


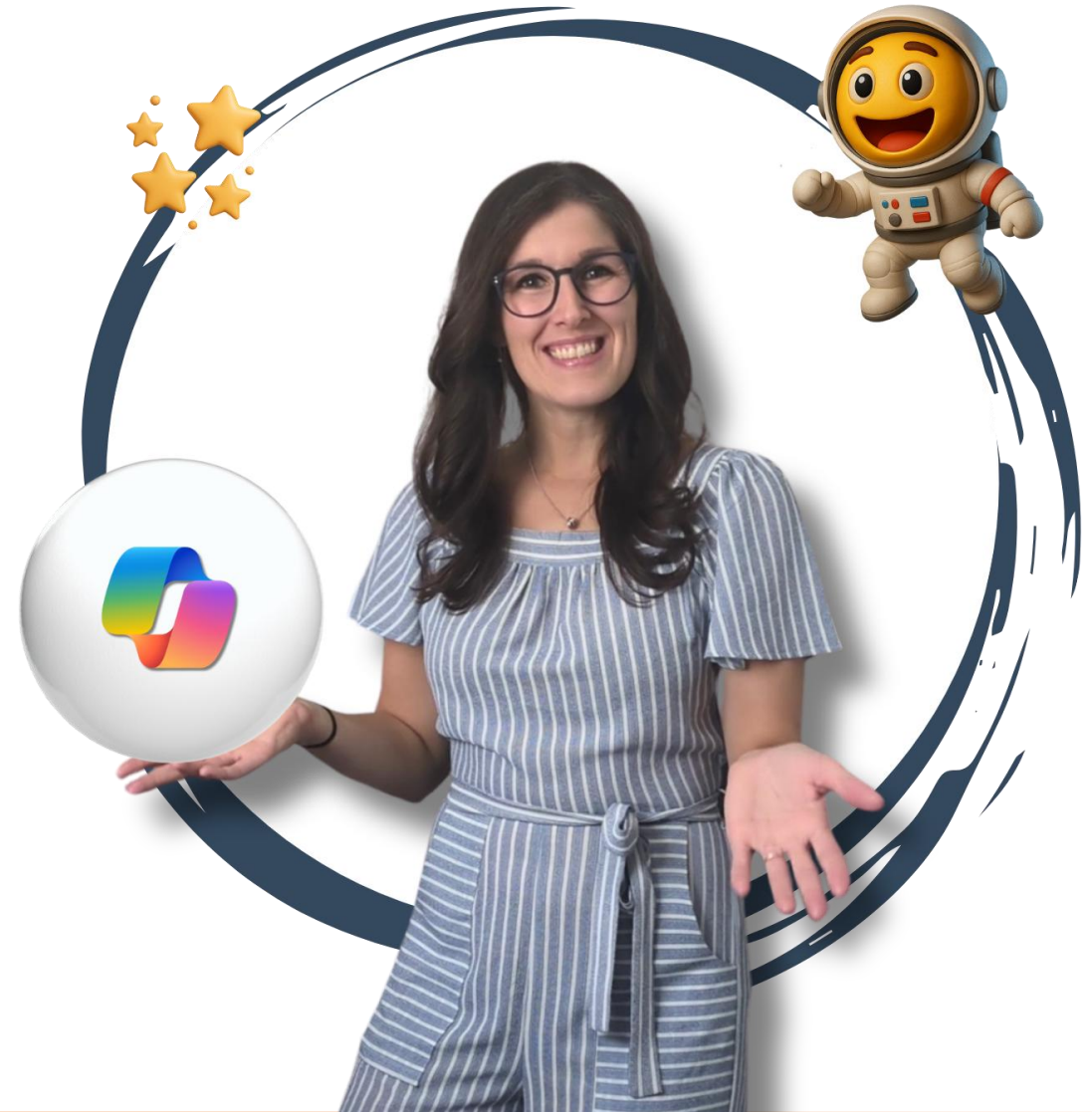


Work Smarter with Microsoft Copilot

# 365 Copilot Starter Pack

Start using Copilot with confidence — and finally get results that save time and make your workday easier:

- +  **My top 10 prompts** to work smarter across Microsoft 365
- +  **My go-to formula** for writing better Copilot prompts
- +  A sneak peek at the **5-Level system** I use to teach Copilot



# Welcome

If your organization just rolled out Microsoft 365 Copilot — but you're staring at a blank chat box thinking "Now what?" You are not alone.

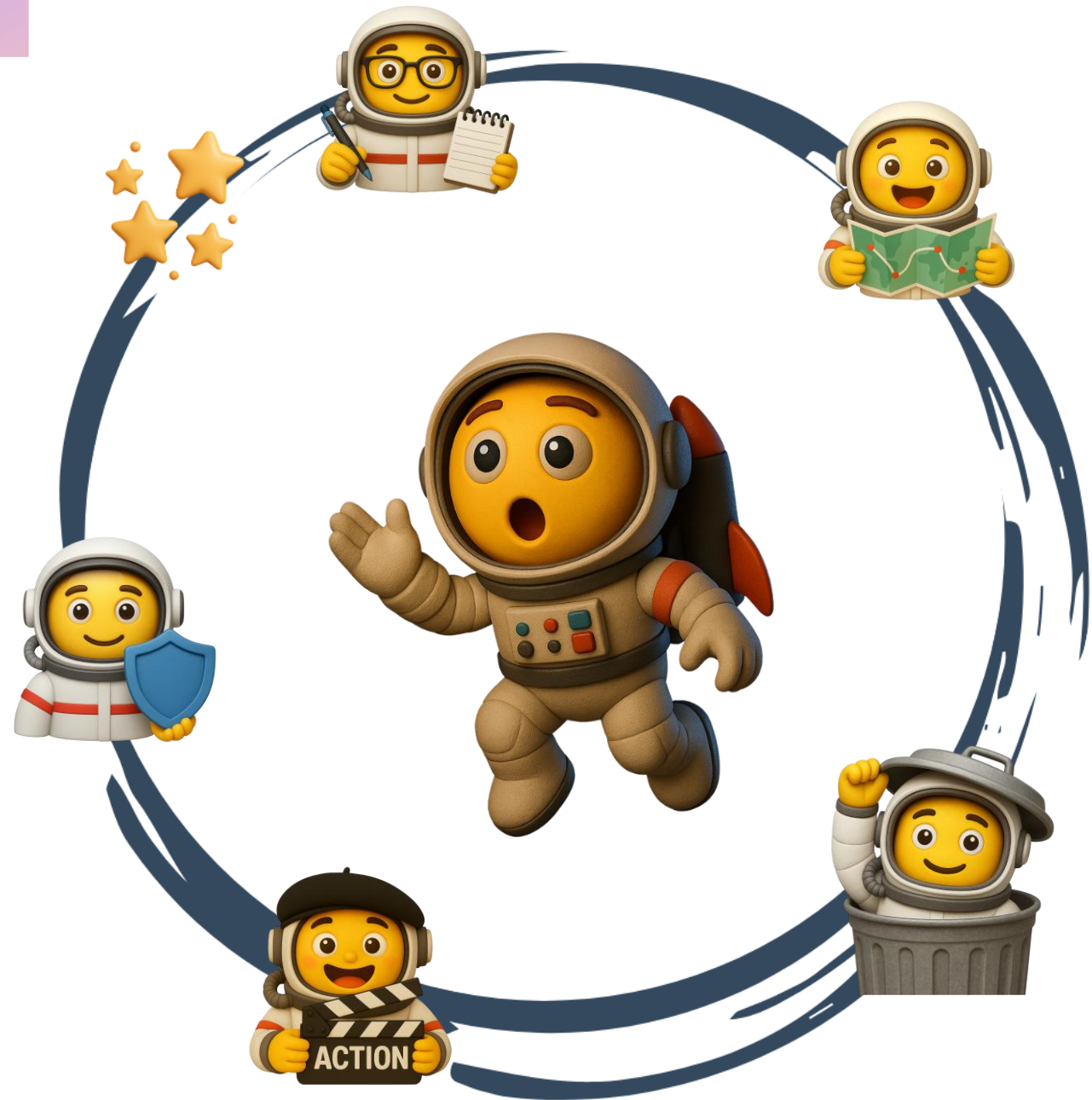
**Most teams are left guessing how to use it**, which apps it works in, and whether they're even doing it right.

**And when you do try prompting?** The replies often feel vague, repetitive, or off-target.

**Without a clear system, it's hard to trust Copilot for real work** — and easy to miss the bigger picture of how it connects across Outlook, Teams, Loop, Word, and more.

**That's exactly why I created this Starter Pack** — so you can start using Copilot with confidence and finally get results that save time and make your workday easier.

Let's get you started! 🚀





# Before We Jump In...

Let's first define what Copilot is — so we're all on the same page.

## 💡 What Is Microsoft 365 Copilot?

- + Copilot brings the power of AI into your Microsoft ecosystem. It's like having your own personal assistant — helping you create faster, stay organized, and work smarter.

### But here's the thing:

Copilot has a lot of features — and it's easy to feel overwhelmed or unsure where to start.

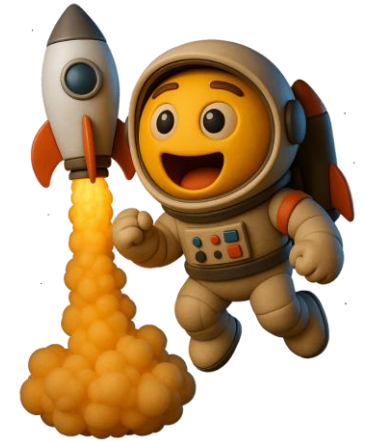
On the next page, I'll introduce my **5-Level System for Learning Copilot** — designed to give you a clear path forward and help you build your skills layer by layer.

🕒 To give you an idea, here are just a few ways you can use Microsoft 365 Copilot:



Chat with Copilot	Microsoft 365 Apps	Advanced Tools
Brainstorm ideas, ask questions, and summarize content — all in plain language.	Write emails, create documents, build presentations, analyze data, and run meetings — right inside Outlook, Word, PowerPoint, Excel, and Teams.	Use AI-powered search, organize your thinking with Notebooks, and streamlines tasks with Agents.

# The 5-Level Launch System



## Build Your Copilot Skills Layer by Layer — Until You Reach Orbit

This system gives you a clear path — so you can stop guessing and start getting results.

This Starter Pack covers the first three levels — your foundation for smarter, more efficient work with Copilot:

Level	Focus Area	What You'll Learn
<a href="#">Level 1</a>	Fundamentals	Understand the difference between Web Copilot and Work Copilot — and when to use each.
<a href="#">Level 2</a>	Prompt Formula	Write better prompts using CLEAR: Context, Layout, Expectations, Attitude, Reference.
<a href="#">Level 3</a>	Everyday Apps	Use Copilot in Outlook, Word, Teams, Loop, PowerPoint, OneDrive, and more.
<b>Level 4</b>	Advanced Tools	Explore Copilot's search, agents, pages, and notebooks.
<b>Level 5</b>	Workflows	Build repeatable systems with Copilot for meetings, planning, and collaboration.



## ■ Level 1: Fundamentals


Understand the difference  
between Web Copilot and  
Work Copilot

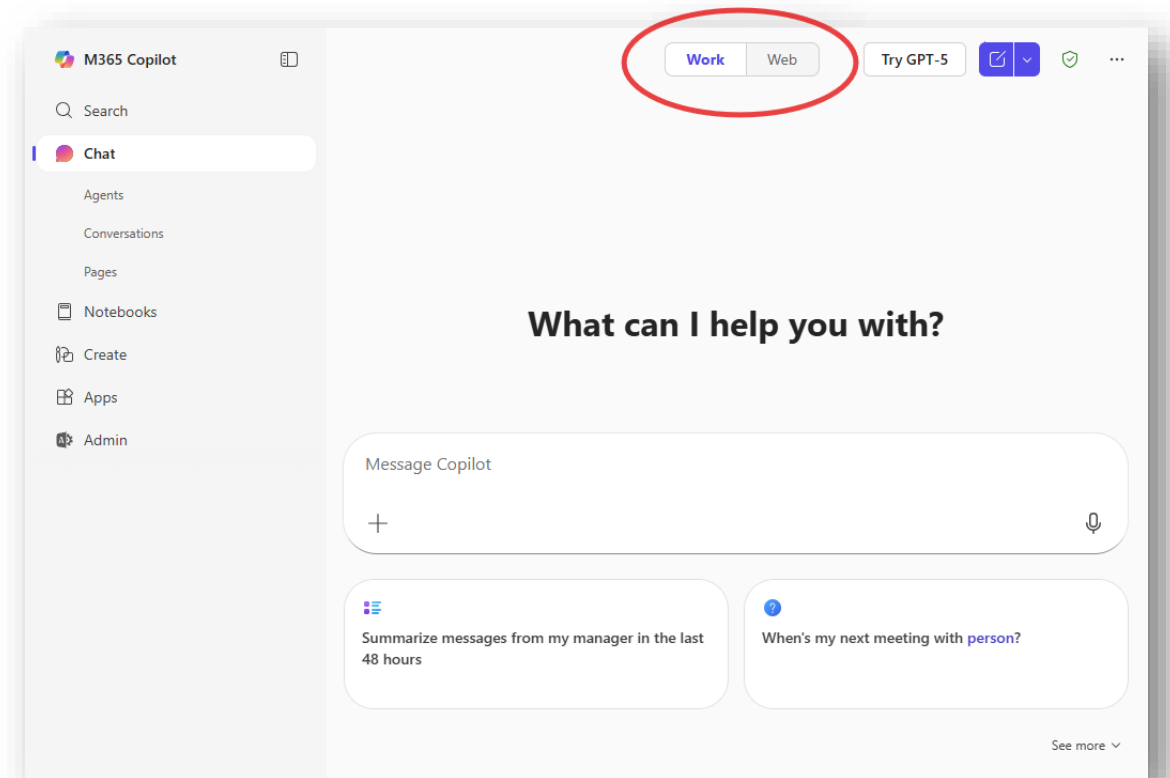


# Level 1: Fundamentals

## Copilot Chat Feature

- + To access Copilot Chat, head to the [Microsoft 365 homepage](#) — you'll find it right near the top, ready to help.
- + Copilot's chat feature is your starting point, and it comes in two modes: **Web** and **Work**.
- + Next, we'll take a closer look at each mode — and when to use them.

 **Tip:** You can also access Copilot Chat from the left navigation in **Teams** or **Outlook**. Open the app, right-click the icon, and pin it for easy access.








# Level 1: Fundamentals

## Chat: Web vs Work

+ Now that you know Copilot Chat has two modes, let's take a closer look at how each one works — and when to use them.

What It's For	 Web Mode	 Work Mode (Paid)
Best Use Case	Open-ended tasks like brainstorming, research, and idea generation.	Work-related tasks like summarizing documents, drafting emails, or gathering insights from your Microsoft 365 content.
How It Works	Uses public web data to generate responses and general knowledge.	Uses your Microsoft 365 data — Copilot inherits your work permissions to reference content you already have access to (like files, emails, chats, and meetings).
Example Prompt	<i>"Brainstorm 10 event ideas for Amy's Animal Shop over the next 12 months."</i>	<i>"Summarize the status of the Puppy Training Level 2 course launch."</i>
 Want to learn more?	Check out the <a href="#">Copilot Chat FAQ</a> for more details on how chat works.	

# Level 1: Fundamentals

## Are My Copilot Chats Secure?



When you chat with Copilot, **Enterprise Data Protection** applies to the conversation.

You'll see a little **green shield** icon in the top-right corner of the chat area — this means your data is protected.

Here are three key fundamentals to know:



### Your Data Is Secure

Copilot protects your data with strong security — just like your emails and files in Microsoft 365.



### Your Data Is Private

Your chats and responses are **not used to train AI models**, and Microsoft won't use your data except as you instruct.



### Your Permissions Still Apply

Copilot only sees what **you** have access to — it follows your existing permissions and settings.

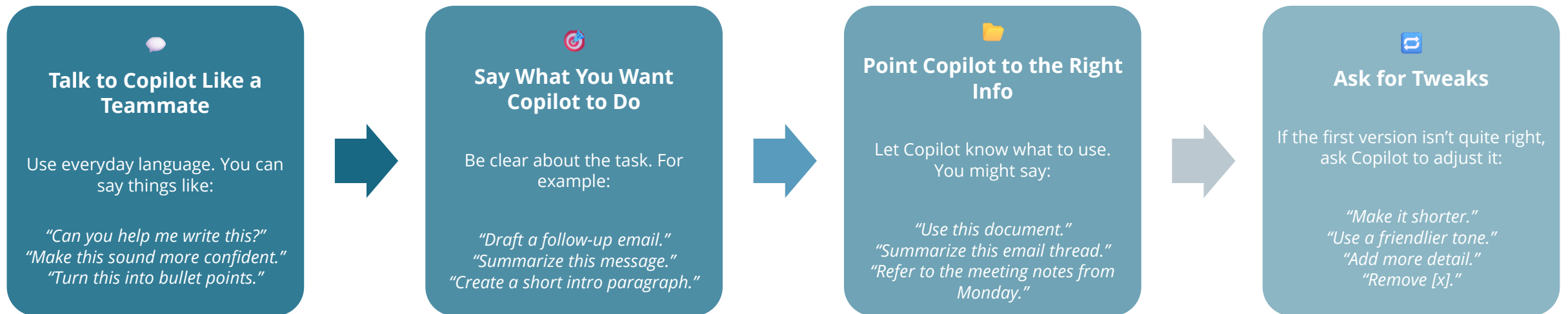
[🔗 Check out this link to learn more.](#)

# Level 1: Fundamentals

## Best Practices for Copilot Chat

Now that you understand the two chat modes — **Web** and **Work** — let's look at how to chat with Copilot.

- + When you send a message to Copilot, it's called a **prompt**.
- + We'll dive deeper into how to craft great prompts in the next level, but for now, here are a few simple best practices to help you get started.





■ Level 2:  
**Writing Better  
Prompts**

Think

*"Garbage In = Garbage Out"*

# Level 2: Why Prompts Matter



When you send a message to Copilot, that's called a **prompt** — and how you phrase it makes a BIG difference.

If you've ever gotten a vague or off-target response, you're not alone. That's why **Level 2 is all about crafting effective prompts** that actually get the results you want.

**Why this matters:**



### **Garbage In = Garbage Out**

Copilot can only work with what you give it — if you give it garbage, it will give you garbage.



### **Clarity Leads to Better Results**

The more specific and clear your prompt, the more helpful Copilot becomes.



### **Better Prompts Save You Time**

A well-written prompt means fewer edits, faster workflows, and smarter output.

# Level 2: The CLEAR Formula



Writing a strong prompt is like giving Copilot a map — the more details you include, the better the destination.

## C = Context

**Purpose:** Give Copilot the background it needs

**Prompt Tips:** Who's involved? What's the situation? Why does this task matter?

## L = Layout

**Purpose:** Tell Copilot how to structure the response

**Prompt Tips:** Do you want a table, list, paragraph, or bullet points? Include constraints like # of sentences

## E = Expectations

**Purpose:** Be clear about what you want Copilot to do

**Prompt Tips:** Are you asking it to summarize, draft, organize, analyze, or brainstorm?

## A = Attitude

**Purpose:** Guide the tone or perspective Copilot should take

**Prompt Tips:** Should it sound professional or friendly? Or adopt the mindset of a sales rep, coach or team lead?

## R = Reference

**Purpose:** Point Copilot to the right material

**Prompt Tips:** Mention files, emails, chats, or examples it should use to generate the response

## Level 2: CLEAR In Action

Let's look at how a strong prompt uses all five parts of the CLEAR method.

### Example Prompt:

- + *"I'm writing a weekly update for my team. Make it a bulleted list. Focus on key wins and upcoming deadlines. Use a confident tone, like a team lead. Pull details from the attached meeting notes."*



This prompt includes:

- ✓ **Context** → Weekly update for the team
- ✓ **Layout** → Bulleted list
- ✓ **Expectations** → Key wins and deadlines
- ✓ **Attitude** → Confident tone, team lead mindset
- ✓ **Reference** → Attached meeting notes



## ■ Level 2:

# CLEAR Challenge: What's Missing?

Here's a prompt that's missing one ingredient. Can you spot which one?

+ *"Summarize this document in a few sentences using a friendly tone. Focus on the main takeaways."*

### ? What's missing?

- + A) Context
- + B) Layout
- + C) Reference
- + D) Expectations

## ■ Level 2:

# CLEAR Challenge: Answer Reveal

The missing ingredient is **Context**.

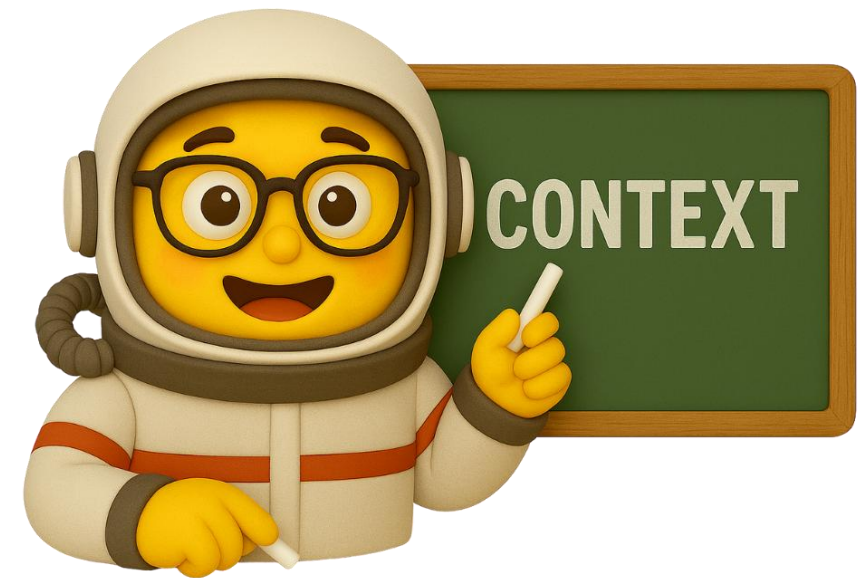
- + There's no context defined — Copilot doesn't know *why* this is needed— so Copilot doesn't know how to tailor the summary.

### Why context matters:

To give Copilot the context it needs, you could start the prompt with:

- + *"I am preparing a monthly performance report for our sales team."*
- + *"I am reviewing a client proposal for tomorrow's meeting."*

Even one sentence like this helps Copilot understand the purpose — and tailor the summary to fit the situation.





## ■ Level 2: Why Referencing Matters

The **Reference** piece in the CLEAR formula is an important piece of the puzzle — it tells Copilot *where* to look.

Think about it like this:

- + If you don't reference a specific file, meeting, or email, you're sending Copilot on a wild goose chase. It will literally search through everything it has access to in your Microsoft 365 account to find what it thinks you need.

Sometimes that's okay — like when you say:

- + *"Reference all materials related to Project X."*

But if you know exactly what you want to focus on — like:

- + *"Use the proposal from last Thursday's meeting,"*  
— then it makes sense to **clearly specify** the resource.



## Level 2:

# How to Reference Content


When you're chatting with Copilot, you can attach or reference specific content to guide its response.

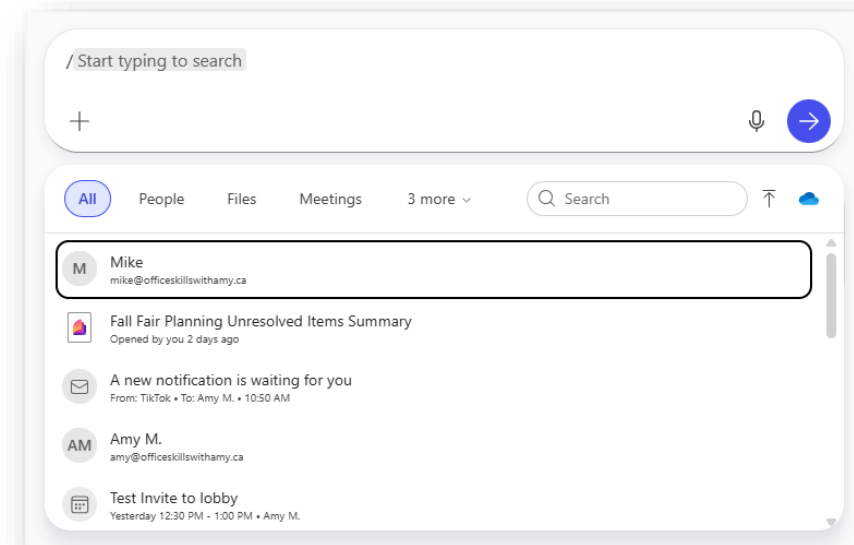
### Ways to Add Work Content:

- + Click the **+** icon next to your message  
Then select **"Add work content"** to choose files, emails, meetings, sites, or people from your Microsoft 365 account.

### You Can Also:

- + **Upload images and files** from your computer
- + **Attach cloud files** from OneDrive
- + **Chat with an Agent** which is more advanced and covered in level 4

 **Pro Tip:** In the chat area, type the **forward slash key /** on your keyboard to open the same menu instantly — no clicking required. **Then start to type to search** what you are looking for.





■ Level 3:  
**Copilot in  
Everyday Apps**

Think  
“Garbage In = Garbage Out”



## ■ Level 3: Top 10 Prompts

### Word

**“Turn this bulleted list into a persuasive proposal with a confident tone and a clear call to action.”**

*Great for transforming rough notes into polished documents.*

**“Rewrite this onboarding guide using a friendly tone and add a short FAQ section based on common client questions.”**

*Perfect for client-facing materials.*



## ■ Level 3: Top 10 Prompts

### Excel

**“Analyze this dataset and highlight any outliers or trends that could impact our monthly goals.”**

*Useful for spotting patterns in business metrics.*

**“Create a dashboard layout using this data, including a slicer for department and a chart showing weekly progress.”**

*Helps visualize performance across teams.*



## ■ Level 3: Top 10 Prompts

### PowerPoint

**“Design a 5-slide presentation summarizing this document for executives. Include one quote per slide.”**

*Ideal for turning reports into impactful decks.*

**“Create an image of Amy’s Animal Shop getting ready to launch into space.”**

*Quickly generate images that support your presentation.*

# Level 3: Top 10 Prompts



## OneNote

**“Summarize these meeting notes into 3 key decisions and 2 follow-up actions. Format it as a checklist.”**

*Streamlines post-meeting workflows.*

**“Organize this brainstorm into categories of [define categories] and suggest a few additional ideas based on the themes.”**

*Great for creative planning sessions.*



## ■ Level 3: Top 10 Prompts

### Outlook

**“Draft a reply to this email confirming the training date, summarizing what’s included, and linking to the intake form.”**

*Speeds up client communication.*

**“Create a follow-up email for webinar attendees that includes a thank-you message, session highlights, and a link to book coaching.”**

*Boosts engagement after events.*

# You're Ready for What's Next!

+ You now know the first **3 Levels** of the **5 Level Launch System** —nice work!

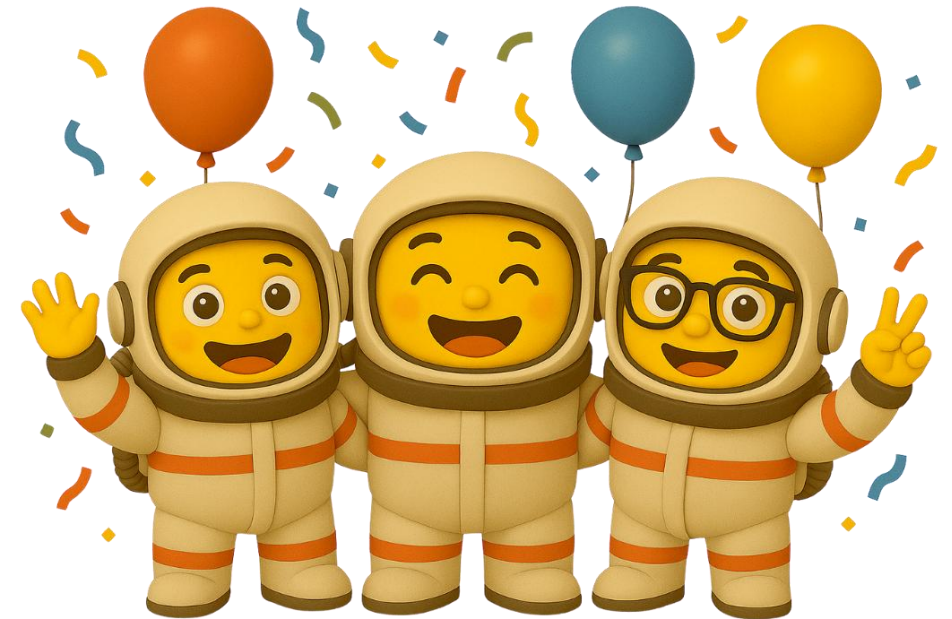
## NEXT STEP:

### ★ COMING SOON ★

#### Grab the full Copilot Launch Kit

- ✓ Save time with **100+ ready-to-use Copilot prompts**
- ✓ Streamline daily tasks using proven **templates and workflow tips**
- ✓ Build confidence with the full **5-Level Launch System** for smarter AI collaboration

**Make sure you are subscribed to our newsletter, you'll be the first to know about the launch!**



I will see you in the next video!

- *Your nerdy office friend, Amy* 🤖

