

PRACTICAL GUIDE

Using Microsoft Copilot & Effective Prompting in Daily Work

A step-by-step reference for getting accurate, useful results, with workplace examples for office and operations teams.

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What's inside this guide

Five parts. Read start to finish or jump to the part you need today.

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Getting oriented

What Copilot is, where it lives, and what it can and can't do.

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Goal, Context, Format, Constraints, Review. The core habit.

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30 ready-to-use prompt templates, plus a 30-day ramp.

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One assistant, inside the apps you already use

Same assistant, different context. What it can see changes with where you open it.

Teams

Recap a meeting you missed, pull out decisions and action items.

Outlook

Summarize a long thread, draft a reply, catch what you owe people.

Word

Draft an SOP, tighten a report, rewrite for a different audience.

Excel

Explain a formula, spot trends in training or downtime data.

PowerPoint

Turn a document into a deck, or shorten a deck for a toolbox talk.

Copilot Chat

Open questions, brainstorming, rewriting. Your general workspace.

Rule of thumb: open Copilot inside the app that holds the information. It can only work with what it can see.

What it does well, and where you stay in charge

Copilot drafts and summarizes. Judgment, approval, and accuracy remain yours.

Strong at

- Summarizing long documents, threads, and meetings
- First drafts: emails, SOPs, agendas, training outlines
- Rewriting for tone, length, or reading level
- Explaining a formula, a policy, or a technical step
- Comparing and organizing information you give it

Your job, not its job

- Confirming facts, names, dates, and numbers
- Anything safety-critical or compliance-related
- Decisions about people, discipline, or pay
- Keeping confidential data out of unapproved tools
- The final wording that goes out with your name on it

If you would not send it without reading it, don't send it without reading it.

Before you start: four ground rules

Set these once and the rest of the guide stays simple.

1

Use the approved, work-signed-in version

Signing in with your work account keeps prompts inside company protection.

2

Never paste what you wouldn't email

No personal records, medical details, passwords, or customer data.

3

Treat every output as a draft

It is a starting point for your judgment, not a finished answer.

4

Verify anything with a number or a name

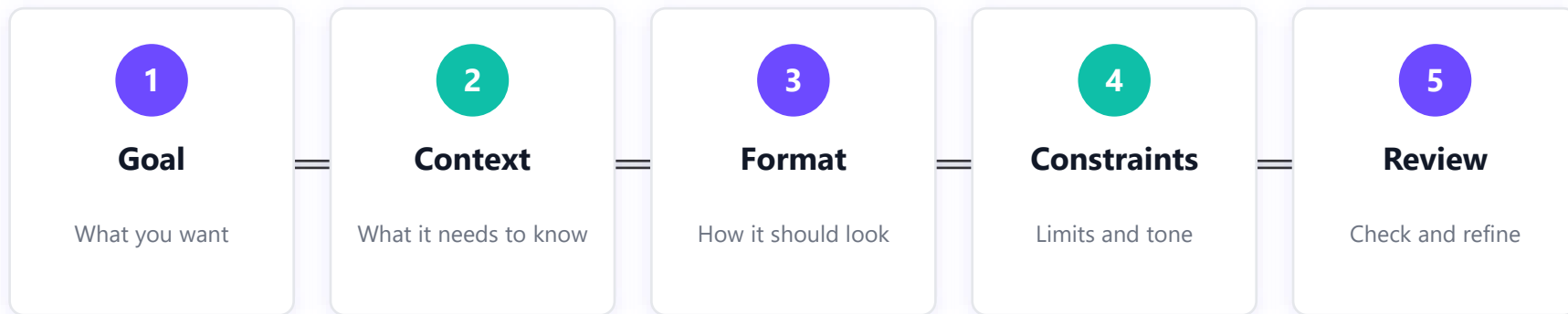
Check it against the source system or document before it goes out.



Copilot works best as a shared habit. Compare prompts with your team and reuse what works.

The five-step method: what every good prompt does

Miss one and the output drifts. Do all five and quality jumps on the first try.



Say it out loud as one sentence

"Write a short email (goal) to my shift supervisors about Tuesday's lockout/tagout refresher (context), as five bullets plus a one-line ask (format), under 120 words, plain and direct (constraints). Then I'll check the date and names against the schedule (review)."

Step 1. Say exactly what you want produced

Name the deliverable and the verb. Vague asks get vague answers.

WEAK PROMPT

Help me with training.

STRONGER PROMPT

Write a one-page summary of our Q3 forklift safety training for the plant manager.

Why it works: The strong version names the output (one-page summary), the subject (Q3 forklift safety training), and the reader (plant manager).

1 STEP 1 Goal

- Start with a verb: write, summarize, compare, list, explain, rewrite.
- Name the artifact: email, agenda, checklist, table, talking points.
- Name the reader: new hires, supervisors, auditors, leadership.
- One goal per prompt. Split multi-part asks into separate turns.

Step 2. Give it the background only you have

Copilot doesn't know your plant, your people, or last week's incident unless you tell it.

WEAK PROMPT

Write a reminder about the training.

STRONGER PROMPT

Write a reminder about Thursday's confined-space refresher. Audience is 22 maintenance techs across north and south zone; attendance last session was 60%, so emphasize that this one is mandatory.

Why it works: Audience, size, timing, and the problem you're solving are the details that change the output.

2 STEP 2 Context

- Attach or reference the real file, meeting, or email thread.
- State the audience and their level of knowledge.
- Say what happened before and what outcome you need.
- Include the constraints of your site, shift patterns, languages, access.

Step 3. Describe the shape of the answer

If you don't specify a format, you'll get paragraphs, and then you'll reformat them yourself.

WEAK PROMPT

Give me the key points from this report.

STRONGER PROMPT

Give me the key points from this report as a table with three columns:
Finding, Risk level, Recommended action. Maximum eight rows.

Why it works: Structure requested up front is structure you don't have to build by hand afterwards.

3

STEP 3

Format

- Ask for a table, numbered steps, bullets, or a short paragraph.
- Set the length: word count, number of bullets, number of rows.
- Name the columns or headings you want.
- Ask for a one-line summary at the top when others will skim it.

Step 4. Set the tone, the limits, and what to leave out

Constraints are how you get something you can actually send without rewriting.

WEAK PROMPT

Make it sound professional.

STRONGER PROMPT

Keep it under 150 words, plain language at an 8th-grade reading level, direct and respectful. No jargon, no exclamation points, and don't invent any dates.

Why it works: "Professional" means something different to everyone. Measurable limits are repeatable.



STEP 4

Constraints

- Give a word or time limit. It forces the point to the top.
- Name the reading level for frontline or multilingual audiences.
- Say what to exclude as clearly as what to include.
- Add "only use the information I provided" when accuracy matters.

Step 5. Read it critically, then push it one step further

The first output is a draft. The second or third is what you send.

WEAK PROMPT

(accepting the first draft as-is)

STRONGER PROMPT

Good start. Make it 40% shorter, move the deadline to the first line, and add one sentence on who to contact with questions.

Why it works: Specific follow-ups improve output far faster than rewriting the original prompt from scratch.

5 STEP 5 Review

- Check every name, number, date, and policy reference against the source.
- Ask it what it assumed, then correct the assumptions.
- Change one thing per follow-up so you can see what improved.
- Save prompts that worked; reuse them as your own templates.

The prompt formula, colour-coded

One sentence can carry all five parts. Here is the same prompt, taken apart.

Draft a 10-minute toolbox talk on hand-injury prevention for west-zone blow mold operators, after two near-misses in August, as a numbered outline with a 3-question quiz at the end, plain language, under 400 words, no new statistics.

GOAL

The deliverable and the action verb.

CONTEXT

Who it's for, what happened, which site or crew.

FORMAT

Structure, length, and any sections you need.

CONSTRAINTS

Tone, word limit, and what it must not do.

Worked example 1. A shift-change email

Same task, two prompts. Compare what each one gives you back.

Prompt A

Write an email about the schedule change.

Result: three generic paragraphs with placeholder brackets, wrong tone for the crew, and no clear action. About 10 minutes of rewriting.

Prompt B

Write an email to 40 north-zone maintenance techs telling them the Tuesday 6 a.m. safety huddle moves to 6:30 a.m. starting Oct 6. Keep it under 100 words, plain and friendly, end with one line on who to contact. Don't invent any other schedule changes.

Result: a send-ready note with the change in line one, the date stated once, and a clear contact. About 1 minute of checking.

The difference is not clever wording. It is the audience, the date, the limit, and the one thing it must not do.

Worked example 2. Turning a meeting into action items

A recap is only useful if it tells people what they now owe.

	Basic prompt	Five-step prompt
Ask	"Summarize today's zone coordination meeting."	"From today's zone coordination meeting, list the decisions made, then a table of action items with owner and due date. Flag anything where no owner was named."
What you get	A paragraph of discussion, no clear owners.	A decision list plus an owner/due-date table, with gaps flagged for you to chase.
What you still do	Re-read the transcript to find commitments.	Confirm the flagged items and send.

Tip: open Copilot in the meeting itself. Asking in chat afterwards without the transcript gives it nothing to work from.

Worked example 3. A monthly report in four moves

One task, broken into a short chain of prompts instead of one giant request.

1 In Excel

Pull the numbers

"From this attendance sheet, show completion rate by zone and by course for September."

2 Follow up

Check the story

"Which two courses dropped the most versus August, and by how much?"

3 In Word

Draft the write-up

"Write a one-page summary of these results for the plant manager: what improved, what slipped, and two recommended actions."

4 In PowerPoint

Make it presentable

"Turn that summary into five slides: one headline, three findings, one next-steps slide."

Chaining beats cramming: each step is easy to check, and a wrong turn costs you one prompt instead of the whole report.

Six prompt patterns worth memorizing

Copy the phrasing, swap in your own subject.

Act as

"Act as a safety trainer reviewing this SOP for a new hire."

Only use this

"Only use the attached document. If it isn't there, say so."

Show your assumptions

"List what you assumed before giving me the draft."

Give me options

"Give three versions: formal, plain, and very short."

Explain it back

"Explain this formula step by step as if I'm new to Excel."

Critique it

"What's missing or unclear in this draft for a frontline reader?"

Combine them freely, "act as" plus "only use this" is the safest pairing for policy and SOP work.

When the answer isn't right, say what to change

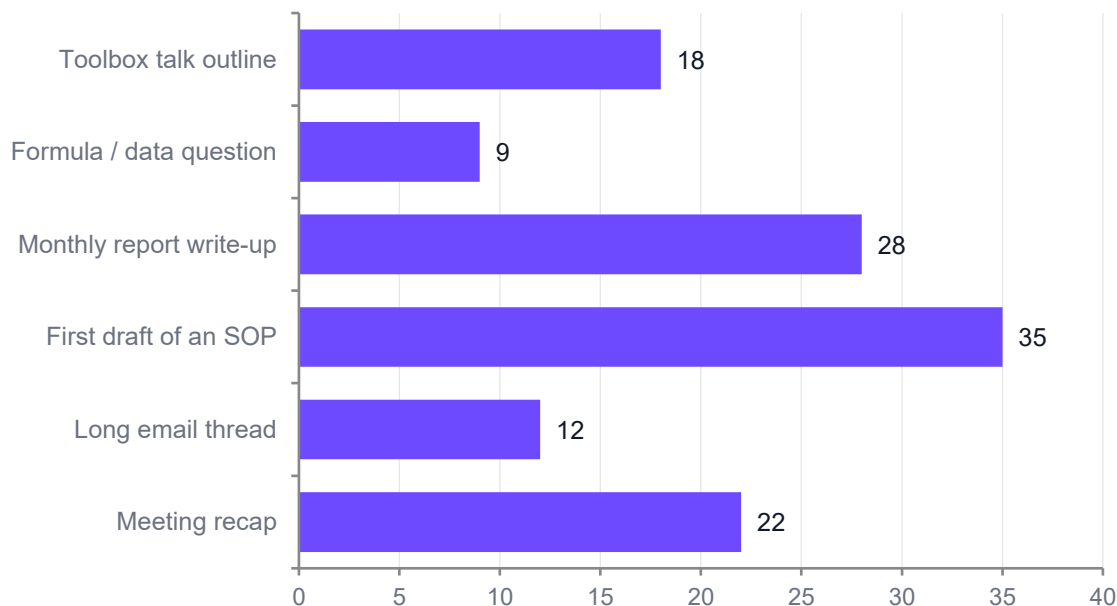
Don't start over. These follow-ups fix most problems in one turn.

If the output is...	Say this next
Too long or padded	"Cut this to 100 words. Keep only the decision and the deadline."
Too generic	"Rewrite using only the details in the attached file. Remove anything general."
Wrong tone	"Make it direct and warm, the way a supervisor talks to their crew."
Missing something	"Add a line on who to contact and what happens if someone can't attend."
Numbers look off	"Where did each figure come from? Quote the source line for each one."
Not sure it's right	"What are you least confident about here, and what should I verify?"

Change one thing at a time. That way you learn which instruction actually made the difference.

Where the time actually goes back into your week

Typical time saved per task once the five-step habit is in place. Treat as a planning guide, not a promise.



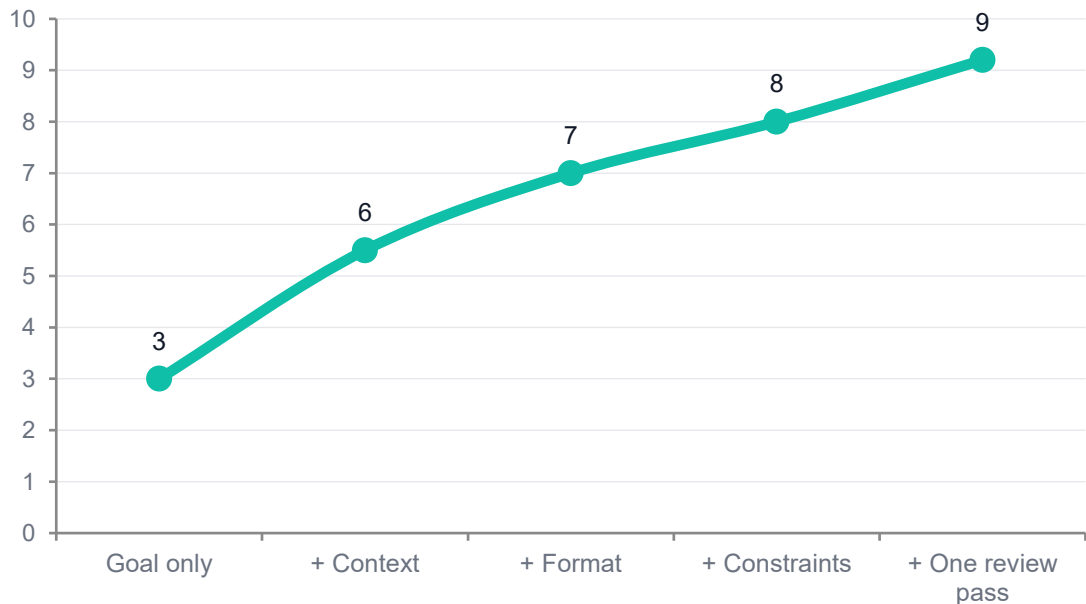
How to read this

- The biggest wins are on tasks that start from a blank page.
- Quick lookups save less. Use Copilot there for confidence, not speed.
- Savings only hold if the prompt is good; a bad prompt costs you the rewrite.

Illustrative planning figures based on typical task lengths. Measure your own before and after.

Output quality climbs with each element you add

The jump comes from context and format, not from longer prompts.



Goal only

It answers something, rarely the thing you needed.

Add context

The single biggest jump. Your details are what it lacks.

Add format and limits

Turns a usable answer into a sendable one.

Review once

Closes the last gap: accuracy, names, and your voice.

Illustrative scale based on how much rework each version needs before it can be sent.

The 60-second accuracy check before you send

Run this every time. It is the difference between a helpful tool and an expensive mistake.



Names and titles

Spelled right, current role, right person for the ask.



Dates and times

Cross-check against the schedule or calendar, not the draft.



Numbers and rates

Trace each one back to the sheet or system it came from.



Policy and procedure

Quote the live document, never a summarized version of it.



Tone for the reader

Would you say it this way face to face on the floor?



Nothing confidential

No personal, medical, customer, or restricted detail included.

You are the author. Copilot is the drafting help. Your name is still the one on the message.

Six mistakes that make Copilot look useless

Almost every disappointing result traces back to one of these.

Mistake	Fix
Asking a one-line question and expecting a finished document	Add goal, context, format, and limits. Four extra lines, different result.
Not attaching the file you're asking about	Reference the document, meeting, or thread directly so it has something to read.
Cramming five requests into one prompt	Chain them. One ask per turn, checked as you go.
Accepting the first draft without reading it	Treat every output as a draft from a fast but unfamiliar colleague.
Trusting numbers, names, or policy wording as given	Verify against the source system every single time.
Giving up after one bad answer	Say what was wrong. One targeted follow-up usually fixes it.

None of these are about the tool being weak. They are about the instructions being thin.

Prompt templates 1: everyday writing and email

Copy a template, replace the bracketed parts with your own details, and send.

Use it when...	Copy this prompt
Announce a change	"Write an email to [audience] about [what changed], starting [date]. Under 100 words."
Reply to a long thread	"Summarize this thread in three bullets, then draft a reply to [the open question]."
Chase an overdue item	"Draft a polite follow-up to [name] about [item], due [date]. Firm, not pushy."
Rewrite for the floor	"Rewrite this for [audience] at an 8th-grade reading level. No jargon."
Say no gracefully	"Draft a reply declining [request] because [reason]. Offer [alternative]."
Three versions at once	"Give me three versions of this message: formal, plain, and very short."

Keep the brackets while you edit. They are your reminder to add the detail only you have.

Prompt templates 2: meetings and follow-up

Use these inside the meeting or with the transcript attached, never from memory.

Use it when...	Copy this prompt
Recap a meeting you missed	"Summarize this meeting: decisions made, open questions, and who committed to what."
Pull out action items	"List action items as a table: task, owner, due date. Flag any with no owner."
Prepare an agenda	"Draft a 30-minute agenda for [purpose] with four topics and a time box each."
Brief a leader	"Write a five-line brief for [leader]: what was decided, what needs their call."
Catch up on a project	"From these notes and emails, tell me where [project] stands and what is blocked."
Write the follow-up note	"Draft a follow-up email with the decisions, the action table, and next meeting."

If Copilot cannot see the transcript or the file, it is guessing. Attach it first.

Prompt templates 3: training, SOPs and safety

Built for coordinator work. Always verify against the live procedure before use.

Use it when...	Copy this prompt
Draft a toolbox talk	"Draft a 10-minute toolbox talk on [topic] for [crew] as a numbered outline."
Turn an SOP into a checklist	"Turn this SOP into a checklist a new hire can follow. One action per line."
Build a quiz	"Write five multiple-choice questions on [topic], with an answer key."
Simplify a procedure	"Explain step [X] as if I am on day one. Short sentences, no acronyms."
Plan a session	"Outline a 60-minute session on [topic]: objectives, activities, knowledge check."
Write a refresher reminder	"Write a reminder for [course] on [date]. State that it is mandatory."

Never let a generated summary replace the approved document. Quote the live procedure.

Prompt templates 4: data, reporting and analysis

Keep these tight. Ask for one thing, check it, then ask for the next.

Use it when...	Copy this prompt
Read a sheet	"From this sheet, show [completion rate] by [zone] and [course] for [month]."
Find the movement	"Which [two courses] changed the most versus [last month], and by how much?"
Explain a formula	"Explain this formula step by step as if I am new to Excel, then tell me what could break it."
Draft the write-up	"Write a one-page summary for [reader]: what improved, what slipped, two actions."
Build the slides	"Turn that summary into [5] slides: one headline, three findings, one next-steps slide."
Sense-check the numbers	"Where did each figure come from? Quote the source row for each one."

Illustrative structure only. Every figure still has to be traced back to the source system.

Prompt templates 5: reviewing and improving

The second prompt is where the quality comes from. These are the ones to memorize.

Use it when...	Copy this prompt
Cut the length	"Cut this to [100] words. Keep only the decision, the date, and the ask."
Find what is missing	"What is missing or unclear in this draft for a [frontline] reader?"
Surface the assumptions	"List everything you assumed to write this, so I can correct it."
Stress-test it	"What would a skeptical [supervisor] push back on here, and how should I answer?"
Fix the tone	"Make this direct and warm, the way a supervisor talks to their crew."
Check your confidence	"What are you least confident about in this answer, and what should I verify myself?"

One change per follow-up. That is how you learn which instruction did the work.

Your first 30 days

Small, repeatable habits beat a big launch. Pick one task a week.

Week 1

Summarize

Use it only to recap meetings and long email threads. Nothing you send yet.

Week 2

Draft

Let it write first drafts of routine emails and agendas. You edit every one.

Week 3

Build

Take on one real deliverable, an SOP, a report, a toolbox talk, using all five steps.

Week 4

Share

Save your three best prompts and swap them with your team.

The one thing to remember

Tell it what you want, what it needs to know, how it should look, and what the limits are, then read it before you send it.