THINK productive

Smarter Work with Copilot Handbook

From first prompt to everyday habit:
make Copilot work for you.

How to use this handbook

Use this handbook as a practical guide during and after the session. Follow the numbered instructions, use the example prompts as starting points, and adapt them to suit your role and work. You do not need to read it from beginning to end. Go directly to the task you want to complete.

Copilot features and screen layouts may vary depending on your device, license and organization's settings.

Before you start:

1. Sign in to Copilot using the correct work account.
2. Check that you have permission to use any files or information you plan to provide.
3. Choose a real task on which you can practice.
4. Remember that you remain responsible for checking Copilot's output before using or sharing it.

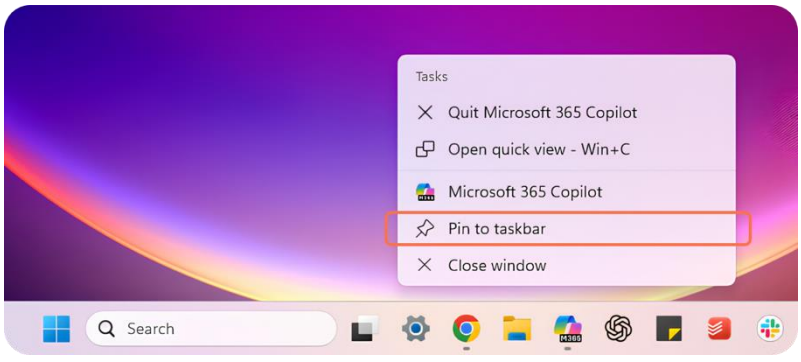
Recommended setup:

For the best experience:

- Open the Copilot App on your computer.
- Pin it to your taskbar for easy access.
- Keep this handbook open on a second screen or device if possible.
- Have a sample document, email or task ready for practice.
- Start a new chat for each different task or topic.
- Keep your organization's security and data-handling policies in mind.

Open and pin the Copilot App

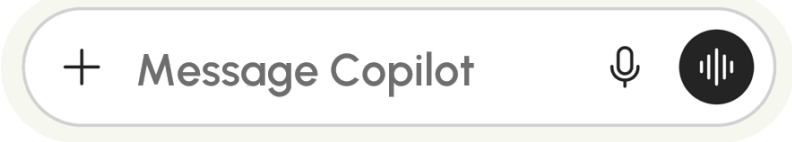
1. Search for the Copilot App.
2. Right-click the application icon.
3. Pin it to the taskbar.
4. Use the pinned icon to open it next time.



Use the chat bar

Explain the four main chat-bar actions:

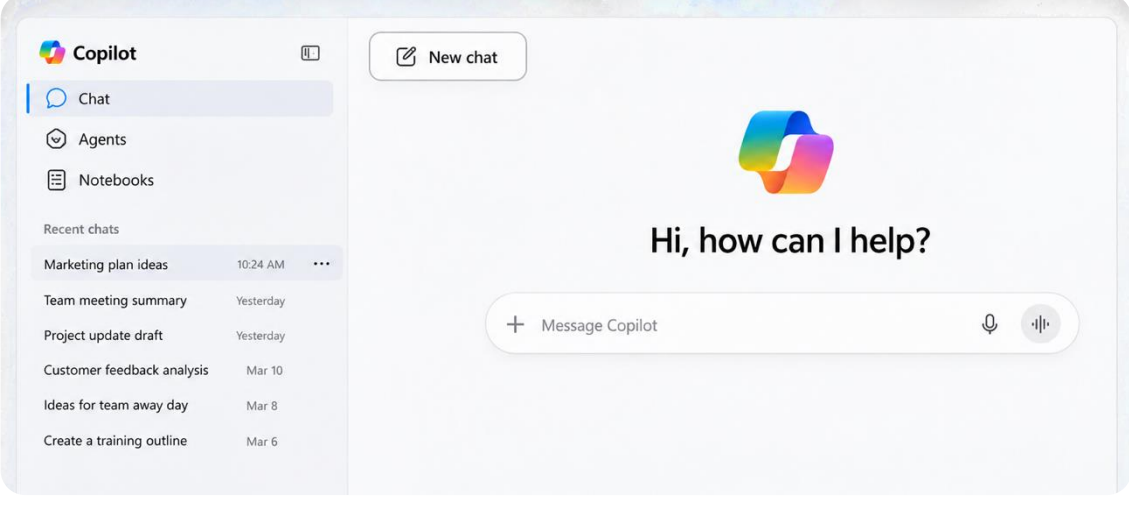
1. Type a message in the **Message Copilot** box.
2. Select the plus symbol to add a file, image or other content.
3. Use the microphone to dictate instead of typing.
4. Use the voice option for a spoken conversation.



New Chats

How to start and manage a new chat

1. Open the **Copilot App**.
2. Select **New chat** to begin a fresh conversation.
3. Enter your question, instruction or task in the chat bar, then send it.
4. Use **a new chat for each different task or topic.** This keeps Copilot focused on the correct context.
5. To find an earlier conversation, open your **Recent chats** list and select the relevant chat.
6. To organize a chat, select the **three dots (…)** beside it. You can:
7. Rename it with a meaningful title
8. Pin it for quick access
9. Access other chat-management options
10. Continue an existing chat when your next question relates to the same task or context.

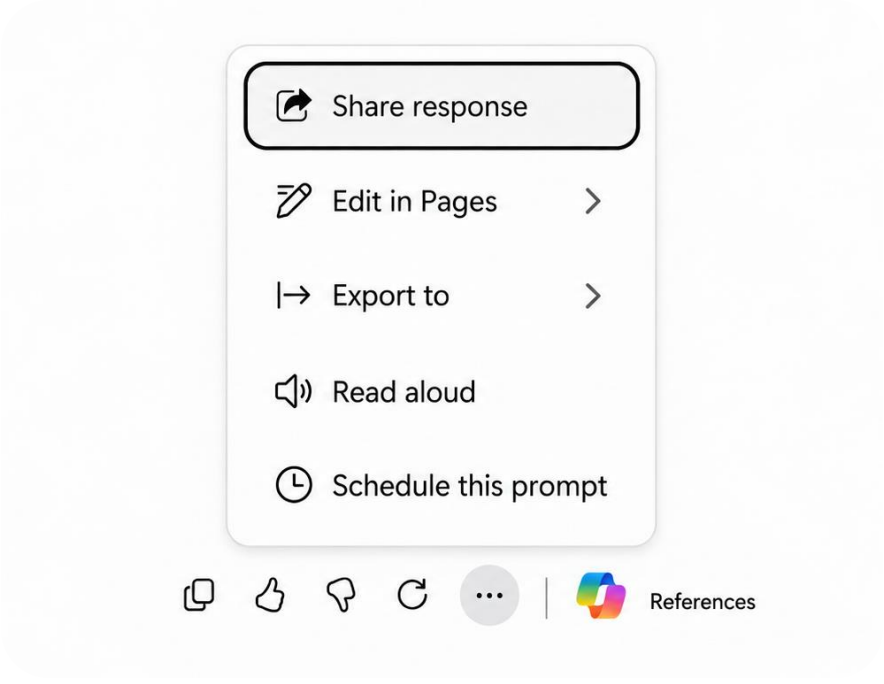


Quick rule:
New topic, new chat. Same topic, continue the existing chat.

Sharing Chats

How to share a chat

1. Open the Copilot chat you want to share.
2. Select the **three-dot menu (...)** beside the response.
3. Select **Share** or **Share response.**
4. Review the content carefully before sharing. Remove or avoid sharing confidential, personal or sensitive information.
5. Copy the generated sharing link and send it to the intended recipient.



Important to know

- The shared content is a snapshot taken when you share it.
- The recipient can view the shared conversation or response but cannot continue your original chat.
- Always confirm that the content is accurate and appropriate for the recipient before sharing.

Chat Files

How to create a file in your chat

1. Start a new Copilot chat.
2. Describe the document you want Copilot to create, including its purpose, audience and required content.

   Example prompt:

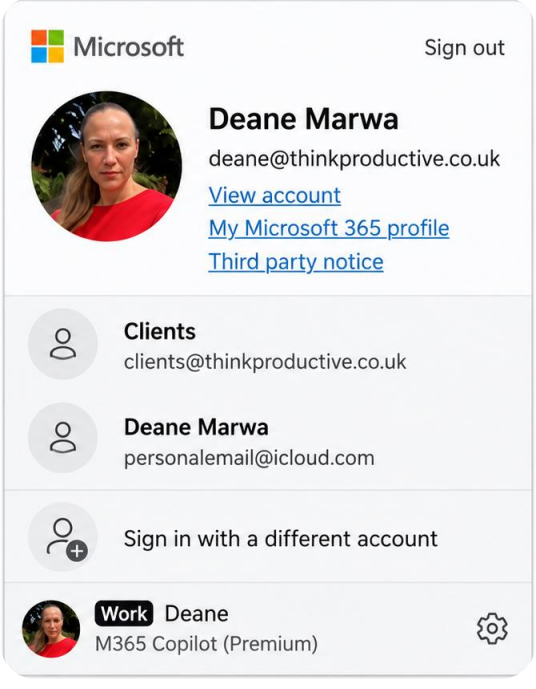
   Create a one-page proposal for a team wellbeing day. Include its purpose, suggested activities, expected benefits and next steps.
3. Review the response and ask Copilot to refine the tone, structure or content if needed.
4. When you are happy with the draft, ask Copilot to **create it as a Word document.**
5. Select the newly created file to open or preview it. The document is automatically saved to your OneDrive.
6. Review the complete document carefully. Check its accuracy, formatting, tone and missing information.
7. Open it in Word if you want to make further changes or use Copilot in Word to rewrite, shorten, expand or refine the content.

Top tip: Finalize the content in your chat before creating the file. This reduces the amount of editing required afterwards.

Switch Accounts

How to switch accounts

1. Open the **Copilot App.**
2. Select your **profile picture** in the top-right corner.
3. Choose the account you want to use from the list. Copilot will switch to that account and its associated information, permissions and conversations.
4. If the account is not listed, select **Add another account.**
5. Enter the account's sign-in details and follow the on-screen instructions.
6. Confirm that the correct profile is displayed before starting your task.



Why this matters

Use your work account for company information and work-related tasks. Use a personal account for personal activities such as hobbies, travel or family projects. Switching accounts helps keep these contexts separate.

Switching Model Guides

How to switch models or response modes

1. Open a chat in the Copilot App.
2. Select the model or response-mode menu at the top of the chat.
3. Choose Auto for most everyday tasks. Copilot will select the most appropriate option for your request.
4. Choose the response pace that suits your task:
    - **Quick Response:** Simple questions, summaries and email drafts.
    - **Deep Thinker:** Complex problems, comparisons, planning and analysis.
5. Explore other available models when you want a different approach:
    - **Claude:** Longer documents, detailed writing and nuanced summaries.
    - **ChatGPT:** Brainstorming, creativity, drafting and conversational problem-solving.
6. Enter your prompt and review the result. If it does not meet your needs, try another mode or model and compare the responses.

Quick rule:

Start with Auto, choose Quick Response when speed matters, and use Deep Thinker when the task needs more careful reasoning. Available options may vary by account and organization.

Set your personal style

How to set your personal style

1. Open a chat in the **Copilot App.**
2. Select the **three-dot menu**, then choose **Chat Settings.**
3. Select **Personalization.**
4. Enter instructions describing how you want Copilot to respond. You could include:
    - Your role and typical tasks
    - Preferred language, such as UK English
    - Tone of voice
    - Preferred length and format
    - Words, jargon or punctuation to avoid
    - How technical or beginner-friendly responses should be
5. Select **Save instructions.** Copilot will consider these preferences in future conversations.

Example instructions

Use UK English. Write in a friendly, professional and natural tone. Keep explanations clear, practical and concise. Avoid jargon and overly corporate language. Use headings and bullet points where helpful and provide copy-and-paste-ready outputs whenever possible.

Quick rule:

Start with Auto, choose Quick Response when speed matters, and use Deep Thinker when the task needs more careful reasoning. Available options may vary by account and organization.

Prompt Lab

How to use Prompt Lab

1. Open a chat in the **Copilot App.**
2. Select the **three-dot menu** below the chat box.
3. Select **Chat Settings.**
4. Open **Help and tips**, then select **Prompt Lab.**
5. Browse the available categories or search for a prompt related to your task.
6. Select a prompt and make it your own:
    - Replace placeholders with your details.
    - Add relevant context.
    - Specify the audience, tone and desired output.
    - Remove anything that does not apply.
7. Submit the adapted prompt and review the response.
8. Save useful prompts so you can find and reuse them later.

Top tip:

Treat Prompt Lab prompts as starting points, not finished instructions. The more relevant context you add, the more useful the response will be.

Set Permanent Instructions

How to set permanent drafting instructions

1. Open the Outlook desktop app.
2. Select View, then open Settings.
3. Select Copilot and find Draft Instructions.
4. Switch Draft Instructions on.
5. Describe how you want Copilot to write your emails. Include your preferred:
    - Tone and level of formality
    - Length and structure
    - Language or spelling style
    - Greeting and sign-off
    - Words or phrases to avoid
6. Save your instructions. Copilot will use them when helping you draft emails in Outlook.

Example instructions

Use UK English. Keep my emails warm, concise and professional. Use short paragraphs and plain language. Avoid jargon and overly formal wording. Keep requests clear and end with a friendly sign-off.

Top tip:

You can ask Copilot to suggest instructions based on your writing style, then edit them before saving.

Copilot Custom Instructions Template

Edit the sections below to suit your role and preferences, then copy and paste them into:

Settings → Personalization → Copilot Personalization → Custom Instructions

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About Me

I am a [job role].

I use Copilot to help with:

Research | Writing and editing | Training and presentations | Content creation | Productivity and planning

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How I Want Copilot to Respond

Priorities

Focus on practical, real-world advice. | Give clear, actionable recommendations. | Use examples wherever helpful. | Suggest the best option when there is one. | Lead with the key point. | Highlight useful next steps. | Offer simpler alternatives where possible.

Research

Use up-to-date, reliable sources. | If information is uncertain, say so. | Do not invent facts, statistics or citations. | Explain conflicting information briefly and clearly. | Separate facts from opinions. | Include dates when information may change. | Prioritise trusted or official sources.

Copilot Custom Instructions Template

Writing Style

Use UK English. | Use plain, professional language. | Keep paragraphs short. | Use clear headings and bullet points. | Do not use em dashes. | Avoid jargon unless it is needed. | Use active voice. | Make content easy to scan. | Keep wording natural and human. | Give copy-and-paste-ready responses.

Tone

Friendly, confident and helpful. | Be concise and get to the point. | Avoid corporate buzzwords and AI clichés. | Sound warm and natural. | Be encouraging, not patronizing. | Match the tone to the audience.

Prompt Support

When helping me write or improve prompts, structure them using:

Goal | Context | Audience | Tone | Requirements | Format | Length | Key information | Constraints | Example (if helpful) | What to avoid | Desired outcome

Creating Graphics

How to create graphics

1. Open the Copilot App and select the App launcher in the top-left corner.
2. Select Create.
3. Choose Create an image.
4. Describe the graphic you want. Include:
    - Main subject
    - Visual style
    - Colours or mood
    - Intended use
    - Required shape, such as a wide image for a presentation
5. Select Create to generate the graphic.
6. Review the result carefully. Check that the details are accurate and that the image suits its intended purpose.
7. If necessary, adjust your description and try again.

Example prompt

Create a wide, realistic image of a calm workspace with natural light. Use a clean, professional style and do not include any text.

Notebook demo

How to create and use a Notebook

1. Open the Copilot App and select Notebooks.
2. Select New Notebook and give it a clear name related to your project or topic.
3. Add useful context, such as:
    - A relevant file
    - Background notes
    - Links to useful webpages or resources
4. Check that the information is relevant and current.
5. Ask Copilot a question based on the material you added.

Example prompt

Summarise the key information in this Notebook and highlight anything that needs my attention.

Based on the materials in this Notebook, suggest the next five actions for this project.

Identify any missing information, risks or unanswered questions.

6. Continue adding information and asking follow-up questions as the project develops.

Top tip:

Keep each Notebook focused on one project or topic so Copilot can work from clear, relevant context.

THINK
productive

Make Space for the Culture Work

Want to explore more ways to work better together?

Contact your local Think Productive team for a discovery call:

www.thinkproductive.com

www.thinkproductive.com

