



IT.IE PRACTICAL GUIDE

Microsoft 365 Copilot Guide

**Practical Prompts, Security and
Governance for Business**

Work smarter. Prompt better. Stay in control.

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Microsoft 365 Copilot

A practical guide for everyday work

Microsoft Copilot provides AI assistance across Copilot Chat and Microsoft 365 applications such as Word, Excel, PowerPoint, Outlook and Teams. Available features, access to organisational information and priority access depend on the user's Microsoft 365 subscription, Copilot licence, administrator settings and platform.

TRY THIS PROMPT

“Summarise this guide in five practical actions I can apply today, then suggest the best place to start based on my role.”

What Copilot is

- An AI assistant that supports writing, analysis, communication and collaboration.
- A tool that can use your instructions, selected files and, where licensed and permitted, organisational content.
- A starting point for work that should be reviewed, refined and validated.

What Copilot is not

- A guaranteed source of truth.
- A replacement for professional judgement, subject-matter expertise or approval processes.
- A reason to bypass data protection, confidentiality or information-governance requirements.

Important: Features vary by licence, app, platform, tenant configuration, permissions and rollout stage. If an option is not visible, check with your Microsoft 365 administrator.

Principles that will not change

Regardless of future Copilot updates:

01

Users remain responsible for outcomes.

02

AI-generated content requires human review.

03

Copilot respects existing permissions.

04

Data governance remains essential.

05

Better prompts generally produce better results.

06

Security and compliance remain organisational responsibilities.

The CRIT prompt model

CRIT is a prompting framework developed by Geoff Woods, author of *The AI-Driven Leader*, to turn AI from a question-and-answer tool into a more effective thought partner. It stands for Context, Role, Interview and Task. The Interview step is the key difference: it encourages Copilot to ask clarifying questions when important information is missing, rather than guessing.



C Context

Provide the background, audience, purpose, constraints and relevant source material.

R Role

Tell Copilot which perspective or expertise to adopt, such as marketing manager, project lead or critical reviewer.

I Interview

Encourage Copilot to ask clarifying questions when important information is missing, unclear or contradictory. Behaviour may vary depending on the Copilot experience, application and context.

T Task

State the outcome required, including format, tone, length, structure and any checks Copilot should perform.

TRY THIS PROMPT

Context	We are promoting a Microsoft 365 Copilot readiness service to Irish SME leaders. Use the attached service brief as the source.
Role	Act as an experienced B2B technology marketing manager.
Interview	Before drafting, ask me up to three focused questions about the audience, offer or call to action if the answers are not clear from the brief. Do not assume missing facts.
Task	Draft a 250-word customer email in a clear, professional tone. Include three evidence-based benefits and finish with one direct call to action.

Why CRIT works: Context reduces ambiguity, Role sets the perspective, Interview invites a clarification step, and Task defines the deliverable. Not every request needs a long interview. For a simple or well-defined task, Copilot can usually proceed straight away. For higher-impact or ambiguous work, the Interview instruction can help surface missing information before a draft is produced.

A useful quality-control instruction

TRY THIS PROMPT

“Prioritise accuracy over agreement. Challenge assumptions, identify missing context and highlight uncertainty. Separate fact from opinion. Do not invent missing information. Cite or identify the source for important claims where possible.”

SOURCE CONTROL PROMPT

“Use only the attached document as your source. If the document does not contain the answer, say so rather than filling the gap from general knowledge.”

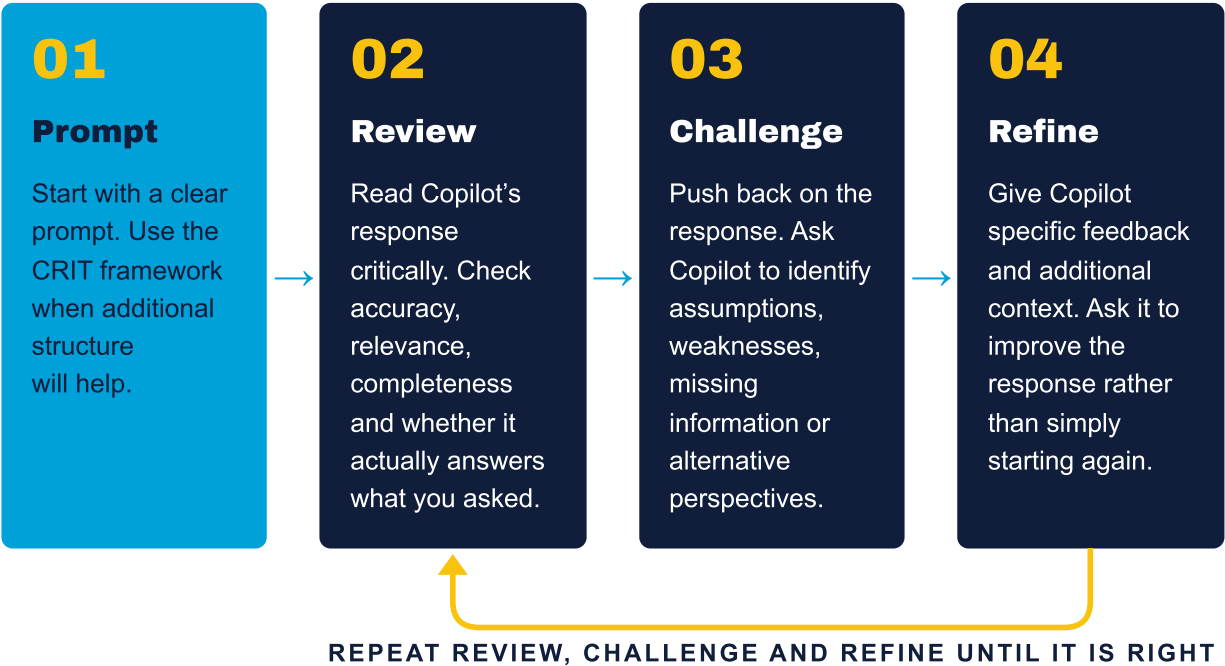
OTHER PROMPTING MODELS

There are many prompting models, including RACE, RISEN, CO-STAR and CREATE. We have found CRIT and the Copilot Refinement Loop the most useful.

The Copilot Refinement Loop

Don't treat Copilot's first response as the finished product. The best results often come from an ongoing conversation where you review, challenge and refine the output.

CRIT helps you build a better prompt. **The Copilot Refinement Loop** helps you improve what happens next. Use them together.



The loop in practice

INITIAL PROMPT	"Draft an email to customers explaining our new service."
REVIEW	"This is too generic. What information is missing that would make the email more relevant to the customer?"
CHALLENGE	"Challenge the assumptions in this email. What objections or questions might a customer have after reading it?"
REFINE	"Now rewrite the email addressing those concerns. Keep it under 200 words, use plain English and finish with a clear next step."

Copilot tips and best practices

Use Copilot as an iterative working partner. Give it a clear task, review the result and then refine it.

- Be specific about the result you need, the audience and the required format.
- Provide relevant context and point Copilot to the right source material.
- Ask follow-up questions and refine the first draft.
- Request alternatives, risks, counterarguments or missing information.
- Verify names, numbers, dates, quotations, legal points and other consequential claims.
- Treat generated content as a draft until a person has reviewed it.
- Do not paste sensitive information into locations or experiences that your organisation has not approved.

General-purpose prompts

USE COPILOT TO	EXAMPLE PROMPTS
Summarise	“Summarise this document in five points. Separate decisions, risks and actions.”
Create	“Draft a one-page project proposal from these notes for a senior management audience.”
Improve	“Rewrite this text for clarity. Keep the meaning, remove repetition and use plain English.”
Challenge	“Review this plan critically. Identify assumptions, gaps, dependencies and alternative options.”
Transform	“Turn these notes into a table with owner, action, deadline and status columns.”

Copilot experiences and availability

PLEASE NOTE

Microsoft Copilot capabilities, licensing, interfaces, and commercial models evolve regularly. Examples shown in this guide reflect capabilities available at the time of publication and may change over time.

The term Copilot covers several related experiences. The table below provides a practical distinction. Confirm current availability before making a purchasing or deployment decision.

EXPERIENCE	PRACTICAL DESCRIPTION
Copilot Chat	Secure AI chat for research, drafting and working with supplied content.
Copilot Pages	A persistent, editable and collaborative content canvas.
Microsoft 365 Copilot	A broader Copilot experience across Microsoft 365 applications and organisational content.
Word, Excel and PowerPoint Agents	Can help create, draft or generate content based on natural-language instructions where supported by the relevant Copilot experience.
Custom agents	Task-specific or knowledge-specific Copilot experiences.

Availability: Availability depends on Microsoft’s licensing model, tenant configuration, regional availability, and organisational settings.

Word, Excel, Outlook, PowerPoint and Teams



Word

Writing, reviewing and structuring

Use Copilot in Word to create a first draft, restructure content, summarise a document and improve clarity. Always verify substantive claims and ensure the finished document follows your organisation’s standards.



USE COPILOT TO	EXAMPLE PROMPTS
Draft and structure	“Create a two-page customer brief with an executive summary, business challenge, proposed approach, benefits and next steps.”
Rewrite for an audience	“Rewrite this section for a non-technical executive audience. Keep all important facts.”
Review critically	“Identify unclear claims, repetition, unsupported statements and missing evidence in this document.”
Repurpose content	“Convert this report into a concise FAQ for customers.”
Format information	“Convert the following list into a table with category, requirement, evidence and owner.”

Excel

Analysis, formulas and insights

Copilot in Excel can help explore structured data, explain formulas and create summaries. For best results, use clear headers, consistent data types and well-structured ranges or tables. Check calculations and source data before relying on conclusions.



USE COPILOT TO	EXAMPLE PROMPTS
Explore trends	“Identify the main month-on-month changes in this table and explain the likely drivers shown in the data.”
Find exceptions	“List the ten largest variances and show the fields contributing to each variance.”
Build formulas	“Create and explain a formula that calculates year-on-year percentage growth.”
Summarise categories	“Summarise revenue by service category and customer segment.”
Visualise	“Create an appropriate chart comparing quarterly revenue by service line, and explain why that chart type fits.”
Data check: Ask Copilot what data is missing, duplicated, inconsistent or potentially outdated before requesting conclusions.	

Outlook

Email and preparation

Use Copilot in Outlook to summarise threads, draft replies, improve tone and prepare for conversations. Availability can differ between Outlook experiences and licences.



USE COPILOT TO	EXAMPLE PROMPTS
Summarise a thread	“Summarise this thread. List the latest position, unresolved questions and actions assigned to me.”
Draft a reply	“Draft a concise reply that confirms the agreed actions, asks for the missing information and proposes the next step.”
Adjust tone	“Make this email warmer and more direct without changing the commitment.”
Prepare for a meeting	“Using the relevant email thread, create a short meeting brief with background, decisions needed and open questions.”
Check clarity	“Review this draft for ambiguity, unnecessary jargon and statements that could be misinterpreted.”

PowerPoint

Presentations and storytelling

Use Copilot to build an outline, create a first draft from source material, improve slide structure and prepare speaker notes. Review facts, branding, visuals and slide density before presenting.



USE COPILOT TO	EXAMPLE PROMPTS
Build from source	“Create an eight-slide executive presentation from this report. Include context, three insights, risks, recommendations and next steps.”
Improve structure	“Reorganise this deck into a clear problem, evidence, recommendation and action storyline.”
Simplify	“Reduce the text on this slide while preserving the key message and supporting evidence.”
Speaker notes	“Create concise speaker notes for each slide, including the main message and likely questions.”
Visual direction	“Suggest a suitable visual for this slide and explain what information the visual should communicate.”

Teams

Meetings and collaboration

Copilot in Teams can support meeting preparation, recap and discussion follow-up when the required meeting data, permissions and settings are available. A meeting invitation does not by itself prove attendance, and a recap may not capture every contribution.



USE COPILOT TO	EXAMPLE PROMPTS
Catch up	“Summarise the discussion so far. Separate decisions, questions and actions.”
Meeting recap	“List the decisions made, actions, owners and stated deadlines from this meeting.”
Challenge the discussion	“What viewpoints, risks or dependencies were not addressed in this meeting?”
Follow-up	“Draft a follow-up message confirming the decisions and actions. Flag anything that remains unclear.”
Prepare	“Create a meeting brief from the available context with objectives, background, open issues and decisions required.”

Copilot Chat, Pages and agents



Copilot Chat provides a conversational workspace for research, drafting and reasoning. It can work with web information, uploaded or selected files and content available in supported applications. Broader reasoning across organisational emails, meetings, chats and files depends on the user's Copilot licence and available experience.

Copilot Pages provides a persistent, editable canvas beside Copilot Chat. It can be used to develop, refine and share content with colleagues, and supported Pages content can be converted into Word or PowerPoint.

Agents extend Copilot for particular tasks and may connect to organisational knowledge or processes, depending on account type, licensing and administrator settings.

USE COPILOT TO	EXAMPLE PROMPTS
Copilot Chat	“Compare these three options using cost, implementation effort, risk and expected business value. State any missing evidence.”
Pages	“Turn this discussion into a structured working page with objectives, decisions, actions and open questions.”
Research	“Research this topic using authoritative sources. Distinguish verified facts from analysis and provide citations.”
Agents	“Use the appropriate available agent to create a first draft, then tell me which sources and assumptions were used.”
Draft content with Word, Excel or PowerPoint Agents	“Draft a two-page proposal with an introduction, problem statement, solution, timeline and next steps.”

Availability note: Availability of Copilot Chat, Pages, agents and Microsoft 365 Copilot depends on Microsoft’s licensing model, tenant configuration, regional availability, and organisational settings. Content created by agents should be reviewed and refined in the relevant application before sharing.

Copilot Cowork: delegating multi-step work



Copilot Cowork is an agentic capability in Microsoft Copilot designed to help with multi-step work across Microsoft 365. Instead of only suggesting what to do, it can help plan and carry out a sequence of actions where supported, showing progress and seeking approval before sensitive actions such as sending, posting or scheduling.

How Cowork differs from Copilot Chat

Copilot Chat	Copilot Cowork
Best for focused questions, summaries, drafts and analysis within a conversation.	Best for coordinated, multi-step work across applications, files and services.
Usually produces information or content for the user to act on.	Can help with actions such as drafting documents, preparing communications for approval and proposing meetings, where supported.
Useful when the task is quick and bounded.	Useful when the outcome requires several connected steps or recurring work.

Practical business use cases

USE CASE	EXAMPLE REQUEST
Meeting preparation	“Prepare a briefing for tomorrow’s customer meeting using the relevant emails, files and previous meeting notes. Create a one-page brief and draft an agenda for my approval.”
Campaign coordination	“Using the approved campaign brief, create a customer email, a short Teams update and a campaign checklist. Save the files and show me everything before anything is sent or posted.”
Research and reporting	“Research this topic using authoritative sources, compare the findings with our available internal material and produce an executive report with citations, risks and recommendations.”
Recurring status updates	“Every Friday, prepare a weekly status summary from the available project information and present the draft for review.”
Document and file management	“Create a project folder, organise the supplied files by workstream and prepare an index that explains what each file contains.”
Inbox and calendar support	“Identify the messages that require action, draft responses for review and propose suitable meeting times where a meeting is requested.”

IMPORTANT CONTROL

Cowork operates with the user’s existing permissions. Users should review generated files and approve communications, calendar changes, payments or other consequential actions before execution. Avoid using Cowork as the final decision-maker for legal, medical, financial, employment or other high-impact matters.

Understanding Agent Costs and Consumption

Agentic AI systems such as Copilot Cowork can consume resources based on the complexity of the task being performed.

Factors that may influence consumption

01 Number of steps in a workflow

02 Volume of data processed

03 Number of systems accessed

04 Frequency of execution

05 Use of reasoning-intensive tasks

06 Use of document generation or analysis

GOOD TO KNOW

Costs and consumption models may change as Microsoft evolves the platform.

Example workflows by relative consumption

These examples describe relative consumption levels only. Actual consumption varies with the task and how it is run.



Customer Meeting Summary

- Read meeting notes
- Produce summary
- Create action list

TYPICAL OUTCOME

Fast execution · Lower consumption · Suitable for daily use



Marketing Campaign Assistant

- Review multiple documents
- Compare previous campaigns
- Create draft campaign plan
- Suggest messaging

TYPICAL OUTCOME

Moderate consumption · Useful for recurring planning tasks



New Customer Onboarding Workflow

- Gather information from multiple systems
- Create documentation
- Generate tasks
- Route information to teams

TYPICAL OUTCOME

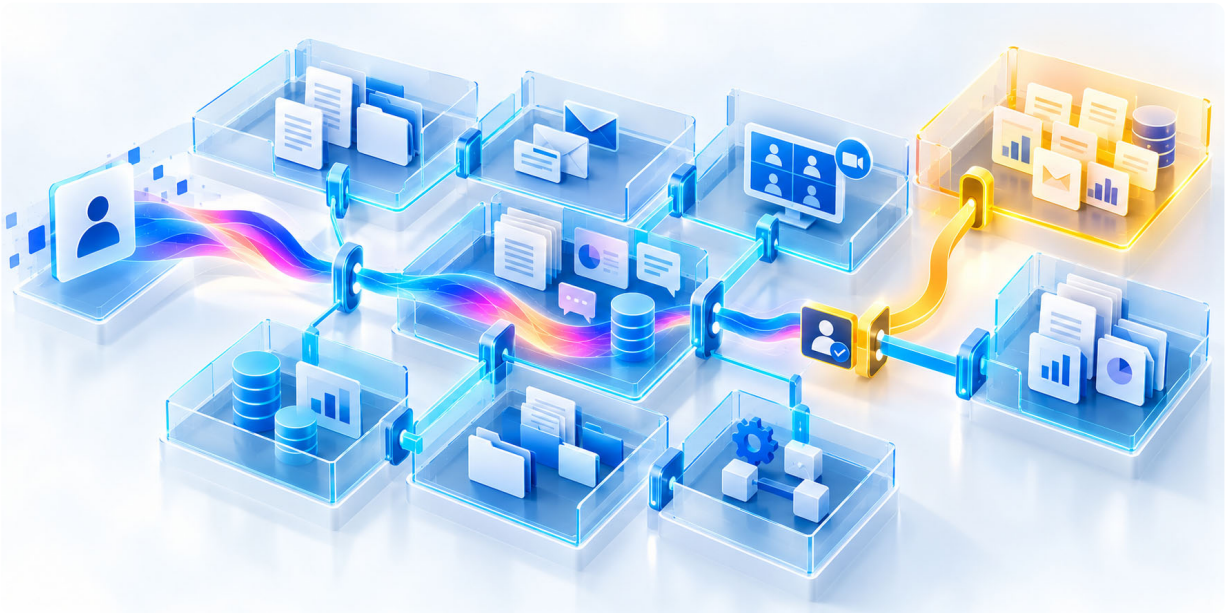
Higher consumption · Greater business value · Requires governance and monitoring

COST PLANNING NOTE

Start with a controlled pilot, review usage by task type and set sensible limits using the usage and cost reporting available to your organisation. Confirm current Microsoft and partner commercial terms before making decisions.

Securing Copilot and agents

Copilot is permission-aware, not risk-free. It does not grant new access, but it can make information that a user already has permission to access easier to find, combine and summarise. Existing oversharing, stale permissions, ownerless sites or poorly labelled information can therefore become more visible and more consequential.



THE KEY SECURITY QUESTION · ASK BEFORE DEPLOYMENT

If a user searched manually across every SharePoint site, OneDrive folder, email, meeting and connected source available to that account, could the user find information that should not be accessible?

If yes, Copilot may surface the same information more efficiently. The control priority is to correct access and governance, not to assume Copilot will hide it.

Key areas to review

AREA	RISK TO CONSIDER	RECOMMENDED CONTROL DIRECTION
Identity and access	Compromised accounts or excessive privileges expand what Copilot can retrieve or act upon.	Apply MFA, Conditional Access, least privilege, role review and managed-device requirements.
SharePoint and OneDrive oversharing	Broad groups, public links, broken inheritance, stale permissions or ownerless sites can expose information through search and Copilot.	Use SharePoint Advanced Management and Microsoft Purview to identify, restrict and remediate overshared content.
Sensitivity and data loss prevention	Sensitive information may be included in prompts, responses or generated files and then shared onward.	Apply sensitivity labels, encryption, DLP, retention and appropriate restrictions on web-grounded prompts and file processing.
Data quality and lifecycle	Old, duplicated or inaccurate content can ground confident but incorrect answers.	Assign owners, archive obsolete sites, remove duplicates and maintain authoritative sources.
Agents, plugins and connectors	Extensions can introduce new data sources, actions, publishers and external endpoints.	Approve agents centrally, review permissions, privacy terms, connectors, authentication and data egress before deployment.

Key areas to review (continued)

AREA	RISK TO CONSIDER	RECOMMENDED CONTROL DIRECTION
Prompt injection and malicious content	Documents, emails or websites may contain hidden instructions intended to redirect an AI system.	Use Microsoft's layered protections, Defender and Purview controls where licensed, restrict risky sources and train users to stop unexpected behaviour.
Agentic actions	AI may misinterpret a request, send incorrect content, alter shared systems or trigger an unintended workflow.	Require human approval for consequential actions, define allowed actions, use narrow scopes and monitor automated tasks.
Audit, retention and investigation	Without logs and retention, organisations may be unable to investigate inappropriate access or AI activity.	Enable and review unified audit logging, define retention, use eDiscovery and monitor Copilot and agent reports.
Third-party and web use	Web grounding and external connectors may involve different sources and data-handling paths.	Control web access, use approved connectors, apply DLP and verify citations before acting.
Human verification	Grounded answers can still be incomplete, outdated or inaccurate.	Require review of sources and expert approval for legal, financial, regulatory, safety or security decisions.

What Microsoft protects, and what the organisation must manage

MICROSOFT PLATFORM PROTECTIONS	ORGANISATION RESPONSIBILITIES
Copilot respects the signed-in user's Microsoft 365 permissions and tenant controls.	Review whether those permissions are appropriate and remove excessive or obsolete access.
Prompts, responses and Microsoft Graph data are not used to train foundation models for organisational Copilot use.	Set policies for acceptable use, sensitive prompts, retention, investigation and feedback.
Enterprise data protection, encryption, compliance controls and prompt-injection mitigations apply according to the service and licence.	Configure available Entra, Purview, Defender, SharePoint and admin controls rather than relying on defaults alone.
Copilot and agents can be audited and monitored through Microsoft 365 and security tooling.	Assign owners, review alerts and reports, test controls and maintain an incident-response process.

A practical readiness checklist

- ☐ Confirm MFA, Conditional Access and device-compliance coverage for users with Copilot or agent access.
- ☐ Identify high-risk SharePoint and OneDrive locations, overshared content, anonymous links, ownerless sites and broad organisation-wide access.
- ☐ Define and publish an information-classification and sensitivity-labelling approach.
- ☐ Apply DLP and retention policies appropriate to the organisation's regulatory and contractual obligations.
- ☐ Create an approved-agent and connector process covering ownership, permissions, external data flows, testing and retirement.
- ☐ Enable audit logging and define who reviews Copilot, agent and usage and consumption reports.
- ☐ Pilot with bounded use cases, limited groups and clear human approvals before scaling.
- ☐ Train users to verify sources, treat generated content as a draft and stop agent activity that behaves unexpectedly.

CORE PRINCIPLE

Copilot generally reveals the state of the organisation's existing identity, permission and information-governance controls. Secure deployment therefore starts with data and access readiness, continues with policy and technical guardrails, and depends on informed human oversight.

Further Microsoft guidance

- Copilot Cowork overview
- Copilot consumption and cost guidance
- Usage-based billing and cost management
- Security for Microsoft Copilot
- Configure a secure and governed foundation
- Data, privacy and security for Microsoft Copilot

Security, privacy and governance

Copilot operates within Microsoft 365 controls and the access available to the signed-in user. That makes permission hygiene essential: information a user can access may be returned by Copilot. Organisations should combine Copilot adoption with data classification, least-privilege access, retention, sensitivity labels, acceptable-use rules and human review. Copilot does not grant users additional access, but existing oversharing or excessive permissions may allow information to appear in Copilot responses.

FOR USERS

Good practice for users

- Use approved work accounts, applications and data sources.
- Check recipients before sending generated content.
- Do not assume a confident answer is correct or complete.
- Validate sensitive, contractual, regulatory, financial, safety or security-related outputs with a qualified person.
- Report inaccurate, unsafe or inappropriate results through approved channels.

FOR ORGANISATIONS

Good practice for organisations

- Review oversharing and permissions before and during deployment.
- Define where AI may and may not be used.
- Apply appropriate identity, device, information-protection and retention controls.
- Train users in prompting, verification, confidentiality and escalation.
- Monitor adoption and value without using AI output as an unsupported measure of individual performance.

Ten prompts every business user should know

These adaptable prompts cover common communication, analysis and planning tasks.

01 Summarise today's most important information from the selected sources. Separate urgent items, decisions and actions.

02 Draft a response using the context provided. Do not invent commitments or facts that are not in the source.

03 Explain this spreadsheet in plain English. Highlight trends, anomalies and data-quality limitations.

04 Review this proposal critically. Identify risks, assumptions, missing evidence and questions a customer may ask.

05 Create a customer presentation from this report. Use a clear storyline and keep each slide focused on one message.

06 Prepare me for this meeting using the available context. Include objectives, background, likely questions and decisions required.

07 Summarise the actions from this conversation. Include owner and deadline only where explicitly stated.

08 Turn these notes into a project plan with phases, deliverables, dependencies, risks and owners.

09 Rewrite this for senior management. Lead with the decision required and the business impact.

10 What am I missing? Challenge the current approach and present credible alternative viewpoints.

A simple verification checklist

- ☐ Is the requested source current and complete?
- ☐ Are names, dates, figures and quotations correct?
- ☐ Did Copilot distinguish fact, assumption and suggestion?
- ☐ Are there missing perspectives, risks or dependencies?
- ☐ Does the output comply with policy, confidentiality and approval requirements?
- ☐ Would a subject-matter expert or decision owner approve this?

NEXT STEP

Start with one repeatable workflow

Choose a frequent, low-risk task such as summarising a document, preparing a meeting brief or drafting a routine email. Save the prompt that works, verify the output and refine the process. Scale usage only when quality, governance and human ownership are clear.

UNDERSTANDING AI HALLUCINATIONS

Copilot can occasionally generate information that appears convincing but is incorrect, incomplete, or unsupported by source data.

USERS SHOULD

- Verify important information
- Check cited sources
- Review generated content before sharing
- Apply professional judgement

Sources and further guidance

This guide was drafted from the existing IT.ie Copilot cheat sheet and updated using Microsoft support material available at the time of preparation. Microsoft changes Copilot experiences regularly, so feature availability should be checked before customer publication.

- Microsoft Copilot help and learning
- How Microsoft Copilot Pages works
- Get started with agents in the Microsoft Copilot app
- Get started with Word, Excel and PowerPoint Agents
- Microsoft Copilot licensing and requirements



Talk to IT.ie

For help with Microsoft 365 Copilot licensing, readiness, security, adoption, training or agent development, contact IT.ie.

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