



Section 1 — Licence Check

- ☐ Confirm you have an eligible Microsoft 365 base licence. **The qualifying base is now broad**, including Business Basic, Business Standard, Business Premium, and enterprise plans E3 or E5 (Business Basic is now included).
- ☐ Decide which Copilot you need: **Microsoft 365 Copilot Chat** is included at no extra cost with eligible plans, while the in-app Copilot across Word, Excel, Outlook and Teams requires the **paid Microsoft 365 Copilot licence**.
- ☐ Check with your IT admin that the paid Copilot licence has been assigned to your account, if required.
- ☐ Confirm you can access **copilot.microsoft.com** or the Copilot button in your Microsoft 365 apps.
- ☐ Download and install the Microsoft 365 desktop apps if not already installed.
- ☐ Sign in with your work Microsoft account, not a personal account.

Section 2 — First 15 Minutes: Setup

- ☐ Open Microsoft Word and click the Copilot icon in the ribbon.
- ☐ In Teams, open a past meeting and click **Recap** to see the intelligent meeting summary.
- ☐ Open Outlook, open an email thread, and click Copilot to summarise the thread.
- ☐ Visit **copilot.microsoft.com** and explore the **Copilot Prompt Gallery** for inspiration.
- ☐ Bookmark the Microsoft adoption hub at **adoption.microsoft.com/copilot** (the former "Copilot Lab" is now the Copilot Prompt Gallery).

5 Most Useful Prompts

Prompt 1 — Meeting Preparation (Teams / Copilot chat)

"Summarise the last [X] emails about [project name] and list the three key open decisions."

Prompt 2 — After a Meeting (Teams)

"What were the key action items from today's meeting, and who was assigned each one?"

Prompt 3 — Email Drafting (Outlook)

"Draft a follow-up email to [recipient] summarising our discussion about [topic] and next steps."

Prompt 4 — Document Summarisation (Word)

"Summarise this document in five bullet points and highlight any risks or decisions needed."

Prompt 5 — Data Analysis (Excel)

"Analyse this spreadsheet and identify the top three trends or anomalies worth investigating."

Tips for Better Results

- ▶ **Be specific:** include the goal, the audience, and the output format you want.
- ▶ **Use the Outcome plus Context formula:** "Write a [output] for [audience] about [topic] so that [goal]".
- ▶ **Review every output:** Copilot can be confidently wrong, so always verify facts and figures.
- ▶ **For sensitive data:** confirm with your IT admin before pasting any customer information into Copilot.

Data handling: never paste customer personally identifiable information into Copilot prompts. Copilot honours your existing Microsoft 365 permissions, but staff still control what goes into a prompt.