



SEVERN
PROFESSIONAL SERVICES

STRATEGY. SOLUTIONS. GROWTH.

QUICKSTART GUIDE

MICROSOFT COPILOT QUICKSTART

Practical Business Uses for Microsoft 365 Copilot

Work Smarter • Communicate Faster • Get More Done

Microsoft Copilot helps you work with your organization's information across Microsoft 365 to create content, analyze data, summarize information, and automate routine tasks.



QUICK WINS

- ✓ Draft emails in seconds
- ✓ Summarize long meetings
- ✓ Create presentations from documents
- ✓ Analyze Excel data without formulas
- ✓ Turn notes into action plans
- ✓ Find answers across Microsoft 365

THE COPILOT WORKFLOW



1. ASK

Define your goal



2. PROMPT

Write a clear prompt



3. COPILOT

Copilot generates a response



4. REVIEW

Review and validate the output



5. REFINE & EXECUTE

Refine the prompt and take action



COPILOT VALUE LOOP

Save Time → Increase Productivity → Improve Quality → Enable Better Decisions → Create Business Value

COPILOT ACROSS MICROSOFT 365



OUTLOOK

Save Time
Managing Email

- Draft responses
- Summarize email threads
- Create follow-ups
- Extract action items
- Prioritize important messages

TRY THIS PROMPT:

"Review my recent emails and identify urgent items requiring response."



WORD

Create and
Improve Content

- Draft reports
- Build proposals
- Summarize documents
- Rewrite content
- Create executive summaries

TRY THIS PROMPT:

"Create a one-page executive summary from this document."



EXCEL

Transform Data
into Insights

- Analyze trends
- Create formulas
- Generate summaries
- Identify patterns
- Build visualizations

TRY THIS PROMPT:

"Analyze this data and identify the top three trends impacting performance."



TEAMS

Improve
Meetings

- Generate meeting recaps
- Capture action items
- Summarize discussions
- Identify decisions
- Prepare for meetings

TRY THIS PROMPT:

"Summarize key decisions and action items from today's meeting."



POWERPOINT

Build Presentations
Faster

- Create presentations
- Generate speaker notes
- Summarize reports visually
- Build executive briefings
- Improve slide clarity

TRY THIS PROMPT:

"Create a leadership presentation based on this project report."

THE COPILOT PROMPT FRAMEWORK

- C** **CONTEXT**
Provide background and situation
- O** **OBJECTIVE**
State the desired outcome
- P** **PARAMETERS**
Specify constraints or requirements
- I** **INPUT DATA**
Include relevant source information
- L** **LIMITATIONS**
Note what to avoid or consider
- O** **OUTPUT FORMAT**
Define how you want the results
- T** **TOPE**
Set the desired tone or style

EXAMPLE PROMPT

“Act as a project manager. Create a one-page executive project update using the attached status report. Highlight risks, accomplishments, next steps, and action items.”

COPILOT SUCCESS CHECKLIST

- Start with a clear objective ☐
- Provide context ☐
- Include source information ☐
- Verify responses ☐
- Protect sensitive data ☐
- Refine prompts as needed ☐
- Review before sharing ☐
- Follow organizational policies ☐

COMMON PITFALLS

- ✗ Using vague or incomplete prompts
- ✗ Assuming AI is always correct
- ✗ Sharing confidential or sensitive information
- ✗ Failing to verify outputs
- ✗ Overlooking business context
- ✗ Expecting perfect results on the first attempt

PRO TIPS

Best Prompt Formula:

+ + +

Be specific, provide examples, and iterate for better results.

SPS TAKEAWAY

Microsoft Copilot is most valuable when used to eliminate administrative work, accelerate decision making, and improve communication. The most successful users combine business expertise with effective prompting to achieve better results faster.



EMPOWER YOUR TEAM.
AMPLIFY YOUR IMPACT.
DRIVE BETTER OUTCOMES.



READY TO GET STARTED?

Explore more AI QuickStart Guides and practical resources at

severnprofessionalservices.com