



Productivity Boost: CoPilot Microsoft 365 Prompt Guide



How to Use This Guide

We designed this guide to help organisations like yours get the most out of Microsoft 365's productivity tools, using AI-driven features to streamline your workflow. Each section includes practical prompts, customisation tips, and ideas to help you save time and work more efficiently.

This guide is organised by Microsoft 365 apps, covering Word, Excel, Teams, PowerPoint, Outlook, OneNote and SharePoint.

Each section has:

1. **Prompts:** Example commands for Microsoft Copilot and ChatGPT to help you get started.
2. **Use Case Tips:** Real-world scenarios showing how you can apply these prompts to your day-to-day work.
3. **Quick Wins:** Ideas for how to make the most of prompts



Microsoft Word: Create, Edit & Share Documents Faster

Access Copilot in Word by selecting Home > Copilot. Use these prompts to quickly generate, edit, or enhance your documents:

1. Create a Quick Report

"Create a 2-page report on [specific topic], including an introduction, main findings, and a conclusion with three recommendations."

Use Case: Save time on recurring reports by creating a reusable template.

2. Write an Executive Summary

"Summarise the key points of this 10-page report in a concise 1-page executive summary."

Quick Win: Use this for summarising lengthy project updates for senior leadership.

3. Draft a Marketing Plan

"Create a marketing plan for [product/service], covering target audience, key messages, and distribution channels."

4. Generate a Proposal Outline

"Create a proposal outline for [specific project/service], with sections for objectives, budget, and timeline."

5. Improve Document Clarity

"Rewrite the following paragraph for better clarity and structure: [paste text here]."

Use Case: This prompt is perfect for refining content created by multiple authors.

6. Create a Meeting Notes Template

"Set up a meeting notes template with sections for agenda, discussions, and follow-up tasks."

Quick Win: Save this as a template for all future meetings.

7. Create a Customer-Facing FAQ

"Create a frequently asked questions document for [specific product/service], covering 10 common questions."

8. Draft a Press Release

"Write a press release announcing [new product/service], highlighting key benefits and a call to action."

Use Case: Ideal for keeping your external communications polished and professional.

9. Create a Policy Document

"Draft a policy document for [topic], with sections for purpose, scope, and procedures."

10. Create a Compliance Checklist

"Create a compliance checklist for [specific regulation/requirement], with tick boxes for each action."

Quick Tip: Leverage Styles & Formatting

Use Word's built-in styles for headings and lists to keep your documents consistently formatted.

Customisation Tip: Adjust the templates provided to include your organisation's branding and tone.

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Microsoft Excel: Make Data Work for You

Access Copilot in Excel by selecting Home > Copilot. Use these prompts to automate data analysis, build complex models, and visualise key information:

1. Generate a Financial Overview

"Create a financial overview for [last quarter], including income, expenses, and a summary chart."

Use Case: Quickly generate overviews for quarterly reviews.

2. Build an Inventory Tracker

"Set up an inventory tracker for [specific product line], with columns for item, quantity, and reorder level."

Quick Win: Add conditional formatting to highlight low-stock items.

3. Create a Budget Plan

"Generate a 12-month budget plan for [department], with automated expense tracking."

4. Set Up a Sales Dashboard

"Create a dashboard tracking monthly sales, customer acquisition, and profit margins."

Use Case: Use this prompt to create dynamic dashboards for real-time decision-making.

5. Analyse Customer Data

"Use this data to create a chart showing customer growth over the past year."

6. Build a Revenue Forecast

"Create a 5-year revenue forecast based on [historical data], including profit margin trends."

7. Set Up a KPI Tracker

"Design a KPI tracker with metrics for [department] and a visual performance indicator."

8. Automate Invoice Calculations

"Set up formulas to calculate totals, tax, and discounts for monthly invoices."

9. Create a Task Management Spreadsheet

"Create a spreadsheet to track project tasks, owners, and status updates."

Use Case: Perfect for project managers who need a quick view of team performance.

10. Generate a Comparison Analysis

"Create a side-by-side comparison of [two data sets] with key similarities and differences."

Quick Tip: Use Conditional Formatting

Highlight cells based on specific conditions (e.g., deadlines approaching) for easy data visualisation.

Customisation Tip: Create different versions of sheets for different teams (finance, HR, etc.) to suit their unique needs.

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Microsoft Teams: Boost Collaboration

Copilot in Teams can be accessed by selecting Chat > Copilot. Use these prompts to automate project updates, streamline communication, and foster team collaboration:

1. Create a Project Overview Channel

"Set up a Teams channel to track [specific project], including tasks, updates, and a shared calendar."

2. Schedule Recurring Meetings

"Create a recurring weekly meeting for [specific team/department]."

3. Automate Task Reminders

"Set up automated reminders in [channel] for upcoming project deadlines."

4. Post Milestone Updates

"Draft a message announcing the completion of [specific milestone] and share it in [channel]."

5. Create a Team Wiki for Best Practices

"Generate a wiki for [team] covering key resources, guidelines, and training materials."

6. Set Up a Virtual Break Room

"Create a channel called 'Break Room' for informal chats and team bonding."

7. Create Action Item Summaries

"Summarise action items from today's meeting and share in [channel]."

8. Automate Meeting Follow-Ups

"Automatically send follow-up emails after every meeting with key decisions and next steps."

9. Translate Messages Instantly

"Translate this message into [specific language] and share it in [channel]."

10. Set Up a Team Project Plan

"Create a shared project plan with deadlines, assigned owners, and task status."

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Microsoft PowerPoint: Create Engaging Presentations Quickly

Access Copilot in PowerPoint by selecting Home > Copilot. Use these prompts to generate structured presentations, visualise complex data, and create polished slides without spending hours on design.

1. Create a Business Overview Presentation

"Generate a 10-slide presentation summarising [company/department name], covering mission, key services, and recent achievements."

Use Case: Perfect for onboarding new employees or presenting to external stakeholders.

2. Build a Product Launch Deck

"Create a product launch presentation with sections for product features, target audience, launch timeline, and call to action."

Quick Win: Use this as a starting point for sales pitches or partner briefings.

3. Visualise Project Timelines

"Set up automated reminders in [channel] for upcoming project deadlines."

Use Case: Ideal for project managers to quickly communicate progress and next steps.

4. Summarise Report Findings

"Create a slide summarising the findings from [specific report], including three key takeaways, one chart, and a conclusion."

Quick Win: Convert dense report data into a clear, visually appealing slide.

5. Create a Strategic Planning Presentation

"Generate a presentation for [strategic planning meeting], covering SWOT analysis, objectives, and actionable strategies."

Use Case: Use this prompt for planning sessions with your management team.

6. Design a Sales Pitch Presentation

"Create a sales pitch presentation with slides for client pain points, your solution, key benefits, and customer testimonials."

Quick Win: Save time by using this structure as a template for future sales pitches.

7. Create a Marketing Campaign Overview

"Build a presentation summarising a marketing campaign, with sections for goals, strategy, key results, and lessons learned."

Use Case: Ideal for presenting campaign results to internal teams or clients.

8. Develop a Training Session Deck

"Create a 15-slide training presentation for [specific topic], including an introduction, step-by-step instructions, and a Q&A section."

Quick Win: Use this structure for recurring training sessions to maintain consistency.

9. Generate a Quarterly Review Presentation

"Create a quarterly review presentation for [department/team], covering key accomplishments, challenges, and future goals."

10. Design a Data-Driven Presentation

"Create a data-driven presentation that visualises [specific data set], including charts, graphs, and a summary slide."

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MS Outlook: Streamline Communication & Manage Tasks Effectively

Access Copilot in Outlook by selecting Home > Copilot. Use these prompts to automate repetitive emails, organise your inbox, and stay on top of your schedule with minimal effort.

1. Automate Follow-Up Emails

"Draft a follow-up email for [specific person/team] to recap today's meeting and outline next steps."

Use Case: Quickly send structured follow-ups after client meetings or team updates.

2. Create a Monthly Update Template

"Create a monthly update email template for [specific team/department] with sections for achievements, upcoming deadlines, and priorities for next month."

Quick Win: Use this template to streamline regular communication without starting from scratch every month.

3. Schedule Reminder Emails

"Set up reminder emails to go out one day before project deadlines for [specific team]."

Use Case: Ideal for keeping everyone aligned and reducing the need for manual reminders.

4. Summarise Long Email Threads

"Summarise this email thread into three key takeaways and suggest a recommended next action."

5. Generate Meeting Invites Based on Content

"Create a meeting invite for [specific person] to discuss [topic] next week, and suggest three possible time slots."

Use Case: Quickly set up meetings without manually checking everyone's availability.

6. Create a Task Summary Email

"Generate a summary email listing all incomplete tasks from this project for [specific team]."

7. Create a Follow-Up Schedule

"Build a presentation summarising a marketing campaign, with sections for goals, strategy, key results, and lessons learned."

Use Case: Ensure no leads slip through the cracks by setting up systematic follow-ups..

8. Automate Client Check-In Reminders

"Create a follow-up schedule for clients who haven't responded to project proposals within 5 days."

Quick Win: Use this structure for recurring training sessions to maintain consistency.

9. Organise Emails into Categories Automatically

"Create rules to categorise and file incoming emails from [specific sender/team] into designated folders."

10. Generate a Weekly Summary Email

"Generate a weekly summary email for [specific person/department] listing key meetings, tasks, and reminders."

.Quick Tip: Use Quick Parts to Save Time on Repetitive Text

If you frequently send similar messages (e.g., welcome emails or project status updates), use Outlook's Quick Parts to save and reuse these chunks of text, saving you from retyping them each time.

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MS OneNote: Organise Information & Capture Ideas Seamlessly

Access Copilot in OneNote by selecting Home > Copilot. Use these prompts to quickly organise your notes, brainstorm ideas, and keep track of project details—all in one place.

1. Create a Meeting Notes Template

Create a meeting notes template with sections for agenda, discussion points, action items, and follow-up tasks."

Use Case: Save time by setting up a reusable template for all your meetings to ensure nothing gets missed.

2. Summarise Key Points from Long Notes

"Summarise the main points from this note into three bullet points and highlight any key action items."

Quick Win: Use this to quickly review and extract value from lengthy notes or brainstorming sessions.

3. Create a Project Notebook

"Create a project notebook for [specific project], with separate pages for objectives, timelines, and key contacts."

Use Case: Perfect for complex projects where multiple areas need to be tracked and organised.

4. Organise Research Notes by Category

"Categorise these notes into sections for [specific topics], and highlight any duplicated information."

Quick Win: Ensure your research is easy to navigate and refer back to, without manually sorting through piles of information.

5. Create a Weekly Planner

"Set up a weekly planner template with sections for meetings, tasks, and personal goals for each day."

Use Case: Keep track of both professional and personal commitments in a single, clear format.

6. Create a Task Checklist

"Generate a checklist for [specific project/task] with due dates and priority levels for each item."

Quick Win: Use checklists for recurring processes to save time and maintain consistency.

7. Generate a Knowledge Hub

"Create a knowledge hub notebook with pages for FAQs, troubleshooting tips, and best practices."

Use Case: Use this for new hires or project onboarding, ensuring that everyone has easy access to essential information.

8. Create a Brainstorming Page

"Set up a brainstorming page for [specific project/idea], including sections for pros, cons, and potential strategies."

Quick Win: Use this prompt to streamline team brainstorming sessions and quickly capture ideas.

9. Create a Learning Journal

"Create a learning journal with sections for key takeaways, new skills learned, and areas to improve."

Use Case: Ideal for keeping track of professional development and personal growth.

10. Set Up a Team Collaboration Notebook

"Create a team collaboration notebook for [specific team], with shared sections for project updates, meeting notes, and action items."

Quick Win: Encourage real-time collaboration and knowledge sharing within your team.

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Microsoft OneDrive: File Management & Collaboration

What Copilot Can Do:

- **Automate File Organisation:** Automatically move, rename, or categorise files based on keywords, date, or other attributes.
- **Set Up File Access Permissions:** Create workflows to grant or revoke file access based on project stages or team requirements.
- **Version Control:** Automatically tag and organise file versions for easy retrieval and auditing.
- **Send Automated File Sharing Links:** Automatically send secure file links to specific individuals when files are uploaded to designated folders.

Example Prompts:

- "Create a workflow that moves all project files from [specific folder] to [archive folder] every quarter."
- "Send a notification to [specific team] whenever new files are shared from [specific folder]."



SharePoint: Team Collaboration & Document Management

What Copilot Can Do:

- **Create Site Pages Automatically:** Generate new site pages with structured layouts, including headers, footers, and document libraries.
- **Automate Approval Workflows:** Set up approval processes for document edits, site updates, or content publishing.
- **Document Classification and Tagging:** Use AI to automatically tag and classify documents based on content.
- **Create Custom SharePoint Lists:** Automate list creation for tracking issues, managing resources, or project planning.

Example Prompts:

- "Create a new site page for [project] with sections for resources, team contacts, and project updates."
- "Set up an approval workflow for all document updates in [specific library] and notify stakeholders once completed."

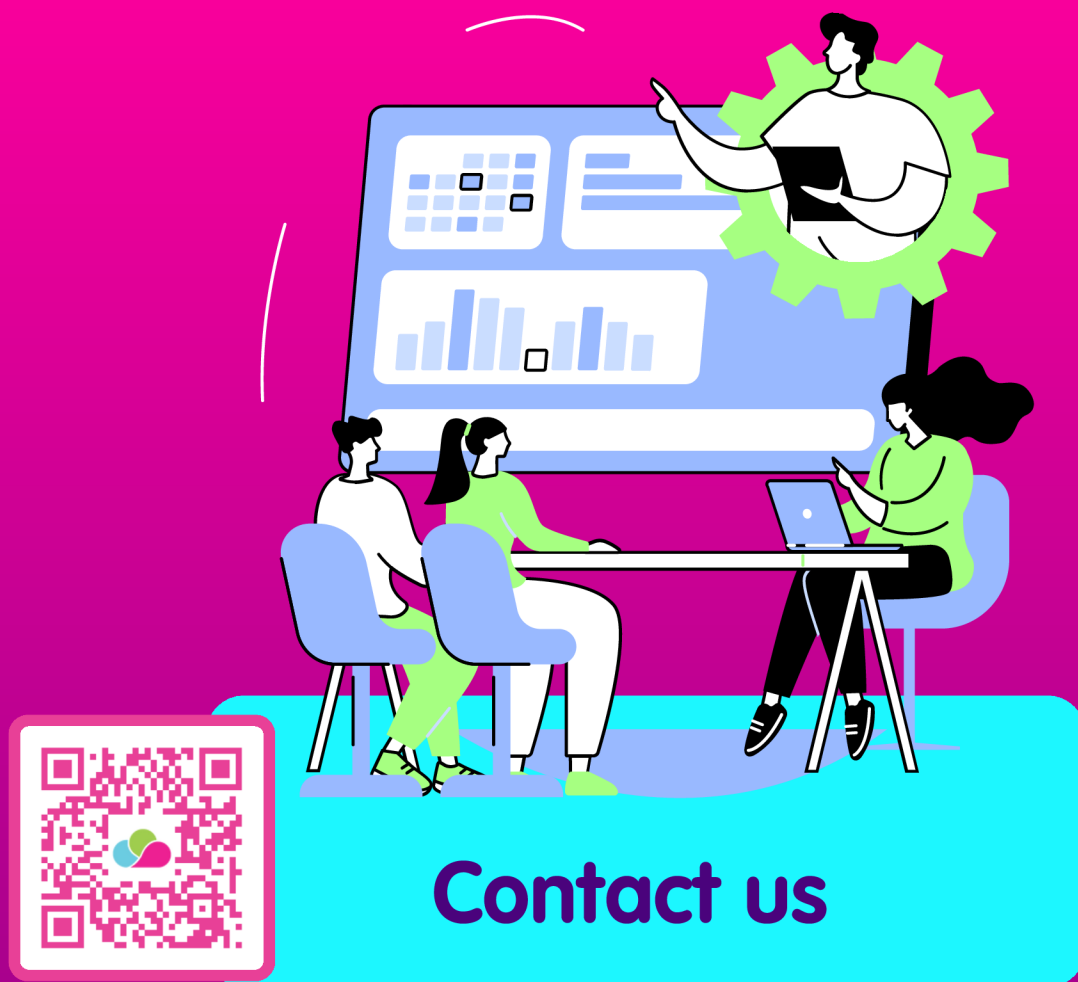
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