

Copilot Starter Kit — Basic (Copilot Chat)

Self-guided practice for the free Copilot you already have

Microsoft 365 Copilot Chat (free) · Sign in with your work account · From Ashley Pyle, GadellNet

You already have this one, so let's make it earn its keep! Everything in this kit works with the free Copilot Chat, on your own time, in about an hour total. Pick one exercise, bring a real task, and watch the blank page disappear.

What you have and how to open it

Microsoft 365 Copilot Chat is the free Copilot that comes with most Microsoft 365 plans. Open it at copilot.microsoft.com or in the Copilot app. Here's the one step that matters most:

- **Sign in with your WORK account.** That's what gives you enterprise data protection, which means your prompts aren't used to train the model. Look for the little shield or "protected" indicator. That's your confirmation you're covered.
- **It's web-grounded chat.** Great for research, drafting, summarizing, and brainstorming. You bring the content; Copilot helps you work it.
- **It doesn't see your files on its own.** Basic can't reach into your emails, documents, or meetings, so you paste in the text you want help with. That's the whole game in this kit.

Ground rules

- You paste in the text you need help with. Basic works from what you give it, not from your files, emails, or meetings.
- Keep confidential client data out unless your firm has confirmed it's protected. Signed in with your work account, you have enterprise data protection, but when in doubt, leave it out or check first.
- Always do a final human review. Copilot drafts; you decide. You're the expert in the loop, every time.

A quick reminder: Frame · Focus · Finish

Each exercise ties back to the framework Michelle shared with the group. Here it is in one breath, so the tie-ins land:

- **Frame:** give Copilot everything up front: the role to play, the source text, why it matters, and the format you want. Pro move: end your first prompt with “What else do you need from me before you start?”
- **Focus:** read the first draft and correct it: wrong facts, off tone, wrong format. Ask for one change at a time.
- **Finish:** cross-check the facts, apply your professional judgment, and finalize. Always do a final human review.

The five exercises

Do them in order or pick the one that matches a task on your plate right now. Every prompt is copy-paste ready, so just swap in the bits in [brackets].

Exercise 1 • Summarize before you read

Goal: Stop reading long documents cover to cover. Get the five things that actually matter first, then read the source only for those.

TRY THIS PROMPT • copy and paste

You're my commercial real estate analyst. Below I'm pasting a long [lease / market report / email thread]. Give me the five most important things I need to know, in plain language, as a short bulleted list. Then add a separate list of anything unusual or that I should double-check myself. Here's the document:

[paste the full text here]

What good looks like: Five tight bullets you can scan in under a minute, plus a short “verify this” list. You open the original only to confirm those five points.

Time: about 10 minutes.

Frame • Focus • Finish: This is Frame at work — you give Copilot the role, the source, and the exact format you want. Finish by checking the five points against the original before you act on them.

Exercise 2 • Never start from a blank page

Goal: Turn messy notes into a solid first draft you edit instead of staring at a blank screen.

TRY THIS PROMPT · copy and paste

You're helping me write a [follow-up email / LinkedIn post / short summary]. Here are my rough notes. They're messy, and that's fine. Write a clear first draft in a warm, professional voice with no jargon, about [120] words, easy to skim. Here are my notes: [paste your rough notes here]

What good looks like: A draft that's most of the way there: right tone, right length, and easy to tighten in a couple of minutes rather than building from scratch.

Time: about 10 minutes.

Frame · Focus · Finish: Frame sets the role, audience, tone, and length up front. Then Focus: read the draft and ask for one tweak at a time, such as "make it shorter," "warmer," or "drop the last line."

Exercise 3 · Frame · Focus · Finish on one real task

Goal: Run the whole framework end to end on a real task you have today and feel the difference a strong first prompt makes.

TRY THIS PROMPT · copy and paste

You're a commercial real estate [analyst / marketer / asset manager]. I need help with [describe the task and what "done" looks like]. The audience is [who it's for], the goal is [why it matters], and I'd like the result as [format: bullets, a short email, a one-page summary]. Before you start, tell me what else you need from me to do this well.

What good looks like: Copilot asks a couple of smart clarifying questions before it dives in, which is exactly what you want. Answer them, then let it draft.

Time: about 15 minutes.

Frame · Focus · Finish: This is the full loop. Frame with everything up front, including that "what else do you need from me?" line. Focus by correcting the draft. Finish with your own judgment and a final human review. You're the expert in the loop.

Exercise 4 · Repurpose one thing into three

Goal: Get three ready-to-use pieces out of one piece of content you already have.

TRY THIS PROMPT • copy and paste

I'm pasting a case study / project recap below. From it, create three things, all consistent and free of hype: (1) a short LinkedIn post in a warm, human voice; (2) a brief client email introducing the win; and (3) an outline for a one-page leave-behind. Here's the source:

[paste the case study here]

What good looks like: Three drafts that clearly come from the same story but fit each format: a scannable post, a personable email, and a clean one-pager outline.

Time: about 15 minutes.

Frame • Focus • Finish: Frame names all three outputs and the tone in a single ask. Focus: pick the strongest draft, refine it, then have Copilot match the other two to it.

Exercise 5 • Meta-prompt: let Copilot teach you

Goal: When you're not sure how to ask, ask Copilot how to ask, tailored to your job.

TRY THIS PROMPT • copy and paste

I'm a [your role] in commercial real estate, and I want to use you to save time on [the kind of work you do most]. Help me break this down: what are the best ways to prompt you for my job, what details should I always include, and what should I avoid? Then give me three example prompts I could reuse.

What good looks like: A short, role-specific playbook plus three reusable prompts you can save and adapt the next time the task comes up.

Time: about 10 minutes.

Frame • Focus • Finish: Meta-prompting is your shortcut whenever you're stuck. Finish by saving the prompts that actually worked. That's your starter library.

Time-yourself challenge

This is where it gets real. Pick one task you do every week, such as a summary, a draft email, or a meeting recap, and time it twice:

- First, do it your usual way once and write down the minutes.
- Next time, run it through Copilot using one of the prompts above, and time it again.

Keep both numbers. That gap, multiplied across a month, is the hours back in your week. That's the whole point: go from generic answers to real time saved.

Pitfalls to watch

- **Hallucinations.** Copilot can sound completely confident and still be wrong. Ask it to cite its sources, then actually click them. If it can't show you where a fact came from, treat it as unverified until you've checked.
- **Verify everything.** Cross-check names, numbers, dates, and anything legal or financial before it leaves your hands. You're the one who signs off.

That's it: one hour, five exercises, real hours back. Have fun with it, and let me know what you learned!

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