

Microsoft 365 Copilot Deep Dive

Participant Workbook

Prepared for **DeNora Tech**

Led by **Phil Barth**

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Welcome

Welcome to your Microsoft 365 Copilot Deep Dive. This workbook is your personal reference guide and hands-on workspace. Use it to capture key prompts, record your own discoveries, and build a prompt library you can reference long after today's session.

How to Use This Workbook

- **Try the prompts live** — Each module contains example prompts in highlighted boxes. Enter them directly into Copilot during the session.
- **Capture your thinking** — Lined writing areas are provided throughout. Record your own prompts, observations, and ideas as you go.
- **Complete the activities** — Activity sections include step-by-step instructions for hands-on exercises using your own data.
- **Build your toolkit** — The Tips & Tricks section at the end is your ongoing reference. Add your favorite prompts from each module.

How to Approach the Exercises

This workshop is designed for people with different levels of Copilot experience. Some participants may be using Copilot for the first time. Others may already be using AI tools regularly in their daily work.

For each activity, choose the approach that fits your current comfort level.

Starter

Use the sample prompt almost exactly as written. Focus on seeing what Copilot can do and how the output changes based on the information you provide.

Builder

Add more context to the prompt. Ask for a specific format, include more detail about your audience or situation, and refine the output with follow-up instructions.

Power User

Push Copilot further. Ask for alternatives, risks, assumptions, missing information, source checks, or a verification checklist. Use Copilot as a thinking partner, not just a writing tool.

The goal is not to write the most complicated prompt. The goal is to find practical ways Copilot can save time, reduce rework, improve communication, and support better decisions in your daily work.

Use the space throughout this workbook to capture what works best for you.

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MODULE 1

Tips & Tricks

Module Objective

Build your personal Copilot toolkit — advanced techniques, prompt patterns, and productivity strategies to maximize your daily impact.

Prompt Engineering Essentials: The RTF Framework

Letter	Element	Description	Example
R	Role	Tell Copilot who to be	<i>"Act as a senior process engineer..."</i>
T	Task	Specify what to do	<i>"Summarize, compare, draft, analyze..."</i>
F	Format	Define the output shape	<i>"As a table with columns for X, Y, Z..."</i>

You can add other items as appropriate - Concise, Explain it like I'm a high school sophomore, write it in my voice (give it examples), etc.

Add this at the end:

Ask me one question at a time until you have enough information to complete the task.

Power User Tips

Be specific about format — "Create a table with columns for X, Y, Z" beats "Organize this information"

Use iterative refinement — Start broad, then narrow. "Now make it more concise" or "Add more technical detail"

Set constraints — "In 200 words or less" or "Using only data from the attached spreadsheet"

Chain prompts — Use the output of one prompt as input for the next to build complex deliverables

Ask for alternatives — "Give me three different approaches to..." expands your options and reveals trade-offs

MODULE 2

Email Management with Copilot

Module Objective

Master Copilot's email capabilities — from intelligent summarization to professional drafting and inbox triage.

Key Copilot Email Capabilities

- Summarize lengthy email threads into concise, actionable briefs
- Draft replies with precise tone control (formal, concise, friendly, assertive)
- Catch up on missed conversations across your inbox
- Prioritize and triage your inbox based on urgency and relevance
- Rewrite existing drafts to match audience and context

Try These Prompts

"Summarize this email thread and highlight any action items assigned to me"

"Draft a professional reply agreeing to the proposed timeline but requesting a revised budget breakdown"

"Catch me up on all emails from [client name] this week — what needs my attention?"

Activity: Inbox Cleanup

Go to Outlook.com and have CoPilot do the following:

1. Draft a reply
2. Rewrite the tone of an email
3. Summarize an email thread (see slides)
4. Look for potential follow ups across your emails

Sample Prompt:

"Draft a reply to this email. Use a professional tone but stress the urgency. For your information I'm frustrated and want action – please convey that tone without saying it. Maintain professionalism."

Your Prompt Ideas

Capture your own email prompts below:

Key Takeaways

What will you apply first?

MODULE 3

Calendar Intelligence

Module Objective

Use Copilot to prepare for meetings, extract insights from your schedule, and manage your time strategically.

Smart Calendar Capabilities

- Generate meeting preparation summaries with relevant context from emails and files
- Identify and resolve schedule conflicts proactively
- Create meeting recaps with decisions, action items, and next steps
- Analyze time-block patterns to optimize your workweek

Try These Prompts

"Prepare me for my 2:00 PM meeting — summarize relevant emails and documents from the attendees"

"What meetings do I have this week that involve [project name]? Summarize the context for each"

"Find gaps in my schedule this week where I could block 90 minutes for focused work"

Your Prompt Ideas

Capture your own calendar prompts below:

Key Takeaways

What will you apply first?

MODULE 4

Document Search with CoPilot

Module Objective

Use Copilot to find, summarize, and compare information across your Microsoft 365 files, including documents, emails, meeting notes, and shared work content.

Search & Discovery Capabilities

- Natural language file search across OneDrive and SharePoint
- Cross-document question and answer — ask questions that span multiple files
- Document comparison and change tracking across versions

Try These Prompts

"Search my files for any documents related to [project] from the last 30 days"

"What do our internal documents say about [specific technical process or standard]?"

"Compare the recommendations in [Document A] vs. [Document B] and highlight the differences"

Your Prompt Ideas:

Capture your own search prompts below:

Key Takeaways

What will you apply first?

MODULE 5

Excel Analysis with Copilot

Module Objective

Unlock Copilot's analytical power in Excel — from formula generation to data visualization and trend analysis.

Excel Copilot Capabilities

- Natural language formula creation — describe what you need, Copilot writes the formula
- Automated data analysis and insight generation
- Chart and visualization generation from your data
- Data cleaning, formatting, and transformation

Try These Prompts

"Analyze this data and tell me the top 3 trends you see"

"Generate a chart showing the monthly trend for [metric] over the past 12 months"

"Highlight any outliers or anomalies in this dataset and explain why they stand out"

Use the following fictional dataset for the Excel Analysis Workflow Exercise.

Month	Production Line	Units Produced	Downtime Hours	Scrap Rate %	Avg Coating Thickness	Customer Complaints	Maintenance Cost
Jan	Line A	12,450	14	2.1	4.9	3	\$12,400
Jan	Line B	11,980	22	3.8	4.4	8	\$18,900
Feb	Line A	12,890	11	1.9	5.0	2	\$11,700
Feb	Line B	11,420	29	4.2	4.2	11	\$21,300
Mar	Line A	13,050	9	1.8	5.1	1	\$10,950
Mar	Line B	10,980	37	5.1	4.0	15	\$24,100
Apr	Line A	12,760	16	2.4	4.8	4	\$13,600
Apr	Line B	11,100	33	4.8	4.1	13	\$22,900
May	Line A	13,220	8	1.7	5.2	1	\$10,400
May	Line B	10,740	41	5.6	3.9	17	\$26,500

How to enter the data:

1. Go to philbarth.com/downloads/denora
2. Take a picture and have CoPilot create the spreadsheet

Activity: Excel Analysis

Use CoPilot and the provided dataset (above) do the following:

1. Load the following data into CoPilot (you choose how)
2. Write prompts to build answer questions about the data (see next page)
3. Create charts and Data summarization
4. Add any additional items to your query.

Possible Copilot Prompts

- “Analyze this dataset and identify the top operational concerns.”
- “Which production line appears to be performing better overall and why?”
- “Create a chart showing the relationship between downtime and scrap rate.”
- “What trends stand out across the last 5 months?”
- “Summarize this data for a plant leadership meeting.”
- “Identify any possible root causes contributing to increased customer complaints.”
- “What additional data would help improve this analysis?”
- “Highlight any anomalies or unusual patterns in the dataset.”
- “Create a formula to calculate month-over-month production change.”
- “Generate a concise executive summary from this spreadsheet.”

Reminder:

Copilot can accelerate analysis and insight generation, but human expertise is still required to validate conclusions and determine root causes.

Your Prompt Ideas

Capture your own Excel prompts below:

Key Takeaways

What will you apply first?

MODULE 6

DISC Customer Communication Exercise

Module Objective

Apply the DISC behavioral framework with Copilot to tailor your communication style for different customer personalities — creating more effective, empathetic customer interactions.

DISC Quick Reference

Style	Traits	Communication Preference	Watch Out For
D — Dominance (Steve Jobs)	Results-oriented, decisive, direct	Be brief, focus on outcomes and bottom line	Avoid excessive detail or small talk
I — Influence (Oprah Winfrey)	Enthusiastic, collaborative, optimistic	Be warm, allow brainstorming, recognize their ideas	Avoid being overly rigid or data-heavy upfront
S — Steadiness (Mr. Rogers)	Patient, reliable, team-oriented	Be supportive, provide reassurance, avoid sudden changes	Avoid rushing or pressuring for quick decisions
C — Conscientious (Bill Gates)	Analytical, precise, quality-focused	Provide data, be thorough, allow processing time	Avoid vague claims or skipping details

Activity: DISC-Adapted Customer Emails

In this exercise, you will use Copilot to draft the **same** customer communication four different ways — each tailored to a different DISC style.

Scenario: A customer has reported a recurring issue with electrode coating degradation in their chlor-alkali cells. You need to communicate that your engineering team has identified the root cause and a corrective action plan is underway, with full resolution expected in 6 weeks.

1. **Step 1:** Draft a response for a **D-style** customer (direct, results-focused, bottom-line first)
2. **Step 2:** Draft a response for an **I-style** customer (warm, collaborative, relationship-forward)
3. **Step 3:** Draft a response for an **S-style** customer (reassuring, steady, team-oriented)
4. **Step 4:** Draft a response for a **C-style** customer (data-rich, detailed, process-oriented)

Sample Prompt:

"Draft a customer email responding to a coating degradation issue. Tailor the tone for a [D/I/S/C]-style communicator. The root cause has been identified and resolution is expected in 6 weeks. Be [direct and concise / warm and collaborative / reassuring and steady / detailed and data-driven]."

Your D-Style Draft Notes

Your I-Style Draft Notes

Your S-Style Draft Notes

Your C-Style Draft Notes

Activity: DISC-Adapted Customer Communication

In this exercise, you will use Copilot to have a simulated customer conversation (following your email) with your opposite DISC quadrant.

1. Identify your primary DISC style (if you are split between two pick your favorite)
2. Find your opposite quadrant using the chart below
3. Use Copilot to help adapt your communication style during the conversation.
4. Continue the conversation for approximately 3–5 back-and-forth interactions. Focus less on “winning” the conversation and more on adapting your communication style to the customer’s DISC personality.
5. Reflect on what felt natural — and what felt difficult.

Sample Prompt Starter:

"I have sent the following email to a customer with a [D-I-S-C] style. This style is the diagonal opposite of my style. You are the customer. Please respond to my email in the customer's style. We will have 3-5 back and forth iterations"

Reflection: What surprised you about how Copilot adapted?

MODULE 7

Decision Support with CoPilot

Module Objective

Use Copilot as a structured thinking partner to evaluate options, identify risks, challenge assumptions, and view decisions from multiple professional perspectives.

Copilot as Your Thought Partner

Copilot can help you think through a problem before you act. It can organize information, compare options, identify trade-offs, surface risks, and help you prepare for decisions or conversations.

The key is to give Copilot enough context and ask it to challenge your thinking, not just confirm your first idea.

Try These Prompts

"I'm evaluating two approaches for [problem]. Help me create a pros/cons analysis considering cost, timeline, and technical risk"

"Help me structure a root cause analysis for [issue] using the 5-Why method"

"What questions should I be asking that I haven't considered yet about [project/design]?"

Copilot as an Advisory Board

You can also ask Copilot to review a decision from several perspectives at once.

This is useful when a decision affects multiple groups, such as operations, customers, engineering, finance, quality, safety, compliance, or leadership.

Try These Prompts

“Act as an advisory board reviewing this decision. Include perspectives from Operations, Engineering, Finance, Customer Service, Quality, Safety, and Leadership. For each perspective, list the biggest concern, likely question, and recommended next step.”

“Review this plan from the perspective of a project manager, a customer, a technical expert, and a senior leader. What would each person care about most?”

“Before I present this recommendation, identify the objections different stakeholders are likely to raise.” (Describe stakeholders)

Activity: Technical Problem-Solving Session

Choose a real engineering challenge you're currently working on (or use the scenario below) and use Copilot as a structured thinking partner.

Fallback Scenario: Your team is deciding whether to improve an existing process with smaller upgrades or replace it with a new solution. Budget is limited, time is tight, and the decision will affect multiple teams.

1. **Step 1:** Describe the problem to Copilot with full context
2. **Step 2:** Ask Copilot for a decision framework
3. **Step 3:** Ask for the Advisory Board View
4. **Step 4:** Ask Copilot to play devil's advocate on your preferred option
5. **Step 5:** Summarize your decision rationale using Copilot's analysis

Your Situation or Decision

Record the problem, decision, or project you selected:

Copilot's Key Insights

Advisory Board Perspectives. Which were most helpful? (Do you need to change the board?)

Assumptions, Risks or Questions to Verify. What still needs to be checked?

Key Takeaways

What will you apply first?

MODULE 8

Accuracy & Verification

Module Objective

Understand Copilot's strengths and limitations — develop a professional verification workflow to ensure output accuracy and reliability.

The Verification Mindset

Copilot is a powerful accelerator, not a replacement for professional judgment. Every output should be reviewed through the lens of your domain expertise. Think of Copilot as a highly capable first-draft generator that requires your expert validation.

Copilot Accuracy Framework

Confidence Level	Use Cases
HIGH	Summarization of provided documents • Formatting and restructuring • Drafting based on explicit input • Data visualization from supplied data
MODERATE	Cross-referencing multiple internal sources • Generating templates and frameworks • Identifying patterns in data
VERIFY CAREFULLY	Numerical calculations and formulas • Technical specifications and tolerances • Regulatory or compliance references • Any claim presented as fact without a cited source

Your Verification Checklist

- ☐ Did I provide Copilot with accurate and complete source material?
- ☐ Have I verified any numerical values, calculations, or measurements?
- ☐ Are regulatory or safety references current and accurately cited?
- ☐ Have I cross-checked technical specifications against authoritative sources?
- ☐ Would I stake my professional reputation on this output as-is?
- ☐ Have I had a subject matter expert review critical content?

Strategies for Improving Accuracy

- **Provide more context upfront** — the better the input, the better the output
- **Ask Copilot to cite its sources** or explain its reasoning step by step
- **Use iterative prompting** — refine rather than accept first drafts
- **Break complex requests into smaller, verifiable steps**
- **Cross-validate outputs** against known standards, specifications, and references

Your Verification Notes

How will you build verification into your workflow?

Your 30-Day Copilot Action Plan

Week 1 Focus:

Week 2 Focus:

Week 3–4 Focus:

Questions for Follow-Up

Capture anything you want to explore further after today:

Additional Notes

Thank you for participating in the Microsoft 365 Copilot Deep Dive.

For questions or follow-up, contact Phil Barth.