

Microsoft Copilot for Office 365 — Workbook

This workbook turns the course into reps you run inside your real Microsoft 365 tenant, not a sandbox. Work one section per module: drill the grounded-prompting framework, then put Copilot to work in Word and Outlook, Excel and PowerPoint, and finally Teams plus the verification and data-protection habits that keep all of it safe. Every exercise runs on live files, inboxes, and meetings, and every worksheet captures decisions you will reuse. By the end you will have a personal prompt library, a verified Excel analysis, a deck generated from a document, a meeting recap routine, and a verify-before-you-trust checklist, plus three reusable templates you can keep.

Copilot Foundations: What It Is and How to Prompt It

Confirm which Copilot you actually have, then build the grounded four-part prompting habit that every later exercise depends on.

Worksheet: Confirm Your Copilot Access and Licensing

Before anything else, establish exactly which Copilot products you can use, because the in-app exercises only work on the licensed Microsoft 365 Copilot. Fill each field by checking your own apps and account. Is there a Copilot button on the Word Home ribbon that acts on your document (yes/no)

Does the Copilot icon appear in Outlook and Teams and act on your mail/meetings (yes/no)

Do you have Copilot Chat at m365.cloud.microsoft/chat with a Web/Work toggle (yes/no)

Which license you appear to hold (Microsoft 365 Copilot paid add-on / Copilot Chat only / consumer only)

If features are missing, who is your admin to request a license from

Your organization's AI usage policy location (link or where to find it)

Exercise: Weak Prompt vs Grounded Four-Part Prompt

Feel the difference the framework makes by running both versions against the same real document. Pick a document you own (a report, brief, or status doc) and use Copilot in Word or Copilot Chat.

- Run the weak prompt Summarize this and note how generic and reworkable the result is
- Rewrite it with all four parts: goal, context (who and why), source (name the file with a slash), and format (e.g. five bullets)
- Run the strong prompt and compare: is it pasteable as-is, and how much less editing does it need
- Add one follow-up (make it shorter, or add the budget figures) and confirm Copilot keeps the session context

Exercise: Use Copilot Chat in Work Mode with Citations

Practice the daily front-door habit and prove the citation fact-check. Open Copilot Chat and make sure the toggle is set to Work, not Web, before each prompt.

- Ask: what are the latest updates on [a real project] this week, and confirm answers come with citations
- Click a numbered citation and confirm it opens the exact source email, file, or message
- Ask: find the deck [a colleague] sent me last month about [a topic] and see if it locates the file
- Switch the toggle to Web, ask a general-knowledge question, then switch back to Work and notice the difference

Checklist: Grounded Prompting Checklist

- [] Every important prompt names a goal, context, a source, and a format
- [] You reference specific files with the slash command instead of hoping Copilot finds them
- [] You treat prompting as a short conversation and refine over two or three follow-ups
- [] In Copilot Chat you confirm the Web/Work toggle is set correctly before prompting
- [] You click citations to verify any claim before acting on it
- [] You never paste a one-line wish when a four-part instruction would work better

Copilot in Word and Outlook: Writing and Email

Turn a blank page into an accurate draft in Word and a full inbox into triaged, answered email in Outlook.

Exercise: Draft and Rewrite a Real Document in Word

Use Copilot in Word end to end on a document you actually need to produce. Ground the draft in your own files rather than letting Copilot invent content.

- Use Draft with Copilot and a four-part prompt, referencing one or two real files with a slash as the source
- Specify length and audience (e.g. a 250-word brief for an executive sponsor) and compare against a vague prompt
- Select one paragraph, open the margin Copilot icon, and Rewrite it shorter and then more formal
- Open the Copilot pane and ask for the action items in the document, then verify each against the text

Exercise: Triage a Busy Inbox with Copilot

Run the catch-up workflow on your real inbox after time away (or on your longest current thread). The goal is to spend reading time deciding, not re-reading.

- Open your longest email thread and click Summary by Copilot, then read the bullets
- Click a numbered reference in the summary to open the exact source message and confirm a key claim
- Ask Copilot which of today's emails likely need a reply from you, and triage by importance not order
- For one client thread, ask for the history between you before drafting a response

Worksheet: Email Draft-and-Coach Plan

Plan how you will use Draft for everyday mail and Coaching for high-stakes mail so you apply each in the right place. Fill the fields for two real upcoming emails.

Email 1: recipient and purpose

Email 1: the substance Copilot needs (decisions, dates, asks it cannot invent)

Email 1: tone and length you will request

Email 2 (high-stakes): recipient and why it is sensitive

Email 2: what you want Coaching by Copilot to check (tone, clarity, sentiment)

Your rule for when to run Coaching versus skip it

Checklist: Writing-with-Copilot Checklist

- [] You give Copilot the real facts and let it write the scaffolding, then edit for your voice
- [] Every drafted document is read in full before it leaves your hands
- [] Long email threads are summarized, with references clicked for anything that matters
- [] Inbox triage is by importance using Copilot summaries, not strictly top to bottom
- [] Coaching by Copilot is run on sensitive emails before sending
- [] No invented statistic, date, or claim survives into a sent document or email

Copilot in Excel and PowerPoint: Data and Decks

Analyze a clean table and verify every number in Excel, then generate and sharpen a presentation from a document in PowerPoint.

Exercise: Clean-Table-In, Verified-Formula-Out in Excel

Run the full Excel Copilot loop on a real dataset, with verification built in. The preparation step is mandatory: Copilot is unreliable on messy ranges.

- Select your data and press Ctrl+T to format it as an Excel Table; remove blank rows and merged cells
- Open the Copilot pane and ask two plain-language questions about the Table (e.g. highest region, average by month)
- Ask Copilot to add a formula column (e.g. profit margin as a percentage) and read the formula before inserting
- Verify: pick one row, compute the result by hand, and confirm it matches Copilot's value

Exercise: Charts, PivotTables, and Insights from Plain Language

Use Copilot to build visuals and surface patterns on the same Table, treating every suggested insight as a hypothesis to confirm.

- Ask Copilot to create a PivotTable (e.g. revenue by category and quarter) on a new sheet
- Ask for a bar chart of a key metric by group, then refine it (sort descending, add percentage of total)
- Ask: what are three insights or outliers in this data I should look into
- Confirm one of those insights directly against the data before you would report it

Exercise: Generate a Deck from a Word Document

Produce a draft presentation from a real document and then sharpen it. Use a Word file that uses Heading styles so Copilot maps headings to slides.

- In PowerPoint, click Copilot then Create presentation from file and select a heading-structured Word doc
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- Review the generated deck for any slide that is generic, padded, or misrepresents the source

- Use the Copilot pane to refine: cut it to ten slides, add a next-steps slide, or summarize a slide to three bullets

- Edit by hand to sharpen the story and add the specific data and judgment Copilot cannot

Checklist: Data-and-Decks Checklist

- [] Excel data is formatted as a clean Table before any Copilot prompt
- [] Every Copilot formula is read and understood, not pasted as a black box
- [] At least one row of any new calculation is spot-checked by hand
- [] Suggested insights are treated as hypotheses and confirmed against the data
- [] Generated decks are reviewed slide by slide for accuracy and filler
- [] Time saved on the draft deck is reinvested in the story, not pocketed

Copilot in Teams, Automation, and Trusting the Output

Stand up a meeting-recap routine, decide where light automation pays off, and lock in the verify-and-protect discipline.

Exercise: Run a Meeting Recap with Action Items in Teams

Practice the Teams meeting workflow on a real or test meeting. Transcription or recording must be on for Copilot to have a transcript to read, and you should tell participants it is on.

- Start a meeting with transcription on and announce it to participants as a courtesy

- Mid-meeting, open the Copilot pane and privately ask what have I missed and what has been decided

- After the meeting, ask Copilot to list every action item with its owner and any due date

- Ask a targeted recall question (e.g. what did [person] say about the budget) and confirm it against the transcript

Worksheet: Automation Candidate Worksheet

Identify which repetitive questions or tasks justify a Copilot Studio agent or a Power Automate flow, and which should stay manual. List your most repeated requests and score them.

Repeated question or task

How often it occurs (per day / week / month / year)

Trusted source it could be grounded in (which SharePoint site or document set)

Better fit: conversational agent (Copilot Studio) or a flow (Power Automate)

Worth automating now (yes/no) and why

Who must approve building/publishing it (IT or admin contact)

Worksheet: Confidential Data and Permissions Plan

Decide your personal guardrails so Copilot never leaks or overshares. Fill the fields against your real working context.

Types of data you must never paste into consumer or non-work AI tools

SharePoint/OneDrive folders where your access is broader than it should be (to tighten)

How you will label and handle sensitive Copilot output before sharing

Your organization's AI usage policy rules that apply to you

When you will escalate to IT/compliance before using Copilot on something

Known Copilot limits to watch for in your work (out-of-date, large/messy inputs, data quality)

Checklist: Verify-and-Protect Checklist

- You read every generated draft in full before sending or presenting
- Formulas and numbers are spot-checked by hand and totals compared to a trusted figure
- Copilot citations are clicked to confirm claims against the real source
- Scrutiny scales to stakes: a glance for routine mail, line-by-line for high-stakes
- Meeting transcription is announced and sensitive conversations are handled thoughtfully
- Customer and confidential data never goes into consumer or non-work AI tools
- You remain accountable for anything you send, present, or decide, whatever tool wrote it

Your Action Plan

1. Confirm which Copilot license you hold and find your organization's AI usage policy
2. Adopt the four-part prompt (goal, context, source, format) as your default for every real task
3. Make Copilot Chat in Work mode your morning catch-up and pre-meeting prep habit, clicking citations to verify
4. Use Draft with Copilot in Word grounded in your own files, then edit and fact-check before sending
5. Run Summary by Copilot on long email threads and triage your inbox by importance
6. Format Excel data as a clean Table before prompting, and spot-check every formula and number Copilot produces
7. Generate one deck from a heading-structured Word document, then sharpen the story by hand
8. Turn on transcription in your recurring meeting, announce it, and capture action items with Copilot recaps
9. Identify your two most repeated questions and decide whether a Copilot Studio agent is worth building
10. Run the verify-and-protect checklist on every high-stakes output so no hallucination or confidential leak ships

