



Microsoft 365 Copilot

Prompt Guide for Small Businesses



Use small moments to understand information, improve communication, review files, prepare for meetings, and move work forward.

20 practical prompts | Responsible-use safeguards | Quick-reference sheet

GETTING ORIENTED

Start here

Know which Copilot experience you have before choosing a prompt.

Microsoft 365 Copilot can help you make progress when you have only a few minutes, but useful results depend on three things: the version you have, the information Copilot can access, and the quality of your instructions. This guide gives you reusable prompts and shows you how to adapt them to real business work.

Copilot Chat and Microsoft 365 Copilot are not identical

Experience	What it can use	Best suited for
Microsoft 365 Copilot Chat	Web information plus content you deliberately provide or that is available through certain configured experiences.	Drafting, rewriting, general research, uploaded-file review, and approved agents.
Microsoft 365 Copilot license	Work data the user already has permission to access, including supported files, email, chats, meetings, and calendar context.	Work-grounded summaries, preparation, drafting, analysis, and in-app assistance.

IMPORTANT Features vary by license, application, device, tenant settings, rollout stage, and administrator configuration. If a prompt cannot find work content, do not assume the content is missing or the product is malfunctioning.

A simple formula for stronger prompts

Goal + Context + Source + Requirements + Format

- **Goal:** State what you need Copilot to accomplish.
- **Context:** Explain the audience, situation, and desired outcome.
- **Source:** Name or attach the file, email, meeting, notes, or text it should use.
- **Requirements:** Add constraints such as tone, length, exclusions, and deadlines.
- **Format:** Ask for bullets, a table, an email, an agenda, or another usable output.

EXAMPLE “Using the attached project notes, identify the five open decisions, assign each a suggested owner, and present the result as a table. Do not invent missing deadlines; mark them ‘Not provided.’”

RESPONSIBLE USE

Before you enter company information

Protect company information and keep a person accountable for the result.

Enterprise data protection can protect prompts and responses used through eligible work accounts, and Microsoft states that protected prompts, responses, and Microsoft Graph data are not used to train foundation models. That does not make every use appropriate. Your company's policies, permissions, retention settings, and data classifications still apply.

Use your approved work account

Confirm you are signed into the organization-managed Microsoft 365 experience, not a personal AI account.

Respect access boundaries

Copilot should only help you use information you are already authorized to access. Broader access is not the same as business need.

Limit sensitive data

Do not enter passwords, private keys, authentication codes, regulated information, or confidential material unless your organization has explicitly approved that use.

Check the source

Ask Copilot to identify the files, messages, or links it relied on. Open important sources and verify them.

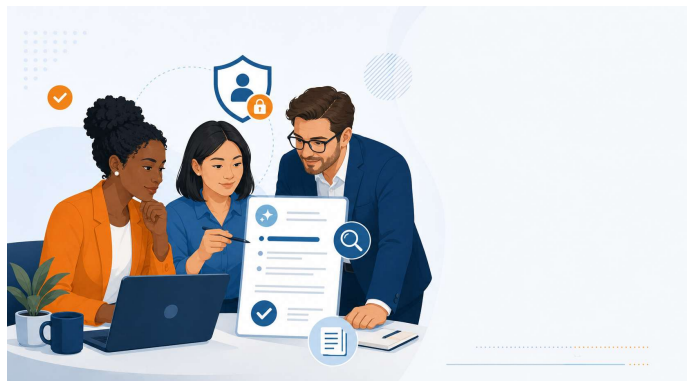
Review before acting

Copilot can omit context, misunderstand instructions, and generate plausible but incorrect content. A person remains responsible for the result.

DO NOT PASTE FIRST AND ASK LATER If you are uncertain whether information is appropriate for Copilot, pause and check your company's AI acceptable-use policy or ask the person responsible for Microsoft 365 security.

How to use the prompts in this guide

- Replace bracketed text with your specific subject, audience, file, or goal.
- Remove any instruction that does not apply.
- Add examples when style, terminology, or formatting matters.
- Treat the first response as a draft. Ask follow-up questions and refine it.



PROMPTS 1-5

Understand information quickly

Orient yourself, reduce reading time, and identify what deserves closer review.

1. Learn a topic in plain English

PROMPT “Help me understand [topic]. Explain it for a business leader without technical expertise. Cover what it is, why it matters, common misunderstandings, and three questions I should ask next.”

Use when: You need a fast orientation before a meeting or decision.

Improve it: Add your industry or role so the explanation reflects your situation.

2. Summarize a file

PROMPT “Summarize [file] in no more than eight bullets. Separate confirmed facts, recommendations, open questions, and deadlines. Cite the relevant section or page for each important point.”

Use when: You have a long report, proposal, policy, or project document.

Improve it: Ask for citations or page references so you can verify the summary.

3. Identify gaps

PROMPT “Review [file] and identify missing information, unsupported assumptions, unclear responsibilities, and decisions that have not been made. Do not fill the gaps. Present them as questions that need answers.”

Use when: You are reviewing a plan, scope, proposal, or procedure.

Improve it: Tell Copilot not to invent missing facts.

4. Compare two documents

PROMPT “Compare [file A] with [file B]. Show material differences in scope, cost, responsibilities, dates, risks, and exclusions. Put the results in a table and flag contradictions.”

Use when: You are comparing proposals, contracts, policies, or versions.

Improve it: Name the categories that matter most to the decision.

5. Extract action items

PROMPT “From [file, email thread, or meeting], list every action item with the responsible person, due date, dependency, and source. If an owner or date is not stated, write ‘Not assigned’ or ‘Not provided.’”

Use when: You need a dependable follow-up list.

Improve it: Require Copilot to distinguish stated assignments from suggestions.

PROMPTS 6-10

Write and communicate clearly

Improve a draft without removing your judgment or your organization's voice.

6. Rewrite a rough draft

PROMPT "Rewrite the text below to sound professional, clear, and concise. Preserve the meaning, avoid hype and jargon, and keep it under [length]. Audience: [audience]. Text: [paste text]"

Use when: You have the substance but need a cleaner delivery.

Improve it: Specify the tone and what must not change.

7. Create an executive summary

PROMPT "Using [source], write an executive summary for [audience]. Lead with the decision or outcome, then explain the supporting facts, risks, unresolved issues, and recommended next step. Limit it to [length]."

Use when: Leaders need the conclusion without all the detail.

Improve it: Name the decision the reader needs to make.

8. Draft a client email

PROMPT "Draft an email to [recipient role] about [subject]. The purpose is [goal]. Include [required details]. Use a warm, direct tone. Do not make commitments beyond the information provided. End with one clear next step."

Use when: You need a polished starting draft for client communication.

Improve it: Review all names, dates, prices, and commitments before sending.

9. Adjust tone without changing substance

PROMPT "Revise this message to sound [firm / reassuring / collaborative / neutral] while preserving every material fact, request, deadline, and boundary. Briefly list any wording that could still be misunderstood."

Use when: The message is accurate but the tone needs work.

Improve it: Ask for ambiguity risks, not just nicer wording.

10. Turn notes into a usable document

PROMPT "Organize these notes into a [procedure / scope of work / agenda / update]. Use clear headings, remove repetition, preserve uncertainties, and add a final section called 'Information Still Needed.' Notes: [paste notes]"

Use when: Your source material is fragmented.

Improve it: Choose the final document type before prompting.

PROMPTS 11-15

Prepare for meetings and follow through

Arrive informed, capture decisions, and make ownership visible.

11. Prepare for an upcoming meeting

PROMPT “Help me prepare for my meeting about [topic] with [people or roles]. Using the available emails, files, calendar details, and chats I am permitted to access, summarize the background, recent decisions, open issues, and questions I should ask. Cite the sources used.”

Use when: You have a licensed, configured experience that can use work context.

Improve it: Specify a date range to prevent old information from dominating.

12. Build a focused agenda

PROMPT “Create a [length]-minute agenda for [meeting]. The desired outcome is [outcome]. Prioritize decisions over status updates. Include time allocations, discussion owner, and required preparation.”

Use when: A meeting needs structure and a clear outcome.

Improve it: Tell Copilot what can be handled asynchronously.

13. Summarize meeting outcomes

PROMPT “Summarize [meeting or transcript] under four headings: Decisions Made, Action Items, Open Questions, and Risks. Include owners and due dates only when explicitly stated. Quote no more than necessary.”

Use when: You need an accurate record after a meeting.

Improve it: Have attendees confirm high-impact decisions.

14. Write a follow-up message

PROMPT “Using the meeting summary, draft a concise follow-up email. Confirm decisions, list action items with owners and dates, identify unresolved questions, and ask recipients to report corrections by [date].”

Use when: You want shared understanding after a meeting.

Improve it: Attach or link the final source of truth when appropriate.

15. Find unresolved commitments

PROMPT “Review the relevant messages and notes from [date range] about [project]. Identify commitments that appear incomplete, overdue, or missing an owner. Cite the source and explain why each item appears unresolved.”

Use when: You are checking project follow-through.

Improve it: Treat the result as a review queue, not proof that work was missed.

PROMPTS 16-20**Plan, decide, and make progress on the go**

Turn short windows of time into useful forward movement.

16. Evaluate options

PROMPT “Compare these options: [options]. Evaluate them against [criteria]. Separate facts from assumptions, identify the information that would change the recommendation, and provide a provisional recommendation with reasoning.”

Use when: You need structured decision support.

Improve it: Supply your actual priorities; otherwise Copilot will infer them.

17. Pressure-test a plan

PROMPT “Challenge this plan as a skeptical reviewer. Identify hidden assumptions, operational dependencies, security or compliance concerns, likely failure points, and the three most valuable tests to run before proceeding. Plan: [paste or attach]”

Use when: You want counterarguments rather than confirmation.

Improve it: Ask for tests that reduce uncertainty, not a longer risk list.

18. Create a short work plan

PROMPT “Turn this goal into a practical work plan: [goal]. Define the outcome, the first five actions, dependencies, owner for each action, and what ‘done’ means. Flag any information you had to assume.”

Use when: You need to convert an idea into action.

Improve it: Replace suggested owners with accountable people before sharing.

19. Turn an image into organized notes

PROMPT “Extract the visible information from this image. Organize it into [notes / a task list / a table]. Mark any text that is uncertain or unreadable, and do not guess missing details.”

Use when: You photographed a whiteboard, handwritten page, or printed material.

Improve it: Check the original image before relying on names or numbers.

20. Use a five-minute window

PROMPT “I have five minutes and need to make progress on [goal]. Based only on the information provided, give me the single highest-value action I can complete now, the exact output to create, and what I should do next when I have more time.”

Use when: You are between meetings or working from your phone.

Improve it: Use voice dictation, but review names and sensitive content before submitting.

HUMAN REVIEW

Review every response before using it

Copilot can accelerate the work; you remain responsible for the outcome.

Before you send, publish, approve, or act on Copilot-generated work, confirm:

- ☐ The names, dates, amounts, links, and commitments are correct.
- ☐ The response used the intended source and date range.
- ☐ Facts are distinguishable from assumptions and recommendations.
- ☐ Important omissions or conflicting sources have been investigated.
- ☐ The tone fits the audience and the message still sounds like your organization.
- ☐ No confidential or regulated information is exposed unnecessarily.
- ☐ A qualified person reviews legal, financial, medical, employment, security, or compliance conclusions.

THE ACCOUNTABILITY RULE Copilot can accelerate the work. It does not become responsible for the accuracy, appropriateness, or outcome. The person using the result remains accountable.

Three useful follow-up prompts

- “What assumptions did you make, and which ones most affect this answer?”
- “What important information may be missing or outdated?”
- “Show me the sources for each material claim so I can verify them.”

QUICK REFERENCE**One-page prompt cheat sheet**

Copy a prompt, replace the bracketed text, and refine the first response.

Task	Prompt starter
Understand	Explain [topic] for [audience]. Cover why it matters, common misunderstandings, and three questions to ask next.
Summarize	Summarize [source] into facts, decisions, action items, risks, and open questions. Cite important points.
Find gaps	Identify missing information, unsupported assumptions, unclear ownership, and unresolved decisions. Do not invent answers.
Rewrite	Rewrite this for [audience] in a [tone] tone. Preserve all facts and keep it under [length].
Prepare	Using permitted sources from [date range], prepare me for [meeting]. Include background, decisions, risks, and questions.
Follow up	Draft a follow-up confirming decisions, owners, dates, open questions, and one clear next step.
Compare	Compare [A] and [B] against [criteria]. Separate facts from assumptions and flag contradictions.
Challenge	Pressure-test this plan. Identify hidden assumptions, failure points, and three tests to run before proceeding.
Plan	Turn [goal] into five actions with owners, dependencies, and a clear definition of done.
Five minutes	Give me the single highest-value action I can complete in five minutes toward [goal].

KEEP LEARNING**Further guidance and sources**

Use current Microsoft documentation to confirm licensing, availability, and data behavior.

Microsoft changes Copilot features frequently. Confirm licensing, availability, and data-protection behavior against current Microsoft documentation and your organization's configuration.

- [Overview of Microsoft 365 Copilot Chat](#)
- [What is Microsoft 365 Copilot?](#)
- [Enterprise data protection in Microsoft 365 Copilot and Copilot Chat](#)
- [Data, privacy, and security for Microsoft 365 Copilot](#)
- [Microsoft Copilot Prompt Gallery](#)

Practical Microsoft 365 guidance from PCC

Professional Computer Concepts helps Bay Area businesses use Microsoft 365 more securely, consistently, and effectively. We support Microsoft 365 planning, governance, security, user adoption, and ongoing technology management.

NEED HELP? PCC can help your organization evaluate Copilot readiness, establish responsible-use standards, review Microsoft 365 security, and turn AI capabilities into practical workflows.

Contact PCC

Questions or concerns? Our support team is here to help.



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