Microsoft

Using Copilot Chat to Co-Create

Quick Reference Guide

Whether you're drafting, reviewing or summarising key details, Copilot chat can streamline your workflow and enhance collaboration and creativity. These techniques work in all Copilot chat experiences, personal, Copilot Pro, web & work. Please do consider data security and only use work data in your prompts and attachments when signed into Copilot with a work account.

These techniques keeps you in the loop, makes it simpler for you to verify each piece of content Copilot produces as well as bring your own contributions to the result.

Create a Document Outline with Copilot Chat

Ask Copilot to create a document outline using a prompt which includes:

- **Goal:** The document you need an outline for.
- **Context:** The purpose of the document including audience and any secondary uses.
- **Expectations:** Requirements for the structure of the document such as sections which much be included.
- **Source:** What is the document to be based on.

Example Prompt:

Please can you create an outline for a report on the results of an employee consultation. Employees were asked for their opinions on project prioritisation for the next 12 months. The primary report audience is senior leadership. It will also be available to all employees upon request. Please suggest a report structure considering that the report will be authored by a representative from each of HR, IT Finance and Project Operations divisions.

Use Copilot Chat as a Constructive Critic

Attach your document to a prompt and obtain a constructive review of your content using a prompt which includes:

- **Goal:** A review of the document
- **Context:** The purpose of the document including audience and any secondary uses
- **Expectations:** Aspects to be reviewed and guidance required
- **Source:** the document to be reviewed

Example Prompt:

Please can you review this report on the results of an employee consultation. Employees were asked for their opinions on project prioritisation for the next 12 months. The primary report audience is senior leadership. It will also be available to all employees upon request. Please suggest improvements that can be made to the document and on any information which is missing.

To provide the source attach the file using the paperclip.

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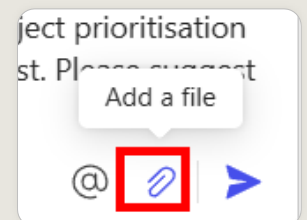
Create Multiple Versions of a Section with Copilot Chat

Get multiple options for a piece of content using a prompt which includes:

- **Goal:** The section of the document required and number of versions to be created.
- **Context:** The purpose of the document including audience and any secondary uses.
- **Expectations:** Requirements for the content such as language style.
- **Source:** What is the content to be based on.

REMEMBER: Continuing a conversation also gives context and sources of information to a prompt.

Example Prompt:

Please draft three variations of an introduction to the report, explaining the consultation process and information to be found in the report. Use business formal, professional language and British English.

Summarise Content with Copilot Chat

Summarise a document using a prompt which includes:

- **Goal:** Your requirements of a summary based on the document.
- **Context:** The use of the summary including audience and any secondary uses.
- **Expectations:** Requirements for the content such as language style.
- **Source:** the document to be reviewed.

NOTE: This technique can also be used for creating an FAQ.

Example Prompt:

Please can you summarise this report. I need two versions of the summary. One to be used the intranet page where employees can request the full report and the second to be used in the email to senior leadership which will accompany the report. Use business formal, professional language and British English.

To provide the source attach the file using the paperclip.