

• FREE GUIDE • 20 TIPS

COPILOT AT WORK / WHAT TO USE AND WHEN

A practical reference for Microsoft 365 users who want to go beyond the basics.

FORMAT

20 tips

4 sections • 7 pages

FOR

**Microsoft 365
users**

READ TIME

~12 min

Reference at your own
pace



ABOUT THIS GUIDE

20 specific actions. 4 contexts. 1 reference

20 concrete Copilot workflows across Outlook, Teams, Word, PowerPoint, and Copilot Chat. Each tip is a specific action with a defined outcome — designed to be applied immediately and refined through use.

HOW TO USE THIS GUIDE

- Skim once. Each tip takes under 30 seconds to read.
- Choose 3 tips relevant to your current work and apply them this week.
- Keep this guide accessible and return to it as new workflows arise.
- Every prompt is copy-paste ready.

WHAT'S INSIDE

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In your meetings

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In your documents

5 TIPS · WORD, POWERPOINT

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Features most people never find

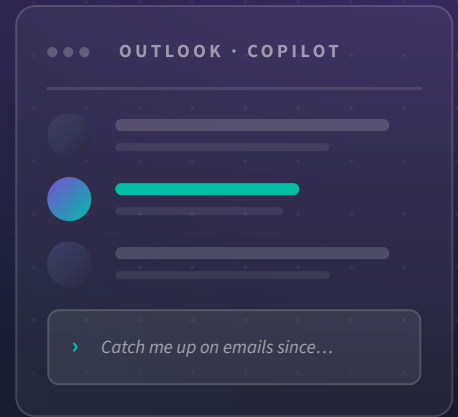
5 TIPS · COPILOT CHAT



01

IN YOUR INBOX

5 Outlook workflows for reading, replying to, and triaging email more efficiently.



01

🔗 Explain anything in **plain** language

Highlight any text in an email you don't understand. Click the Copilot icon and select **Explain this**. Copilot rewrites the passage in plain language, expanding acronyms and clarifying terminology in seconds.

02

📶 Adjust your tone before sending

Draft your reply, then use Copilot to adjust the tone. Options include **more casual**, **more formal**, **more direct**, **shorter**, **longer** — applied in 2 clicks.

03

✅ Get coaching on an important draft

Before sending a high-stakes message, click **Coaching by Copilot** in the toolbar. Copilot reviews tone, clarity, and how the reader is likely to receive your message, then suggests improvements.

Requires at least 100 characters in your draft.

04

☰ Summarize a long email thread

Open any long conversation and select **Copilot → Summarize**. Copilot extracts decisions made, open questions, and next steps in under 30 seconds.

05

🔄 Catch up after time away

Open Copilot Chat and request a digest for any time period you missed. Copilot identifies the threads that need your attention and filters out the rest.

TRY THIS

"Catch me up on emails since last Friday."



02

IN YOUR MEETINGS

5 Teams workflows for entering meetings prepared and leaving with follow-ups complete.



06

🕒 Get your daily meeting brief

Start the day by asking Copilot for a calendar summary. It lists every scheduled meeting, summarizes related emails and documents, and highlights what to prepare in advance.

TRY THIS

“What are my meetings today and what do I need to know?”

07

🔄 Join late without missing anything

Join a Teams meeting 5 or more minutes late and Copilot offers to summarize what has been discussed so far. Select **Open Copilot** for an instant recap.

Transcription must be enabled for full functionality.

08

📄 Generate a pre-read for any meeting

Open a meeting invite and ask Copilot to generate a pre-read. Copilot consolidates related emails and documents into a single summary you can share with attendees before the session.

09

✉️ Draft the follow-up email automatically

After any meeting, ask Copilot to draft the recap from the transcript. Decisions, action items, and owners are extracted and formatted into a ready-to-send email.

TRY THIS

“Draft a follow-up with the key decisions, actions, and owners from this meeting.”

10

📅 Stop the scheduling back-and-forth

Ask Copilot to format your available time slots as plain text for an email. Offering 3 specific options up front significantly reduces back-and-forth scheduling exchanges.



03

IN YOUR DOCUMENTS

5 ways to draft, tailor, and rewrite Word documents and PowerPoint decks.



11

Start any document from a prompt

Open a blank Word document and the **Draft with Copilot** box appears automatically. Describe document type, audience, key points, and tone, then select Generate.

The document must be saved on OneDrive or SharePoint.

12

Summarize any PDF in seconds

Upload a PDF to Copilot Chat and request a summary. Copilot extracts key points, decisions, and actions in under a minute. Works for reports, contracts, policy documents, and research papers.

13

Improve your slide titles

In PowerPoint, select any text on a slide, click the pen icon, and choose **Make professional** — or provide a custom instruction. Each rewrite takes seconds.

14

Tailor a deck for a specific audience

In the PowerPoint Copilot pane, ask Copilot to rewrite the deck for your intended audience. Copilot adjusts framing, density, and emphasis without requiring slide-by-slide changes.

TRY THIS

“Rewrite for senior leadership — concise, outcome-focused, lead with the recommendation.”

15

Write like an executive

Paste any draft, email, or report into Copilot Chat and request an executive rewrite. Works for emails, slide text, status reports, and meeting summaries.

TRY THIS

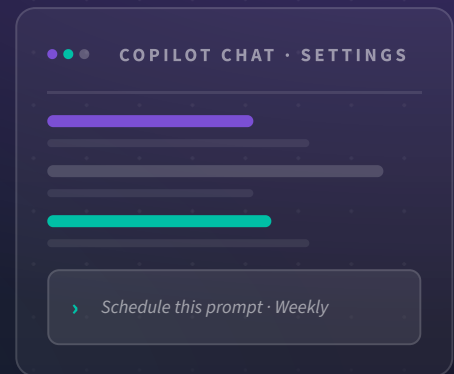
“Rewrite this in executive style — concise, outcome-focused, no filler.”



04

FEATURES MOST MISS

5 Copilot Chat features most users overlook.



16

The **Work / Web** toggle

The most important setting in Copilot. **Work** searches your Microsoft 365 data — emails, meetings, Teams chats, SharePoint. **Web** searches the internet. Set this deliberately for each task; most users leave it on the default and never adjust.

17

Save your best prompts

When a prompt produces a result you want to reuse, save it. Hover over the prompt and click **Save this prompt**. It's added to your personal library for 1-click reuse.

18

The Prompt Gallery

Copilot includes a built-in library of ready-to-use prompts organized by app and task — Outlook, Teams, Word, Excel. Review the gallery before composing prompts from scratch.

19

Schedule a recurring prompt

Hover over any prompt and click **Schedule this prompt**. Set the time, day, and frequency, and Copilot runs the prompt automatically — useful for daily inbox briefs, weekly status summaries, or end-of-week reviews. Up to 10 scheduled prompts.

Requires your organization's admin settings to allow this feature.

20

Copilot **Memory**

Copilot can retain context about your role, preferences, and working style across sessions. Review, edit, or delete saved memories at any time via **top right menu → Personalization → Saved memories**.

Requires your organization's admin settings to allow this feature.

20 TIPS COMPLETE • RECOMMENDED NEXT STEP

PICK 3. APPLY THEM THIS WEEK.

Adopting Copilot is a matter of habit. Choose 3 tips that fit your current work, apply them consistently for one week, then return for the next 3.

CONTINUE LEARNING

Follow Lela on LinkedIn

1 new Copilot workflow each week. Practical applications of Microsoft 365 AI for working professionals.

MORE RESOURCES

Alvelli.com

MADE BY

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VISIT

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