



Microsoft 365  
Copilot

# Copilot in Word

State of NC





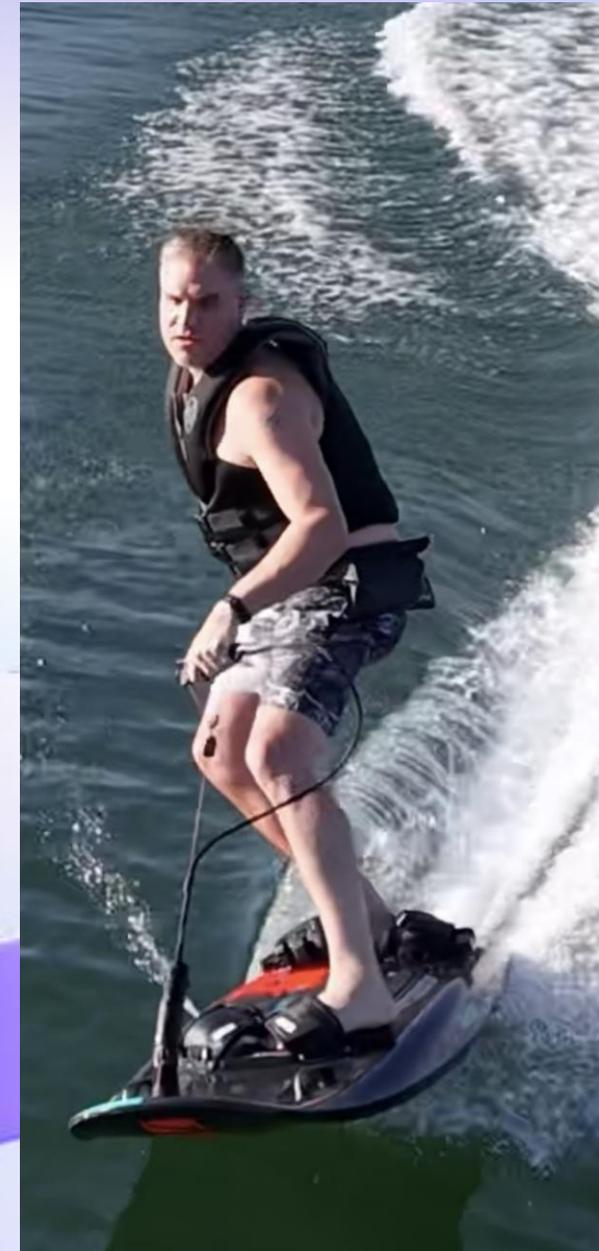
## Josh Meredith

Cloud Solution Architect

Microsoft 365

State and Local Government division

[Josh.Meredith@microsoft.com](mailto:Josh.Meredith@microsoft.com)



# Topics

- Quick Prompting Recap
- Some Copilot in Word Practice
- Demo
- Copilot in Word Overview
- Questions

# Art of Prompting - Key Elements

**WHAT**  
*do I want?*



**Goal (Objective)**

What response do you want from Copilot?  
(Desired outcome)

**WHY / WHO**  
*do I need it?*



**Context, Persona & Audience**

Why do you need it?  
Who is involved?  
Act as a <Persona>

**WHERE**  
*to look?*



**Source (Grounding)**

Which information sources should Copilot use (ground against)?

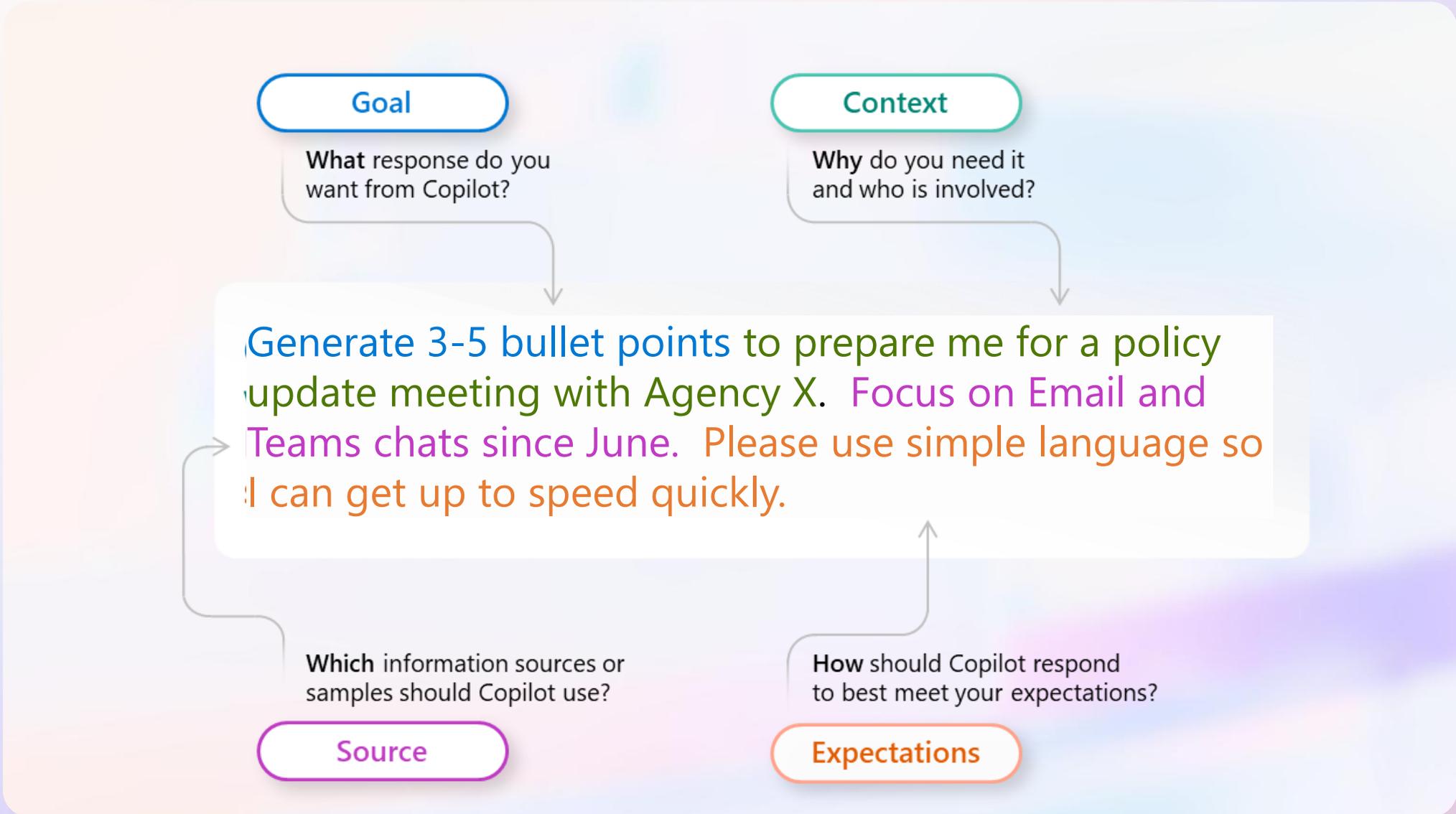
**HOW**  
*do I need it?*



**Expectations**

How should Copilot respond to meet your expectations?

# Art of Prompting - Key Elements



# How to use: Copilot in Word in the document

Note the specific prompts shown may vary

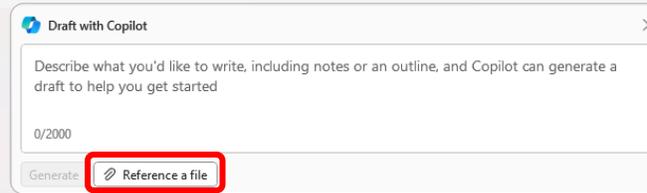


## Sample use cases

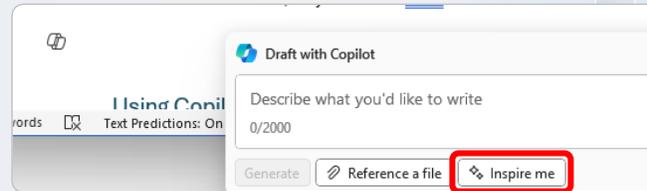
- Turn an outline or idea into text
- Rewrite existing text for length, tone, new phrasing
- Add tables based on the text

What can you do in the document

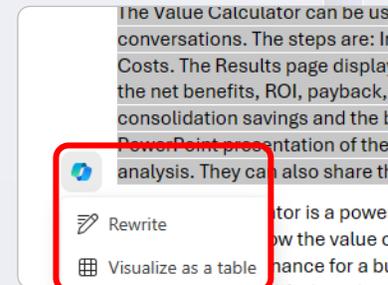
- **Draft with Copilot** – Add content to the Word doc
  - Start from a blank page to create new content using **Reference a file** (up to 3 Word or PowerPoint files) or providing a topic for ungrounded content (ungrounded content will not necessarily be factual)
  - Add new content at any point using **Inspire Me** (to build on existing content), referencing a file for new grounded content, or providing a topic for ungrounded content (ungrounded content will not necessarily be factual)
- Add suggested image (next to the title)
- Put information into a table using **Visualize as a table**



Provide ideas or reference a file



Provide ideas, reference a file, or let Copilot write



Rewrite or add a table



Summary of the Value Guide

Add an image

# How to use: Copilot in Word in the Copilot chat pane

Note the specific prompts shown may vary

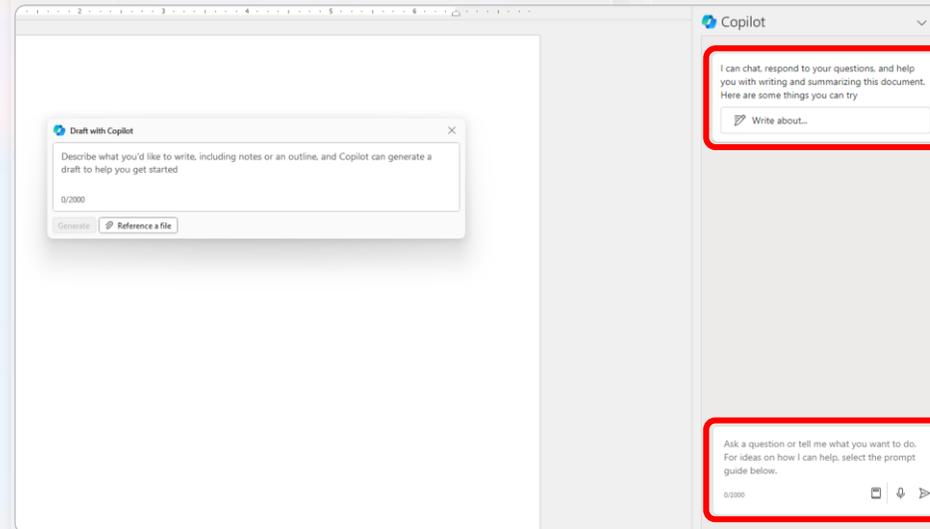


## Sample use cases

- Summarize or answer questions about an existing document

## Use the Copilot chat pane to

- Summarize
  - Create a summary
  - Show action items and next steps
- Command (Ask)
  - Ask general questions
  - Add table of contents



Select a predefined prompt in the Copilot sidebar. You can then add more context.

Ask general knowledge questions or ask for creative ideas. You'll need to review any content for factual mistakes

## Practice : Create a Copilot training plan

1. Go to Copilot in Teams, Word or to <https://www.microsoft365.com/chat>
2. In chat box write this example prompt below

“Create a training plan to help me with adopting M365 co-pilot. Include a list of daily activities that I can do that help me to build Copilot into my daily routine”

How did it work? Provide feedback, choose either the thumbs up or down reaction

# Practice : From Copilot Chat to Word

1. Go to a long (preferably complicated) Word document and open Copilot
2. Enter the following prompt:

“Act as a rewriting expert, your task is to rewrite the following text, making it easier to understand for a general audience. The rewritten text should maintain the original meaning but should be written in simpler, more accessible language. The goal is to ensure that anyone can understand the information. Ensure that the text is free from jargon and complicated terms. Suggest a glossary where needed. The tone should remain professional but friendly. Reply with Yes if you understand”

You can also use Copilot in Word to summarize, add content, expand or rewrite particular sections.

How did it work? Provide feedback, choose either the thumbs up or down reaction



**Demo**

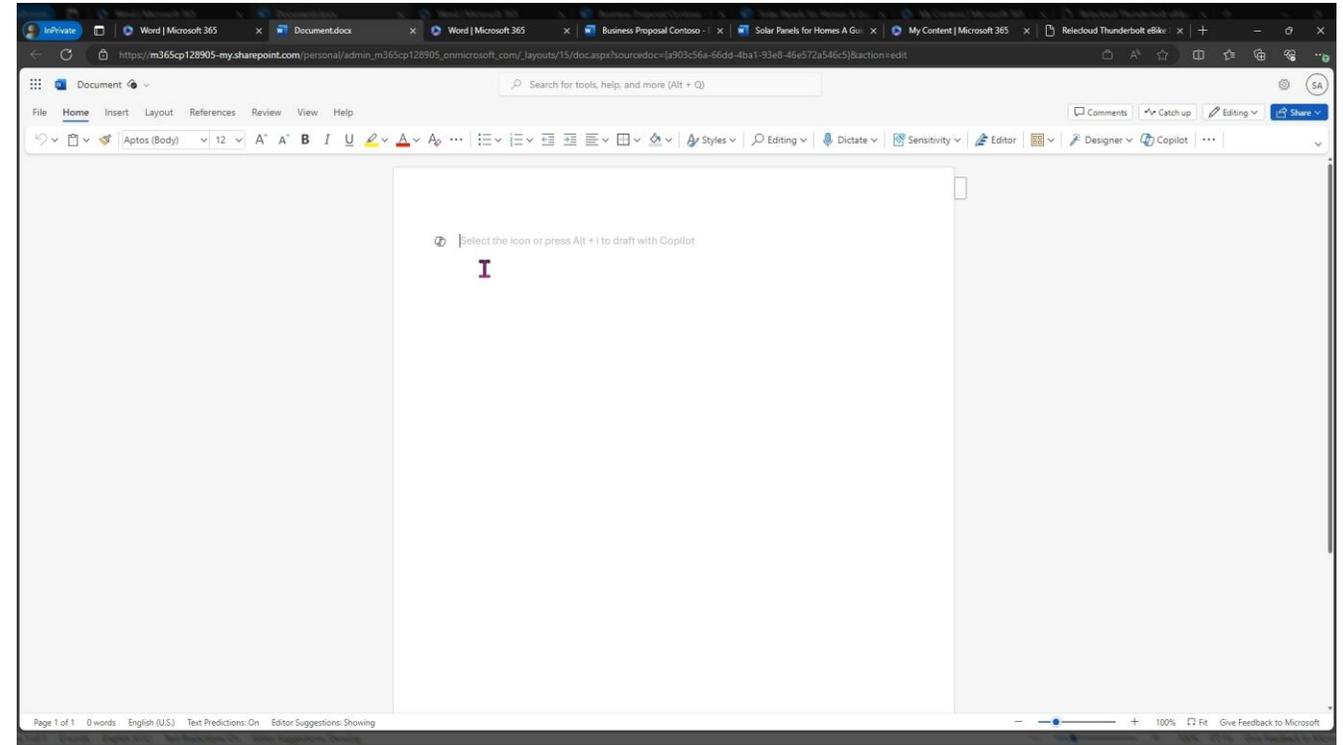
# Creating a new Document with Copilot in Word

# Practice : Creating a new Word document with Copilot in Word

1. Go to Word or <https://www.microsoft365.com/launch/word> and create a new Blank Document
2. Enter the following prompt:  

“Write a new document on the cost, benefits, and considerations for installing solar panels on homes. Provide an introduction at the beginning of the document and a summary at the end of the document. Include a table of contents”

How did it work? Provide feedback, choose either the thumbs up or down reaction



# Practice : Creating a new Word document with Copilot in Word

1. Go to Word or <https://www.microsoft365.com/launch/word> and create a new Blank Document

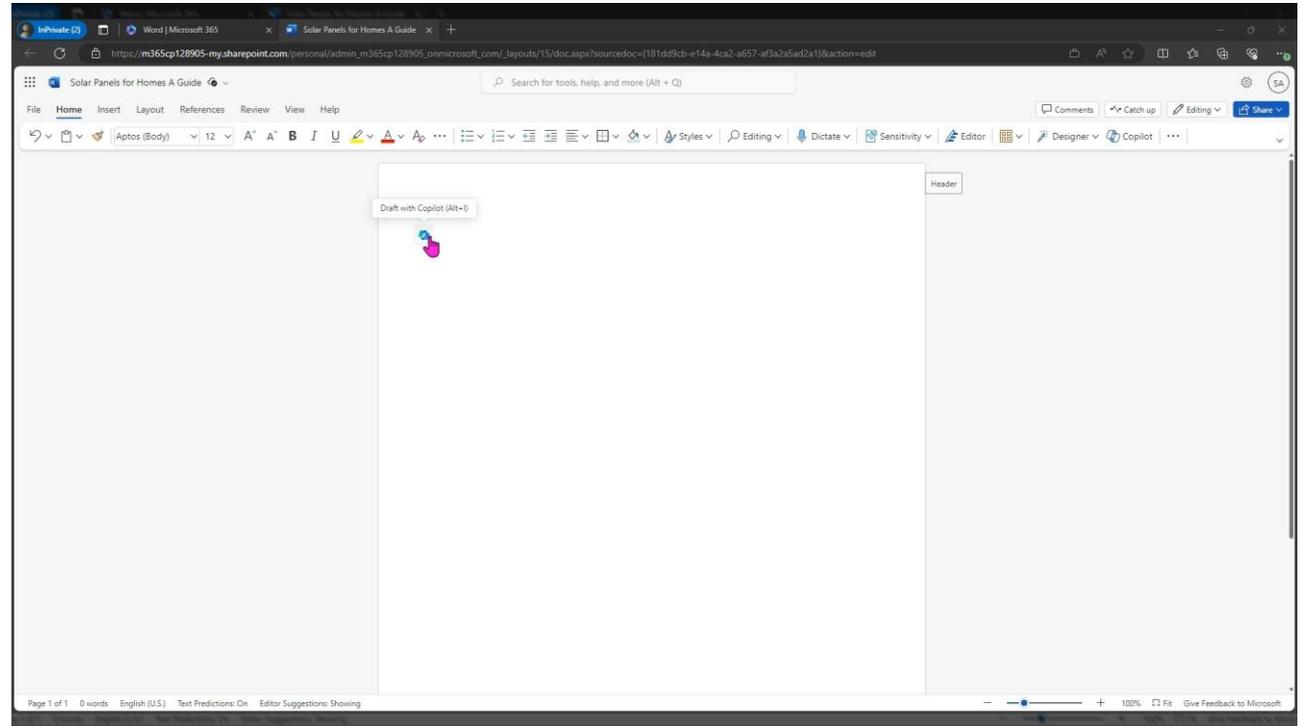
2. Enter the following prompt:

“Give me a list of questions to ask an agency about a new policy”

or you may enter your own prompt:

“Write a new document about <this topic> and include <these details>.”

How did it work? Provide feedback, choose either the thumbs up or down reaction



# Practice : Use Existing Documents to Create a new Word document with Copilot in Word

1. Go to Word or <https://www.microsoft365.com/launch/word> and create a new Blank Document
2. Enter a prompt using the forward / to reference existing content:

“Draft a response to the Tailwind RFP using the /<RFP reply framework> to format the response. Reference the /<Boulder Internal Meeting> and the /<Commercial Charger Pro Spec> for technical details and pricing. Include discount details from the following email /<Exciting Opportunity> ”

This is a sample prompt that is using 4 different reference documents.

How did it work? Provide feedback, choose either the thumbs up or down reaction

# Modifying an existing document with Copilot in Word

# Practice : Modifying an existing Word document with Copilot in Word

1. In an existing Word document (or one used for this practice)
2. Select and highlight an existing sentence or a paragraph.
3. Click the Copilot icon on the left of the new line
4. Enter the following prompt:

“Rewrite this sentence, but make it sound more professional.”

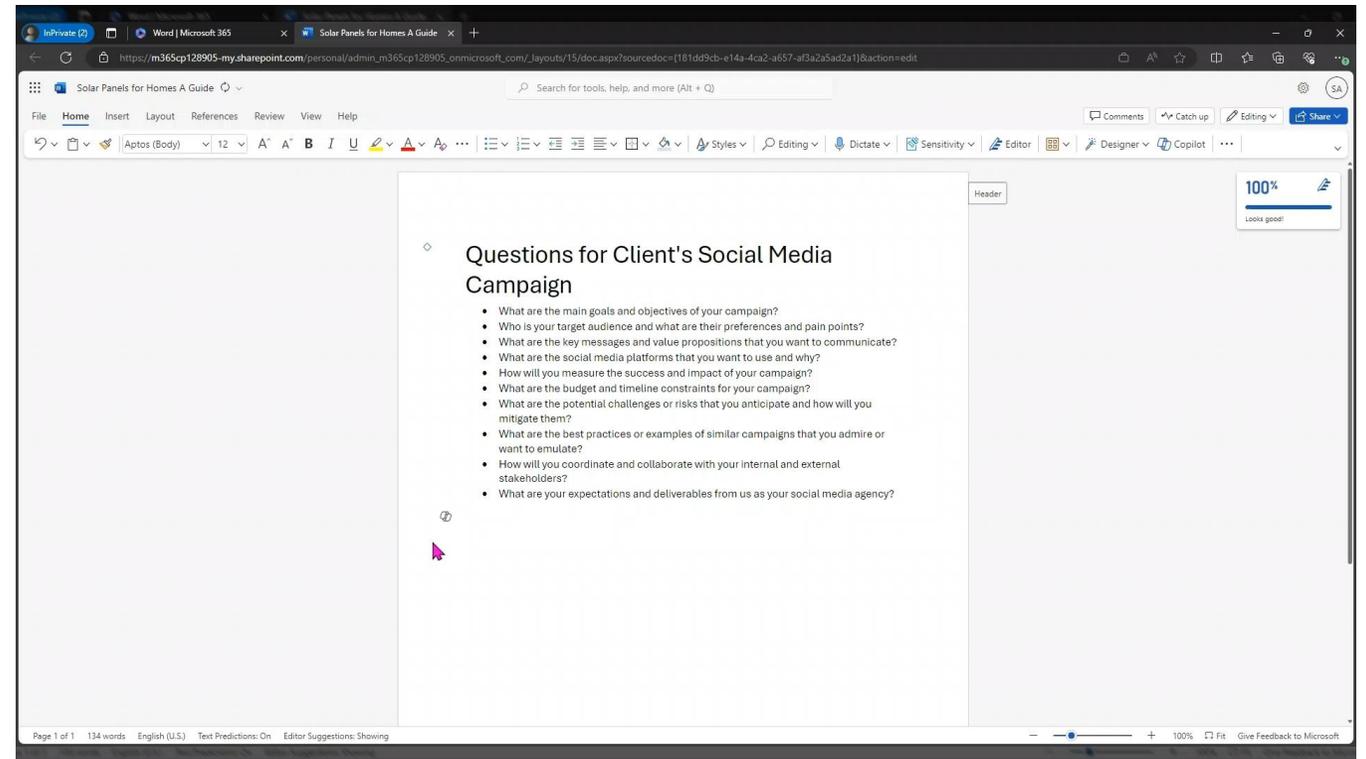
How did it work? Provide feedback, choose either the thumbs up or down reaction

# Practice : Modifying an existing Word document with Copilot in Word

1. In an existing Word document (or one used for this practice)
2. Navigate to the **end of the document**
3. In **new line** click the Copilot icon on the left of the new line
4. Click **Inspire Me** or **Keep Writing This**

You can regenerate the response more than one time, then you can select the response that you like

How did it work? Provide feedback, choose either the thumbs up or down reaction

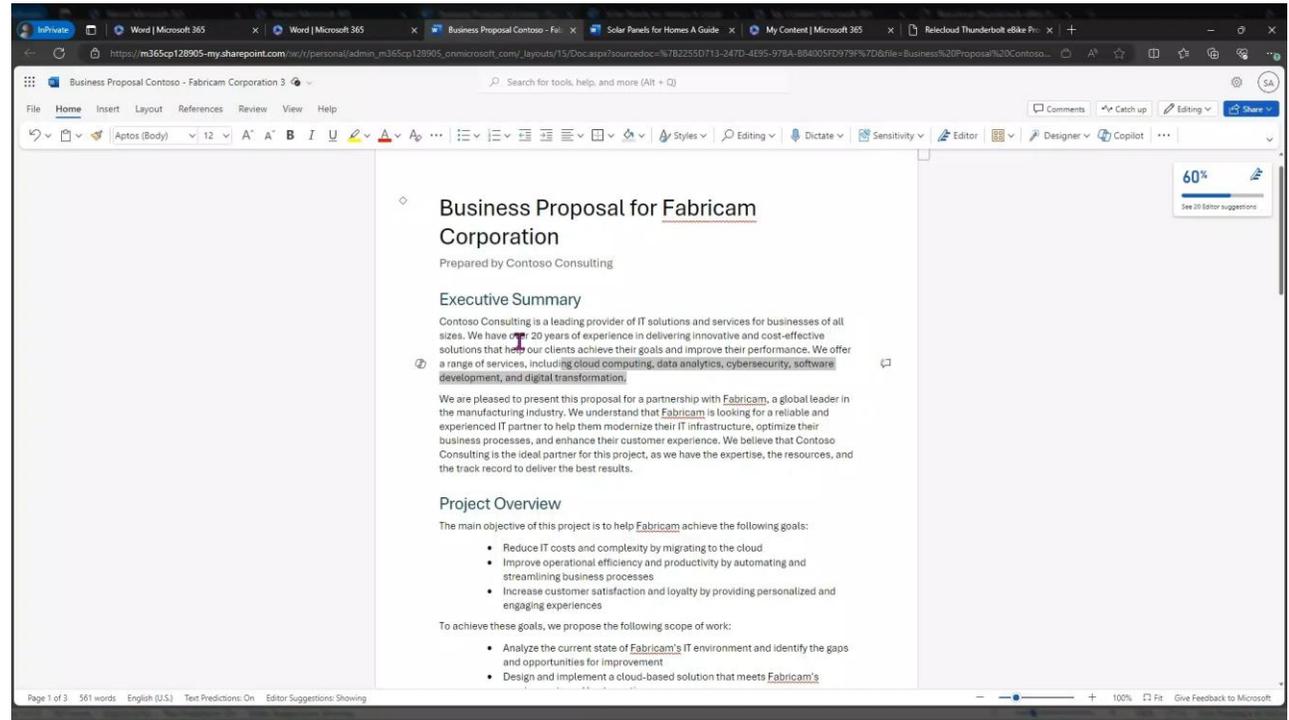


# Practice : Visualize Content as a Table

1. Go to Word or <https://www.microsoft365.com/launch/word> and create a new Blank Document
2. Enter the following prompt:  

“Write a paragraph about the different types of apples.”
3. Select Keep It and Select the **target content**
4. Click on the **Copilot Icon** to the left of the text and select the “**Visualize as a Table**” option

How did it work? Provide feedback, choose either the thumbs up or down reaction

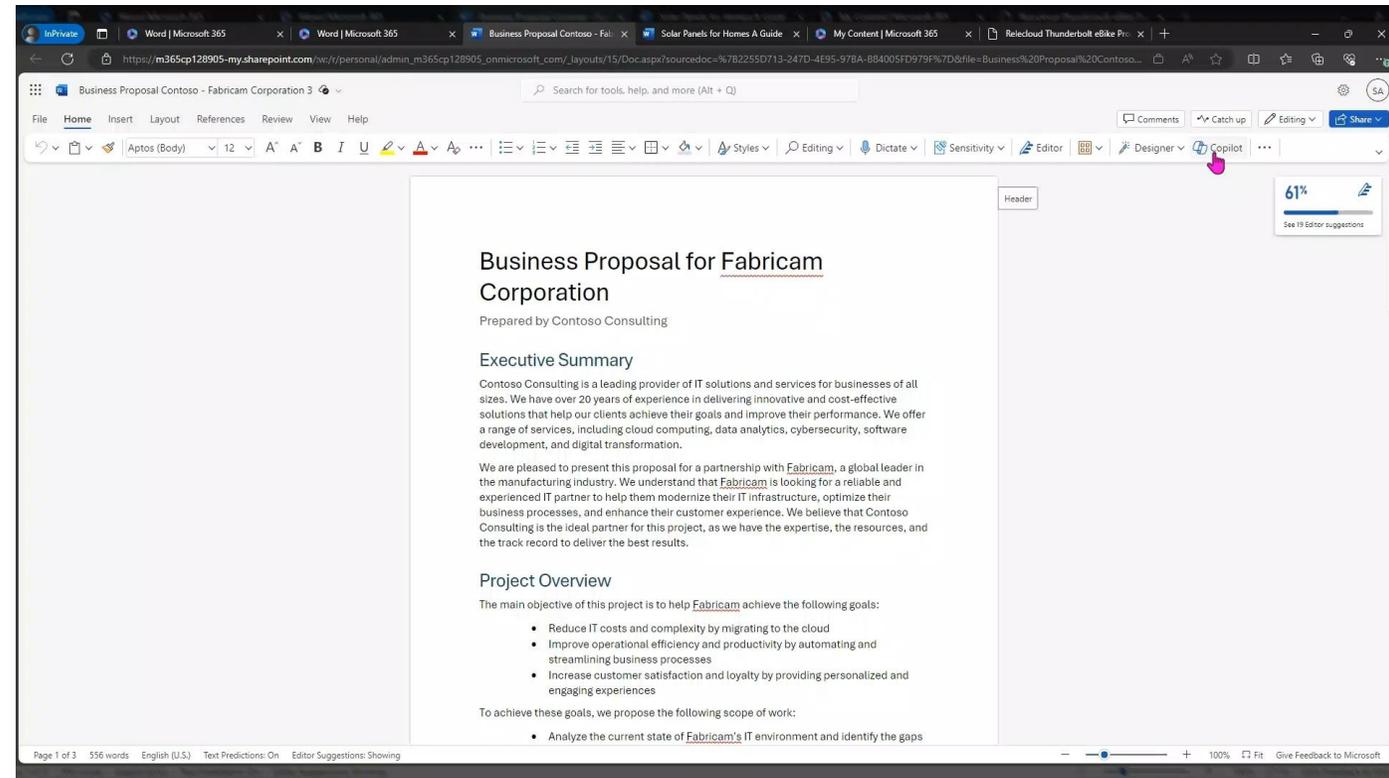


# Analyzing an existing document with Copilot in Word

# Practice : Summarize a Document

1. Open an existing Word file that you have access to.
2. At the top of the **file**, click on the **Copilot Icon** in the ribbon menu and open the Copilot pane on the right side of the document.
3. Click or enter the prompt: **Summarize the document**

How did it work? Provide feedback, choose either the thumbs up or down reaction



# Practice : Ask Questions about the Document

1. Open an existing Word file that you have access to.
2. At the top of the **file**, click on the **Copilot Icon** in the ribbon menu and open the Copilot pane on the right side of the document.
3. Example **Prompt**: ***“What does this document say about <pick a topic>?”***

How did it work? Provide feedback, choose either the thumbs up or down reaction

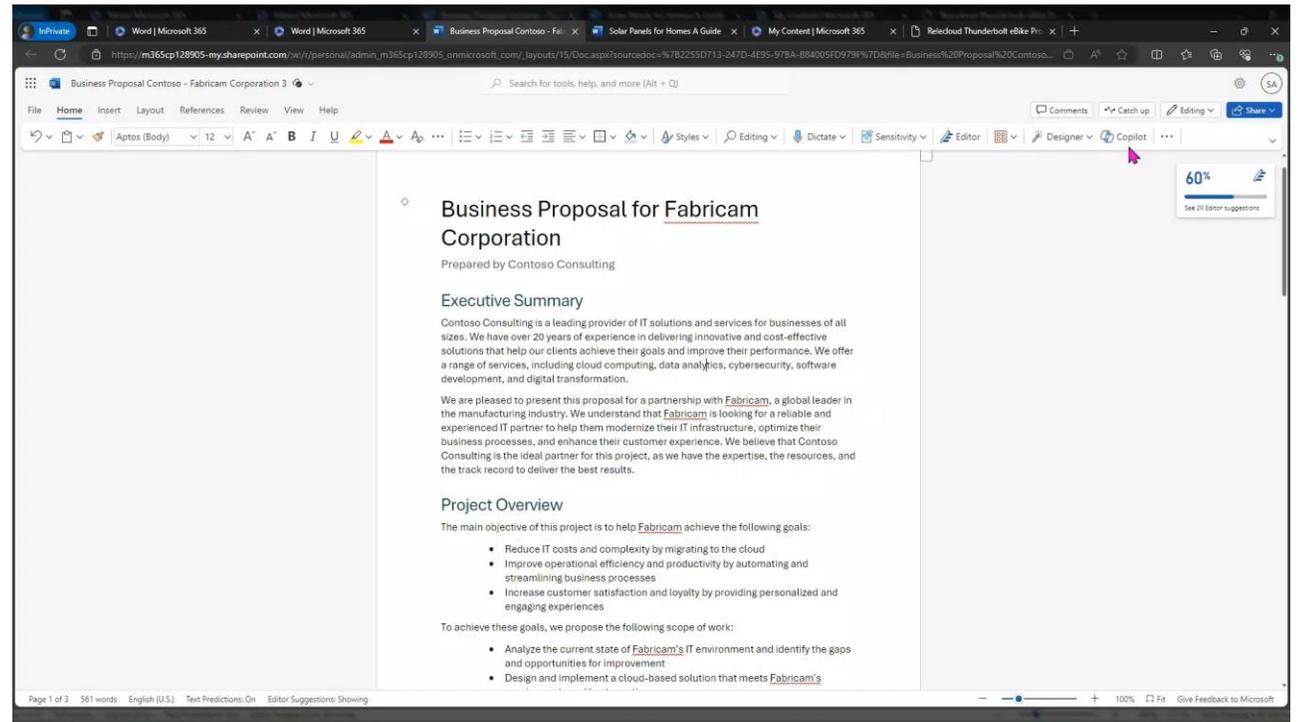
# Transforming a document to an email with Copilot in Word

# Practice : Transform a Document into an Email

1. Open an existing Word file that you have access to.
2. At the top of the **file**, click on the **Copilot Icon** in the ribbon menu and open the Copilot pane on the right side of the document.
3. Enter the Prompt:  
*“Transform this document into an email”*

Copilot will create an email draft based on the document content which can be used to send an email

How did it work? Provide feedback, choose either the thumbs up or down reaction





# Find more Word prompts to try in [Copilot Lab](#)

## Write an introduction

Write an intro paragraph for this document and make it sound [professional]



## Summarize this doc

Summarize this document [in 3key points]



## List pros and cons

List the pros and cons of [the different project ideas mentioned in this document]



## Add a paragraph

Add a paragraph that captures [the argument of this document]



## Change the font

Change the font to [Segoe UI, 12point]



## Create an overview

Create a high-level overview of [agile product development]



## Outline a business plan

Draft a business plan outline for a [sustainable marketing company]



## Take notes in a meeting

Draft a one-page template that I can use to take notes for a meeting. Include sections for the date and topic



## Understand quickly

Explain this document in three sentences



## Brainstorm team building ideas

Give me ideas for icebreaker activities for a new team



## Improve this document

Give me specific examples from this document on how I can improve it for [a leadership review?]



## Write more confidently

How can I more concisely describe [time management]?



# Questions