use the individual apps for additional review and supported editing rather than treating each app as a separate starting point.

Start Online: One Connected Workflow

1. **Find or start the work:** Open your organization's Copilot app in the browser with your work account. Return to the relevant conversation or Project where available.
2. **Confirm context:** Reference the approved files, emails, chats, or meetings available to you. Check which sources the task is actually using; do not assume all prior context carries forward.
3. **Describe the finished result:** State the audience, deliverables, required sections, format, and boundaries. Use Chat to clarify or refine; use Cowork for a defined multi-step assignment where available. Confirm its sources if a new task opens.
4. **Refine in the same workflow:** Ask for a focused change, such as shortening Risks or tailoring the draft for leadership. For recurring work, reuse a Project's instructions or an approved Skill where enabled.

5. **Review before reuse:** Open the actual output, verify sources and figures, and inspect formatting. Review messages, recipients, and consequential actions before approving them.

Illustrative connected prompt: "Using these approved meeting notes and the current tracker, summarize confirmed progress and risks, then prepare a Word leadership update and a draft stakeholder email. Include Decisions Needed and Next Steps. Flag missing owners or dates. Return both for review; do not send or assign anything."

Availability: Home navigation, Projects, Skills, delegated actions, and Office editing depend on rollout, licensing, and organizational settings. Use the experience shown in your tenant. If file editing is unavailable, request a structured draft and finish it in the relevant app. Office in Copilot overview · October experience update

Word: Transforming and Standardizing Documents

Start in Copilot online with approved notes or an existing document. Where Office editing is enabled, request a Word brief and refine it alongside the conversation; open it in Word for final review.

Illustrative prompt: "Using these approved notes, prepare a Word leadership brief with Progress, Risks, Decisions Needed, and Next Steps. Preserve verified facts and flag gaps." Follow up: "Shorten Risks without losing the stated impact."

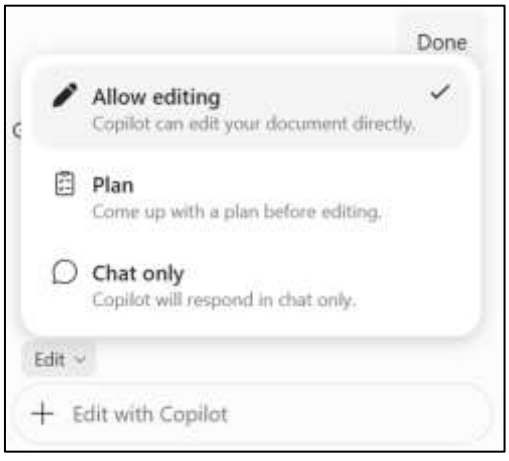
Review: Check the actual document, source support, names, dates, and commitments. If online file editing is unavailable, request the same structure as a draft and finish it in Word.

Excel: From Explaining Data to Explaining Meaning

In Copilot online, reference the approved workbook and define the business question before requesting an analysis or editable Excel output, where supported. **Illustrative prompt:** "Compare Budget and Actual expenses by category. Show the supporting values and calculations, flag missing mappings, and prepare an Excel variance report for review. Do not change source values."

When You Continue in Excel: Edit, Plan, or Chat

Edit: Use when you are ready for direct workbook changes, such as adding formulas or a chart. Name the source range and output location; review the changes in the workbook.

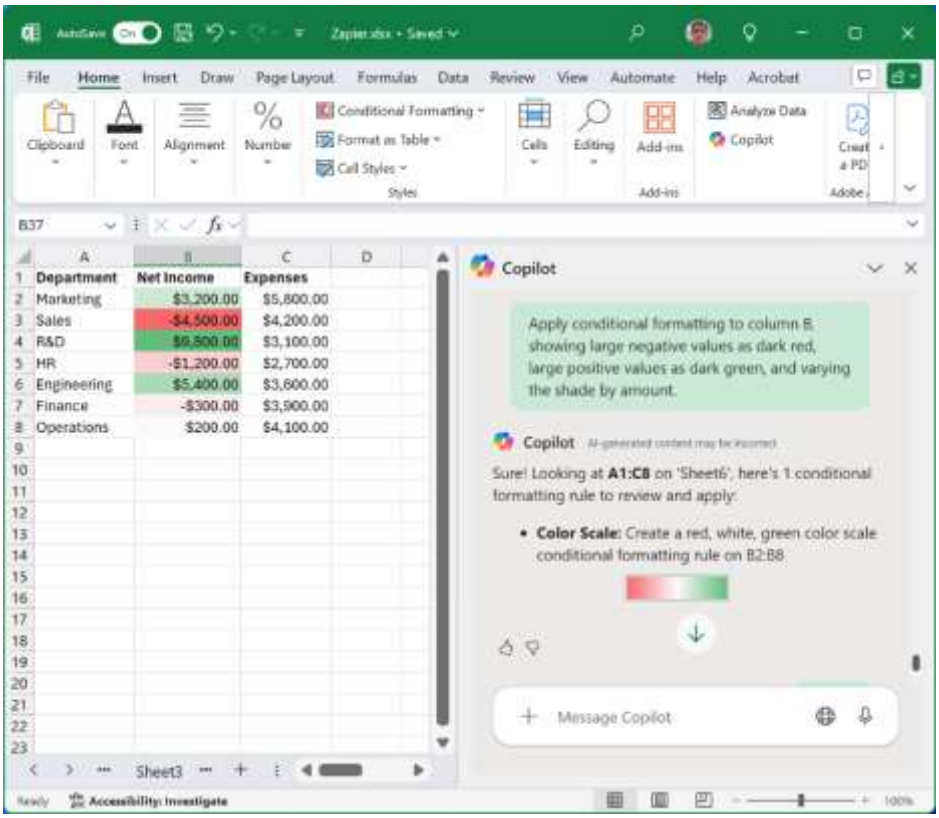


Plan: Use for complex or multi-sheet work when you want to review the approach before editing begins. Confirm the proposed calculations, assumptions, and outputs first.

Chat: Use to ask questions, explain formulas, or explore patterns without changing the workbook. Check supporting values before treating an answer as a finding.

These are Excel controls, not a guarantee of identical options in Copilot Home. Microsoft lists all three for Excel on Windows, Mac, and the web; access varies by environment. Excel mode guidance.

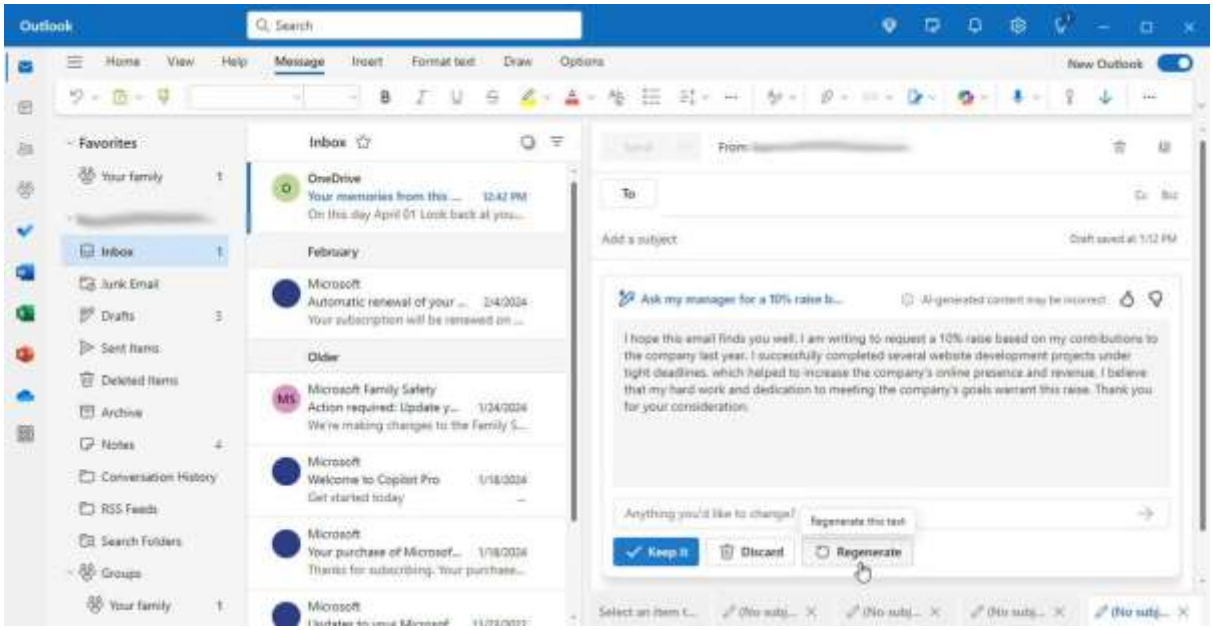
Review: Verify formulas, category mappings, units, filters, and totals against the source. Treat possible causes as hypotheses unless supported. Open the workbook to inspect the result before reusing its narrative.



Outlook: Reducing Information Overload

Start online: In Copilot, reference an approved email thread or ask about a clearly defined topic and date range, where work email access is enabled. Use the verified recap to prepare a reply rather than starting from a blank message.

Copilot's value in communication tools has expanded from drafting messages to managing information volume—helping professionals keep up when the pace of email, meetings, and chat outstrips the time available to read everything. Instead of only generating a reply, Copilot can summarize long threads, surface the key decisions and open questions, extract action items, and highlight what requires attention now versus what can wait. This enables faster catch-up after PTO, fewer missed commitments, and more consistent follow-through because updates and responses are grounded in a clear recap of what actually happened. In practice, Copilot becomes an information filter that supports prioritization, continuity, and cleaner handoffs—not just a faster way to write.

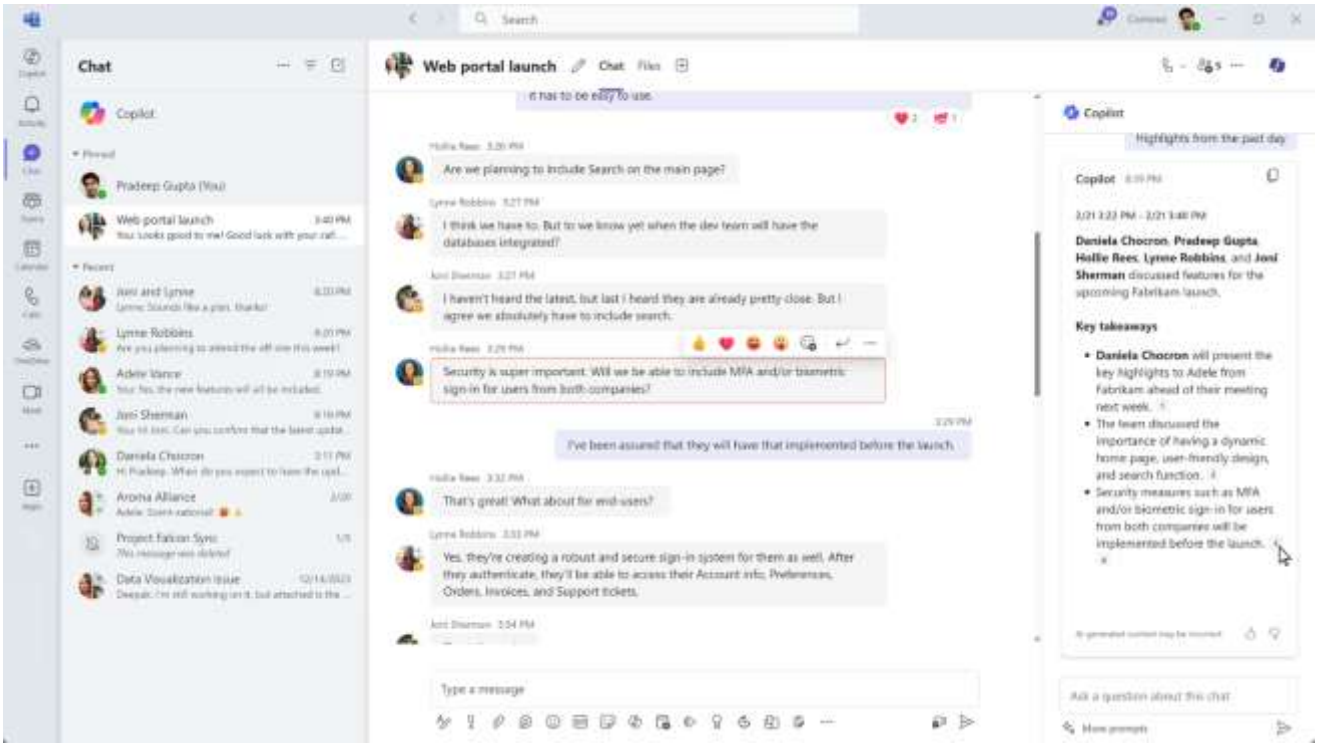


Illustrative prompt: "Using this approved thread, summarize decisions, open questions, and actions with owners and dates only when stated. Draft a concise stakeholder reply. Do not send." **Review:** Check the original messages, recipients, attachments, and commitments; open Outlook for final review and sending. If email access is unavailable, use an approved excerpt without sensitive details.

Teams: Turn Conversations into Verified Next Steps

Use Copilot online to bring available Teams meeting or conversation context into the same workflow as your documents and email drafts. Identify the exact meeting, chat, channel, and period; confirm the sources returned before requesting a handoff.

- **Action extraction:** "What actions were assigned to me this week across chats/meetings? List them with due dates if mentioned."



Illustrative prompt: "Using this approved meeting and tracker, list confirmed decisions, unresolved questions, and actions. Include owners and dates only when stated, identify supporting content, and draft a leadership update. Do not create or assign tasks."

Review: Compare the recap with the available meeting record. Review proposed Planner tasks before creating or assigning them. If online access to the meeting is unavailable, supply approved notes and transfer the verified actions manually.

PowerPoint: Branded and Interactive Leadership Briefings

In Copilot online, turn the reviewed brief and verified analysis into a presentation where Office creation is enabled. Specify the audience, key messages, and approved template; refine the resulting deck alongside the conversation.

Illustrative prompt: "Using this reviewed leadership brief and verified expense analysis, create a short PowerPoint briefing in the approved template. Use one key message per slide, preserve figures, identify source support, and flag gaps." Follow up: "Shorten the Risks slide without changing its meaning."

Review: Open the actual deck and check figures, branding, slide order, readability, and presentation behavior. If online file creation is unavailable, request a slide-by-slide outline and finish it in PowerPoint.

Practical Business Scenarios

Copilot is most impactful when applied to repeatable business tasks such as status reporting, policy communication, meeting preparation, and customer communication. In these scenarios, Copilot accelerates drafting, synthesis, and formatting while leaving judgment and accountability with the user. The difference between early and advanced Copilot use is not *using it more*, but *using it more intentionally*.

Below are examples of high-value, repeatable scenarios where Copilot can help teams move faster while maintaining quality and consistency:

- **Status reporting (weekly/monthly updates):** Compile progress, blockers, and next steps into a consistent format.
  Prompt: "Using this week's meeting notes and the project tracker, draft a 1-page status update for leadership with sections for Progress, Risks/Blockers, Decisions Needed, and Next Week."
- **Meeting preparation (agenda + talking points):** Build an agenda that aligns to outcomes and time constraints.
  Prompt: "Create a 30-minute agenda for a stakeholder sync on Project X. Include goal, timeboxes, required decisions, and 3 concise talking points per topic."
- **Meeting recap (decisions and actions):** Turn notes/transcripts into a decision log and task list.
  Prompt: "Summarize this meeting focusing on decisions made, open questions, and action items (owner + due date if stated). Format as a bulleted list."
- **Policy and process communication:** Translate formal policy language into clear employee-ready messaging.
  Prompt: "Rewrite this policy update for all employees in plain language. Include: what's changing, effective date, who it impacts, what to do next, and where to get help."
- **Customer/client communications:** Draft responses that are accurate, concise, and aligned with brand tone.
  Prompt: "Draft a customer email acknowledging the issue, summarizing what we know, providing the next

update time, and listing any recommended customer actions. Keep it under 150 words and use a calm, professional tone."

- **Project updates across channels:** Reuse a single source of truth while tailoring to different audiences. **Prompt:** "Turn this detailed project update into (1) a 5-bullet executive summary, (2) a Teams channel post under 80 words, and (3) a stakeholder email with a clear call to action."
- **Risk/issues tracking:** Convert notes into a structured risk log for follow-up and accountability. **Prompt:** "From these notes, extract risks and issues. For each, provide description, impact, likelihood (low/medium/high), owner (if mentioned), and recommended mitigation."

Final Conclusion

Moving beyond the basics means starting with a business outcome—not an isolated prompt or a particular app. Use the Copilot app online to bring approved context together, clarify the task, and refine the result. Use Cowork for defined, multi-step assignments, with clear deliverables, boundaries, and review checkpoints. Projects and Skills can support continuity and repeatable standards where available; automation comes after a supervised workflow has been tested. Whether the result is a brief, workbook, presentation, or communication draft, review the actual output and its supporting sources. Copilot helps move the work forward; you remain responsible for accuracy, permissions, and final approval.

Next Steps

Choose one recurring task and practice the full online workflow: confirm the sources, define the result, delegate or draft, review, and refine. Use approved, nonsensitive sample material first. Build a repeatable routine before expanding to additional deliverables or automation.

- **Start online:** Choose a leadership update, meeting-preparation package, or policy communication kit. Confirm which Copilot capabilities are available and prepare a manual fallback.
- **Write a clear brief:** Name the audience, deliverables, references, reporting period, format, and action boundaries. Tell Copilot to flag gaps rather than invent missing details.
- **Practice Cowork:** Delegate one defined, multi-step assignment where available. Confirm its context, inspect every requested output, and use a focused follow-up to improve the result.
- **Validate before sharing:** Check source support, figures, formulas, names, dates, recipients, and commitments. Keep sending, publishing, scheduling, and assignments under deliberate human approval.
- **Reuse, then automate carefully:** Save the approved prompt or Skill and use a Project for ongoing context where enabled. Test a supervised run before configuring automation; confirm triggers, access, cost, review, and stop controls.

Key Takeaways

Use these principles to make Copilot part of a repeatable business workflow:

- **Outcome first:** Define the finished result, audience, and constraints before choosing how to work.

- **Start in Copilot online:** Bring related work together; use the individual Office apps for additional review and editing as needed.
- **Context is deliberate:** Confirm approved references and current versions. Shared history does not guarantee that every task inherits every source.
- **Clarify, delegate, refine:** Use Chat for conversational work and Cowork for defined multi-step assignments where available. Review and improve the returned outputs.
- **Make good work repeatable:** Reuse approved prompts, Projects, and Skills where enabled. Treat recurring automation as a separate configuration and review decision.
- **Keep control:** Verify facts and actual files, protect sensitive material, and approve consequential actions deliberately. Availability varies; retain a workable fallback.

Final Key Takeaways

Your Approach	What to Aim For
Define the outcome and confirm approved context	A focused draft grounded in the right sources
Brief Cowork with deliverables, constraints, and boundaries	Multi-step work returned for inspection and refinement
Review actual outputs and request targeted changes	Verified facts and consistent messages across deliverables
Reuse tested instructions; review automation separately	A repeatable workflow with human oversight