



NC INNOVATION SUMMIT

Working Smarter with Outlook and To Do

Tame your inbox, turn email into action, and let Copilot do the heavy lifting.

Presented by Michelle Checchi & Navin Pokhrel

Five short sections take you from inbox overload to a planned day

- 1 Opening
- 2 Tame Your Inbox · Outlook
- 3 Turn Email into Action · Outlook + To Do
- 4 Microsoft To Do Hub
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- 6 Close & Q&A



Meet your presenters

Cloud Solution Architects at Microsoft — we help customers get real value out of the tools they already own



Michelle Checchi

Sr Cloud Solution Architect, Microsoft

Helps customers turn everyday
Microsoft 365 tools into working habits.



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Sr Cloud Solution Architect, Microsoft

Partners with customers on cloud
architecture, adoption, and planning.



01

Tame Your Inbox

In Outlook

Six built-in Outlook tools cut the noise before you read a thing

1

Focused Inbox

Priority mail surfaces in Focused; the rest waits in Other.

2

Rules

Auto-file, forward, or flag messages the moment they land.

3

Categories & Color

Tag mail by program or priority with scannable color.

4

Sweep & Archive

Clear repetitive senders in one click; archive, don't delete.

5

Quick Steps

One click runs a multi-step action you do often.

6

Schedule Send & Snooze

Send at the right time; snooze mail back later.

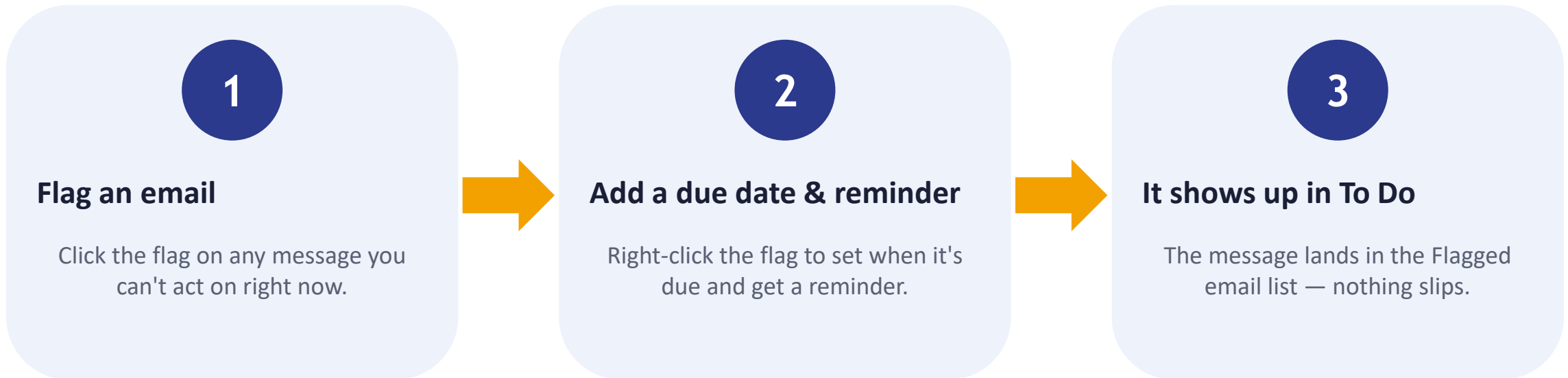


02

Turn Email into Action

Outlook + Microsoft To Do

Flag an email once and it becomes a tracked task in To Do



IN GOVERNMENT — PUBLIC-RECORDS REQUEST

A constituent emails a public-records request. Flag it, set a due date and reminder, and it waits in the Flagged email list in To Do until it's closed — no request falls through the cracks.



03

Microsoft To Do Hub

Your single place to plan the day

My Day, Lists, and Steps turn scattered tasks into one plan

1

My Day

A fresh list each morning for today's focus only.

2

Lists

Group tasks by project, program, or client.

3

Steps

Break a big task into checkable steps that move.

4

Due Dates & Reminders

Add a due date, a reminder ping, and recurrence.

5

Important & Planned

Starred and dated tasks roll up into smart lists.

6

Build Routines

Recurring tasks plus My Day make a daily rhythm.

One example: a grant deadline becomes steps, a date, and a routine

GRANTS LIST

☐ Submit FY26 grant report

- Pull Q4 spend from finance
- Draft narrative in Word
- Review with manager
- Upload to grantor portal

Due Fri

Repeats quarterly

My Day

Build it in about 60 seconds

- 1 Add the task to a "Grants" list.
- 2 Break it into Steps — one per hand-off.
- 3 Set a due date and a reminder two days early.
- 4 Make it repeat quarterly, then add to My Day.

Result: a routine, not a fire drill.



04

Make It Smarter with Copilot

Outlook + To Do + Microsoft 365 Copilot

Seven Copilot moves that give the most time back in email and planning

1

Catch Up

A daily digest of what changed while you were away.

2

Drafts in Seconds

Write a first-draft reply or new email from a prompt.

3

Summarize a Thread

Collapse a long chain into key points and asks.

4

Fix the Tone

Rewrite to be clearer, warmer, or more formal.

5

Turn a Message into Action

Pull the to-dos out of an email into tasks.

6

Plan & Prioritize Your Day

Ask what to focus on across mail and tasks.

7

Find Things Fast

Ask in plain language to locate a file or fact.

Four habits make every prompt work harder: Goal, Context, Source, Expectations



Goal

Say what you want Copilot to produce.

EXAMPLE

"Draft a reply agreeing to the meeting."



Context

Add the who, why, and background.

EXAMPLE

"It's for our county finance director."



Source

Point to the email, file, or thread.

EXAMPLE

"Use Dana's thread about FY26."



Expectations

Set tone, length, and format.

EXAMPLE

"Under 120 words, friendly tone."

One scenario, four prompts: catching up after two days out

You're back from two days at a conference. Four prompts get you current.

PROMPT 1 • CATCH UP

“Summarize the emails I missed over the last two days and flag anything urgent.”

→ *A ranked digest with the must-answer items.*

PROMPT 2 • SUMMARIZE

“Summarize this budget thread and list every decision and open question.”

→ *Key points, decisions, and who owes what.*

PROMPT 3 • DRAFT + TONE

“Draft a warm reply to Dana confirming Friday; keep it under 100 words.”

→ *A ready first draft you review and send.*

PROMPT 4 • PLAN THE DAY

“From my flagged mail and tasks, what are my top five priorities today?”

→ *A focused plan you push into My Day.*



WRAP-UP & Q&A

Pick one thing to try this week

- 1 Turn on Focused Inbox and save two Quick Steps.
- 2 Add your top tasks to To Do's My Day each morning.
- 3 Stack Goal + Context + Source + Expectations on your next prompt.

Questions? Let's make your inbox work for you.