

Microsoft 365 Copilot Experience Guide

A practical guide to unlocking the power of Copilot with
real-world prompts and purpose-built agent scenarios

December 18th, 2025



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Getting Started

This guide is your quick path to **harnessing the power of Microsoft 365 Copilot**, your AI built for work. Inside, you'll find **real-world prompts and purpose-built agent scenarios** that work across your content and workflows, helping you move faster, improve quality, and unlock insights using the data and tools your organization already relies on.

Explore how Microsoft 365 Copilot can work for you

- 1 Use **Work toggle** for prompts using your company's data and web data. Use **Web toggle** for general internet-based questions.
- 2 **Evaluate the responses** for accuracy, comprehensiveness, and relevancy.
- 3 **Share your favorite prompts and helpful tips** to support your team's success.
- 4 **Experiment with agents** embedded in Microsoft 365 Copilot to further increase team efficiency and communication.
- 5 **Provide feedback** to your admin or through Copilot's tools to help improve your experience.

Always remember to:

- **Review and verify AI-generated responses.** Copilot uses Large Language Models (LLMs), advanced systems designed to predict and generate text. Occasionally, responses may contain inaccuracies due to the complex nature of LLMs. Always evaluate Copilot's output and cross-check with trusted sources as needed.
- **Using the same prompt multiple times may yield different responses.** LLMs rely on neural networks, which can introduce some variability. Even with identical prompts, responses might vary slightly each time.
- **Use Copilot responsibly, ethically, and legally.** Avoid employing Copilot for any activities that could harm yourself or others. For more information, see our [responsible AI \(Artificial Intelligence\) principles and standards](#).

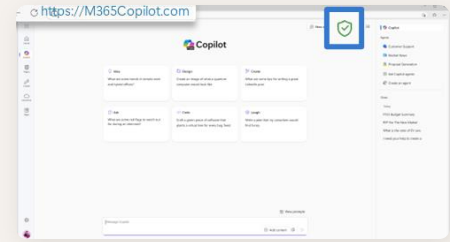
Microsoft 365 Copilot

Prompts to try for Microsoft 365 Copilot

To get started, tap **Work toggle** in the Microsoft 365 Copilot app or visit <https://www.M365copilot.com>. Then, launch Copilot in your Microsoft 365 apps—on web or desktop—to access the full range of capabilities tailored to your prompt.





Important: If you are not signed in with your work account, Enterprise Data Protection does not apply.



Unlock even more power with GPT-5.2. In Microsoft 365 Copilot, GPT-5.2 works with **Work IQ** to surface insights, power market research, and strengthen strategic planning—reasoning across your meetings, emails, and documents. Use the model selector to choose from the following models:

- **GPT – 5.2 Quick Response** fires back instant, streamlined answers
- **GPT – 5.2 Think Deeper** tackles complex, high-stakes work with precision and nuance

Scenario	Prompt in Microsoft 365 Copilot ..
Organize action items	Summarize this week's [customer name] action items from the [functional team] reporting to [person name] from Teams chats, meetings and emails and compile it into a checklist.
Track unresolved issues	What are the unresolved issues from prior meetings of [/meeting series]
Draft an executive report	Synthesize key information on [confidential project] into an executive status report from documents in /[SharePoint site]
Prepare for a meeting	Summarize /[document with encrypted sensitivity label] and include any key details I should know to help me prepare for my upcoming meeting.
Organize your priorities	Identify tasks or action items assigned to me from my manager in this week's emails, Teams chats, and meeting notes, and compile them into a checklist.
Summarize unread messages	Summarize my unread messages from my manager and skip manager. Categorize by project
Create research reports with Researcher	Open Researcher agent  Based on the internal meeting discussion on [topic], draft a comprehensive research report evaluating the ideas proposed. Incorporate relevant insights from external market research, customer meetings and internal intelligence.
Generate video clips	Open the Create  module: Create a 4-second clip where three pillars labeled "Growth," "Reliability," and "Trust" animate as stacks. Top-down, eye-level camera tilt, clean infographic style, 16:9 aspect ratio.

Prompts to try for Copilot in Microsoft 365 apps and Teams

Use **Copilot Chat in Microsoft 365 apps** to help you work more efficiently and intelligently in the applications you use every day. Within Microsoft 365 applications, Copilot will reason over reason over open files and persistent conversations that follow the user across applications without disrupting workflows.



To get started, simply click the Copilot icon  and enter your prompt – or try using one of the suggested prompts in the Copilot window!

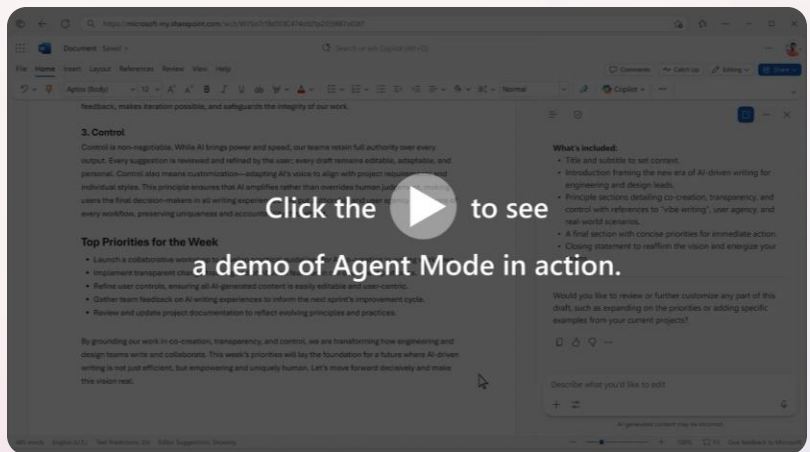
Scenario	Copilot Chat in ...	Prompt
Summarize key discussions	Outlook	Write a recap email for my team based on the discussion in this email thread.
Stay on top of meetings	Teams meeting	Summarize what's been discussed so far and list any open questions or unresolved items.
Create precise questions	Teams meeting	Create a list of follow-up questions from the [/meeting].
Jumpstart an email based on a meeting	Teams meeting	Help me draft an email to my leadership team based on the outcome of this meeting.
Revise doc based on feedback	Word	Suggest edits for this document based on my conversation with /[person] today.
Analyze data to drive decision-making	Excel	Run a full analysis on this sales data set in this [Excel file]. I want to understand some important insights to help me make decisions about my business. Make it visual.
Draft a project update presentation	PowerPoint	Prepare a project update deck about [topic] using internal emails, meetings, and chats.
Combine key insights	PowerPoint	Create 3 brief bullet points for this slide using insights from the [insert recorded meeting title] held on [date].

Using Agent Mode in Office Apps

Microsoft 365 Copilot transforms how you create and refine **Office artifacts** in Word, Excel, and PowerPoint. The new [Agent Mode in Office apps](#) orchestrates multi-step tasks, including structuring content, applying styles and formulas, and refining results, so you can work in-app or in chat and get polished outputs fast. Available now in [Frontier](#).

How to access Agent Mode

- 1 Click to Copilot chat icon 
- 2 Click Tools 
- 3 Select Agent Mode



Agent Mode in Word turns document creation into vibe writing – an interactive, conversational experience. Try these prompts to see the deeper interaction Agent Mode can provide.

Scenario	Prompt
Quickly refine content	Clean up the language and effectiveness of this content to be better aligned with <code>/[brand guidelines file]</code> ?
Update quarterly sales	Help me update this monthly report for <code>[timeframe]</code> . Update the data table with the latest numbers from the <code>/[email with metrics or data]</code> .

Agent Mode in Excel is AI that natively understands your spreadsheets—it “speaks Excel.” Built on the richness of your tables, formulas, and charts, and powered by OpenAI’s latest reasoning models, it helps you generate insights and create visualizations as you iterate with Copilot. Try the following prompts to see it in action.


Scenario	Prompt
Build a loan calculator	Build a loan calculator that computes monthly payments based on user inputs for loan amount, annual interest rate, and term in years. Generate a schedule showing month, payment, principal, interest, and remaining balance. Present the results in a clear, formatted table.
Aid business decision-making	Run a full analysis on this sales data set. I want to understand some important insights to help me make decisions about my business. Make it visual.

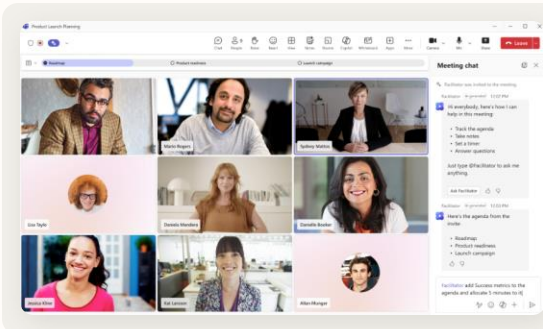
Excel & Word: Rollout to Frontier Program starts Sept. 2025; worldwide rollout starts in Q4 2025. PowerPoint: rollout to Frontier Program starts Nov 2025. Available in Public Preview to Copilot Chat users (non-M365 Copilot licensed users) in Q1 CY'26

Working with Microsoft 365 Copilot Agents

While prompts are great for single tasks, Microsoft 365 Copilot Agents **persist, remember, and act** across the applications your team already uses, reducing coordination work and re-prompting. Use the Microsoft 365 Copilot Agents already embedded with a few clicks—no coding required!


Using Microsoft Teams Agents


 [Facilitator agent](#) is your AI partner for Teams meetings. It runs in the background to keep discussions structured, documented, and productive – no multitasking or scrambling for notes.



Use Facilitator agent to:

- Keep meetings structured and on time, create tasks & documents
- Support hybrid teams who need shared visibility
- Give late joiners or absentees a quick way to catch up
- Turn conversations into action — tasks, docs, summaries
- Create more inclusive meetings where everyone stays informed



Turn on Facilitator agent in the meeting invite, or during the meeting by selecting **More actions...** from the meeting controls and clicking **Turn on Facilitator**  from the menu.

 [Channel Agent](#) is an AI teammate embedded in a Teams channel, giving each workstream a persistent, context-aware agent that reduces coordination and improves information sharing.

Use Channel Agent when your team needs to...

- Run a project with lots of moving parts or turn ongoing conversation into structured action
- Keep track of decisions, deadlines, and responsibilities
- Reduce the time spent writing reports or updates
- Ensure continuity when teammates join late or miss meetings

Using SharePoint Knowledge Agent

 [SharePoint Knowledge agent](#) is the primary AI solution to increase SharePoint productivity—allowing users to find the content they need more quickly. Once your SharePoint administrator has enabled Knowledge Agent, access it by clicking the floating action button  in the bottom-right corner of any SharePoint page or launch it from the agent icon near the SharePoint command bar.

Use Knowledge Agent:

- Organize files with suggested columns and metadata
- Automate workflows in a library
- Design custom views
- Fix broken links
- Detect content gaps using search behavior—see what users are looking for but not finding
- Summarize documents to extract key insights
- Generate audio overviews of page content




Find best practices at [AI agents – Microsoft Adoption](#)

Teams Mode for Microsoft 365 Copilot

[Teams Mode](#) is a simple, secure way to bring your co-workers into your Copilot conversations, turning individual AI chats into group AI chats in Microsoft Teams. Now when you are generating new ideas or insights in Copilot, you can easily create a group chat in Teams with your colleagues and Copilot, making it easy for others to build on your work.

You can also add Copilot to any existing Teams group chat, just like adding a teammate, to help your team research, draft, coordinate, and complete tasks with AI.

Getting Started with Teams Mode

To begin using Teams Mode, simply add co-workers to an existing conversation in the Microsoft 365 Copilot app by clicking  in the upper left-hand corner, or [@Copilot](#) in a Teams group chat. Teams Mode for Microsoft 365 Copilot is available in public preview for Microsoft 365 Copilot licensed users on desktop, mobile, and web.

Here are a few ways to start group collaboration with Copilot:

Scenario	Prompt
Plan team events	Start a plan for your next team offsite in the Microsoft 365 Copilot app, then start a group chat with members of your team; everyone can @Copilot to suggest different agenda topics and organize logistics.
Explore new market opportunities	Use Copilot to explore a new market opportunity, then start a group chat with Finance, Sales, and Product teams; @Copilot to add data points, explore product comparisons, outline pricing benchmarks, and build the business case together.
Create team goals	Draft your team's quarterly goals with Copilot, then share the chat with your direct reports to iterate on priorities and assign owners; @Copilot to help clarify goals and success metrics.
Prepare for quarterly business review	Kick off a quarterly business review prep in Copilot, then share the chat with your leadership team; @Copilot to compile metrics, summarize key wins, and draft slides.

Microsoft 365 Copilot Chat

Prompts to try for Copilot Chat

To get started, tap **Web toggle** in the Microsoft 365 Copilot app or visit <https://www.M365copilot.com>. Copilot Chat is available at no additional cost to all Microsoft Entra ID users with an [eligible Microsoft 365 subscription](#).

Scenario	Prompt ¹
Develop a project plan	Review the attached project plan and give me five substantive ways to make it better; include rationale for your responses and specific text to insert into the plan.
Prepare an executive report	Use the attached spreadsheet with customer feedback to create a polished executive report that helps upper management decide where to prioritize resources in our next cycle. [upload file]
Improve a document draft	We have a draft press release [document]. Find a couple of similar recent announcements on the web and then suggest how to make ours stand out
Gain subject-matter knowledge	Act as a financial compliance analyst, prepare a summary comparing the Dodd-Frank, Basel III, and MiFID II capital adequacy and reporting requirements for banks.
Visualize data quickly	Create a pie chart showing the market share of smartphones in the United States in 2024.
Understand the main point	Recap the findings of this research paper: [upload file]. Highlight the surprising or potentially controversial results, if they exist.
Stand out on socials	Craft an engaging LinkedIn post based on the content of [upload file].
Calculate the ROI	How much value will a \$450,000 investment have after 5 years with an 8% return annually?
Improve your writing	Rewrite my draft so it sounds more professional and less verbose [upload file].
Code faster	Write a python script to perform binary search.
Generate ideas	Suggest 10 compelling titles for this document: [upload file].
Get writing recommendations	Analyze the text in the following and make suggestions on how to improve it: [insert text]
Visualize a scene	Create an image with the running sneaker standing upright in a modern studio setting. The scene has a clean, minimalist design and the background includes a setting of simple minimalist gradients. [add an image]

¹Image generation and file upload limits apply.

Evaluation rubric

When it comes to evaluating AI, clarity builds trust. The **ACR framework** gives you a simple, consistent way to judge response quality—so you can quickly see whether an answer is **Accurate, Comprehensive, and Relevant to your business**.

Use the ACR rubric to score answers, compare tools side-by-side, and decide with confidence. It's straightforward to apply to **Microsoft 365 Copilot** and other solutions, with clear definitions and scoring guidance to understand what tools fits your needs.

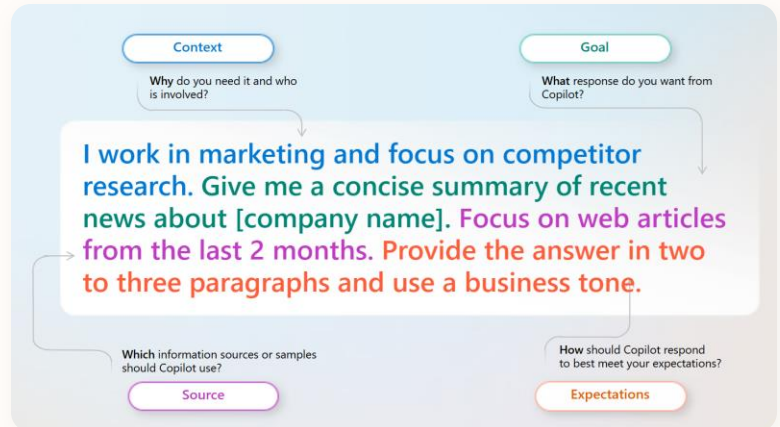
Evaluation Steps:

1. Begin by testing the sample prompts.
2. Examine and confirm the AI-generated answers. Check the sources and ensure the accuracy of your responses.
3. Try the test prompt on another AI chat platform.
4. Analyze the variations between the two responses across different aspects.
5. If you have feedback, use the thumbs up or down buttons, or inform your IT administrator.

Dimension	Definition	1 Very Poor	2 Poor	3 Acceptable	4 Good	5 Excellent
Accurate (A)	<i>Are the facts correct?</i>	Contains clear factual errors	Mostly incorrect or misleading	Mostly correct with minor inaccuracies	Correct with minor nuance issues	Fully accurate and trustworthy
Comprehensive (C)	<i>Does it cover all important points?</i>	Misses major elements or is overly brief	Covers some points but lacks depth	Covers most relevant points	Covers nearly all key points with good depth	Thorough and complete
Relevant (R)	<i>Is it on-topic and aligned with the prompt?</i>	Off-topic or misinterprets the prompt	Partially relevant, some drift	Mostly relevant with slight drift	Clearly relevant with strong alignment	Directly addresses the prompt with precision

Prompt guidance

Prompts are how you have a conversation with Copilot. Use plain, clear language and provide context like you would with an assistant—prompts are like instructions you provide to Copilot. For the best responses, focus on these four key elements when phrasing your Copilot prompts: **context**, **goal**, **source**, and **expectations**.



Do's and don'ts

Most Copilot users generally receive the desired responses. However, as with any AI technology, there are occasions when the answer may not be what you expected. Artificial Intelligence is inherently unpredictable and does not always provide the anticipated outcomes. Get the most out of Copilot and avoid common pitfalls by learning what to do and what not to do when writing prompts:

Do's

- ✓ **Be clear and specific.**
Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.
- ✓ **Keep it conversational.**
Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.
- ✓ **Give examples.**
Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.
- ✓ **Ask for feedback.**
Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.
- ✓ **Write legibly.**
Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses.
- ✓ **Check for accuracy.**
Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.
- ✓ **Provide details.**
Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.
- ✓ **Be polite.**
Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

Don'ts

- ✓ **Be vague.**
When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.
- ✓ **Request inappropriate or unethical content.**
Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.
- ✓ **Use slang, jargon, or informal language.**
This may cause Copilot to give low-quality, inappropriate, or unprofessional responses.
- ✓ **Give conflicting instructions.**
Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.
- ✓ **Interrupt or change topics abruptly.**
This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

When using Copilot, think of it as having a conversation with a colleague. You wouldn't discuss a whole encyclopedia at once, right? Similarly, keep your document references concise and to the point for the best experience with Copilot.

Tips to get the most out of Copilot:

1. **Be clear and specific:** Treat Copilot like a teammate. The more specific your instructions, the more accurate and relevant the results will be.
2. **Provide Context:** Include business scenario, audience, and relevant background. Context helps Copilot deliver answers that fit your needs.
3. **Define Output Format:** Want a bulleted list, table, or summary? Say so. Visualize the output before your prompt, then describe it.
4. **Set Constraints:** Limit word count, specify tone, and exclude unwanted elements (like emojis). Guardrails lead to better output.
5. **Use Role or Perspective:** Frame prompts from a specific role (e.g., "Act as a clinical manager"). This tailors responses to your audience.
6. **Avoid Ambiguity:** Skip vague terms like "make better." Be as descriptive as you would with a coworker or even a child—clear instructions matter.

Discover and share Copilot prompts

[Copilot Prompt Gallery](#) helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others

Access the Prompt Gallery in Copilot Chat by selecting the box with star icon next to the prompt box. Here, you'll see suggested Copilot prompts and your saved prompts.

