

Microsoft Copilot Workflow Guide

A practical step-by-step guide for writing better prompts, summarizing information, recapping Teams meetings, and automating Excel analysis.

Purpose

This guide helps users learn Microsoft Copilot in a practical way so they can streamline daily work, reduce manual effort, and use AI more confidently across Microsoft 365 apps. The focus areas are prompt writing, document and email summaries, Teams meeting recaps, and Excel data analysis.

Before You Start

1. Confirm you are signed in with your Microsoft 365 work or school account.
2. Open the app where the work is happening, such as Word, Outlook, Teams, Excel, or Copilot Chat.
3. Make sure the file, email thread, meeting recap, or spreadsheet you want Copilot to use is available and accessible.
4. Decide what output you need before prompting Copilot: summary, action items, table, checklist, email draft, analysis, or next steps.
5. Review Copilot's response for accuracy before sharing or using it for decisions.

Step 1: Write Better Prompts

A strong prompt gives Copilot clear direction. Microsoft guidance emphasizes using clear goals, useful context, expectations, and source material so Copilot can produce more relevant results.

1. **Start with the goal:** Tell Copilot exactly what you want it to do, such as summarize, rewrite, analyze, compare, draft, or create.
2. **Add context:** Explain the situation, audience, purpose, deadline, or business need.
3. **Set expectations:** Specify tone, length, format, level of detail, and any must-have sections.
4. **Point to the source:** Reference the document, email thread, meeting, table, or file Copilot should use.
5. **Refine the output:** Ask follow-up questions such as “make it shorter,” “turn this into bullets,” or “add action items and owners.”

Prompt template: “Using [source], create [output] for [audience]. Focus on [key topics]. Use a [tone] tone and format it as [format]. Include [specific details] and keep it to [length].”

Step 2: Summarize Lengthy Documents

1. Open the document in Word or access it through Copilot Chat.
2. Ask Copilot for a summary that matches your purpose, such as executive overview, training notes, risks, or action items.
3. Request structure so the output is easy to use, such as headings, bullets, table format, or checklist format.
4. Ask Copilot to extract specific items, such as key dates, owners, decisions, requirements, or follow-up tasks.
5. Verify the summary against the original document before using it in meetings, reports, or emails.

Example prompt: “Summarize this document into five bullet points for a training coordinator. Include key requirements, deadlines, risks, and next steps. Keep the tone professional and practical.”

Step 3: Summarize Long Email Threads

1. Open Outlook and select the email thread you want to review.
2. Ask Copilot to summarize the thread with emphasis on decisions, action items, and unresolved questions.
3. Request a concise version if you only need the main points.
4. Ask Copilot to identify who needs to respond, what is due, and any deadlines mentioned.
5. Use the summary to draft a reply, follow-up email, or task list.

Example prompt: “Summarize this email thread. List the main topic, decisions made, open questions, action items, owners, and due dates. Keep it brief and easy to scan.”

Step 4: Recap Teams Meetings

1. Open Teams and go to the meeting chat, recap, or transcript if available.
2. Ask Copilot for a recap focused on the outcome you need, such as decisions, tasks, blockers, or follow-up owners.
3. Request a short version for quick updates or a detailed version for documentation.
4. Ask Copilot to separate completed items from open action items.
5. Send the recap to stakeholders or convert the action items into a task tracker.

Example prompt: “Recap this Teams meeting. Include key discussion points, decisions, action items, owners, due dates, and any risks or blockers. Format the action items as a table.”

Step 5: Automate Data Analysis in Excel

1. Open the Excel workbook and make sure the data is organized in a clean table with clear column headers.
2. Ask Copilot to explain the dataset before requesting deeper analysis.
3. Prompt Copilot to identify trends, outliers, missing values, duplicates, or performance changes.
4. Ask for formulas, pivot table suggestions, or chart recommendations based on the data.
5. Request a plain-language summary that explains what the numbers mean and what action should be taken next.

Example prompt: “Analyze this table and identify the top trends, exceptions, and possible causes. Recommend three practical next steps and show any useful formulas or pivot table ideas.”

Step 6: Build a Repeatable Copilot Routine

- **Daily:** Use Copilot Chat to catch up on unread emails, missed meetings, and recent project updates.
- **Before meetings:** Ask Copilot to summarize related emails, files, and previous meeting notes.
- **After meetings:** Generate a recap with action items, owners, and due dates.
- **Weekly:** Use Copilot to summarize progress, open risks, completed tasks, and next priorities.
- **Monthly:** Review prompt examples that worked well and save them as reusable templates.

Core Copilot Features Users Search For

The most common Copilot tutorial searches are focused on practical workflow improvement. Users want to understand how Copilot can act as a central work hub, stay connected to Microsoft 365 apps, and support more advanced productivity through notebooks and custom AI agents.

1. Copilot Chat & Enterprise Search

Users frequently want to know how to use Copilot as a central hub for work. Copilot Chat can help users pull together information from files, meetings, emails, and the web when the right context is provided.

- **Attaching files:** Use the forward slash (/) in the prompt bar when available to quickly search for and reference specific OneDrive or SharePoint documents for analysis.
- **Web search grounding:** Ask Copilot to research a topic using web results and provide citations so users can trace information back to the source.
- **Thought partnering:** Use Copilot as a sounding board to brainstorm, compare options, stress-test ideas, and identify gaps before presenting or acting.

Example prompt: “Use / to reference the project file, then summarize the key risks, decisions, and next steps. If more context is needed, suggest what file or meeting notes I should add.”

2. Copilot in Microsoft 365 Apps

Many users want Copilot to stay in the flow of daily work across Word, Outlook, Teams, Excel, and PowerPoint. The goal is to reduce switching between tools while creating useful outputs faster.

- **Word & Outlook:** Brainstorm taglines, summarize long email threads, rewrite content, and draft professional responses.
- **Teams:** Catch up on missed meetings by asking for recaps, key topics, decisions, and assigned action items without listening to full recordings.
- **Excel & PowerPoint:** Automate data formatting, request formulas such as XLOOKUP or nested IF statements, analyze tables, and transform plain text into visually structured presentation content.

Example prompt: “Turn these notes into a professional three-slide presentation outline with a title slide, key findings slide, and next steps slide.”

3. Notebooks and Custom AI Agents

Advanced users are exploring productivity workflows that go beyond one-time prompts. These include collecting related context into notebooks and building reusable AI agents for repetitive work.

- **Notebooks:** Gather chats, meetings, and files in one place to generate summaries, mind maps, structured notes, or audio-style overviews.
- **Copilot Agents:** Build and deploy custom or ready-to-use agents through Copilot Studio to handle specific repeatable workflows without writing code.
- **Best use cases:** Create agents for common internal questions, onboarding support, policy lookup, training support, meeting preparation, or recurring report generation.

Example prompt: “Create an agent concept for a training support assistant. It should answer questions from training files, suggest next steps, and provide links to the right internal resources when available.”

Quick Reference: Best Copilot Prompts

Task	Prompt to Try
Write better prompts	“Improve this prompt so it gives Copilot a clear goal, context, format, and source.”
Summarize a document	“Summarize this document for leadership in five bullets and include action items.”
Summarize emails	“Summarize this thread and identify decisions, open questions, owners, and deadlines.”
Recap a Teams meeting	“Create a meeting recap with key points, decisions, action items, owners, and due dates.”
Analyze Excel data	“Analyze this table for trends, outliers, and recommended next actions.”

Prompt Gallery: Microsoft-Suggested Prompts

Use this prompt gallery as a quick-start library for common Copilot tasks. Replace the bracketed placeholders with your specific topic, file, person, message, time range, or business need.

Prompt Name	Prompt	Source
Ace your work habits	In the style of a [tennis] coach, help me improve my performance and habits by looking over my recent work and communications.	Microsoft suggested
Adjust message tone	Adjust the tone of this message to be more empathetic and supportive without losing clarity. Message: [message]	Microsoft suggested
Agenda and attendees	What’s the agenda for /event meeting, and who are the attendees?	Microsoft suggested
AI vs. manual comparison	Compare the advantages of using AI tools versus manual analysis for [purpose].	Microsoft suggested
Analyze chat decisions	Analyze my recent chat history with /person and highlight decisions made.	Microsoft suggested
Answer questions from file	Provide answers to the questions mentioned in /file.	Microsoft suggested

System stability best practices	Recommend best practices for maintaining [system/tool] stability.	Microsoft suggested
Boost your productivity	How can Copilot help me be more productive at work?	Microsoft suggested
Brainstorm ideas	Brainstorm 10 innovative ways to improve [process/product/service].	Microsoft suggested
Break down simply	Break down complex concepts in /file into beginner-friendly steps.	Microsoft suggested
Build team trust	Suggest ways to build [trust] quickly with a new team.	Microsoft suggested
Calendar events summary	Provide a summary of my calendar events from [time1] to [time2], including the times, topics, and the importance level of each event.	Microsoft suggested
Track what's important	Summarize messages from my manager in the last 48 hours.	Microsoft suggested
Catch up on what I missed	Summarize key updates occurring in the last [number] of days from emails, chats, and meetings while I was out.	Microsoft suggested
Character limit reduction	Reduce this text to under [200] characters while keeping all essential information clear and impactful: [text].	Microsoft suggested
Coach team members	Give me some tips for helping my team self-advocate.	Microsoft suggested

Best Practices

- Be specific about the result you want.
- Use follow-up prompts to improve the first response.
- Ask for tables, bullets, or checklists when you need fast scanning.
- Provide audience and tone so the response fits the situation.
- Do not rely on Copilot without reviewing the source content and validating the output.
- Avoid entering sensitive information unless it is appropriate for your organization's data policies.