



ALDRIDGE

VIRTUAL TRAINING

# MICROSOFT 365 COPILOT BEYOND THE BASICS

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ELEVATE YOUR PRODUCTIVITY



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# Microsoft Copilot 365 – Elevate your Productivity

Starting your day with the Copilot app sets a productive tone by instantly organizing your priorities. It gives you a clear overview of your schedule, highlights urgent emails, and helps you prepare for meetings all within seconds.



Instead of spending time sorting through information, Copilot delivers personalized insights and actionable suggestions, allowing you to focus on what matters most. Whether you're drafting content, planning tasks, or seeking motivation, Copilot acts like a smart assistant that helps you start strong and stay ahead.

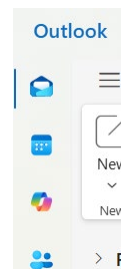
## Copilot App

The **Copilot app for Microsoft 365** is designed to be your AI-powered productivity partner, combining the intelligence of Microsoft Graph with large language models (LLMs) to streamline your work.

## Where to Open the Copilot App

The Copilot App is easy to get to. Microsoft provides multiple options for you to open the App.

- Your Microsoft Account Online – <https://m365.cloud.microsoft>
- Microsoft Teams
- Microsoft Outlook



## Benefits of Using the Copilot App

Using the Copilot app offers a range of benefits that enhance productivity and simplify daily tasks. It provides intelligent assistance by integrating seamlessly with Microsoft 365 tools, helping users draft emails, summarize documents, generate reports, and automate workflows. With natural language input, users can interact more intuitively, saving time and reducing the need for manual effort. Copilot also supports learning and decision-making by offering contextual insights and



suggestions tailored to your work. Overall, it empowers users to work smarter and focus on what matters most.

**1. Unified Workspace** – Copilot synthesizes data from across your ecosystem – emails, chats, meetings, files, and people—into a single interface. This means you can catch up on unread messages, summarize meetings, and locate buried information without switching apps.

**2. Seamless Integration** – Using a **Work account** connects you automatically to all Microsoft 365 apps, enabling full functionality across Outlook, Word, Excel, PowerPoint, Teams, and SharePoint. You can draft emails, generate presentations, and analyze spreadsheets—all within the same app.

**3. Prompt-Driven Productivity** – The app offers **real-time prompt suggestions** based on your context, helping you complete tasks faster. You can also customize prompts or use voice input to interact with Copilot.

**4. Content Creation & Collaboration** – Copilot helps you create content from scratch or based on existing files. You can upload documents, ask for summaries, or draft proposals. It also supports collaboration by turning conversations into action items and organizing chat threads.

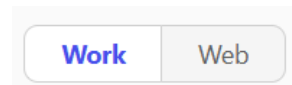
**5. Copilot Lab** – This feature lets users experiment with prompts, share insights, and learn how to work effectively with AI. It's a safe space for innovation and skill-building, especially useful for training environments like yours.

**6. Accessibility & Efficiency** – Features like **audio overviews of Word documents**, embedded Excel charts in PowerPoint, and automatic formatting preservation enhance accessibility and reduce manual effort.

**7. Security & Confidentiality** – Copilot respects organizational data boundaries and supports automatic confidentiality label syncing, helping protect sensitive information during content creation.

## Work vs Web

In Microsoft Copilot, **Work** and **Web** refer to the two distinct sources Copilot can draw from when responding to your prompts. **Work mode** accesses your organization's internal data—like emails, Teams chats,

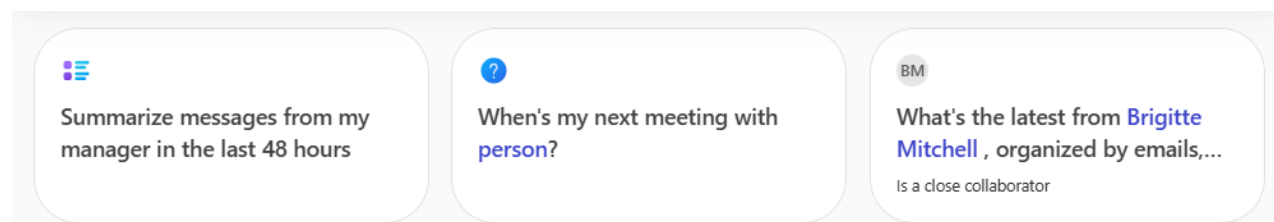




documents, and meeting notes—through Microsoft Graph, making it ideal for personalized, secure, and context-aware tasks. In contrast, **Web mode** pulls information from the public internet, such as news articles, websites, and general knowledge, which is useful for external research or broader inquiries. You can toggle between these modes in the Copilot interface depending on whether you need internal insights or public information.

- Slide to **Work** for direct connection to your Microsoft Account.
- Slide to **Web** to search content on the Internet.

The Prompt suggestions under the chat window change as you slide from Work to Web. It will provide relevant options related to your Account or the Internet.



## Using the Copilot App to Start Your Day

Here's a simple and energizing **morning routine using the Copilot app** to help you start your day with clarity and focus:

### Copilot-Powered Morning Routine

#### 1. Review Your Day

Ask Copilot: *"What's on my calendar today?"*

→ Get a quick summary of meetings, deadlines, and events.

#### 2. Prioritize Tasks

Ask Copilot: *"Summarize my unread emails and flag anything urgent."*

→ Focus on what needs immediate attention.

#### 3. Prep for Meetings

Ask Copilot: *"Give me a summary of recent emails or documents related to my 10 AM meeting."*

→ Walk in prepared and confident.



#### 4. **Plan Your Work**

Ask Copilot: *"Create a to-do list based on my calendar and recent tasks."*

→ Stay organized and goal-oriented.

#### 5. **Boost Your Mindset**

Ask Copilot: *"Share a motivational quote or tip to start my day."*

→ Begin with positivity and purpose.

### **Tips for Better Results**

- **Be specific:** Add filters like *"from today," "from [Name],"* or *"related to [project name]."*
- **Ask for priorities:** Include phrases like *"highlight urgent or time-sensitive emails."*
- **Follow up:** After the summary, you can ask Copilot to *"Draft responses for the top 3 emails"* or *"Schedule meetings based on these emails."*

## **GPT-5**

**GPT-5** is now available in Copilot. GPT-5 offers a powerful leap in AI capabilities, making it an ideal tool for enhancing productivity, creativity, and decision-making. With improved understanding, context awareness, and reasoning, GPT-5 delivers more accurate, relevant, and human-like responses across a wide range of tasks—from writing and coding to learning and collaboration.

### **Benefits of Using GPT-5**

- **Enhanced Accuracy:** Delivers more precise and context-aware responses.
- **Improved Reasoning:** Handles complex tasks and multi-step problems more effectively.
- **Greater Personalization:** Adapts to individual user preferences and work styles.
- **Multimodal Capabilities:** Understands and generates text, images, and code seamlessly.
- **Faster Performance:** Responds quickly with optimized processing and reduced latency.





- **Better Memory Handling:** Maintains context over longer conversations and tasks.
- **Stronger Security & Safety:** Includes advanced safeguards for responsible use.

To use GPT-5 click the Try GPT-5 icon located at the top right of the Copilot App.

Try GPT-5

**GPT-5 is now being used in Microsoft 365 Copilot**, including apps like **Word, Excel, Outlook, and Teams**.

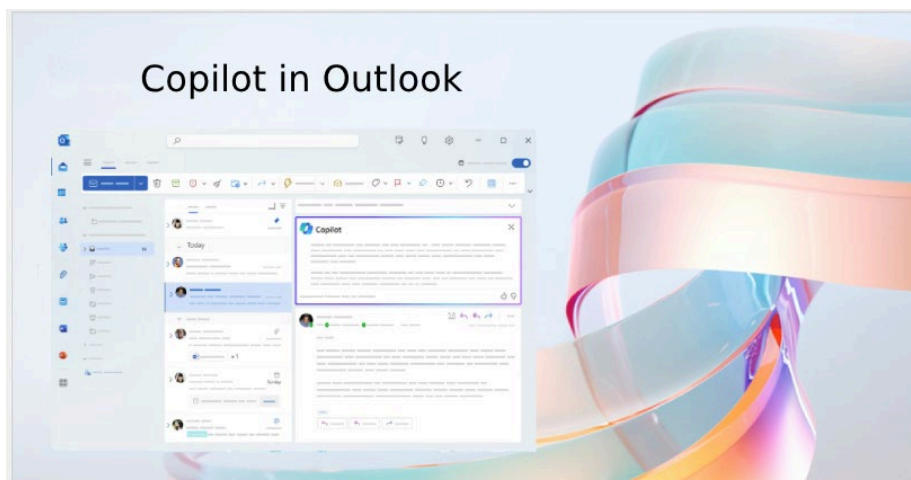
#### Key Highlights:

- **Automatic Integration:** GPT-5 is rolling out across Microsoft 365 Copilot and Copilot Studio. If you have a Microsoft 365 Copilot license, GPT-5 is already available to you.
- **Smart Mode:** Copilot uses GPT-5's real-time routing to automatically choose between fast responses for simple tasks and deeper reasoning for complex ones.
- **Context-Aware Assistance:** GPT-5 can analyze your emails, documents, meetings, and chats to provide tailored, intelligent support.
- **Cross-App Consistency:** The model is integrated across Word, Excel, Outlook, and Teams, ensuring a unified experience.
- **Custom Agents:** In Copilot Studio, you can build agents powered by GPT-5 to handle specific business processes with adaptive intelligence.



# Using Copilot for Morning Setup in Outlook

Starting your day with a clear plan is essential for productivity, and Copilot in Outlook makes this easier than ever. Instead of manually scanning through dozens of emails and calendar



entries, you can use Copilot to summarize, prioritize, and organize your morning in just a few clicks.

## Use Copilot to Summarize Unread Emails

Copilot in Outlook can quickly scan your inbox and provide a concise summary of your unread emails, highlighting urgent messages and key action items. This helps you start your day with a clear picture of what needs attention first.

### Steps to Use This Feature

1. **Open Outlook** (desktop or web version) and click the **Copilot icon** in the ribbon.
2. In the Copilot chat pane, type a prompt like:
  - *"Summarize my unread emails and highlight anything marked urgent."*
  - *"Give me a summary of my inbox focusing on emails from [specific person or team]."*
3. Copilot will generate a summary that includes:
  - Key senders and subjects
  - Urgent or flagged messages
  - Suggested next steps or actions



## Email Summarization:

Copilot can quickly review your unread emails and provide a concise summary of what's important. For example, you can type:

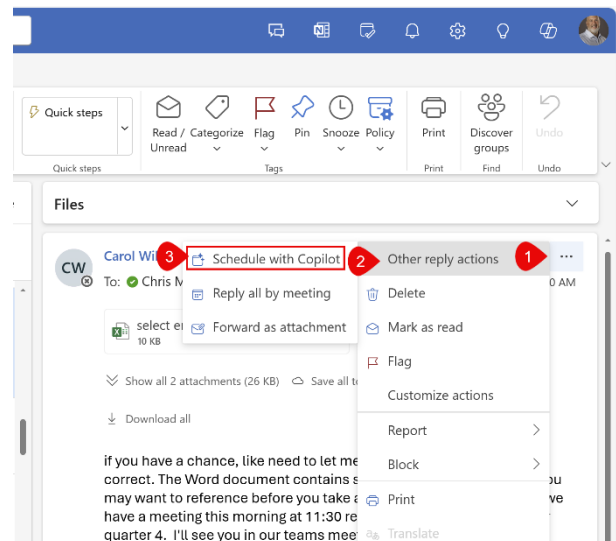
*"Summarize my unread emails and highlight anything marked urgent."*

Copilot will return a list of key messages, including the sender, subject, and any flagged or time-sensitive items. This helps you focus on what matters most without getting lost in your inbox.

## How Copilot Helps with Calendar Management

Copilot can quickly review your schedule, summarize upcoming meetings, and even suggest time for focused work. This saves you from manually scanning your calendar and helps you plan your day more effectively.

Copilot will summarize your appointments, highlight any conflicts, and even recommend time blocks for deep work.



### 1. Daily Overview

- Prompt: *"Summarize my meetings for today, including times and participants."*
- Copilot will list your meetings in order, with key details.
- After reviewing emails, ask Copilot to check your schedule: *"Give me an overview of my meetings today and suggest the best time for focused work."*

### 2. Multi-Day View

- Prompt: *"Give me an overview of my calendar for the next 3 days and highlight any conflicts."*

### 3. Find Free Time

- Prompt: *"Suggest the best time for a 1-hour focus block this week."*



#### 4. Meeting Prep

- Prompt: *"Summarize the agenda and related emails for my next meeting."*

5. You can also extend this to the next few days by asking: **"Show me my calendar for the next three days and highlight any overlapping meetings."**

#### Tips for Better Results

- Add **specific time frames**: *"today," "next 3 days," "this week."*
- Ask for **conflict checks**: *"Highlight overlapping meetings."*
- Combine with tasks: *"Based on my calendar and tasks, suggest when I can work on [project name]."*

## Actionable Next Steps

Once you have your email and calendar summary, Copilot can help you create a prioritized to-do list. For example:

***"Create a task list from my flagged emails and today's calendar events."***

This gives you a clear roadmap for the day, ensuring nothing slips through the cracks.

## Copilot Can Help With Managing Tasks

Copilot can pull together tasks from multiple sources—emails, calendar events, and even Teams messages—so you know exactly what needs to be done and when. This is especially useful for starting your day with a clear plan.



#### 1. Create a Prioritized Task List

- Prompt: *"Create a prioritized to-do list from my flagged emails and today's calendar events."*
- Copilot will generate a list with deadlines and priorities.

#### 2. Identify Action Items from Emails

- Prompt: *"Summarize action items from my unread emails."*
- Great for surfacing hidden tasks without reading every email.



### 3. Combine Tasks Across Apps

- Prompt: *"Pull together tasks from Outlook and Teams messages related to [project name]."*

### 4. Plan Your Day

- Prompt: *"Based on my calendar and tasks, suggest the best time blocks for focused work."*

#### Tips for Success

- **Be specific:** Include project names or deadlines in your prompt.
- **Ask for prioritization:** Use phrases like *"rank by urgency"* or *"highlight overdue tasks."*
- **Follow up:** After getting the list, ask Copilot to *"Schedule time for these tasks in my calendar."*

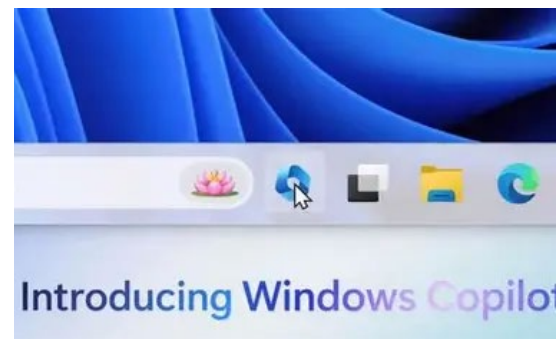
## Edge: Enhance Your Browsing Experience and Gather Information Quickly

Microsoft Edge with Copilot transforms how you browse and research online. Instead of manually reading through multiple pages or copying content into notes, Copilot can summarize, compare, and extract insights directly from web pages—saving you time and effort.

### Smart Summarization in Edge

When browsing the web, you often encounter lengthy articles, reports, or research papers that take time to read and digest. Copilot in Microsoft Edge solves this by providing **instant summaries** of web content, allowing you to extract key information without leaving the page.

- Open the webpage you want to summarize in Microsoft Edge.

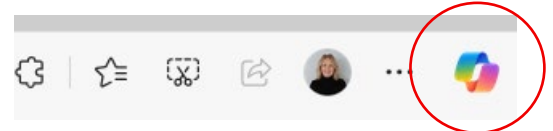




- Click the **Copilot icon** in the sidebar or press **Ctrl + Shift + .** to open the Copilot pane.
- Type a prompt like:
  - *"Summarize this page in 5 bullet points."*
  - *"Give me the key takeaways from this article in 3 sentences."*

Copilot will scan the page and return a concise summary, often highlighting:

- Main ideas or arguments
- Key statistics or data points
- Actionable insights relevant to your query



### Examples of Smart Summarization Prompts

- *"Summarize this article in bullet points for a quick review."*
- *"Give me a short summary of this page for a LinkedIn post."*
- *"Extract the top 3 insights from this report for my presentation."*

### Tips for Better Results

- **Be specific about format:** Use phrases like *"in bullet points"* or *"in 3 sentences."*
- **Add context:** For example, *"Summarize this page for a beginner audience"* or *"Summarize for a business report."*
- **Follow up:** After summarizing, ask Copilot to *"Draft a paragraph for my report based on this summary."*

## Compare and Analyze in Edge

When researching online, you often need to review multiple sources to identify differences, similarities, or unique insights. Copilot in Microsoft Edge makes this process effortless by comparing content from different web pages and highlighting key distinctions or overlaps.

1. Open the first webpage in Microsoft Edge and activate Copilot from the sidebar.
2. Provide the second source (a link or pasted text) in your prompt.
3. Ask Copilot to compare the two sources and summarize the differences or similarities.





## Examples of Compare and Analyze Prompts

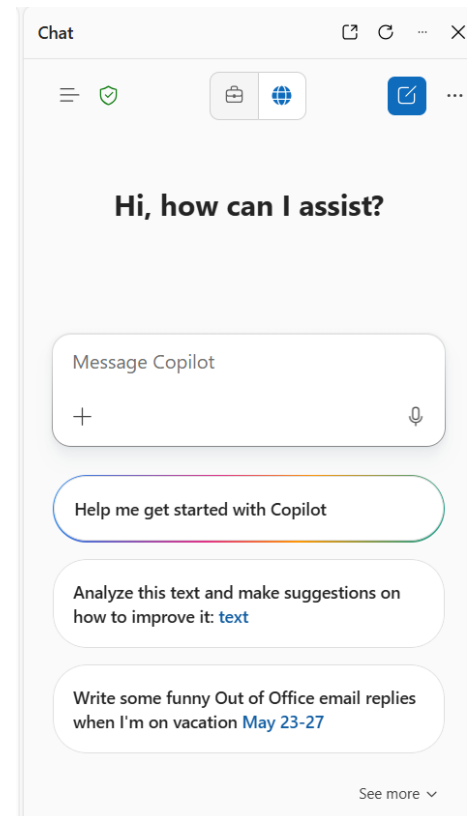
- *"Compare this article with [link] and highlight the main differences in their conclusions."*
- *"Analyze these two pages and summarize what they agree on and where they differ."*
- *"Compare this report with [link] and tell me which one provides more recent data."*

## What Copilot Can Highlight

- Key differences in arguments or findings
- Contrasting statistics or data points
- Unique insights from each source
- Areas of agreement or consensus

## Tips for Better Results

- **Be clear about what you want compared:** For example, *"Compare their recommendations for small businesses."*
- **Add context:** *"Highlight differences relevant to sustainability practices."*
- **Follow up:** After comparing, ask Copilot to *"Draft a summary paragraph for my report based on these differences."*



## Generate Insights in Edge

Copilot in Microsoft Edge goes beyond summarizing content, it can analyze information and provide actionable insights tailored to your needs. This feature is especially useful when you're researching complex topics, preparing reports, or looking for trends and recommendations.

- Open the webpage or multiple sources you want to analyze.
- Activate Copilot from the Edge sidebar.
- Ask Copilot to extract key takeaways, recommendations, or implications from the content.



## Examples of Generate Insights Prompts

- *"Give me 3 key takeaways from this article for a business strategy presentation."*
- *"What are the main risks and opportunities mentioned in this report?"*
- *"Summarize the benefits of [technology/product] and suggest how it could impact small businesses."*
- *"Based on this article, what are the top trends in [industry] and why do they matter?"*

## What Copilot Can Deliver

- Actionable recommendations for decision-making
- Trend analysis for reports or presentations
- Pros and cons lists for evaluating options
- Impact summaries for specific audiences (e.g., executives, customers)

## Tips for Success

- Use **specific instructions** like "in bullet points" or "in 3 sentences" for clarity.
- Provide **context**: Mention the purpose (e.g., "for a presentation" or "for a report").
- Combine tasks: After summarizing, ask Copilot to *"Draft a paragraph for my report based on this summary."*

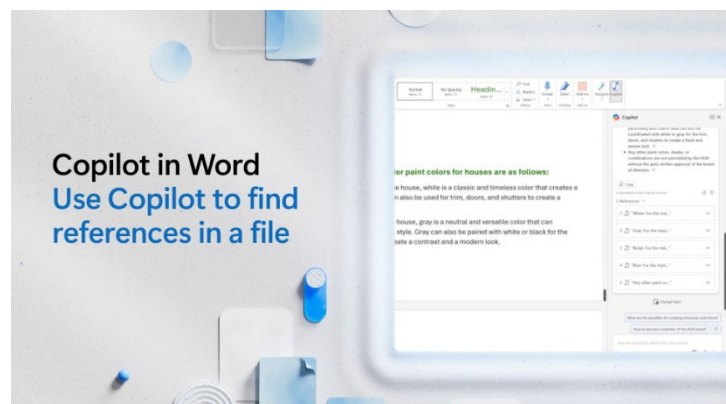
# Using Copilot for Daily Document Management

To find out what you were **recently working on using Copilot**, here are a few helpful ways to get that information quickly:

### 1. Ask for Recent Files

Say: "Show me the documents I've worked on this week."

→ Copilot can pull up your recent activity across Word, Excel, PowerPoint, and OneDrive.







## 2. Review Recent Emails or Threads

Say: "Summarize my recent email conversations."

→ Helps you recall ongoing projects or follow-ups.

## 3. Check Calendar-Linked Files

Say: "List documents linked to my recent meetings."

→ Copilot can surface files shared or discussed during scheduled events.

## 4. Use Activity Feed (in Teams or OneDrive)

→ Navigate to the activity tab to see recent edits, shares, and comments.

# PowerPoint & Word: Prepare Presentations and Documents with Ease Using Copilot

Creating professional presentations and documents can be time-consuming, but Copilot in PowerPoint and Word makes the process faster and more intuitive. With natural language prompts, you can generate outlines, design slides, draft content, and even refine tone and formatting, all without starting from scratch.



## PowerPoint: Build Presentations in Minutes

Copilot can create slide decks based on your instructions, complete with suggested layouts and visuals. For example:

- *"Create a 5-slide presentation on the benefits of AI in education."*
- *"Add speaker notes for each slide in a conversational tone."*
- *"Suggest relevant images or icons for this presentation."*

You can also ask Copilot to **summarize a document into slides**, making it easy to turn reports into engaging presentations.

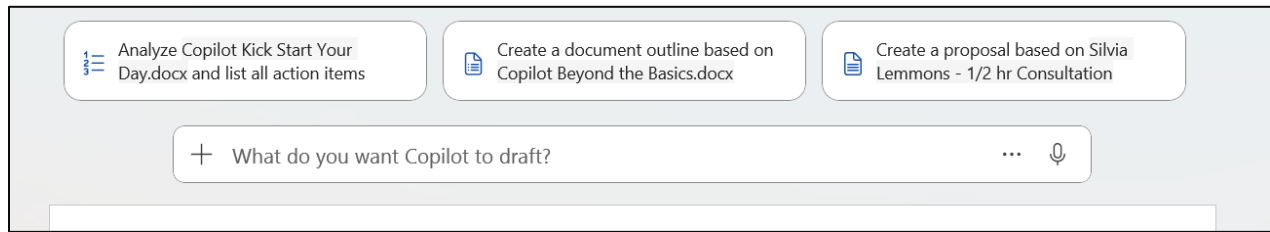
## Word: Draft and Refine Documents Quickly

Copilot helps you draft reports, summaries, and proposals in seconds. For example:

- *"Write a one-page summary of this document in bullet points."*



- *"Rewrite this paragraph to make it more concise and professional."*
- *"Format this document with headings and a formal tone."*



It can also **generate first drafts** based on your ideas or **improve existing content** by adjusting tone, clarity, and structure.

## Actionable Tips and Ready-To-Use Copilot Prompts

Here are **actionable tips and ready-to-use Copilot prompts** to kickstart your day effectively:

### 1. Plan Your Day

**Prompt:** *"Create a prioritized to-do list for today based on my calendar and emails. Highlight urgent tasks and suggest time blocks."*

**Why it works:** Copilot can scan your Outlook calendar and emails to generate a structured plan.

### 2. Summarize Overnight Updates

**Prompt:** *"Summarize all unread emails from the last 12 hours and highlight any that require immediate action."*

**Bonus:** Add *"Draft quick responses for the top 3 urgent emails."*

### 3. Get Meeting-Ready

**Prompt:** *"Prepare a briefing for my first meeting today. Include agenda, attendees, and any recent email threads or documents related to the topic."*



#### 4. Daily Insights

**Prompt:** "Give me a quick snapshot of yesterday's key metrics (sales, engagement, or project progress) and any trends I should watch today."

#### 5. Brainstorm or Draft Content

**Prompt:** "Draft a LinkedIn post about [topic] in a professional yet engaging tone. Keep it under 150 words."

or

"Generate 3 creative ideas for an internal newsletter headline about [topic]."

#### 6. Personal Productivity Boost

**Prompt:** "Suggest a 15-minute focus routine to start my day energized and productive."

## Keep Moving Forward with Copilot

Copilot is more than just a productivity tool—it's your personal assistant for organizing, planning, and staying on track. By starting your day with Copilot, you can quickly clear the clutter from your inbox, review your schedule, and create a prioritized task list in minutes. Instead of spending the first hour of your day sorting through emails and planning meetings, Copilot does the heavy lifting so you can focus on what matters most.



But Copilot doesn't stop there. Throughout the day, it helps you stay productive by drafting emails, summarizing documents, generating insights from research, and even creating presentations on the fly. Whether you need to prepare for a meeting, respond to urgent messages, or pull together a quick report, Copilot keeps you moving forward—saving time and reducing stress. With Copilot by your side, you'll not only start strong but maintain momentum all day long.



## After your Morning Setup

After your morning setup, Copilot continues to be your productivity partner, helping you stay focused and efficient as new tasks and challenges arise. Whether you're responding to emails, preparing for meetings, or creating content, Copilot ensures you maintain momentum without getting bogged down in repetitive work.

## Stay on Top of Communication

Copilot helps you manage communication efficiently by drafting responses and summarizing conversations. Instead of spending time crafting every email, you can ask Copilot to write a professional or friendly response in seconds. For example:

*"Draft a friendly follow-up email to thank the client for attending today's meeting."*

If you're dealing with long email threads or Teams chats, Copilot can summarize the key points so you can respond intelligently without reading every message.

Example:

*"Summarize this email thread and suggest a response."*

This keeps you informed and responsive without losing valuable time.

- **Draft Responses Quickly:**

Instead of typing every email from scratch, ask Copilot to draft responses in the tone you need.

*Example:*

*"Draft a friendly follow-up email to thank the client for attending today's meeting."*

- **Summarize Conversations:**

For long email threads or Teams chats, Copilot can summarize the key points so you can respond intelligently without reading every message.

*Example:*

*"Summarize this email thread and suggest a response."*



## Prepare for Meetings on the Fly

Copilot ensures you're always ready for meetings, even at short notice. It can summarize recent emails, highlight key discussion points, and even create agendas. For example:

"Summarize the last 3 emails from [Name] for context before my 2 PM meeting."

Or,

"Create a meeting agenda based on these discussion points."

This feature eliminates the stress of last-minute preparation and helps you walk into meetings confident and informed.

- **Meeting Recaps:**

*"Summarize the last 3 emails from [Name] for context before my 2 PM meeting."*

- **Agenda Creation:**

*"Create a meeting agenda based on these discussion points."*



## Create and Refine Content Quickly

Whether you're working in PowerPoint or Word, Copilot accelerates content creation. You can ask it to add slides to an existing presentation, generate speaker notes, or rewrite text for clarity and tone. For example:

"Add two slides to my presentation with key trends in [topic]."

Or,

"Rewrite this section to make it more concise and professional."

This allows you to produce polished, professional content without spending hours formatting or editing.

- **PowerPoint:** *"Add two slides to my presentation with key trends in [topic]."*

- **Word:** *"Rewrite this section to make it more concise and professional."*



## Research and Insights

Copilot in Edge helps you gather and analyze information without leaving your browser. It can summarize articles, compare sources, and generate actionable insights for reports or presentations. For example:

*“Give me 3 key takeaways from this article for a client briefing.”*

This feature is perfect for staying informed and making data-driven decisions quickly, even when you’re pressed for time.

- Use Edge Copilot to **summarize articles, compare sources, and generate insights** for reports or presentations without leaving your browser.

*Example:*

*“Give me 3 key takeaways from this article for a client briefing.”*

## Tips for Staying Productive All Day

- **Batch tasks:** Use Copilot to handle multiple emails or summarize multiple documents at once.
- **Ask for context:** Before responding or making decisions, let Copilot pull together the essentials.
- **Iterate:** Start with a draft and refine by asking Copilot to adjust tone, length, or format.

# Daily Copilot Command Cheat Sheet

**Daily Copilot Command Cheat Sheet** for staying organized across Microsoft 365 apps:

### Morning Kickoff

- **Outlook:**  
*“Summarize my emails and meetings for today. Highlight anything urgent.”*
- **Teams:**  
*“What are the latest updates in [Team/Channel] since yesterday?”*
- **Planner/To Do:**  
*“Show me tasks due today and any overdue items.”*





### During the Day

- **Meetings:**  
*"Summarize key decisions and action items from this meeting."*
- **Documents:**  
*"Summarize this document into key points and next steps."*
- **Teams Chat:**  
*"Summarize this conversation and list any action items."*

### End-of-Day Wrap-Up

- **Outlook:**  
*"Summarize what I accomplished today and what I need to focus on tomorrow."*
- **Teams:**  
*"Create a recap of today's updates for my team."*
- **Planner/To Do:**  
*"Show me what's left for today and move unfinished tasks to tomorrow."*

### Weekly Prep (Friday or Monday)

- *"Summarize my upcoming week: meetings, deadlines, and top priorities."*
- *"Draft a Monday kickoff email for my team with key updates."*

## In Conclusion

Microsoft Copilot is more than just a productivity tool—it's your personal assistant for organizing, planning, and staying on track. By starting your day with Copilot, you can quickly clear the clutter from your inbox, review your schedule, and create a prioritized task list in minutes. Instead of spending the first hour of your day sorting through emails and planning meetings, Copilot does the heavy lifting so you can focus on what matters most.

But Copilot doesn't stop there. Throughout the day, it helps you stay productive by drafting emails, summarizing documents, generating insights from research, and even creating presentations on the fly. Whether you need to prepare for a meeting, respond to urgent messages, or pull together a quick report, Copilot keeps you





moving forward—saving time and reducing stress. With Copilot by your side, you'll not only start strong but maintain momentum all day long.

Here are the key takeaways:

- **Organizing Priorities:** The document explains how the Copilot app can instantly organize your priorities, giving you a clear overview of your schedule, highlighting urgent emails, and helping you prepare for meetings within seconds.
- **Personalized Insights:** Copilot delivers personalized insights and actionable suggestions, allowing you to focus on what matters most. Whether you're drafting content, planning tasks, or seeking motivation, Copilot acts like a smart assistant.
- **Benefits of Using Copilot:** The document outlines various benefits of using the Copilot app, such as intelligent assistance, seamless integration with Microsoft 365 tools, and support for learning and decision-making.
- **Morning Routine:** It provides a simple and energizing morning routine using the Copilot app to help you start your day with clarity and focus. This includes reviewing your day, prioritizing tasks, preparing for meetings, planning your work, and boosting your mindset.
- **Productivity Features:** The document highlights features like unified workspace, seamless integration, prompt-driven productivity, content creation and collaboration, Copilot Lab, accessibility and efficiency, and security and confidentiality.