

Getting started with Copilot, by Role

This guide is designed to help you explore how M365 Copilot can show up in your day-to-day work. Whether you're managing projects, supporting clients, leading teams, or writing communications, you'll find use cases and prompts to get you started.

Each page focuses on a specific role or function and includes:

- Real-world use cases by role
- Sample prompts to try
- Tips to get better results

Whether you're just getting started or looking for ideas this is your quick-start companion.

Table of Contents

M365 for Consulting Roles

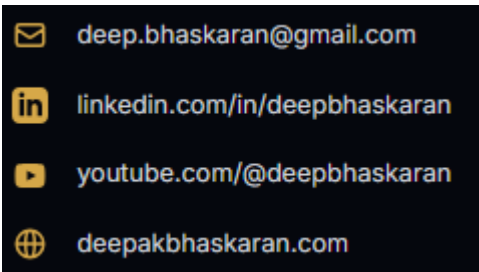
- [Consultants](#)
- [Change Management](#)
- [Program Management](#)
- [Product Owner](#)
- [Sales](#)
- [People Management](#)
- [Scrum Masters](#)

M365 by Functional Areas

- [Executives](#)
- [HR](#)
- [Recruiters](#)
- [Marketing](#)
- [Finance](#)
- [Supply Chain](#)
- [Legal](#)
- [Software Testers](#)

How to Use This Guide

- **Jump to the page for your role or functional area.**
- **Scan the use cases** for something that resonates.
- **Try a prompt** in Word, Teams, Outlook and PowerPoint
- **Adjust and refine your prompting:** Remember to point Copilot to SharePoint and OneDrive files as well as emails, chat threads and meeting transcripts.
- **Share what works.** Your feedback helps us improve this guide. Connect with me



 deep.bhaskaran@gmail.com

 linkedin.com/in/deepbhaskaran

 youtube.com/@deepbhaskaran

 deepakbhaskaran.com

M365 Copilot for a Consultant

DB

DEEPAK
BHASKARAN

AI Coach. AI Architect.
Transformation Advisor.

Consultant Cheat Sheet

Basic Prompt Structure



ROLE

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Consultant Use Cases



Find Content

Use Copilot to search across Slalom repositories to locate slides or content on given topic



Project Kick Off

Use Copilot to transform SOW activities into outcomes, help to frame potential risks / issues and propose mitigations



Presentation Prep

Use Copilot to prepare for your next pitch by suggesting questions that may arise from the content.



Mine Meeting Transcripts

Turn questions, clarifications and concerns from the meeting into project FAQs or Knowledge Base materials.



Stakeholder Analysis

Leverage Copilot meeting transcripts to detect stakeholder sentiment - resistance or alignment. Use these insights to inform change management strategies.



Stakeholder Communication

Leverage Copilot coaching to ensure communication with stakeholders is clear and effective



Explain a Concept

Upload slide or image and prompt Copilot to suggest clear, jargon-free explanations / speaker notes that are tailored for your audience



Topic Framing

Use Copilot to rewrite verbose sections into crisp summaries, ideal for slide decks or executive briefs



Meeting Prep

Use Copilot to prep for upcoming meeting recapping recent activities and discussions

Human In Loop

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M365
Copilot Best
Practices

Sample Prompts for Slalom Consultant.

DISCOVERY Find all recent client deliverables and slide decks about [topic] across Slalom repositories. Summarize key insights and flag reusable assets.

PROJECT KICK OFF Transform the SOW activities into a project plan slide, including milestones, risks, and mitigation strategies.

KNOWLEDGE MANAGEMENT Create a knowledge base article from the last project retrospective, including lessons learned and best practices.

MEETING PREP Summarize all emails from the past week related to [project/client]. Highlight pending responses and action items

DISCOVERY Summarize the main findings from the attached client report and highlight recommendations relevant to [industry/client].

PLANNING Generate a risk register for [project name] based on recent meeting notes and SOW. Include probability, impact, and mitigation columns.

DATA ANALYSIS & REPORTING Analyze this project budget worksheet. Flag anomalies and suggest cost-saving opportunities.

STAKEHOLDER ENGAGEMENT Analyze the last three project meetings for stakeholder sentiment. Identify resistance, alignment, and suggest tailored communication strategies.

M365 Copilot for Change Management

Change Management Cheat Sheet

DB

DEEPAK BHASKARAN

AI Coach. AI Architect. Transformation Advisor.

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Change Management Use Cases

☒ **Change Strategy and Planning**

Use Copilot to analyse current trends to inform the development of change strategies & plans.

☒ **Leadership Alignment**

Use Copilot to tailor communication and training materials for change sponsors.

☒ **Stakeholder Insights**

Extract stakeholder concerns and sentiment from communications

☒ **Engagement Strategies**

Ask Copilot to customize engagement strategies for different stakeholder groups.

☒ **Communication**

Ask Copilot to generate clear and effective communication tailored to specific audiences.

☒ **Survey Preparation**

Ask Copilot to draft survey questions to inform the adoption.

☒ **Resistance Management**

Request Copilot to suggest proactive strategies to manage change resistance.

☒ **Meeting Summaries**

Use Copilot to extract key themes from stakeholder meetings and interviews.

☒ **Campaign Creation**

Ask Copilot to create a campaign to promote core company values.

☒ **Scenario Planning**

Ask Copilot to generate different scenarios for how a change may unfold and develop contingency plans to adapt and respond effectively.

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Sample Prompts for Change Management



Draft an awareness post about the new internal tool based on emails about the tool from the past few weeks.



Summarize the announcement email and extract the most important bullet points to understand the value-add of the new tool.



Based on the content of the awareness post, draft a fun and engaging intro and outro for the comm that will get employees excited about the new tool.



Search for announcements of new tools and review their tone and sentiment.



Act as a change manager. Outline a strategic roadmap for a [company wide technology upgrade], detailing phases, milestones, and key performance indicators for success



Draft a guide for C-Suite executives to effectively sponsor and communicate the benefits of new [change program] initiative



Compose an initial announcement to employees about the upcoming [change initiative], including key points and anticipated concerns. Keep the tone [positive and empathetic.]

M365 Copilot for Program Management

Program Management Cheat Sheet



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Program Management Use Cases

**Email Summarisation**
Summarise lengthy email threads to stay updated on project communications.

**Research Assistance**
Gather and synthesize information to support project planning and decision-making.

**Meeting Insights**
Generate action items and key takeaways from meeting transcripts to ensure follow-up on important tasks.

**Document Management**
Organize project documents for easy retrieval and collaboration among team members

**Report Generation**
Ask Copilot to create detailed project reports with data integration and formatting assistance for professional presentation.

**Create and evaluate RFPs**
Develop Vendor questionnaires based on user requirement documents. Copilot helps link the questions to each requirement to facilitate scoring

**Streamline repeatable tasks**
Create formulas to extract and manipulate data in Excel

**Build Training Materials**
Ask Copilot to help with Create engaging, interactive training modules with real-time feedback and support.

**Presentation Creation**
Generate professional presentations with AI-assisted design and content suggestions

**Speaker Notes**
Generate detailed speaker notes to support effective delivery during presentations

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Sample Prompts for Program Management



Provide a brief summary of this email conversation, focusing on action items and decisions.



Create a comparison table to evaluate the proposals based on criteria such as cost, timeline, and experience.



Find documents uploaded in the last 30 days in the [Team/Channel Name] channel

Locate the files shared by [Author's Name] related to [specific project].



Analyze this dataset and highlight any significant trends or patterns

Remove any duplicate entries from this spreadsheet

Generate a pivot table to analyze the monthly expenses



You are a notetaker tasked with creating a recap of a meeting based on meeting transcription. The meeting recap should include the following: Agenda, Attendees, Summary of the discussion, Key themes of discussion, Key decisions made (note the decision maker), Key follow-up/action items and owners in table format



Act as a Program Manager, generate a detailed project report about [Description of the project] that includes the following sections: executive summary, project timeline, budget overview, Resource allocation, risk management, next steps)



Create an interactive training module for [specific topic or project] that includes: 1. Introduction, 2.Content Sections, 3. Interactive Elements, 4. Multimedia, 5. Assessment: 6. Resources, 7. Feedback

M365 Copilot for Product Owner

Product Owner Cheat Sheet

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Product Owner Use Cases



User Story Prioritisation

Quickly prioritize user stories by value and complexity



Task Creation

Ask Copilot to split user stories or meeting notes into actionable backlog tasks.



Generate Acceptance Criteria

Automatically generate detailed acceptance criteria based on user stories and requirements



Risk Management

Ask Copilot to identify risks and dependencies for a given feature and to suggest mitigating actions.



Suggest KPIs

Ask Copilot to suggest relevant KPIs for a given feature under consideration.



Stakeholder Communication

Leverage Copilot to ensure communication with stakeholder is clear and effective



Manage Scope Creep

Ask Copilot to suggest strategies to handle scope creep in relation to the [product goal]



Effective Presentations

Use Copilot to create presentations that communicate complex concepts in terms suitable to your target audience.



Meeting Summaries

Copilot can provide concise summaries of meetings, highlighting decisions made and action items.



Content Summarisation

Copilot can summarize lengthy Confluence pages, making it easier to get a quick overview of project documentation

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Copilot Best
Practices**

Sample Prompts for Product Owners



- Hi can you look into my emails and see if there's any pending responses from me

- Provide a brief summary of this email conversation, focusing on action items and decisions.



- What assumptions are we making about this feature, and how can we validate them? [Insert Feature Description]
- How does this user story align with our Sprint Goal, and what impact could it have on our delivery timeline? [Insert User Story and Sprint Goal]
- What are the most common support requests we receive, and how can we reduce their frequency? Please craft a detailed plan [attach support request logs]



Looking at my emails would you please tell which particular discussions or email needs further discussion and help with 1:1 or a group meeting



Act as a world class workshop facilitator and product owner with decades of experience. You have access to the knowledge of all of the known agile frameworks, methodologies and practices. You are especially proficient in workshops design and delivery both in person and virtually. Using the 4 C's model from the book "Training from the back of the room", design a 1 hour workshop on the topic of [Insert Topic]



Act as an experienced product owner. Your task is to aggregate and analyze customer feedback to identify common themes, pain points, and prioritize feature requests based on customer demand. Generate a comprehensive summary report that includes: Aggregated feedback from all sources. Identification of common themes and pain points. A prioritized list of feature requests based on customer demand. [attach customer survey feedback etc]



What are the current trends in our [target market], and how can we use this information to improve our product?

M365 Copilot for Sales

Sales Cheat Sheet

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Sales Use Cases



Email Drafting

Use Copilot to create personalized and professional sales emails quickly.



Proposal Creation

Use Copilot to generate detailed and customized sales proposals.



Competitor Analysis

Use Copilot to gather and analyze information on competitors.



Customer Meeting Preparation

Ask Copilot to prepare customer overview in preparation for sales meeting



Creating Process Documents

Ask Copilot to create sales process documents to drive consistency and sales excellence.



Lead Conversion Analysis

Ask Copilot to identify weak spots in sales funnel and suggest improvement strategies.



Contextual Communication

Use Copilots contextual awareness when drafting an email or preparing for a client meeting.



Meeting Assistance

Use Copilot to provide real time suggestions during meetings, analysing conversation trends and recommending next steps or talking points.



Sentiment Analysis

Ask Copilot to analyse sentiment from a meeting transcript and suggest negotiation tactics.



Mailbox Management

Use Copilot to summarise recent emails from leads and suggest follow up response.

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Sample Prompts for Sales



Identify the clients top 5 pain points [from Teams meeting transcript].



For each pain point listed, give me a brief outline of how I could address this issue in a way that adds value to the client.



Write a second follow up email for a lead who showed interest but hasn't responded to the first email.



Write an effective response to the objection [your product is too expensive for my company]



Write a sales pitch for [client] pitching their reusable pallets, crates, and containers to optimize supply chain efficiency and sustainability worldwide



Act as a Sales executive. Create a 5-step email sequence for nurturing leads interested in [client product].



Write a business proposal for [client] pitching their reusable pallets, crates, and containers to optimize supply chain efficiency and sustainability worldwide

M365 Copilot for People Management

DB

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People Management Cheat Sheet

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People Management Use Cases

 **Employee Feedback**

Summarize feedback emails to quickly understand team sentiments and concerns.

 **People Search**

Ask Copilot to search and retrieve the person's contact details, role, and recent activity within your organization.

 **Training Presentation**

Create engaging presentations for employee training and development sessions.

 **Sentiment Analysis**

Ask Copilot to analyse sentiment from a meeting transcript and suggest communication tactics.

 **Performance Reviews**

Create templates for conducting thorough and consistent performance reviews.

 **Recognition Programs**

Design presentations to highlight employee achievements and recognition programs.

 **Task Delegation**

Prioritize and delegate tasks based on email content, teams conversations and deadlines

 **Employee Well-being**

Research best practices for promoting employee well-being and work-life balance.

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Sample Prompts for People Management

 Develop a presentation for the upcoming team training session about [Theme & Topic], including slides on key topics, interactive elements, and discussion points

 Create a template for performance review documents, including sections for goals, achievements, feedback, and development plans

 Draft a follow-up email to [employee name] regarding their performance review, including next steps and any required actions.

 Draft a welcome email for new hires, including an introduction to the team and important first-day information.

 Based on the following observations about my colleagues work performance this quarter: [General Observations], please draft a 200-word constructive feedback paragraph that highlights their strengths, areas for improvement, and actionable suggestions for professional growth.

 Draft a template for employee development plans, including sections for career goals, current skills assessment, skill gaps, action steps, resource and support, timeline, progress monitoring, feedback mechanism

 Identify team members for [specific task] based on skills, availability, and past performance. Consider their interest and impact on team dynamics. Ensure the task offers development opportunities

M365 Copilot for Scrum Masters

Scrum Master Cheat Sheet

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Scrum Master Use Cases



Plan Team Retrospective

Use M365 Copilot to suggest themes or engaging approaches for your team retrospectives.



Coach me

Ask Copilot to coach you through challenges



Workshop preparation

Ask Copilot to assist with effective workshop design and planning.



Daily Scrum Preparation

Ask Copilot for suggestions to structure daily stand ups to ensure team stays focused, shares essential updates, and resolves blockers quickly.



Improve Team Dynamics

Ask Copilot to suggest ways to identify and resolve conflicts within the team and promoting a healthy work environment



Scrum Definitions

Create a Definition of Done considering the following [your criteria].



Stakeholder Management

Provide guidance on handling external dependencies and stakeholder engagement.



Coaching and Mentoring

Use Copilot to prepare targeted training on Scrum frameworks, principles and values helping to continuously improve team performance



Meeting Transcription

Use Copilot to summarize your meeting notes, actions and owners.



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Sample Prompts for Scrum Managers

Act as a Scrum Master with decades of experience. You have access to extensive knowledge of all agile frameworks, methodologies, and practices. You deeply understand human psychology, facilitation, and other key agile competencies. In this conversation, act as a coach to me, a Scrum Master, who wants to receive feedback on how to improve and gain new perspectives on approaching challenges faced by my teams.

You are an expert scrum master who uses a range of modern agile methodologies and approaches to create high performing teams. You have facilitated a retrospective and captured a number of actions with the team. Review the list of actions below. [Insert list of actions] Suggest ways that these actions could be made more actionable. Use the approaches outlined in the book Atomic Habits by James Clear. Each action should have an example of how it could be made easier, more obvious, more attractive or more satisfying. Each action should also suggest how it can be tracked for accountability and visibility and how it can be sustained as a habit-forming initiative.

Act as an Agile Coach observing certain team challenges during sprints [Insert team challenges here]. Provide insights into improving SCRUM team dynamics, collaboration, and overall performance. Recommend specific practices or exercises to foster a more cohesive and effective team.

Act as a SCRUM Master for a team that often has incomplete items at the end of sprints [Insert reasons or observations here]. Propose a strategy to address and reduce the number of carry-over items, ensuring that sprint commitments are realistic and achieved consistently.

Act as an Agile Practitioner focusing on continuous improvement. Based on the outcomes of the last few sprints [Insert brief sprint outcomes here], recommend practices, metrics, or techniques to measure and enhance the team's efficiency and effectiveness in the SCRUM process.

M365 Copilot for Executives

Executive Cheat Sheet

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Executive Use Cases



Strategic Planning

Use Copilot to draft strategic plans and business proposals, ensuring clarity and alignment with organizational goals.



Meeting Summaries

Summarize meeting minutes and key action items from executive meetings to streamline follow-ups and decision-making.



Market Analysis

Conduct comprehensive market research and analysis to inform strategic decisions and identify growth opportunities.



Stakeholder Communication

Draft personalized communication for stakeholders and partners.



Policy Development

Draft company policies and procedures to ensure compliance and operational efficiency.



Crisis Management

Prepare crisis communication plans and statements to address potential issues and maintain organizational reputation.



Mailbox Management

Use Copilot to manage your inbox by drafting responses, organizing emails, and setting reminders for follow-ups.



Extracting Insights from Documentation

Utilize Copilot to analyze and extract key insights from presentations, proposals or white papers.

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M365 Copilot Best Practices

Sample Prompts for Executives

Act as an Executive. Summarize the key points of relevance to my role and the recommended actions for my team. Suggest an action plan for the next three months to roll out these recommendations in my team with major milestones flagged. [attach white paper]

Help me prepare for upcoming meeting with [employee] OR on [topic]

Provide a brief summary of this email conversation, focusing on action items and decisions.

Find documents uploaded in the last 30 days in the [Team/Channel Name] channel

Locate the files shared by [Author's Name] related to [specific project].

Generate a concise executive summary for this presentation, highlighting the key points and recommendations.

Can you provide a detailed analysis of strategies to optimize public sector budgeting? I am preparing a report on this topic and would like to include recommendations based on recent research and case studies. Please format the response with bullet points for each strategy and include examples where applicable.

Act as a DAERA executive who is skilled at preparing effective communications for ministerial updates. Draft an executive summary from the attached notes and highlight the key points to address in the upcoming presentation to the parliament. Ensure the output is concise with clear calls to action, decisions, and support needed.

Teams Chat - Work Mode

	Organise your Day <i>I am trying to plan ahead for today. I'd like you to please act as my executive assistant and provide me with an overview of what is on my plate today. This is a combination of several smaller reports you will provide to me as part of an executive briefing.</i> <i>Step 1: Pull a list of all of my meetings for today.</i> <i>Step 2: Aggregate all of the meeting information into a table format that I can easily read. The columns should be: Time Meeting Title.</i> <i>Step 3: Summarize my Teams chats and channels from today.</i> <i>Step 4: Go through my inbox and summarize any emails where I am in the to line. Summarize into a table with the columns Email Title Email Summary Recommended Action.</i> <i>Step 5: Based on the above, please suggest the top three actions I should focus on today.</i> <i>Step 6: Provide a briefing on the public sector developments in Northern Ireland. Please act as my administrative assistant and prepare a daily industry brief of big news from the last day regarding sustainable solutions in the environmental and agricultural sector. Please format into a table and include the columns Short Topic Brief Summary Suggested Impact Source Name Link to Source Material Issue date. Rank in order of potential impact and only include reputable sources. Be sure to include a variety of reputable sources. I value thoroughness and accuracy of over speed</i>
	<i>Summarize all my emails, meetings, and chats over the past 30 days related to [specified topic]</i>
	<i>Help me prepare for upcoming meeting [on Topic / with Person]</i> <i>Help me find file / email about [topic]</i>

Powerpoint - Extract Insights

	<i>Summarise this deck</i> <i>What are the key takeaways from this deck</i> <i>Generate a quick FAQ based on the information in the deck</i> <i>I am about to present this deck to my team. What questions can I anticipate being asked about the content?</i> <i>Generate speaker notes based on [slide X]</i> <i>Generate an executive summary from this report</i>
--	---

Word - Create / Summarise Docs

	<i>Create an executive summary from this document</i> <i>Rewrite this paragraph to be more [succinct / formal/informal]</i> <i>Extract the key takeaways from this document and summarise them into 3 - 5 bullet points. Ensure each one highlights the most important information and include a question I can ask about each point within each section.</i>
--	---

Outlook - Mailbox Management

	<i>Draft an email reply that suggests a call to discuss topic</i> <i>Draft an email reply that provides an empathetic / firm response to a complaint.</i> <i>Summarise an email (thread)</i> <i>Catch me up on emails from the past day. Organise and summarise by topic</i>
--	--

Prompting Cheat Sheet

Basic Prompt Structure



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HR Use Cases



Policy Drafting

Use Copilot to draft document, employee handbooks, onboarding materials and policies



Learning customization

Use Copilot to customize learning materials and adapt them to your audience or language.



Summarize feedback

Use Copilot to collate observational notes into constructive feedback.(ie S-T-A-R format)



Strengthen Communication

Ask Copilot to transform your text to meet the needs of your audience and communication channel.



Writing improvement

Ask Copilot to coach your writing by suggesting improvements for grammar but also inclusivity, tone and clarity.



Interview questions

Ask Copilot to draft interview questions to interview for specific skills or job descriptions.



Employee Recognition

Request Copilot to draft personalized appreciation messages for employee achievements.



Meeting Summaries

Use Copilot to summarize key points from HR meetings or discussions.



People Management

Ask Copilot to provide a list of coaching questions or propose a personal development plan.



Employee Surveys

Ask Copilot to design questions for employee satisfaction or engagement surveys.

Human In Loop

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Use Quotation Marks

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Manage Expectations

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Test Responses

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User Clear Prompts

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M365 Copilot Best Practices

Sample Prompts for HR

I need to have a difficult conversation about [topic] with [employee or team members] during [meeting or event]. Help me prepare by suggesting an approach to communicate my thoughts clearly while remaining calm and ensuring I am listening to their views.

Draft an upbeat and welcoming email to introduce [new hire] to the team based on the following information from CV

Generate a draft FAQ about the [parental leave policy].
-
Paste this prompt into 'Draft with Copilot' box attaching the policy document.

Prepare for upcoming meeting with [employee] OR on [topic]

Create a job description for a [insert name of position]. Include [A, B & C] responsibilities.

Provide 10 screening interview questions for a [add job title].

List 5 best practices for onboarding a new employee.

Draft a work-from-home policy for an employee handbook.

M365 Copilot for Recruiters

Recruiters Cheat Sheet

DB

DEEPAK BHASKARAN

AI Coach. AI Architect. Transformation Advisor.

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Recruitment Use Cases



Writing job descriptions

Use Copilot to draft job descriptions that are clear and engaging



Summarise CVs

Use Copilot to summarise CVs and highlight candidate strengths and alignment with role.



Summarize Interview

Use Copilot to summarise interview transcripts generated by Teams



Strengthen Communication

Use Copilot to target candidates in native language with personalized outreaches



Candidate Search

Ask Copilot to help you create the search parameters for a targeted LinkedIn search



Interview questions

Ask Copilot to draft interview questions to interview for specific skills or job descriptions.



Employee Recognition

Request Copilot to draft personalized appreciation messages for employee achievements.



Social Media Management

Draft engaging posts for LinkedIn to attract potential candidates



Market Research

Conduct research on industry salary benchmarks and hiring trends for specific roles.



Candidate Communication

Draft personalized emails to candidates for interview invitations, follow ups and feedback.

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M365
Copilot Best
Practices

Sample Prompts for Recruitment

Help me prepare for upcoming meeting with [employee] OR on [topic]

Draft an upbeat and welcoming email to introduce [new hire] to the team based on the following information from CV [insert key details]

Give me a 10-bullet point summary of this resume, [attach or copy/paste resume]

Based on this resume, is this person a good fit for an [job title]

Act as an expert recruiter. Create a set of interview questions for the position of [Software Engineer]. Include questions about previous experience, goals, and personal interests.

Act as a recruitment copywriter and help me write a job description optimized for generating applications. Start by asking me all the necessary details one question at a time (e.g., title, summary, location, responsibilities, skills, organization fit, growth opportunities, compensation, and benefits). Once you have enough information, craft a clear, professional, and engaging description using active language, bullet points, relevant keywords, and a strong call to action to improve search visibility.

Act as an expert recruiter. Please help me create engaging EVP content for my company, [insert company name], which effectively and concisely communicates why it is a great place to work and is designed to help us be attractive to top talent. Ask questions, one at a time, to gather the information you need, and when you have enough, generate copy that can be used on our website, recruitment portals and social media channels.

M365 Copilot for Marketing

DB

DEEPAK
BHASKARAN

AI Coach. AI Architect.
Transformation Advisor.

Marketing Cheat Sheet

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Marketing Use Cases



Content Creation

Use Copilot to generate engaging marketing content quickly and efficiently



Email Campaigns

Use Copilot to design personalized email marketing campaigns. For your audience or language.



Market Research

Use Copilot to Analyze market trends and competitor strategies.



Create Video Scripts

Ask Copilot to generate an instructional script to achieve a given learning outcome.



Customer Insights

Ask Copilot to analyze customer feedback, identify pain points and suggests proactive interventions.



Copywriting

Ask Copilot to create compelling copy for various advertising channels.



Performance Reports

Request Copilot to generate detailed reports on marketing campaign performance.



Communications

Use Copilot to inform the team about changes in marketing strategy.



Onboarding Packs

Ask Copilot to generate customized training materials and FAQs, helping new hires quickly understand the company culture and brand values



Employee Development Plans

Ask Copilot to suggest a 6-month development plan for [employee name] whose goals are [state goals]

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Sample Prompts for Marketing



Act as a marketing manager. Please write a 300-word article about [topic], focusing on how it solves [specific pain point] for [customer persona.]



Summarize the announcement email and extract the most important bullet points to understand the value-add of the new tool.



Based on the content of the awareness post, draft a fun and engaging intro and outro for the comm that will get employees excited about the new tool.



Develop a 6-week social media content calendar for the launch of new [initiative]



Act as a marketing creative and strategy expert. Create 5-10 ideas to market [client products]. These ideas will be shared with a team that will use them as inspiration to come up with more ideas so do not limit how creative your ideas are.



Act as a marketing manager tasked with preparing an effective internal communication plan for upcoming [initiative]. You have a [six week] timeframe to prepare the organisation. Suggest a week-by-week schedule of activities to ensure organisational readiness. Format your output in table format.

M365 Copilot for Finance

Finance Cheat Sheet

Basic Prompt Structure



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Finance Use Cases



Email Drafting

Use Copilot to create personalized and professional emails quickly.



Insights from Presentations

Extract insights and calls to action from corporate presentations to prepare team cascades.



Draft Procedure Documents

Use Copilot to draft or update procedure documents based on discussions captured in team meeting transcripts



Effective Meeting Preparation

Ask Copilot to help you prep for upcoming meeting pulling the necessary updates and information.



Formula Suggestions

Ask Copilot to help navigate complex XL functions with natural language prompts



Data Formatting

Ask Copilot to add conditional or other formatting rules to your data sheet



Summarise Information

Use Copilots to generate an extract for inclusion in executive presentation deck



Meeting Assistance

Use Copilot to provide real time suggestions during meetings, analysing conversation trends and recommending next steps or talking points.



Data Visualisation

Ask Copilot to suggest the right chart for visualizing your data.



Mailbox Management

Use Copilot to summarise recent emails and suggest follow up response.

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Sample Prompts for Finance



Summarise the latest updates and list out the pending action items related to [project name], ensuring nothing is missed



Generate a concise executive summary for this [financial strategy presentation], highlighting the key points and recommendations.



Convert this frequently asked question document into a presentation for the onboarding of new finance team members, ensuring it covers all essential information



I want to show the [average cost of production]. What what is the best chart format to visualize this data?



You are an experienced program manager known for your ability to write thorough and impactful business proposals. Please list the most important points to make when writing a proposal, a [insert project initiative]. Please start by asking questions to gather the information you need. Do not offer a response until you have the answers. Present your response as bulleted paragraphs for each point discussed.



Draft an operations efficiency improvement plan to address current operational challenges specific to the supply chain industry, propose specific improvement initiatives, and set measurable goals for enhancing efficiency. Include a timeline for implementation, responsible parties for each initiative, and methods for tracking progress. Ensure the plan is actionable and aligns with overall business objectives.

M365 Copilot for Finance

Finance Cheat Sheet

Finance Use Cases - Process Improvements



Benchmarking Performance

Act as a FP&A professional. Outline and explain benchmarks for [financial ratios, like gross margin, EBITDA margin, and net profit margin] for companies in the logistics / supply chain sector with a similar revenue size to [client]. Highlight any industry specific considerations for these ratios. Summarise the typical range for these metrics.



Trends Analysis

Act as a FP&A professional. Look up the latest trends in [shipping costs]. Summarise recent price changes, causes for fluctuations and any expected future trends



Competitor Analysis

Act as a FP&A professional. Find the most recent earnings report for [competitor]. Summarise their revenue growth, profit margins and any significant strategic initiatives or cost cutting measures they announced.



Financial Reporting

Act as a McKinsey consultant and analyse this datasheet. Provide meaningful recommendations alongside data visualisations.



Finance Procedures

Act as a FP&A professional who is very process and detail orientated. You have been tasked with documenting a detailed procedure outline for [Financial Modeling] in use in [client]. Create a procedure document for [financial modeling] detailing the steps, methodologies, and best practices to ensure consistency and accuracy (attach reference documents / meeting transcripts in Word).



Internal Controls

Act as a FP&A professional who is very process and detail orientated. You have been tasked with documenting robust internal controls to improve overall risk management and decision making in [client]. Detail the key internal preventative and detective controls that typically apply considering additional steps for continuous improvement.



Review existing procedures

Act as a FP&A process expert. Review the above procedure for clarity and completeness. Suggest additional detail, clarifications or revisions to ensure the process is clear and consistent and in line with industry best practice. [Use in Word]



Analyse White Paper

Act as a FP&A professional. Summarise the key points of relevance to my role in Financial Planning and the recommended actions for my team. Suggest an action plan for the next three months to roll out these recommendations in my team with major milestones flagged. [insert Url for white paper]

Finance Use Cases - People Development / Stakeholder Mngt / Communication



Sentiment Analysis

What were the main concerns of the stakeholders in the meeting. [Using Teams Meeting transcript]

+

Given these stakeholder concerns raised in a meeting, suggest some steps or communication strategies that could be adopted to deal with these effectively. [Using word]



Executive Reporting

Act as a FP&A professional who is adept at preparing effective communications to board level. Draft an executive summary from the attached notes and suggest the key points to call out in the upcoming presentation. Keep the output concise with clear [calls to action/decisions/ support needed]



Financial Story Telling

Act as a FP&A professional who is adept at preparing effective communications to board level. Prepare a [financial risk assessment] and recommendations in a precise, professional tone suitable for an executive audience from these notes. Keep the output to [100 words]

M365 Copilot for Supply Chain

Supply Chain Cheat Sheet

Basic Prompt Structure



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Supply Chain Use Cases



Email Drafting

Use Copilot to create personalized and professional emails quickly.



Generate Vendor RFP

Use Copilot to generate vendor assessment questionnaire based on requirements.



Complaint Handling

Use Copilot to compose suitable responses to customer queries or complaints



Meeting Preparation

Ask Copilot to help you prepare for upcoming internal or external meeting



Quality Control Processes

Ask Copilot to review quality control processes and suggest improvements based on industry best practice.



Supplier Discovery and Management

Use Copilot to identify and assess potential suppliers and their capabilities.



Risk Analysis

Use Copilots to identify potential risks and vulnerabilities within supply chain and develop mitigation strategies.



Global Collaboration

Use Copilot to share information and collaborate across global supply chains without language barriers.



Document Creation

Use Copilot to draft standard documents such as contracts, purchase orders, and reports using templates.



Mailbox Management

Use Copilot to summarise recent emails and suggest follow up responses.

Human In Loop

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Sample Prompts for Supply Chain



Act as a Supply chain strategist. Outline a risk-based audit plan targeting supply chain vulnerabilities in the logistics sector.



Create a compliance checklist for our upcoming warehouse inspection based on the latest industry standards and regulations.



Compose an email response to a supplier inquiry about data protection compliance. Assure trust and compliance.



Draft an email to the team summarizing the key points from our last meeting and asking for updates on their respective tasks.



Act as a Supply Chain expert. Develop a risk assessment report for our <insert product type> supply chain using AI. Consider external factors like weather, geopolitical situations, and financial fluctuations.



Act as a Supply Chain Strategist. Suggest top 5 points on why we must use shift management feature integrated in teams for frontline workers instead of manually managing shifts.



What are the top 5 project management tools available in the market. Compare them in a table & suggest pricing for each of them. Also suggest USPs that I could use to convince for buying/budgeting purposes.

M365 Copilot for Legal

Legal Cheat Sheet

DB

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Legal Use Cases



Email Drafting

Draft formal letters and communications to clients with professional formatting.



Legal Search

Gather and synthesize legal information from the web to support case preparation and decision-making.



Meeting Insights

Generate action items and key takeaways from meeting transcripts to ensure follow-up on important tasks.



Contract Drafting

Assist in drafting and reviewing legal contracts with integrated data and formatting tools.



Training Modules

Develop training presentations for legal staff on new laws and regulations.



Document Review

Track changes and compare different versions of legal documents to highlight modifications.



Document Summarisation

Summarize lengthy legal documents to extract key points and action items.



Regulatory Updates

Integrate the latest regulatory changes into compliance reports.



Mailbox Management

Use Copilot to summarise recent emails from leads and suggest follow up response.

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M365 Copilot Best Practices

Sample Prompts for Legal



Find all documents related to the [specific case name] case in our team files.

Locate all correspondence with [client name] regarding [specific matter].



Find recent case law related to [specific legal issue]

Search for the latest regulatory changes in [specific industry]



Gather information on recent legal actions taken by competitors in [industry].

Analyze the legal strategies used by competitors in recent cases



Create a follow-up email template for client consultations.

Draft a formal letter to [client name] regarding [specific matter]



Generate a legal brief for [case name] summarizing the key arguments and evidence

Draft a motion to dismiss for [specific legal issue]



Review this contract for any inconsistencies or errors

Summarize the key points and obligations in this agreement

Summarize recent case law related to [specific legal topic]



Conduct a background check on [client name], including recent news articles, legal filings, and public records.

Find information on [client name]'s business activities and legal history, and provide a comprehensive summary.

M365 Copilot for Software Testers

Software Testers Cheat Sheet

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Software Tester Use Cases



Prepare detailed Bug Reports.

Use Copilot to turn your summary notes into a detailed bug report.



Test Strategy and Planning

Get Copilot to help create a test plan for next release based on requirements and timeframe.



Test Coverage

Ask Copilot to consider test coverage and identify gaps based on Requirements and Test cases.



Test Case Generation

Use Copilot to draft test cases in required format based on requirement details provided



Requirement Analysis

Leverage Copilot to interpret requirements documents to clarify ambiguity or validate understanding.



Stakeholder Communication

Leverage Copilot to ensure communication with stakeholders is clear and effective



Create Documentation

Use Copilot to create clear and precise documentation for test team - (ie test environment setup)



Bug Reports

Use Copilot to generate detailed bug reports for developers from summary notes.



Knowledge Sharing

Copilot can generate project FAQs to accelerate the onboarding of new team members

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Sample Prompts for Software Tester



- Hi can you look into my emails and see if there's any pending responses from me

- Provide a brief summary of this email conversation, focusing on action items and decisions.



Act as an expert software tester specializing in [technology software / feature]. Based on the following requirements, generate comprehensive test scenarios. Ensure that you cover edge cases, positive cases, negative cases, and scenarios that are often missed by testers. Additionally, provide a checklist of potential bugs that could arise during the implementation of these requirements. [insert specific requirements for this feature]



"What are some negative test cases for the following requirement:[Add Requirement details]? How could this be tested with invalid or unexpected input?"



Act as an expert software tester who reviews requirements and participates in requirement refinement meetings with the product team. Based on the following requirements, ensure that each requirement is testable. If a requirement is not testable, highlight what can be done to make it testable. Additionally, analyze each requirement and provide your comments in the form of Questions, Notes, Risks, Test Ideas, and Requirement Bugs. Here are the specific requirements for this feature: [insert specific requirements for this feature]



Generate an FAQ for the team to update them on [discussions at recent meeting / feature roadmap / testing standards in Ocuco]



Create a detailed bug report for the following defect: [Insert Bug Details] . Include steps to reproduce, expected vs. actual results, severity, priority, environment details, and potential impact on users.