



MICROSOFT COPILOT IN TEAMS

BEYOND THE BASICS



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What is Microsoft Copilot 365



Microsoft Copilot is an AI-powered assistant integrated into Microsoft 365 apps like Excel, Word, PowerPoint, Outlook, and Teams. Built on advanced large language models (LLMs), Copilot helps users work more efficiently by understanding natural language prompts and generating intelligent suggestions in real time. Whether you're analyzing data in Excel, drafting documents in Word, creating presentations in PowerPoint, or managing communications in Outlook and Teams, Copilot enhances productivity, creativity, and decision-making by streamlining tasks and offering context-aware support.

Ensure You Have Access

Before you start using Copilot, ensure that you have:

- A Microsoft 365 subscription that includes access to Copilot. This feature is generally included in business and enterprise plans.
- The latest version of Teams is installed. Update your application to ensure you have the latest features and security updates.

Limitations of Using Copilot

While I find Copilot in Excel to be a powerful tool, I've noticed it has some limitations that I need to keep in mind:

- **Dependency on Cloud Storage:** I must save my workbook in the cloud (OneDrive or SharePoint) for Copilot to function properly. This requires a stable internet connection to access its features effectively.
- **Subscription Requirements:** Copilot is only available to those with specific Microsoft 365 subscriptions. Without the appropriate subscription, I won't be able to use Copilot.
- **Data Structure:** I've realized that Copilot works best with well-structured data, ideally formatted as tables. If my data is messy or unorganized, Copilot may struggle to provide accurate insights.

Access Copilot 365

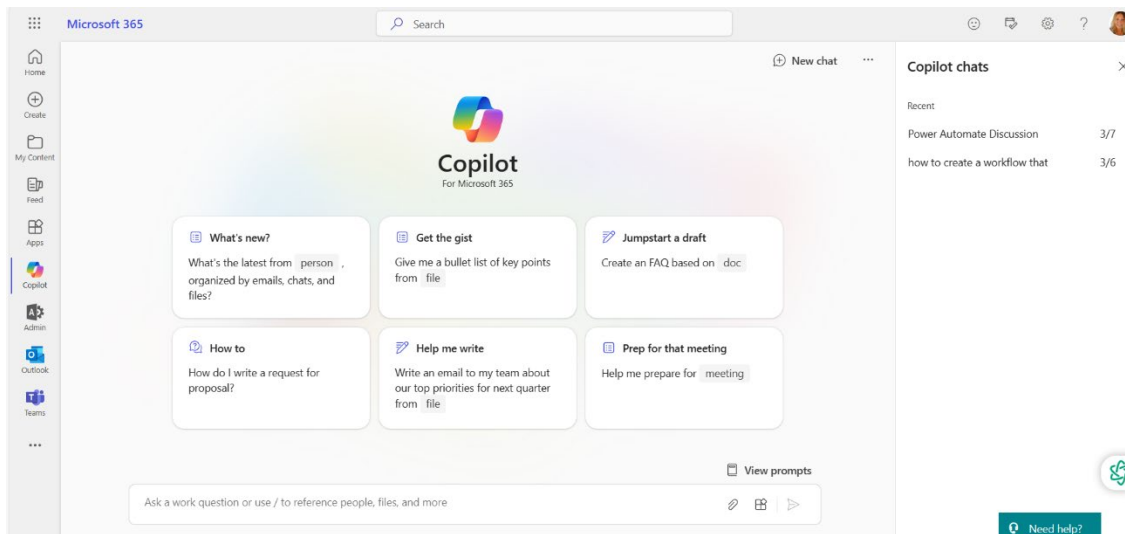
1. Log into your Microsoft Account online.
2. Click on the Copilot icon from the menu bar on the left.

You can open Copilot from:

- Taskbar
- Microsoft Account



- Teams



The Copilot App

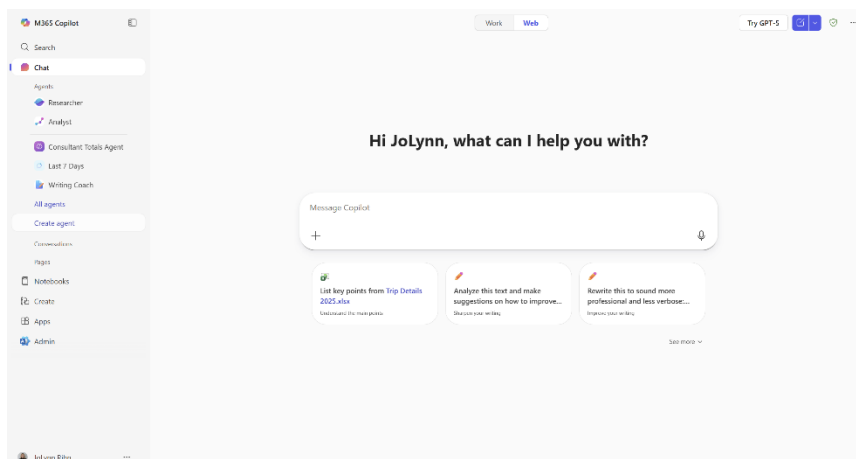
Copilot can synthesize data from multiple sources to give you a summary of things you need to catch up on, including your files, messages, meetings, emails, and people. It can also help you find and use info that's buried in documents or lost in conversations. And with Copilot by your side, you can create content with it all.

Using a Work account gives you advantages over a personal account. Most important is that you will be automatically connected to all other Microsoft 365 apps for fully connectivity.

Using the Copilot App

Ask a work-related question, or try one of these:

- Draft a message with action items from my last meeting.
- Catch up on my unread emails.
- How do I write a request for proposal?





Benefits of Using Copilot in Microsoft Teams

Using **Copilot in Microsoft Teams** offers several benefits that can significantly improve productivity, collaboration, and workflow efficiency. Here are the key advantages:

Copilot in Microsoft Teams helps you work smarter by summarizing meetings, automating tasks, and improving collaboration in real time. It reduces manual effort, keeps everyone aligned, and ensures follow-ups don't slip through the cracks.

Key Benefits of Using Copilot in Microsoft Teams

Meeting Productivity

- **Real-time summaries:** Copilot captures key discussion points, including *who said what* and where participants agree or disagree.
- **Action items:** It automatically suggests follow-ups and tasks, so nothing gets lost after a meeting.
- **Q&A support:** You can ask Copilot questions during or after meetings to clarify details without rewatching recordings.



Enhanced Collaboration

- **Streamlined communication:** Copilot organizes and summarizes conversations across Teams channels, making it easier to catch up quickly.
- **Cross-department efficiency:** It helps coordinate tasks and projects by integrating with Microsoft 365 apps like Word, Excel, and Outlook.
- **Automated workflows:** Routine tasks such as drafting updates, creating reports, or scheduling follow-ups are handled intelligently.

Productivity Boost

- **Eliminates manual note-taking:** No need to scribble down meeting minutes—Copilot does it for you.
- **Smarter task management:** It keeps track of deadlines and responsibilities, reducing the risk of missed deliverables.
- **Time savings:** By automating repetitive work, employees can focus on higher-value tasks.

Organizational Control

- **Customizable use:** Meeting organizers decide how Copilot is enabled, ensuring compliance with company policies.
- **Integrated security:** Copilot works within Microsoft's trusted ecosystem, aligning with organizational sensitivity labels and governance.



Why It Matters

Copilot transforms Teams from a communication tool into a **true AI-powered workplace assistant**. Instead of just hosting meetings, Teams becomes a hub where decisions are documented, tasks are tracked, and collaboration flows seamlessly.

Copilot in Teams

The new Copilot app in Microsoft Teams gives you personalized information, such as your meetings, files, or colleagues. Go back to your chat history with Copilot anytime you need a reminder and explore a range of prompts in the Copilot Lab to get the most out of your experience. The Copilot app is located at the top of your chat conversations and is currently offered with a Copilot for M365 license.



Copilot in Microsoft Teams to Streamline Communication

Copilot in Microsoft Teams enhances collaboration and productivity by streamlining communication, summarizing conversations, and generating meeting notes with actionable tasks. It helps create documents, agendas, and reports directly within Teams, while providing quick access to organizational knowledge and data insights. By automating workflows and offering personalized suggestions, Copilot reduces time spent on repetitive tasks and ensures teams stay focused on high-value work—all without leaving the Teams environment.

Here are practical ways to use **Copilot in Microsoft Teams to streamline communication**:

1. Summarize Conversations

- In a busy channel or chat, ask Copilot:
“**Summarize the last 20 messages in this chat.**”
This gives you a quick digest of key points without scrolling through everything.

2. Draft Responses

- Use Copilot to **suggest replies** based on the context of the conversation.
Example:
“**Draft a professional response to confirm the meeting and thank them for sharing the report.**”

3. Clarify and Translate

- If messages are unclear or in another language, Copilot can **rephrase for clarity** or **translate** instantly.
Example:
“**Rewrite this message to sound more concise and friendly.**”

4. Prepare Meeting Follow-Ups



- After a meeting, ask Copilot:
“Create a summary of today’s meeting and draft a follow-up message for the team.”
It will include decisions and action items.

5. Organize Information

- Copilot can **extract tasks, deadlines, and key points** from long threads and turn them into actionable lists.
Example:
“List all tasks mentioned in this chat and assign them to the right people.”

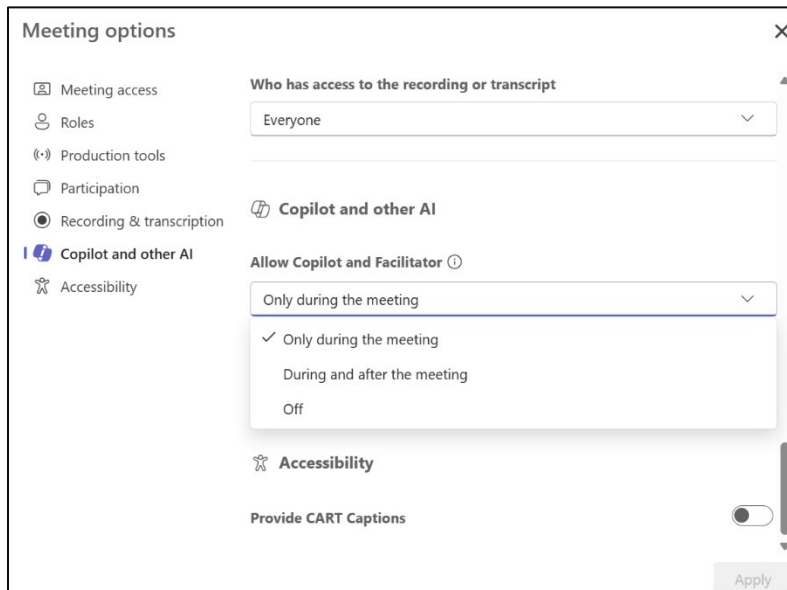
6. Reduce Noise

- For large channels, ask Copilot to **highlight only relevant updates** for your role or project.
Example:
“Show me updates related to Project X from this channel.”

Copilot in Teams Meetings

Copilot in Microsoft Teams enhances collaboration and helps you get the most out of your Teams chats and meetings. Quickly recap, identify follow-up tasks, create agendas, and ask questions for more effective and focused meetings. Summarize key takeaways, see what you’ve missed, and pinpoint key people of interest in chat threads you were added to. All without breaking the flow of discussion. Copilot in Teams uses your Teams chat and meeting content to generate insights and actionable suggestions alongside your most important Teams touch points.

Here’s how you can use **Copilot in Microsoft Teams for meeting efficiency:**





Before the Meeting

- **Create an agenda:** Ask Copilot to draft a structured agenda based on previous conversations or documents.
 - **Prepare talking points:** Use Copilot to summarize relevant chat threads or files so you're ready for discussion.
1. **Open Teams and go to the meeting chat or calendar event.**
 2. Click the **Copilot icon** in the chat or meeting details pane.
 3. **Ask Copilot to draft an agenda:**
 - Example: *"Create a meeting agenda based on our last project update."*
 4. **Summarize previous discussions:**
 - Example: *"Summarize the last 3 conversations related to this project."*
 5. **Prepare talking points:**
 - Example: *"Highlight key decisions from last week's meeting."*

During the Meeting

- **Real-time summaries:** Copilot can capture key points, decisions, and action items as the meeting progresses.
- **Clarify questions:** If someone asks for context, Copilot can quickly pull related information from Teams chats or documents. Copilot can be used by editing a meeting after it has finished and clicking on the **Recap** button at the top of the screen. This shows an AI summary and Copilot can be accessed to ask further questions by clicking on the **Copilot** icon.

Alternatively, it can be used in a live meeting by clicking on the **Copilot** icon on the ribbon and asking questions in the pane that appears.

1. **Start the meeting in Teams** and ensure Copilot is enabled.
2. Click **Copilot in the meeting window** (usually in the side panel).
3. Use prompts like:
 - *"Summarize what's been discussed so far."*
 - *"Capture action items from this conversation."*

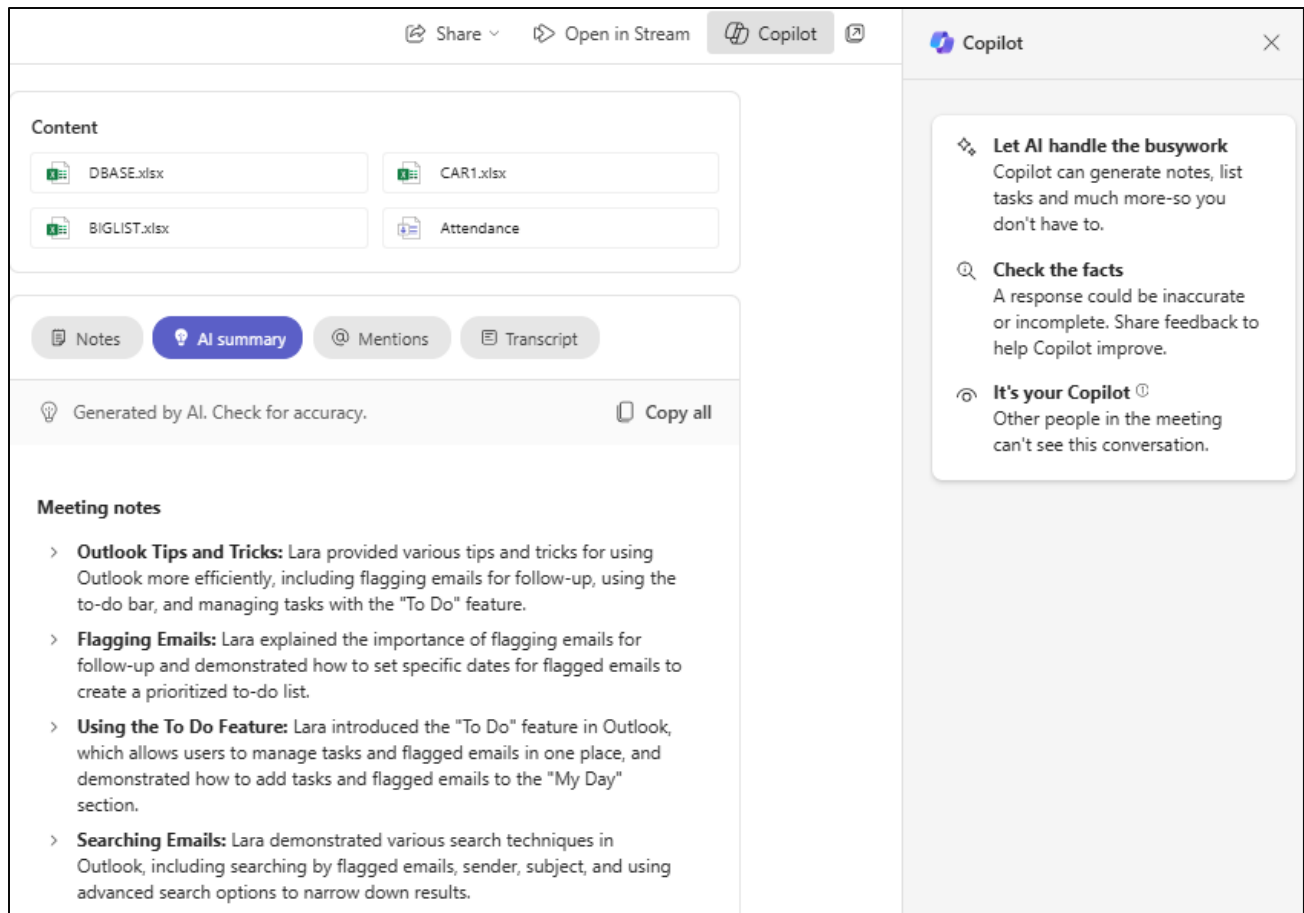
Copilot will generate **real-time summaries** and **list decisions or tasks**.

After the Meeting

- **Generate meeting recap:** Copilot creates a concise summary with decisions and next steps.
- **Assign tasks automatically:** It identifies action items and suggests assigning them in Planner or To Do.



- **Follow-up messages:** Drafts a professional recap email or Teams post for attendees.



1. Go to the **meeting chat or recap tab** in Teams.
2. Click **Copilot** and ask for:
 - *“Create a meeting summary with decisions and next steps.”*
 - *“Draft a follow-up message for attendees.”*
3. **Assign tasks automatically:**
 - Example: *“Add these action items to Planner and assign to the right people.”*

Copilot in Microsoft Teams for Workflow Automation

Copilot in Microsoft Teams for Workflow Automation helps streamline post-meeting processes by suggesting next steps based on the context of your discussions. It can automatically propose scheduling follow-up meetings, creating tasks in Planner or To Do, and drafting recap messages for your team. By reducing manual effort and ensuring nothing falls through the cracks, Copilot keeps projects moving forward efficiently and saves time for more strategic work.

Example Prompts:

- *“Suggest next steps based on today’s meeting.”*
- *“Create a follow-up meeting for unresolved items.”*
- *“Add these action items to Planner and assign them to the right people.”*



- *“Draft a Teams post summarizing next steps and deadlines.”*

Before the Meeting

1. Enable Copilot in Teams:

- Make sure your organization has Copilot licensed and enabled.
- Confirm Copilot is available in your Teams meeting settings.

During the Meeting

1. Capture Context:

- Copilot automatically listens for decisions and action items during the meeting.
- Use prompts like:
 - *“List all action items so far.”*
 - *“Summarize decisions made in this meeting.”*

After the Meeting

1. Generate Follow-Up Suggestions:

- Go to the **meeting recap** in Teams.
- Click **Copilot** and ask:
 - *“Suggest next steps based on today’s discussion.”*
 - *“Create a follow-up plan for unresolved items.”*

2. Schedule Follow-Ups:

- Copilot can propose dates and draft calendar invites:
 - *“Schedule a follow-up meeting next week for pending tasks.”*

3. Create Tasks in Planner or To Do:

- Ask Copilot:
 - *“Add these action items to Planner and assign to the right people.”*

4. Draft Communication:

- *“Write a Teams post summarizing next steps and deadlines.”*

Copilot in Teams Chats and Channels



Copilot in Teams Chats and Channels

Copilot in Teams Chats and Channels helps users stay organized and efficient by summarizing lengthy conversations, drafting clear and professional responses, and extracting action items from discussions. It can also create announcements or posts based on prior context and retrieve relevant files or information without leaving the chat. By providing personalized suggestions and reducing manual effort, Copilot ensures communication remains focused and actionable across your team’s channels.

Here are the **benefits and steps for using Copilot in Teams Chats and Channels**:

1. **Quick Summaries** - Copilot can summarize long chat threads or channel conversations, helping you catch up instantly without scrolling through dozens of messages.

**Steps:**

1. Open the chat or channel in Teams.
2. Click the **Copilot icon** in the message box.
3. Type a prompt like:
 - *“Summarize the last 20 messages in this channel.”*
 - *“Give me the key decisions from this conversation.”*

Example Output:

“Summary: The team agreed to launch the campaign next Monday, finalize the budget by Friday, and assign tasks to marketing and design.”

- 2. Draft Responses** - It suggests professional, context-aware replies, saving time and ensuring clarity in communication.

Steps:

1. In the chat or channel, click **Copilot**.
2. Enter a prompt:
 - *“Draft a professional response thanking the team and confirming next steps.”*
 - *“Write a short reply acknowledging the update and asking for the timeline.”*

Example Output:

“Thanks for the update! Could you confirm the timeline for the design deliverables?”

- 3. Extract Action Items** - Identifies tasks or decisions mentioned in chats and converts them into actionable items for Planner or To Do.

Steps:

1. Open the relevant chat or channel.
2. Ask Copilot:
 - *“List all action items mentioned in this conversation.”*
 - *“Create a task list from today’s discussion.”*

Example Output:

- Finalize budget by Friday
- Schedule campaign launch meeting
- Assign design tasks to Sarah

- 4. Content Creation** - Helps draft announcements, updates, or posts for channels based on previous discussions or documents.

Create Announcements or Posts Steps:

1. Go to the channel where you want to post.
2. Ask Copilot:
 - *“Draft an announcement summarizing the project kickoff details.”*
 - *“Write a post reminding the team about the deadline.”*

Example Output:

“Reminder: The project kickoff meeting is scheduled for Monday at 10 AM. Please review the agenda beforehand.”



5. Knowledge Retrieval - Pulls relevant files, links, and organizational knowledge from connected apps without leaving the chat.

Steps:

1. In the chat or channel, click **Copilot**.
2. Use prompts like:
 - *“Find the latest budget spreadsheet shared in this channel.”*
 - *“Locate the project plan document from last week.”*

Microsoft Copilot in Teams Channels

Microsoft Copilot in Teams channels helps you quickly summarize conversations, track decisions, identify action items, and even draft messages directly in the channel, streamlining communication and boosting productivity.

Accessing Copilot in a Channel

Open Microsoft Teams and navigate to the left panel. Select the team channel where you want to use Copilot.

1. Expand the conversation by clicking the link under a post showing replies (e.g., “[N replies]”) to see the full thread.
2. Locate the Copilot icon in the upper-right corner of the expanded channel post view and click it to open Copilot.
3. The compose box will appear on the right-hand side, ready for you to type prompts or select pre-defined actions.

Using Copilot Prompts in Channel Posts

Once Copilot is open, you can:

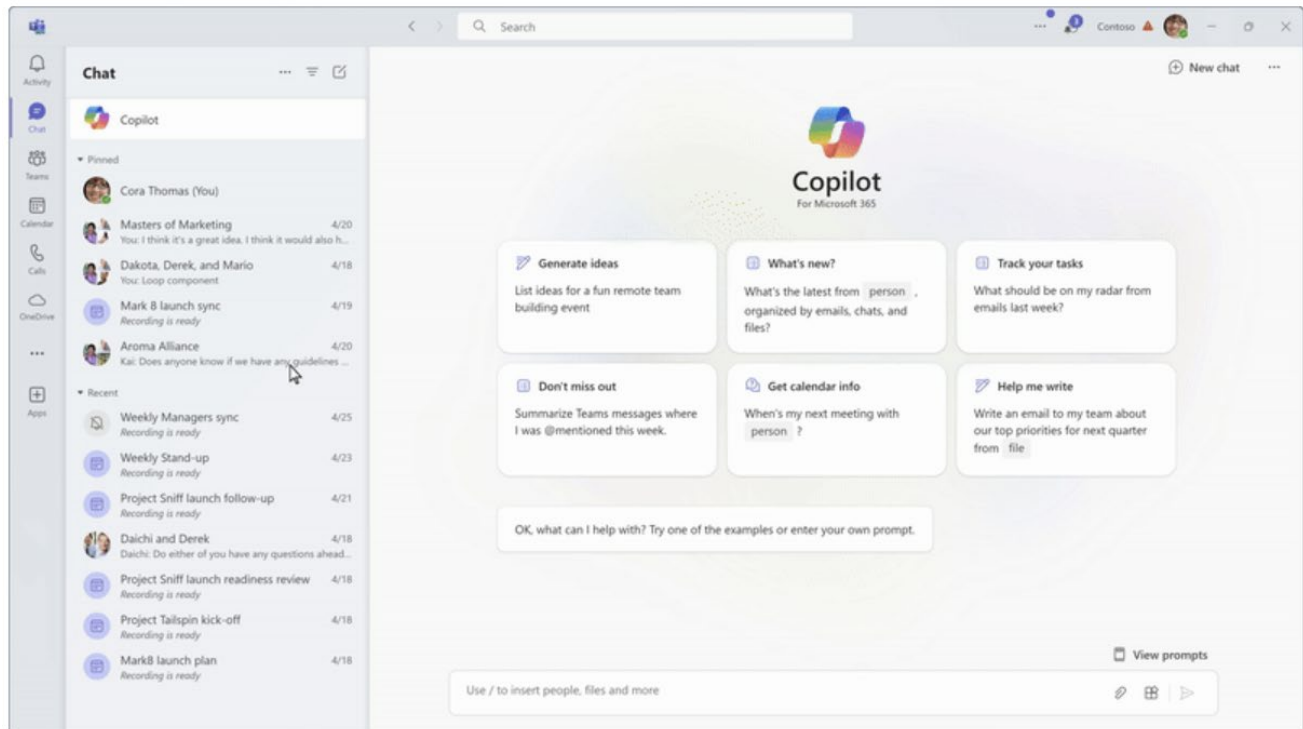
- Summarize conversations: e.g., “Summarize this thread” or “What are the highlights?”
- Track decisions: “What decisions were made in this discussion?”
- List action items: “What tasks are open or assigned?”
- Generate content: Draft messages, documentation outlines, or project updates based on conversations e.g., “Draft a follow-up post summarizing action items”
- Use follow-up prompts to dive deeper on specific documents or updates within the channel, such as “What are the key points in the [shared document]?”

Get Channel Highlights with Copilot in Teams

Say it’s been a busy day. On top of all the emails you need to answer and chat threads to respond to, there are also all the unresolved projects and updates in your Teams channels. Copilot in Teams can help you get up to speed, fast! Navigate over to your “Chat” tab in Teams and click on the Copilot icon at the top of your chats. This opens Copilot for Microsoft 365 in Teams, which will be able to use data grounded in the Microsoft Graph to answer your questions. To start, use the prompt “What’s new in [channel] of [team]?” For example, I want to find out what I missed from the Go to Market channel in my Mark 8 Project team, so I would ask



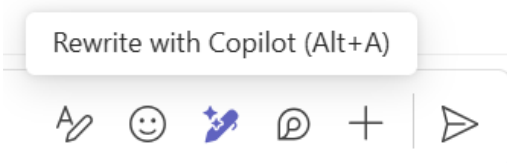
Copilot: "What's new in the Go to Market channel of the Mark 8 Project team?"



Copilot quickly scans through that specific channel and tells me when the latest update was, who was involved in that change, if there were any new documents shared, and even links to that update, making it easy to navigate directly to that thread. When prompting, make sure you give Copilot the correct spelling of the team name in your prompt, otherwise it may not search for the right channel.

Use Copilot to Rewrite a Post

How to Use Copilot to Rewrite a Post in Teams



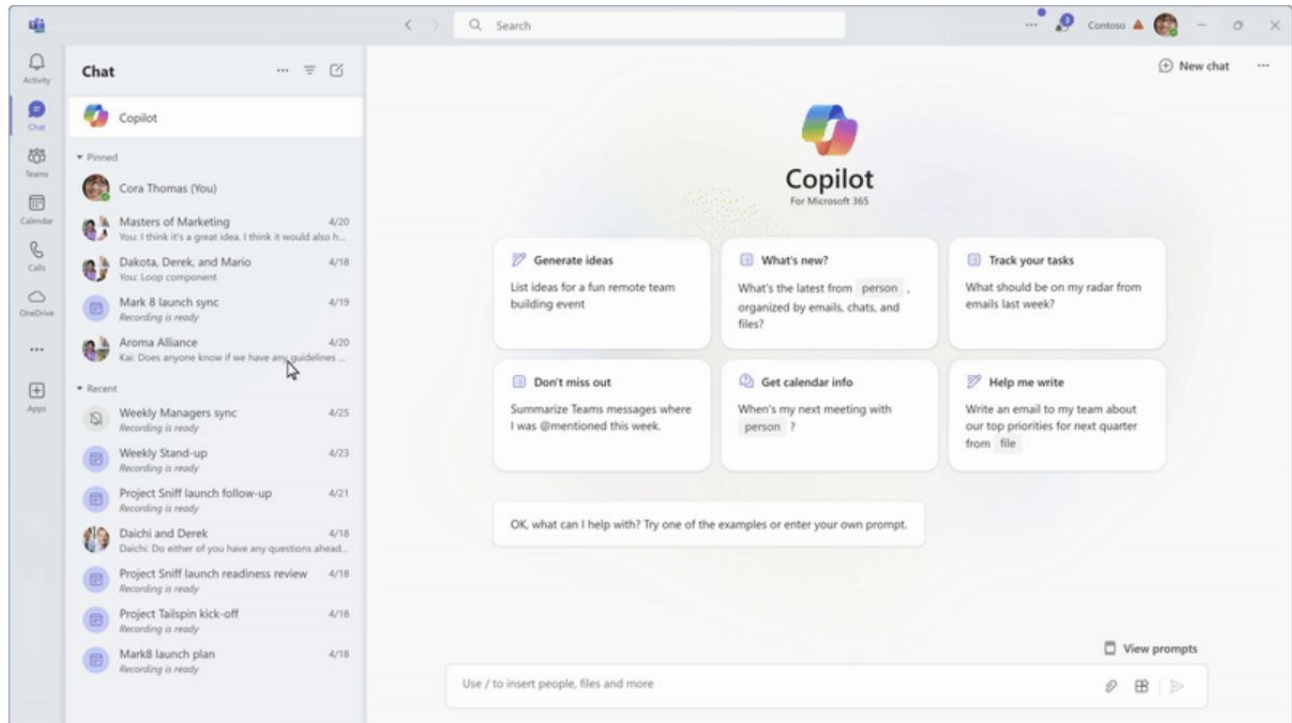
To rewrite a post in Microsoft Teams using Copilot, follow these steps:

1. Open the compose box in the chat or channel.
2. Type your message in the compose box.
3. Click on "Rewrite with Copilot" beneath the compose box.
4. Choose between "Rewrite" and "Adjust" to generate a new version of your message or modify the selected text.
5. Use the left and right arrows to navigate between versions.
6. Adjust the tone and style of your message using the "Adjust" tool.
7. If you want to keep the original message, select "X" to reject the suggestions.



8. Once satisfied, select "Replace" to replace the original message.
9. Send the message to share your rewritten post with the team.

Copilot can help improve your messages and communication in Teams by providing rewrite suggestions and tone adjustments. It's a valuable tool for ensuring clear and impactful communication within your team.



Why Use Copilot for Messages and Announcements in Teams

1. **Speed and efficiency.** When an announcement needs to go out—say a product update, policy change, or team milestone—you don't always have time to craft the perfect message from scratch. Copilot can draft a first version quickly, giving you a strong starting point.
2. **Consistency and tone control.** Using Copilot means you can specify tone (professional, casual, enthusiastic) and length (concise or detailed). Especially for announcements, having a consistent company voice matters.
3. **Context-aware suggestions.** Because Copilot in Teams can access chat history, documents, and calendar items (depending on permissions), it can pull in relevant context so messages align with what's been happening.



- 4. **Better collaboration and less friction.** Instead of debating wording for 30 minutes, you can generate a draft, tweak it, get approval, and send. This frees people to focus on content rather than format or phrasing.
- 5. **Inclusive communication.** With global teams, different levels of language proficiency may exist. Copilot helps refine grammar, adjust tone, and ensure clarity for broader audiences.

Where in Teams to Draft Messages or Announcements with Copilot

Inside Teams, Copilot's support for drafting messages appears primarily in chats, channels, and announcement posts:

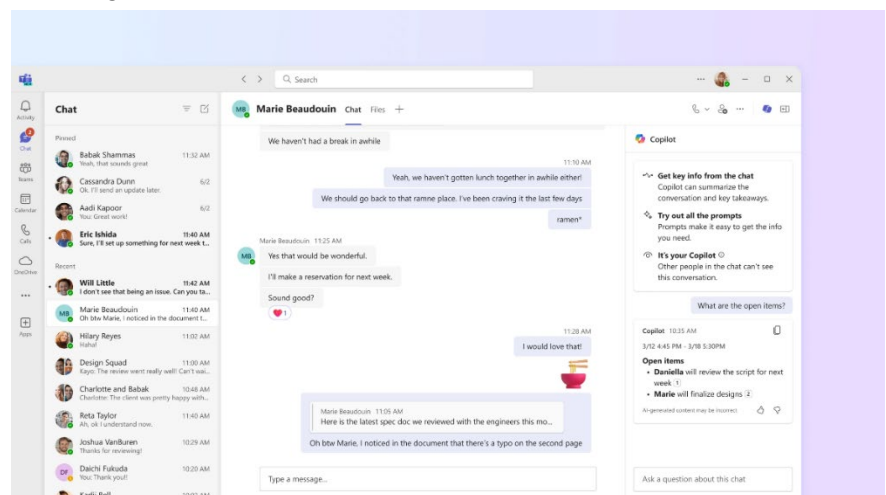
- In a **Chat or Channel** compose box, you can write a message and then use the “Rewrite with Copilot” or “Adjust with Copilot” feature to refine your text.
- For **announcements** (such as a channel “post” or “team news” message) you can use Copilot via the chat or side panel to generate a draft and then paste it into your announcement.
- In **Copilot Chat** for Teams (available with your Teams + Copilot license), you can ask Copilot to generate a draft announcement based on a detailed prompt.

How to Draft Messages and Announcements Using Copilot: Step-by-Step

Step 1: Clarify the Goal and Audience

Before you ask Copilot to draft a message, be clear on:

- **What** you are announcing (e.g., new feature, team reorganization, upcoming training)
- **Who** the audience is (entire organization, specific channel, cross-functional team)
- **What tone** fits (formal vs casual, short vs detailed)
- **Any key details** that must be included (dates, links, next steps, contact person)





Step 2: Open Copilot and Supply the Prompt

Go to Copilot Chat in Teams (or open the compose box and use the rewrite/adjust feature). Then enter a prompt such as:

“Draft an announcement for the marketing team channel in Teams: We are launching the Q4 product update on November 15. Include key benefits, who to contact for questions, and next steps. Tone: enthusiastic but professional. Target length: around 150 words.”

If you already have some text, you could paste it and say:

“Rewrite this message to sound more concise and engaging. Audience: global team, non-technical.”

Step 3: Review and Refine

Copilot delivers a draft. Then:

- Check for **accuracy** of facts (dates, names, links).
- Adjust any **tone or clarity** issues (e.g., ensure it’s not too casual if for executives).
- Add **personal or brand-specific touches** (company phrases, team names).
- Ensure **accessibility**: short paragraphs, bullet points, clear next steps.

Step 4: Publish the Announcement

- In the relevant Teams channel, choose the “New post” or “Announcement” style (which provides a large header and visual emphasis).
- Paste your polished draft.
- Use formatting (bold, italics, bullet points) to highlight key items.
- Tag relevant people or teams (e.g., @MarketingTeam) so they see it.
- Attach links or documents as needed.

Step 5: Follow Up

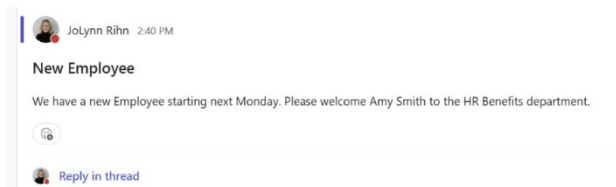
After posting:

- Monitor responses and questions in the channel.
- If you receive feedback or updates, ask Copilot to **draft a follow-up** message: “Write a follow-up message adding the updated FAQ and thanking everyone for their input.”
- Save copies of the announcement and follow-up for record-keeping.

Best Prompt Tips for Announcements in Teams

Here are some prompt styles and tips to get the most out of Copilot:

- **Be specific:** “Draft a message announcing X to channel Y, include date, time, link, and next steps.”
- **Specify tone and length:** “Tone: friendly yet professional. Length: about 120 words.”
- **Frame audience context:** “Audience: remote global team, some non-native English speakers.”
- **Include formatting instructions:** “Use 3 bullet points summarizing benefits.”





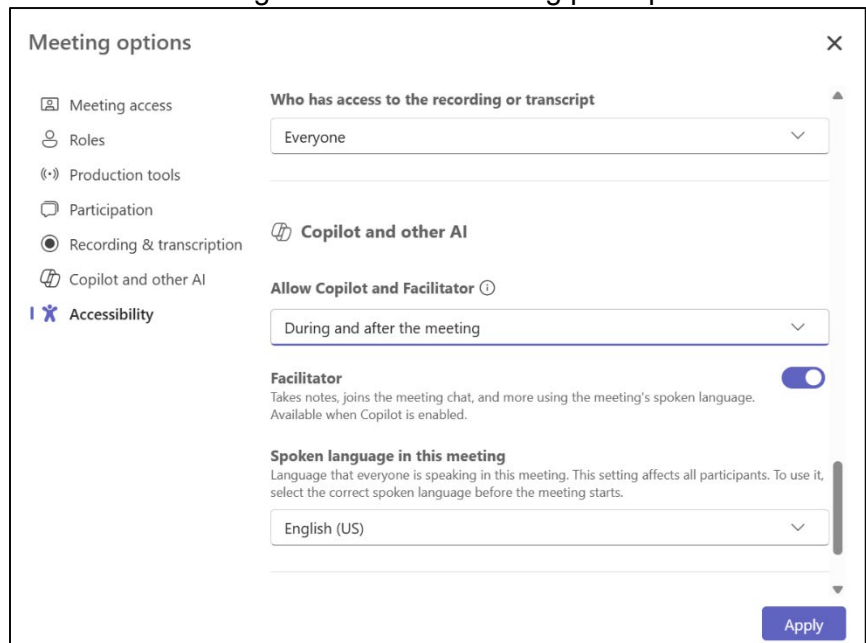
- **Iterate:** If the first draft isn't quite right, ask Copilot to "make it shorter" or "add an FAQ section."
- **Use the "Adjust" feature** inside Teams: After Copilot suggests text, choose "Adjust → Make it concise / longer" or "Make it sound casual / professional / confident / enthusiastic."

What's New in Teams

Run smoother meetings with Facilitator

The Facilitator agent works within Teams meetings for more effective collaboration, including the following features:

- Generates real-time AI-generated notes during meetings, allowing everyone to co-author and collaborate seamlessly.
- Summarizes key decisions and open questions from meeting discussion.
- Answers open-ended questions in the meeting chat from the meeting participants.
- Documents insights from the meeting discussion.
- Checks for a meeting agenda from the meeting invite and the meeting notes Loop component and then send the agenda in the meeting chat so all participants are aware of the topics to be discussed.
- Prompts participants to define meeting goals if no agenda is detected.
- Helps the discussion stay on agenda and on time by showing topics in an agenda timer with time allocations and marking when a discussion has started for a topic.
- Manages time by starting and showing a countdown timer to all participants, alerting users when the timer ends to help the meeting stay on track.
- Alerts participants when the meeting runs over the scheduled end time and help users schedule necessary follow-up meetings.
- @mentions absent participants in the meeting chat when they've been mentioned multiple times during the meeting.



Add Facilitator, a meeting AI agent, to your Teams meetings to keep them running smoothly and efficiently. Facilitator reminds participants about agenda items and time



remaining, captures real-time notes, and much more. Available with a Microsoft 365 Copilot license.

Add Facilitator during a meeting

1. Select **More actions** **⋮** from the meeting controls.
2. Select **Turn on Facilitator** from the menu.

When you turn on Facilitator, you'll be asked to select a language if a language for the meeting hasn't already been selected.

Once Facilitator is on, your meeting is automatically transcribed, and content capturing continues as long as the transcript is on. If the transcript is turned off, content capturing stops until the transcript is turned back on.

Ask questions to Facilitator in a meeting chat

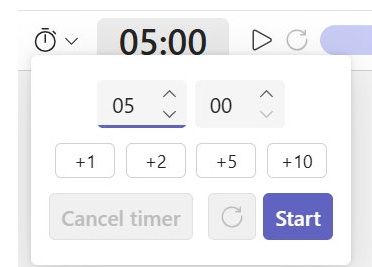
Facilitator acts as a collaborative team member in the meeting chat and can help search the web and answer questions about the conversation in the meeting. Just mention @Facilitator to:

- Get quick summaries to catch up.
- Ask questions about the meeting/chat or shared documents.
- Find answers about the conversation or general topics.
- Keep the team updated with key insights.
- Search the web for relevant information to share.
- Ask questions about the agenda and time.

Start a meeting countdown timer

Keep meetings on track with countdown timers. When someone starts a countdown timer, everyone will see in their meeting window and be able to start, stop, pause, or add more time.

1. From the menu, click more options, Timer.
2. Setup the time you want!



In Conclusion

Microsoft Copilot in Teams represents a transformative leap in how organizations collaborate, communicate, and manage workflows. By harnessing AI-powered features, Copilot streamlines everything from meeting preparation and real-time summaries to post-meeting follow-ups and workflow automation. Its ability to synthesize information across chats, channels, files, and meetings ensures that teams stay aligned, productive, and focused on high-value tasks.

Copilot's integration with Microsoft 365 apps not only boosts efficiency but also empowers users to make informed decisions, automate repetitive work, and maintain organizational control with customizable security and compliance features. Whether you're drafting announcements,



summarizing conversations, or assigning tasks, Copilot adapts to your needs—making Teams a true hub for intelligent collaboration.

As organizations continue to evolve, adopting Copilot in Teams will be essential for staying ahead in a fast-paced, digital-first workplace. Embrace these tools to unlock new levels of productivity, clarity, and teamwork—ensuring your team is always ready for what's next.