

FREE RESOURCE — MICROSOFT 365 COPILOT

M365 Copilot Prompt Cheat Sheet

A staff handout for getting useful answers out of Copilot on the first try — one prompt formula, patterns for every core M365 app, and 20+ ready-to-adapt example prompts for Outlook, Word, Excel, Teams and PowerPoint. Print it, pin it, or drop it in the pilot onboarding pack.

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PROMPT
FORMULA
TO REMEMBER

5

APPS COVERED
—
OUTLOOK TO
POWERPOINT

20+

READY-TO-
ADAPT
EXAMPLE
PROMPTS

A4

PRINT-READY
STAFF HANDOUT

OUTLOOK

WORD

EXCEL

TEAMS

POWERPOINT

PREPARED FOR

Cloudswitched Knowledge
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Print / PDF handout

01

The prompt formula

Most disappointing Copilot answers come from one-line prompts with no context. Use this formula and the quality jumps immediately.

GOAL · CONTEXT · SOURCE · FORMAT

Goal — what do you actually want to happen? **Context** — who is it for, and why does it matter? **Source** — which document, email thread or data should Copilot use? **Format** — how should the output look — bullets, a table, a short paragraph, a specific length?

EXAMPLE

“Draft a reply to Sarah’s email about the Q3 budget (*source*), summarising our agreed position from the attached spreadsheet (*source*), for a client who needs reassurance the numbers are on track (*context/goal*), in three short paragraphs (*format*).”

Outlook — triage & drafting

- “Summarise this email thread in 3 bullet points and tell me what decision is being asked of me.”
- “Draft a polite reply declining this meeting request and suggesting Thursday afternoon instead.”
- “What are my outstanding action items from emails this week? List them with sender and deadline.”
- “Rewrite this email to sound more concise and professional, keeping the same key points.”

Word — first drafts & summaries

- “Draft a one-page project update for [Client Name] based on the notes below, in a formal but friendly tone.”
- “Summarise this 12-page report into a one-paragraph executive summary for a non-technical audience.”
- “Rewrite this section to be half the length without losing the key figures.”
- “Compare this draft against our house style guide and flag anything inconsistent.”

02

Excel, Teams & PowerPoint

Excel — analysis

- “Analyse this sales data and tell me the top 3 trends over the last 6 months.”
- “Create a formula that flags any row where spend exceeds budget by more than 10%.”
- “Build a pivot table summarising revenue by region and quarter from this data.”
- “Explain in plain English what this formula in cell D12 is doing.”

Teams — recap & actions

- “Summarise this meeting and list all decisions made and action items with owners.”
- “What did I miss in the first 15 minutes of this call before I joined?”
- “Draft a follow-up message to the channel summarising today’s meeting for people who couldn’t attend.”
- “Has anyone raised concerns about the launch date in this channel this week?”

PowerPoint — outlines

- “Turn this Word document into a 8-slide presentation with speaker notes.”
- “Suggest a slide structure for a 15-minute pitch to a new client about our IT support service.”
- “Simplify the text on this slide — it’s too dense for a live audience.”
- “Add a summary slide at the end recapping the three key takeaways.”

Do / don’t

GUIDANCE	
Do	Give Copilot a named source document or thread — it drafts far better from something real than from a blank prompt.
Do	Always read the output before sending — Copilot drafts, you decide.
Don’t	Paste confidential client data into a prompt if you are not sure it should leave that document’s current permissions.
Don’t	Trust generated numbers or citations without checking the source — verify anything going to a client or the board.



Keep this handy

Pin this page near your desk or save it to your favourites during your first few weeks with Copilot. The Goal · Context · Source · Format formula becomes second nature after a handful of prompts.

My own go-to prompts

IF YOU'RE NOT SURE IT SHOULD BE SHARED

Copilot only ever shows you what you already have permission to see — but that also means anything you can see, you can now search and summarise instantly. If something looks like it shouldn't be that easy to find, report it to IT rather than assuming it's fine.

Rolling out Copilot across the business?

Cloudswitched runs Copilot readiness assessments, pilots and staff training for UK SMEs — this cheat sheet is part of our standard onboarding pack.

info@cloudswitched.com

cloudswitched.com/services/microsoft-365



CLOUDSWITCHED

OPTIMIZE YOUR IT AND THRIVE

info@cloudswitched.com

New London House, 6 London St
London EC3R 7LP · United Kingdom