



Best practices to avoid common pitfalls, enhance accuracy, and get better results using Copilot in Microsoft 365 applications (*requires the paid Copilot add-on*):

## COPILOT DO'S

### 1. Be Clear and Specific with Your Requests:

- **Why:** Copilot works best when given precise instructions. Clear and specific prompts help Copilot understand exactly what you want, reducing the chances of errors or incomplete responses.
- **Examples:**
  - Instead of: "Summarize this document," try: "Summarize this report focusing on key sales figures from the third quarter."
  - Instead of: "Create an email," try: "Draft a professional, formal email thanking the team for their contributions and highlighting the next steps in the project."

### 2. Use Actionable Verbs:

- **Why:** Using direct, actionable verbs helps Copilot know what kind of output you need, whether it's a draft, summary, analysis, or formatting.
- **Examples of Actionable Verbs:**
  - Summarize: "Summarize the last 10 emails in this thread."
  - Draft: "Draft a follow-up email based on these meeting notes."
  - Generate: "Generate a 10-slide presentation based on this document."
  - Analyze: "Analyze this data set and identify key trends over the past six months."
  - Rewrite: "Rewrite this paragraph to sound more concise and professional."

### 3. Break Down Complex Tasks into Smaller Steps:

- **Why:** Giving Copilot smaller, digestible tasks helps it handle each task more effectively, especially when working on multi-step processes.
- **Examples:**
  - Instead of asking: "Create a 20-slide presentation from this 50-page document," break it into steps:
    1. "Summarize the key points from this 50-page document."
    2. "Generate a 5-slide outline based on the key points."
    3. "Expand the outline into a 20-slide presentation."

**Friendly Reminder:** Microsoft Copilot is always evolving, so its features and capabilities may change over time. Be sure to test different prompts to find what works best for your content and goals!

#### 4. Leverage Copilot's Contextual Awareness:

- **Why:** Copilot can use the context from the document, email thread, or dataset you're working with to provide more accurate outputs.
- **Examples:**
  - When drafting emails, Copilot can use previous conversations to understand the context.
  - While working in Word, Copilot can reference earlier sections of a document to maintain consistency in style or content.

#### 5. Use Tone and Style Instructions:

- **Why:** Copilot allows you to specify the tone and style of your outputs, making it versatile for both formal and informal communication.
- **Examples:**
  - "Draft a professional, formal email thanking the client for their feedback."
  - "Summarize this document in an informal, conversational style suitable for internal team communication."

#### 6. Review and Edit the Results:

- **Why:** Copilot can generate great starting points, but it's always a good idea to review and fine-tune the output to ensure it fits your specific needs.
- **Example:**
  - After Copilot generates a meeting summary, quickly scan it for accuracy, ensuring the key points are correctly captured before sending it out.

## COPILOT DON'TS

### 1. Avoid Being Too Vague:

- **Why:** Vague prompts lead to generic or inaccurate responses. Copilot may struggle to determine what exactly you want, resulting in an incomplete or irrelevant output.
- **Examples:**
  - Instead of saying: "Create a report," try: "Using a professional tone, create a one-page Q4 sales report from the attached sales spreadsheet. Add charts for revenue and customer growth."
  - Instead of saying: "Fix this document," try: "Correct the formatting of this document to match our corporate template and simplify the language."

### 2. Don't Expect Copilot to Know Everything Automatically:

- **Why:** While Copilot is powerful, it doesn't have access to information outside the document or data you're working with, such as external websites or databases.
- **Examples:**
  - Don't ask: "Give me the latest market trends."
  - Instead, provide the relevant data or context: "Analyze the attached sales data and highlight trends over the past six months."

### 3. Don't Overload Copilot with Too Much Information at Once:

- **Why:** Large, complex prompts may confuse Copilot or result in incomplete answers. It's better to break down tasks.
- **Example:**
  - Instead of: "Summarize this 50-page document and generate a presentation," break it down: "Summarize the document first," then, "Create a slide presentation based on the summary."

### 4. Don't Rely on Copilot for Critical, Nuanced Communication:

- **Why:** Copilot is great for generating content, but for nuanced, highly sensitive communication, especially with executives or clients, a human touch is essential.
- **Example:**
  - Instead of fully relying on Copilot to draft an email addressing a client complaint, use it to draft a starting point, then carefully edit for tone and sensitivity before sending.

### 5. Don't Use Copilot Without Proofreading the Output:

- **Why:** While Copilot is effective, it's not perfect and may occasionally miss details, misunderstand prompts, or make formatting errors. Proofreading ensures professionalism and accuracy.
- **Examples:**
  - After Copilot generates a report or email, always review the document to ensure the key points are accurate and that it meets your standards.
  - Before sending a Copilot-drafted email, check for clarity, tone, and consistency with the message you want to convey.

### 6. Don't Use Copilot for Highly Confidential or Sensitive Information Without Careful Review:

- **Why:** Copilot may use data from within the document you are working on, but it's important to review outputs when dealing with confidential or sensitive topics to ensure no information is misrepresented or over-shared.
- **Example:**
  - If using Copilot to summarize a legal document or sensitive report, carefully review the output to ensure all legal or confidential details are correctly handled.

## ADDITIONAL TIPS:

### Do Use Copilot as a Learning Tool:

- **Why:** Copilot can teach you how to approach tasks more efficiently by providing smart suggestions for document formatting, formulas in Excel, and structuring content.
- **Example:** Ask Copilot to explain a formula or process step-by-step in Excel if you are unsure how it works.

### Don't Forget to Experiment:

- **Why:** Copilot is a flexible tool. By experimenting with different types of Copilot prompts and instructions, you may find new ways to streamline your work or generate creative outputs.
- **Example:** Try prompts like "Give me three ways to present this data" to explore alternative approaches.