Microsoft Copilot

Microsoft Copilot Experience Guide

A practical guide to unlocking the power of Copilot and agents with real-world prompts and scenario-based capabilities

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Getting Started

This guide helps you get started with everyday Copilot scenarios to get work done.

Microsoft Copilot* uses Work IQ— the intelligence layer that connects the data, context, skills, and tools from your work — to surface insights and take action based on your meetings, emails, and files, with built-in model choice for any task.

Work smarter with Microsoft Copilot

1. **Delegate your administrative tasks.** Use Copilot for email triage, meeting scheduling and recaps, and first drafts.
2. **Choose the AI model that is best for the task.** Balance execution speed with analytical depth.
3. **Ask for clear outputs.** Specify format, length, and audience every time for more tailored responses.
4. **Use Copilot inside the Microsoft 365 apps you already work in.** No need to open a separate app or copy and paste – review and approve the edits Copilot makes directly in your document.
5. **Customize the prompts in this guide based on your own information and needs.** Use a forward slash (/) to pull in specific files, meetings, chats, or sites. Modify prompt details where you see placeholders like [insert text].

Use Copilot responsibly:

- Review and verify AI-generated responses. LLMs may occasionally produce inaccuracies, so always cross-check Copilot's output with trusted sources.
- The same prompt may yield different responses due to inherent variability in neural networks.
- Use Copilot responsibly, ethically, and legally. For more information, visit responsible AI (Artificial Intelligence) principles and standards.

Microsoft Copilot add-on license required for automatic grounding in organizational data.

Microsoft

Legend
/ = reference files, chats, meetings
[ ] = [Details you insert]

Microsoft Copilot Chat

Use these prompts to tackle common work scenarios in Microsoft Copilot Chat* like meeting prep, decision tracking, and prioritization. Microsoft Copilot uses Work IQ to pull context from your work to surface summaries, insights, and next steps.

Scenario	Prompt
Create action item checklist	Identify tasks or action items assigned to me from my manager in this week's emails, Teams chats, and meeting notes, and compile them into a checklist.
Prepare for a meeting	Identify risks, blockers, and themes (with owners if available) that may resurface for /meeting after reviewing related chats, files, and emails. Keep the response brief and well-structured. Limit details to what's essential in each category. Then craft one smart prompt question based on these findings to move the conversation forward.
Search for relevant documents	Summarize the latest /documents on topic from the past [timeframe], grouped by document type, include last modified date, and highlight recent updates. [Link to SharePoint folder].
Weekly planning and work triage	Help me plan my upcoming week. Look at my calendar and find all meetings that need prep, or where I'm making decisions. Show me where I'm overbooked, where I have real focus time, and any scheduling problems I need to fix now. Summarize any weekend emails I need to handle, any threads from last week that become urgent this week if ignored, and anyone blocked waiting for my response. Create an overview document of my must-dos, daily structure, preparation I still need to do, blocks of time I need for deep work, and email triage of high-priority vs. can-wait.
Create a project update	Draft a [project] update for this week using meetings and emails with key decisions. I need it in a format of a skimmable Teams post. Let's include wins, work in motion, next week's focus, and any asks I have for the team. Keep it under 12 bullets total.
Help me learn	[Start a new voice chat] Explain [concept X] in less technical language. How does it compare to our internal [project X]?
Draft an executive report	Synthesize key information on [confidential project] into an executive status report from documents in /SharePoint site.
Identify blockers	. Identify major themes and blockers in /file to discuss with my team.
Create a decision memo and follow-up email	Based on /[email thread], create a one-page decision memo in Word outlining the context, decision, and rationale. Additionally, draft a follow-up email to my manager summarizing commitments and next steps.

**Microsoft Copilot license is required for automatic grounding in organizational data.*

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[ ] = [Details you insert]

Copilot in Microsoft 365 apps

Copilot in Microsoft 365 apps enables you to create or update content directly in apps like Word*, Excel*, PowerPoint*, or Outlook* without leaving your document, spreadsheet, or presentation.

Customize the prompts below to support your own workflows and projects.

Scenario	Copilot in...	Prompt
Quickly update content	Word	Turn on Track Changes, update only the section I own using the latest email from my manager, and add comments where claims need evidence and citations are pending review.
Prepare a monthly report**	Word	Update the impacted timelines using the latest project update email, and ensure the latest decisions from Thursday's review meeting are reflected throughout the document. Then, insert a table of contents and update page numbers.
Present data to drive decision-making	Excel	We're reviewing our [Q2 marketing spend] and need to improve conversions without increasing customer acquisition cost. First, restore the broken formula in B4 to the last working version. Then, using the latest agency quote in the email from [name of person] and the data in this workbook, recommend how to reallocate ~10% of spend across channels and regions. Create a before-and-after table, waterfall chart, actuals vs. budget variance analysis, and supporting PivotTables.
Analyze and visualize data	Excel	Analyze the customer data imported from my recent email attachment and group accounts by behavioral similarity using clustering. @chart-design Create a summary table showing each segment's defining behaviors and relative size, along with a chart comparing the key characteristics of each segment.
Enable story-telling	PowerPoint	Use my brand [select brand kit from + menu] to create a presentation about adding [type of product] to our product line up, based on our latest /internal program documents
Turn text into visuals to aid storytelling	PowerPoint	[Start from within an existing PowerPoint deck] I'm prepping for a leadership readiness review and need this wall of text to land as a clear, decision-ready visual. Turn this slide into a sophisticated executive-grade visual that maps the workstreams across a unified readiness framework. Show interdependencies between workstreams, surface critical gating items (staffing, integrations, certifications), and visually distinguish what is on track versus at risk. The output should help an executive immediately understand where attention is required.
Proactively manage my calendar	Outlook	Schedule a meeting with [person] on [specific days] to discuss [topic]. If there's a conflict reschedule it within that timeframe.
Update email based on new information	Outlook	I need to catch up quickly on my inbox. Pin recent emails from my team that need a reply and draft responses. Also, flag any messages from my skip-level manager that I received in the past two weeks.

**Microsoft Copilot license is required for automatic grounding in organizational data. Outlook: Calendar scheduling actions are currently available in Lexical English only. Some Outlook features only available the Frontier program.*
***Track changes support and commenting with Copilot are available on Copilot in Word on Windows Desktop and Mac through Insiders Preview channel.*

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[ ] = [Details you insert]

Copilot in Teams

Copilot in Teams keeps you on track by summarizing meetings, catching up on missed chats, and turning discussions into clear next steps — so your team spends less time reviewing and more time doing.

Scenario	Prompt
Live meeting	
Catch up on a meeting in progress	What have I missed so far and summarize open questions.
Surface blockers	What decisions are blocking progress?
Recommend a path forward	Based on the options and pros/cons discussed, recommend a path forward.
Copilot in Teams app	
Track progress over time	Construct a table timeline of all major milestones and decisions from /meeting series
Summarize meeting	How did the group come to this conclusion on [specific decision or topic]?
Catching up on missed chats	Summarize this chat and call out anything that requires my follow-up.
Meeting recap	
Customizable recap templates	Summarize by topic, for each topic discussed, follow this format: [Topic 1], Context, Discussion, Conclusion

Teams Mode

To use Teams Mode*, simply @Copilot in a Teams group chat or click **Open Agents and bots** in the upper right corner of Teams and select Copilot. You can also start work in the Microsoft Copilot app, then bring your work to a group chat.

Scenario	Prompt
Plan team events	**@Copilot** suggest a different opening and closing session. @Copilot create a plan to organize logistics.
Build plan from group chat	**@Copilot** suggest a different opening and closing session. @Copilot create a plan to organize logistics.

**Copilot in Teams is generally available for Microsoft Copilot licensed users on desktop, mobile, and web.*

Microsoft

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Agents in Teams

Agents in Teams work alongside you to capture decisions, track progress, and move work forward across meetings, chats, and channels.

Facilitator

Acts as a real-time meeting collaborator in Microsoft Teams that helps structure discussions, capture decisions, and turn conversations into clear next steps.

Scenario	Prompt
Create meeting docs	**@Facilitator** Generate a one pager on our strategy discussion in Word
Add agenda topics	**@Facilitator** add agenda with these topics: [topic 1], [topic 2], [topic 3]
Create tasks from discussion	**@Facilitator** turn today's discussion into a task list with owners and next steps and generate a shareable document the team can use.
Ask questions live	**@Facilitator** based on what's been said so far, what have we decided, what's still open, and what should we do next?

Channel Agent

Acts as a channel-aware collaborator that synthesizes conversations, tracks progress, and turns discussions into clear updates and next steps.

Scenario	Prompt
Create status updates	**@Channel Agent** Create a status report on the latest updates. Include columns for status, this week's focus, next steps, any help needed, and the due date.
Carry Context Across Work	**@Channel Agent**, summarize key decisions, blockers, and next steps from this channel and any related meetings.
Answer project questions	**@Channel Agent**, what's the current project status in this channel—recent decisions, owners, and what's at risk?
Automate project updates	**@Channel Agent**, create tasks from the follow-ups in this thread (with owners + due dates) and suggest a follow-up meeting with a proposed agenda.
Surface team insights	**@Channel Agent**, identify the top risks, dependencies, and insights from recent channel activity and summarize what needs attention this week.

Third-Party Agents

Bring third-party agents directly into Teams – all while respecting the permissions and policies of your organization. support your team's ability to get work done more efficiently by integrating third-party agents into your collaboration workflows. You'll collaborate with third-party agents like you do with your colleagues to help:

- Complete specialized tasks
- Assist with project management
- Coordinate and communicate across your team

**Copilot in Teams is generally available for Microsoft Copilot licensed users on desktop, mobile, and web.*

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Copilot in SharePoint

Copilot in SharePoint* makes your team's shared content easier to find, understand, and keep current — so people spend less time searching and more time acting on what they know. It works directly inside the SharePoint sites, pages, and libraries your team already uses, with no extra setup required.

If your IT administrator has enabled Copilot in SharePoint, access it by clicking the Copilot button in the bottom-right corner of any SharePoint page.

Scenario	Prompt
Generate interactive HTML reports	Create an interactive dashboard based on this quarter's sales performance data [folder link]. Include total revenue, quota attainment, top and bottom performing regions, and trend over time. Add filters for region and product, and make it suitable for a leadership review.
Create a SharePoint page	Create a page summarizing [topic or /files]. Include a timeline and links to key documents. Make it exec-ready.
Create a SharePoint list	Create a list to track action items from this /Excel file. Add columns for assignee, due date, priority, and status.
Create documents	Based on /files, create a [Word/Excel/PowerPoint document] highlighting key results, growth trends, and notable wins. Keep the tone factual and customer-ready.
Organize files in a document library	Based on the contents of this folder, suggest a folder structure to better organize my files. Show me a mapping structure, and when approved, re-organize it.
Create a new document library	Create a document library for [topic] assets. Include folders for Project Management, Requirements, and Working Documents. Create columns for Document Type, Project Phase, Status, and Owner. Create views for In Review, At Risk, and Approved.
Add autofill library columns	Analyze the files in this library and suggest autofill columns based on their content.
Automate workflows	Create an approval workflow for this library: When a new document is uploaded, notify my manager for review and approval.

Skills in SharePoint

Use skills to save repeatable workflows as reusable AI instructions anyone on your site can run—no need to rewrite the same prompt each time. See what skills your team has by checking the Agent Assets library or ask Copilot, "What custom skills have been created on this site?" No Agent Assets library yet? Ask Copilot in SharePoint to create one.

Scenario	Prompt
Image analysis	Review the images in this library. Summarize the equipment labels shown, extract relevant text, and flag anything that may require follow-up.
Create a skill	Save [workflow or process] as a skill to this site" and "Create a personal skill for concise weekly leadership updates with progress, decisions, risks, and next steps."
Track projects in a consistent way	Create a new Project Tracker list for [project name] using "[Skill name]" Skill

**Microsoft Copilot license is required. Some features may only be available in Public Preview. Find more information on licensing and availability in the Copilot in SharePoint guide on Microsoft Learn.*

Microsoft

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Copilot Notebooks

Copilot Notebooks is an AI-powered workspace that brings your project's files, meetings, emails, and notes together so Copilot can reason across everything in one place. Unlike a single chat, a Notebook keeps persistent context that grows with your project—no need to rebuild prompts from scratch.

Ask questions, synthesize themes, generate drafts, and create deliverables like documents, presentations, and infographics—all grounded in your curated sources. Notebooks turn scattered information into clear, actionable outcomes.

Screenshot shows an infographic created from Copilot Notebooks in OneNote

Try it

Scenario	Prompt
Create project infographic	**Prompt 1:** Create Infographic: Generate a polished, professional, information-dense infographic image strictly from the notebook contents. Output only the image, with no text, explanations, summaries, or description **Prompt 2:** Simplify to focus only on [topic/aspect]
Compare Notebook content and summarize findings	**Prompt 1:** Pull the notes from [date] [meeting name] and compare them with the Project Status Summary. Highlight where the discussion differs from the current documentation. [Note: currently, the meeting should be added as a reference to the notebook prior to running this prompt. Future updates will enable a dropdown to open the scope to Work IQ & Web.] **Prompt 2:** Now create a Word document with a clear summary of findings and recommended updates.

**Available for Microsoft Copilot licensed users and Copilot Chat users. Copilot Chat users have limited sources per notebook, access to standard sources only, and standard access to chat; premium sources, premium AI capabilities, and priority access to chat are included with a Microsoft Copilot license.*

**Infographics is available in the Frontier program.*

Legend
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[ ] = [Details you insert]

Copilot Researcher

Researcher* is Microsoft Copilot's deep research agent for tackling your complex, multi-step research at work.

Find **Researcher** under Agents in the Microsoft Copilot app. Then use the model drop-down to select the best mode for the task.

Scenario	Prompt
Identify themes, impact, tradeoffs and conflicts	Review the latest [project 1] customer interview email recaps to find the top product feedback themes and outline the impact of the themes on the [project 2] roadmap. Using this and our internal plans, give me three product recommendations ranked by priority and call out where it aligns or conflicts with current initiatives, key tradeoffs, and the biggest objections we should expect.
Create a view of the competitive landscape for expansion	Create an executive brief on the competitive landscape exploring category expansion opportunities in the [product type industry] based on consumer shifts. Map how leading competitors are responding, where [company name] is well-positioned, and other categories or markets to evaluate. Benchmark [company name] against industry frameworks and flag risks and opportunities.
Understand strategic risks and identify priorities	Evaluate the biggest strategic risks and opportunities facing [industry] in the next quarter. Consider market dynamics, regulatory pressure, customer expectations, and technology adoption. Then recommend 3 strategic priorities a [segment name] executive team should focus on based on the recent meeting discussions, including key tradeoffs and risks associated with each recommendation.

Microsoft Copilot license is required. Some features may only be available in the Frontier program.

Microsoft

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Copilot Cowork

While Microsoft Copilot can help you brainstorm or generate content, Microsoft Copilot Cowork* plans and executes multi-step workflows across Microsoft 365 apps, Dynamics 365, and third-party sources**. You can delegate real work – setting multiple tasks in motion, add guidance anytime, and keep work moving while you're away — with checkpoints that keep you in control.

Try the following prompts to see what Cowork can help you with – and visit the Cowork Prompt Gallery for more inspiration.

Scenario	Prompt
Rebalance your week and protect focus time	Help me organize my week. First, show me a summary: Total meetings and hours spent, where I have focus time (2+ hours), and days with the most meetings. Before making changes, ask clarifying questions: what I'm trying to accomplish this week, how to prioritize conflicts, personal commitments, and which meetings to decline or shorten. Then show proposed changes with explanations: meetings to accept/decline/reschedule, conflicts to resolve (including emailing organizers), and focus blocks to add. Start with highest-impact changes first. Once I approve each change, make edits directly in my calendar one at a time.
Catch up on messages and send replies automatically	Go through my Teams messages and emails from this week where someone asked me a direct question and I haven't responded. For anything that just needs a quick acknowledgment or "got it," send the reply. For anything that needs a real answer, draft it and show me first.
Turn inbox noise into a curated intelligence brief	Search my inbox for all newsletters, digests, and industry publications received in the past 7 days. Then write a polished, article-style weekly brief covering four sections: (1) [Company] internal newsletters, (2) AI & tech news, (3) World affairs/news publications, and (4) [Your industry] –weaving the key stories and themes from each into flowing narrative paragraphs, not bullet lists. End with a 2-3 sentence throughline tying the week's themes together. Write the output inline as a readable article and include links inline to the actual emails in case I want to read more. Send me this weekly brief every Friday afternoon.
Automate recurring project reporting	Set up a recurring bi-weekly status update for [Project name] that pulls from my files, emails, meetings, and chats. Each update should highlight: Overall project health, tasks completed since last update, upcoming deadlines in the next two weeks, and any blockers or risks. Draft the update and send it to [stakeholder/distribution list] every other Monday. Create a skill so this runs automatically.
Run deep research with a citation map	I'm giving you a folder of [PDFs / research papers / contracts / reports]. Read every document in full. Produce a structured brief on [topic] covering background and context, key findings, conflicts across sources, and the three strongest insights with rationale. Cross-reference the findings against our live business data in Fabric IQ* – validate where the documents line up with our actual metrics and flag where they diverge. Include a citation map that links each claim back to its source document and page reference. Flag any gaps or missing context I should chase. *Note: requires Fabric IQ plugin.

Licensing varies: Chat is included for eligible users; Cowork requires a Microsoft Copilot license. For more information about usage-based billing and cost management visit the usage-based billing overview.

**See list of plug-ins in the Microsoft agent showcase.*

Microsoft

Legend

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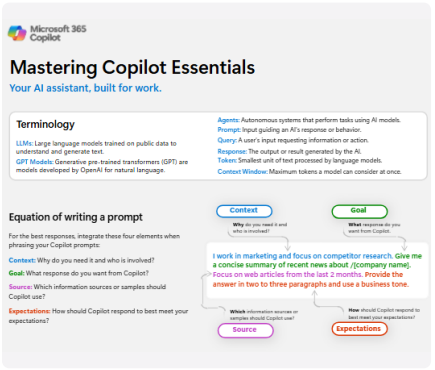
[ ] = [Details you insert]

Additional Prompt Resources

Mastering Copilot Essentials

Get a simple overview of Copilot fundamentals—terminology, prompt structure, and quality criteria—to support users just beginning their AI transformation journey.

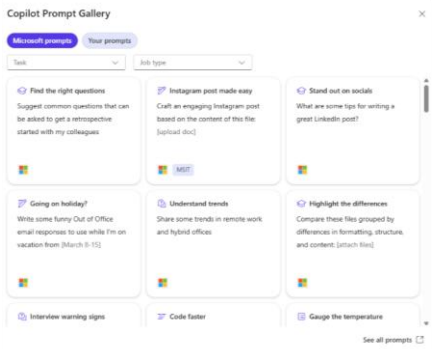


Copilot Prompt Gallery

Find prompting inspiration so you can take greater advantage of Copilot in your daily work.

- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others

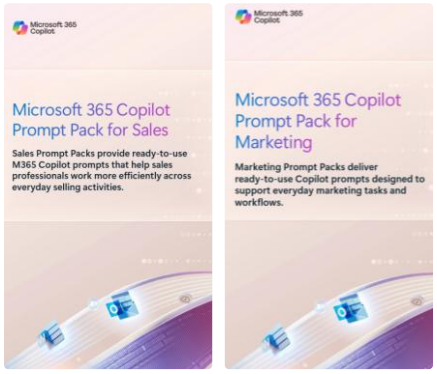
Access the Prompt Gallery in Copilot Chat by selecting the box with star icon next to the prompt box.

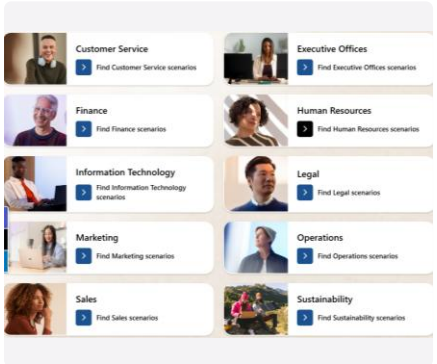


Microsoft Copilot Prompt Packs

Ready-to-use, day-in-the-life Copilot prompts that make everyday work easier. Check out role-specific prompts for:

- Customer Service
- Human Resources
- Legal
- Finance
- Marketing
- Operations
- Product Management
- Sales



Microsoft Adoption Scenario Library

Find business function-and industry-specific scenarios to inspire your organization's AI transformation journey.