

QUICK-START TIPS

For Microsoft Copilot Chat

1. Secure Your Network and Data

Your company data must be secured and permissioned correctly before using Copilot. Only the data that should be visible to AI should be accessible.

Take your quick 5-minute self-assessment to learn about your readiness to implement Copilot.



2. Start with Real Business Questions

Ask Copilot about the work you already do:

- › “Summarize this client email and draft a response.”
- › “Give me three risks I should consider before approving this project.”
- › “Turn this meeting transcript into action items for my team.”

3. Give Copilot Context Up Front

Strong prompts include:

- › The goal
- › The audience
- › The format
- › Any constraints

4. Use Copilot as a Thinking Partner, Not Just a Writer

Copilot can help you:

- Pressure-test decisions
- Explore scenarios
- Identify blind spots
- Draft talking points for tough conversations

5. Bring Your Documents Into the Conversation

Upload or reference files directly:

- Contracts
- Proposals
- Reports
- Spreadsheets

6. Ask Copilot to Improve Your Work, Not Replace It

Try prompts like:

- "Make this more concise."
- "Rewrite this for a CFO audience."
- "Strengthen the argument and add missing considerations."

7. Use Copilot to Prep for Meetings

- Before a meeting: “Summarize the last three emails with this client and give me three questions I should ask.”
- After a meeting: “Turn these notes into a follow-up email and next-step plan.”

8. Build Repeatable Prompts

When you find a prompt that works, save it.
Leaders often reuse prompts for:

- Weekly updates
- Board summaries
- Performance reviews
- Sales forecasting
- Client communication

9. Encourage Your Team to Use Copilot, But Set Guardrails

Define what’s okay to use Copilot for and what requires human review.
This keeps quality high and reduces risk.

10. Treat Copilot as a Skill, Not a Tool

The more you use Microsoft Copilot, the better your prompts and outcomes become.

Leaders who practice and experiment with Copilot daily see the fastest productivity gains.

Prompts

to Get You Started

➤ **Strategic decision-making**

- “Give me three strategic options for addressing [challenge], with risks and trade-offs for each.”
- “Pressure-test this decision: what am I not considering?”
- “Summarize the key insights from these documents and tell me what actions a CEO should take next.”

➤ **Communication and leadership**

- “Rewrite this message for my leadership team so it’s clearer, more concise, and action-oriented.”
- “Turn these meeting notes into a follow-up email with next steps and owners.”
- “Draft talking points for a 5-minute update to my board on [topic].”

➤ **Operational efficiency**

- “Create a simple plan to streamline our process for [workflow], including steps, owners, and risks.”
- “Summarize the last 30 days of emails with this client and highlight anything requiring my attention.”
- “Turn this messy data into a clean, structured table with the most important insights.”

➤ **Team alignment**

- “Translate this strategy into a one-page brief my team can act on.”
- “Give me three ways to communicate this change so employees understand the ‘why’ and the impact.”
- “Draft a performance conversation outline that is direct, fair, and constructive.”

➤ **Planning and forecasting**

- “Build a simple scenario analysis for best-case, expected, and worst-case outcomes for [initiative].”
- “Identify the top five risks to our Q2 goals and propose mitigation steps.”
- “Turn this spreadsheet into a narrative summary I can present to stakeholders.”

Are You Copilot Ready?



Take Your **FREE**
Microsoft Copilot
Self-Assessment!

