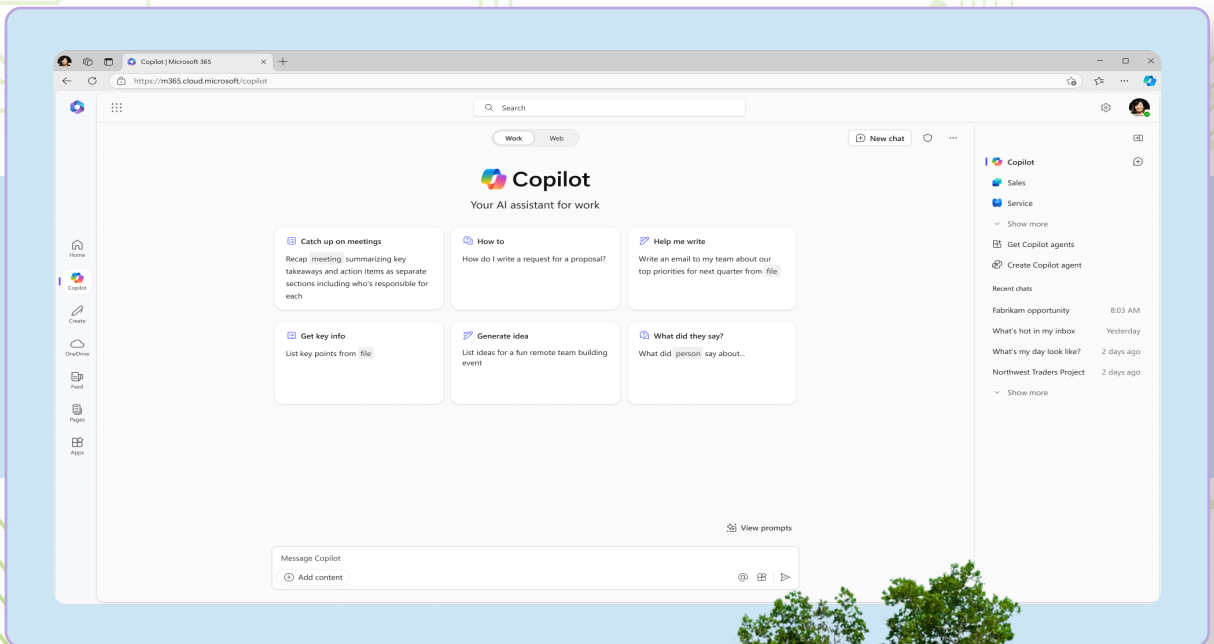




Copilot for Microsoft 365

Mastering AI Prompting

Unlocking the Power of AI Tools



Introduction

Artificial Intelligence (AI) is transforming how organizations work—automating tasks, accelerating decisions, and creating new value. Lasting adoption, however, depends not just on access to tools, but on how effectively people interact with them. Prompting plays a critical role in this process. Well-crafted prompts translate human intent into meaningful AI output, building trust, driving results, and enabling confident AI use across the organization.

How Effective Prompting Fuels AI Adoption

When prompts are clear and specific, users achieve better outcomes and experience immediate value. This builds confidence, encourages teams to apply AI to real business needs, and accelerates adoption. As employees see AI working for them, uncertainty fades and momentum grows.

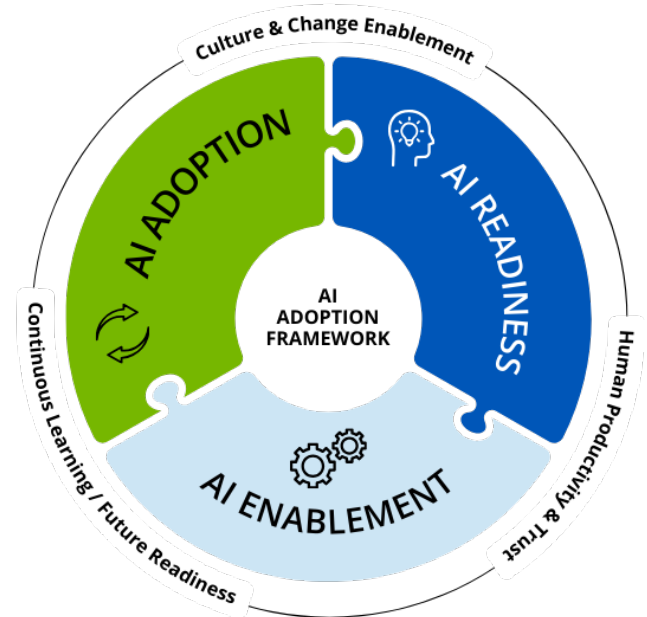
The AI Adoption Model

AI adoption is built on three pillars: **AI Readiness**, **AI Enablement**, and **AI Adoption**. Together, they create a structured path that helps organizations move from understanding AI to applying it effectively and embedding it at scale.

AI Readiness: Prepares your organization by building awareness, shared understanding, and trust. Teams learn what AI is—and what it isn't—along with responsible use and the fundamentals of effective prompting. This phase reduces skepticism and aligns people for change.

AI Enablement: Focuses on strengthening AI fluency in daily work. Employees apply prompting techniques within tools like Microsoft 365 Copilot, share best practices, and use AI to support real tasks. Curiosity turns into capability, driving engagement and productivity.

AI Adoption: Embeds AI into workflows and culture so it becomes a trusted part of everyday work. With the right prompting skills and change support in place, teams integrate AI consistently and confidently across the organization.



When readiness, enablement, and adoption come together, AI prompting becomes a bridge: helping employees overcome uncertainty, achieve results, and connect AI's power to real business goals.

Building Trust and Accelerating Value

Effective prompting isn't just technical—it inspires confidence in AI. When users see their instructions produce useful results, trust in AI grows and adoption speeds up, making AI a natural part of everyday work.

Your Path Forward

This ebook will guide you through the essentials of effective prompting with **Microsoft 365 Copilot**, helping your team move confidently along the adoption journey.

Whether just starting with AI or deepening its use, mastering prompting is the catalyst for sustainable, valuable change. [See more about our AI Workforce Solutions.](#)

Ready to unlock the full potential of AI in your organization? Let's discover how the right prompts can drive adoption and lasting success.

- Learning Tree International

Get started with Microsoft 365 Copilot



Microsoft 365 Copilot is a transformative AI assistant embedded directly within everyday tools like Teams, Word, Outlook, Excel, and PowerPoint. By leveraging cutting-edge AI, Copilot helps organizations streamline workflows, improve collaboration, and drive productivity through intelligent automation and real-time support.

Its presence across the Microsoft 365 suite ensures that employees at every level can access smart assistance where and when they need it most.

Copilot's Integration into Everyday Tools

Copilot's strength lies in its seamless integration across Microsoft 365.

In **Teams**, it summarizes meetings, highlights key discussions, and creates actionable follow-ups.

In **Word**, it speeds up drafting reports, proposals, and job descriptions, delivering professional, audience-focused content.

Outlook users can rely on it to summarize emails, draft responses, and pinpoint business opportunities. In PowerPoint, Copilot quickly creates and refines engaging slides from notes or data.

In **Excel**, it simplifies analysis by generating charts, spotting trends, and turning raw data into insights.



Business Chat

Quickly catch up on projects

"Summarize emails where I was mentioned."

Get quick insights from a sea of content—no matter where the information is

"Teach me about [Concept] in a way a non-technical person could understand."

Create content by getting data from multiple sources

"Draft a personal email I can send to people in [Role] to call their attention to [Product's] launch."

Prepare for meetings

"Create a storyboard for a 60-minute keynote where I need to engage a room full of [Audience] about [Topic]; use [File] and [File] as background."



Copilot in Teams

Catch up on missed meetings in a pinch

"What were the key points discussed?"

"Draft a summary from last week's spotlight meeting and include top customer pitch tips."

Host team brainstorm sessions

"Start a targeted promotion plan based on our meeting notes."



Copilot in Word

Draft job descriptions from scratch

"Generate a job description for a [Role]. Include bullet points from the [Role] core responsibility list."

Discover and summarize a detailed process document

"Review this document [File] and summarize all references into bullet points."



Copilot in Outlook

Draft personalized emails

"Draft an offer letter to [Name] with a start date of [Date]. Include our benefits information and use a professional tone."

Discover new sales leads

"Highlight emails from new senders."
"Invite [Client] to a meeting to discuss our core offerings. Include three time options."



Copilot in PowerPoint

Update template slides

"Update the pitch template slide using the recap from last week's Teams meeting. Include the client's logo on the slide."

Create new slides with existing content

"Summarize the client's profile, promotion plans, and taglines and separate into three new slides."

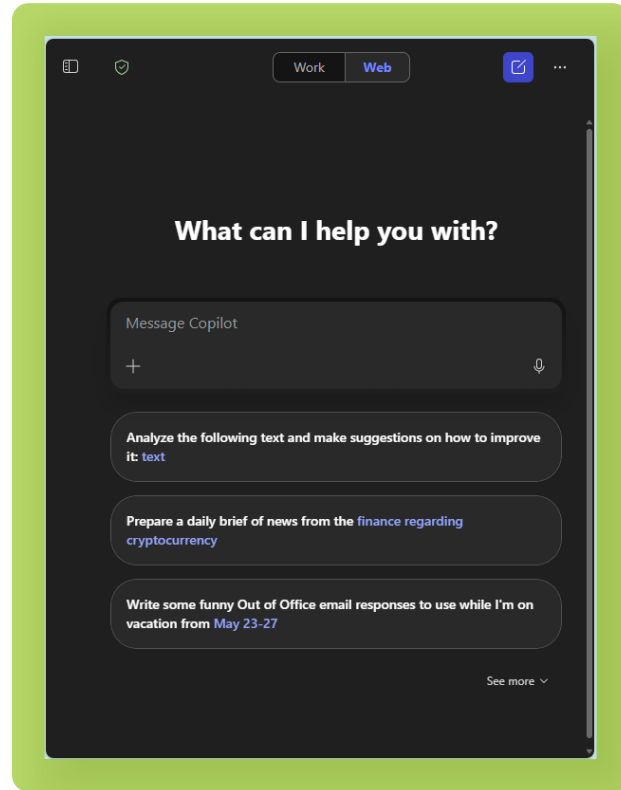
Top 10 prompts to try first with Microsoft 365 Copilot



Unlocking Potential with Effective Prompts

Crafting effective prompts is essential for harnessing Microsoft 365 Copilot's full capabilities. Clear, goal-driven prompts guide Copilot to deliver actionable insights, create polished documents, and simplify repetitive tasks. Using concise language with clear context turns Copilot into a powerful assistant, whether summarizing meetings, drafting emails, or designing presentations. Strategic prompting boosts productivity and drives team creativity. This section provides foundational guidance for creating targeted prompts that align with diverse workflows across roles and departments.

The "Top 10 Prompts to Try" isn't just a list but a practical guide to tailor AI for specific needs. From timelines for project managers to personalized campaigns for marketers, these examples show how Copilot adapts across scenarios. Using these tested prompts allows users to refine their approach and drive efficiency while building confidence in AI. This practical framework empowers teams to innovate and unlock new opportunities in daily operations.



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

- ➔ Draft an email with notes and action items from [meeting](#)



2

Summarize an email thread

– get quickly caught up to a long, complex email thread.

- ➔ Click on the Summarize icon



3

Draft email

– personalize the tone and length.

- ➔ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

- ➔ Give me a bulleted list of key points from [file](#)



5

Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

- ➔ Tell me what's new about [topic](#) organized by emails, chats, and files?



6

Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

- ➔ Suggest 10 compelling taglines based on [file](#)



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

- ➔ Generate three ways to say [\[x\]](#)



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

- ➔ What did [person](#) say about [topic](#)?



9

How do I ...

– let Copilot help you build or fix formulas in Excel.

- ➔ How do I sum values that are greater than 0?



10

Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

- ➔ Translate the following text into French:

The art and science of prompting



Prompts are how you ask Microsoft 365 Copilot to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- ✓ **Learn about projects and concepts:**
"What is [Project X] and who are the key stakeholders working on it?"
- ✓ **Summarize information:**
"Write a session abstract of this [presentation]."
- ✓ **Edit text:**
"Check this product launch rationale for inconsistencies."
- ✓ **Create engaging content:**
"Create a value proposition for [Product X]."
- ✓ **Transform documents:**
"Transform this FAQ doc into a 10-slide onboarding guide."
- ✓ **Catch-up on missed items:**
"Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

The art and science of prompting (continued)

3. Keep the conversation going

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.



Generating content ideas

Lead with broader requests, then give specific details about the content.



Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations.

Copilot is limited to your current conversation, so give lots of details.

Be professional.

Using polite language improves Copilot's response.

Communicate clearly.

Pay attention to punctuation, grammar, and capitalization.

Use quotation marks.

This helps Copilot know what to write, modify, or replace for you.

Start fresh.

Avoid interrupting and type "new topic" when switching tasks.



Effective prompting balances creativity and precision to harness the full potential of AI. By combining clear goals with thoughtful phrasing, a well-crafted prompt turns AI into a powerful tool for innovation and efficiency. This involves understanding the desired outcome and clearly articulating it in a way AI systems can interpret. Prompts are both an art and a science. Creativity

inspires diverse, meaningful outputs, while structure ensures accuracy and relevance. Together, they guide AI to generate insights, streamline processes, and align results with objectives. Mastering prompting helps leaders integrate AI into workflows, enhance decision-making, and drive success.

Prompting do's and don'ts

Get the most out of Copilot and avoid common pitfalls by learning **what to do** and **what not to do** when writing prompts.

Do's

✓ Be clear and specific.

Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.

✓ Keep it conversational.

Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.

✓ Give examples.

Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.

✓ Ask for feedback.

Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.

✓ Write legibly.

Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses.

✓ Check for accuracy.

Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.

✓ Provide details.

Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

✓ Be polite.

Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

Don'ts

✗ Be vague.

When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.

✗ Request inappropriate or unethical content.

Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.

✗ Use slang, jargon, or informal language.

This may cause Copilot to give low-quality, inappropriate or unprofessional responses.

✗ Give conflicting instructions.

Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.

✗ Interrupt or change topics abruptly.

This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

Copilot for Microsoft 365 Courses



Readiness, Enablement, and Adoption come together in driving successful **AI Adoption**. Learn how to seamlessly integrate AI into your workflows while maximizing its impact with the courses below, taught by Microsoft Certified Trainers (MTCs).

AI Readiness

[Work Smarter with AI and Microsoft Copilot \(AI-3025\)](#)

[Transform Your Business with Microsoft AI \(AI-3017\)](#)

[Draft, Analyze, and Present with Microsoft 365 Copilot \(MS-4018\)](#)

AI Enablement

[Empower Your Workforce with Copilot for Microsoft 365 Use Cases \(MS-4004\)](#)

[Copilot for Microsoft 365 User Enablement Specialist \(MS-4007\)](#)

[Build a Foundation to Extend Microsoft 365 Copilot \(MS-4014\)](#)

[Manage and Extend Microsoft 365 Copilot \(MS-4017\)](#)

AI Adoption

[Develop Copilots with Azure AI Studio \(AI-3016\)](#)

[Build Plugins and Connectors for Microsoft Copilot for Microsoft 365 \(MS-4010\)](#)

[Get Started with Microsoft Copilot for Security \(SC-5006\)](#)

[Customizing Copilot AI Assistants for Use in Your Organization \(PL-7008\)](#)

[Prepare security and compliance to support Microsoft 365 Copilot \(MS-4002\)](#)

Closing the Gap Between Potential and Mastery

Mastering effective prompting isn't just about better AI interactions; it's about driving meaningful change. With the right approach, you can unlock unprecedented productivity, spark creativity, and accelerate AI adoption within your organization. Clear, purpose-driven prompts position AI as a true partner, helping you tackle challenges, streamline workflows, and amplify the value of every task it assists with.

Your Next Step to Mastery

Are you ready to transform how your organization interacts with AI? Take the next step with Learning Tree International. Our expert-led training programs empower senior leaders and teams to master the nuances of AI prompting, ensuring you're poised to harness AI's full potential. From strategic guidance to hands-on skills, we equip you with the confidence and expertise needed to align AI with your company's strategic goals.



By enrolling in Learning Tree International's specialized AI training programs, you'll gain the tools and knowledge needed to lead the way in this transformative journey. Together, we'll pave the path toward a smarter, more efficient future.



Email us today @ info@LearningTree.com or visit:



LearningTree.com/microsoft-training-solutions/

A global leader in workforce development, advancing knowledge, skills, and professional excellence

