

Copilot Starter Kit — Premium (Microsoft 365 Copilot)

Self-guided homework for the Copilot that lives inside your Microsoft 365

For Microsoft 365 Copilot (paid) · Work at your own pace · Presented by Ashley Pyle, GadellNet

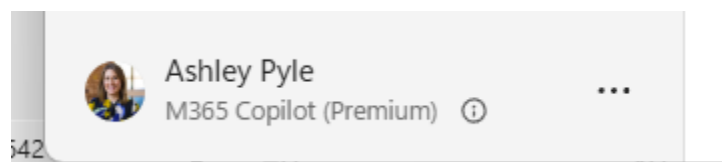
You've got the good stuff: the paid Microsoft 365 Copilot that lives right inside your apps and actually knows your work. Here are six quick exercises to make it earn its keep, on your own time. Pick one, set a timer, and notice the minutes you get back!

What you have, and where it lives

Premium Copilot isn't a website you visit. It's built into the tools you already use, and it can work from your actual files and conversations (with your permissions). Here's where to find it:

- **Inside your apps:** look for the Copilot button in Word, Excel, PowerPoint, Outlook, and Teams, on the ribbon or in the side pane.
- **Work-grounded Copilot Chat:** the chat signed in with your work account can pull from your own emails, files, chats, and meetings. This is the big upgrade over the free version. It already has your context, so you don't have to paste it in.
- **Copilot Pages:** a shared, editable canvas where you and Copilot build something together and your team can jump in.
- **Agents:** small, task-specific helpers you (or your firm) can set up to handle a repeatable job the same way every time.

How to tell you're on Premium: you'll see Copilot living inside the apps, and it can reference your real work, not just the text you paste into a chat box. It will say Premium in the bottom left of the Chat app.



Ground rules before you start

- **Selective data:** hand Copilot only the files it actually needs for the task. More isn't better, and keeping the scope tight keeps sensitive material out of the way.
- **Verify everything:** it sounds confident even when it's wrong. Treat the first draft as a first try, not the final answer.
- **Final human review:** you're the expert in the loop. Nothing leaves your hands until you've read it and you own it.

Stuck? Ask Copilot: *"Help me break this down and tell me how I should be prompting you."*

The six exercises

Each one lists the goal, an exact prompt you can copy and paste, what good looks like, and roughly how long it takes. Start anywhere. The lease workflow is the showpiece, but the inbox and meeting wins are the fastest payoff!

Exercise 1 • The lease workflow: abstract → matrix → board brief

Goal Take a stack of leases from "I'll read these later" to a clean abstract, a side-by-side comparison, and a board-ready brief in minutes, not an afternoon.

Use the three sample leases shared with this session: Sample-Lease-A (industrial), -B (office), and -C (retail), all fictional and built for practice. Or swap in your own non-sensitive leases.

Try this prompt: run these three steps in order:

Step 1: Abstract one lease. *In Copilot Chat or Word, attach a single lease, then:*

You're a commercial real estate analyst. Abstract this lease into a clean table with these fields: Property, Tenant, Landlord, Lease type, Square footage, Term, Commencement, Expiration, Base rent, Escalations, Renewal options, Security deposit, Permitted use, and Notable clauses. Flag anything unusual or that a human should verify. Before you start, tell me what else you need from me.

Then fix any field it got wrong and tell Copilot: "Put this in a Word document." That correction is the Focus step, so don't skip it.

Step 2: Build the comparison matrix. *Attach all three leases, then:*

Compare these three leases side by side in an Excel table — one column per property, a row for each key term above, plus a “Flags / verify” row. Create it in Excel.

Step 3: Write the board brief. *With the same three leases in context:*

From these three leases, write a one-page executive board brief: portfolio snapshot, key risks, upcoming critical dates, and three recommendations. One page.

What good looks like A tidy table with every field filled in or clearly flagged, an Excel matrix you’d actually hand to your boss, and a one-page brief with risks and key dates. A few cells will be wrong or marked “verify.” That’s the point. You check those before anyone sees it.

~Time 15–20 minutes.

Exercise 2 • Meeting recap in Teams

Goal Turn a meeting you sat through into notes you’d actually send: a recap, action items with owners, and a follow-up email, without replaying the recording.

Try this prompt:

In Teams, open the meeting → Recap (or ask Copilot in the meeting chat):

Summarize this meeting: decisions, action items with owners and due dates, and any risks. Then draft a short follow-up email to the team.

What good looks like A short recap, a clean action-item list with names and due dates, and a draft email you can tweak and send. Check the owners and dates against what you remember. Copilot sometimes guesses who owns what.

~Time 5–10 minutes.

Exercise 3 • “Catch me up” on a project

Goal Walk into Monday already knowing where a deal stands, without digging through a week of email and files.

Try this prompt:

In work-grounded Copilot Chat (the one signed in with your work account):

Catch me up on the Maple Commerce Center deal. Using my emails, files, and chats from the last week, give me a short summary: what changed, what's still open, and what needs a decision from me. Group it by topic, and cite the sources so I can click through to check.

Swap "Maple Commerce Center" for one of your real projects. This only works because Premium can see your actual emails and files.

What good looks like A tight, grouped summary that pulls from real emails, files, and chats, with links you can click to confirm. If it cites something, open it. Trust, then verify.

~Time 5 minutes.

Exercise 4 • Quick wins right in Word and Excel

Goal Use Copilot where you're already working, with no copying and pasting into a separate chat window.

Try these two:

In Word: open a draft, click Copilot, then:

Summarize this draft in five bullet points at the top, then rewrite it to be about 30% shorter in a warm but professional tone. Keep my key numbers exactly as they are.

In Excel: open a sheet with a few months of numbers, then:

Analyze this sheet and chart the trend over time. Tell me the top three takeaways and flag any outliers I should double-check.

What good looks like A shorter, sharper draft you can accept or refine, and a chart plus a plain-English takeaway you didn't have to build by hand. Reread before you keep either one.

~Time 10 minutes.

Exercise 5 • Tame your inbox in Outlook

Goal Stop reading long threads top to bottom. Get the gist, then a draft reply, in seconds.

Try these two:

Before you read: open a long thread, click Copilot → Summary, or ask:

Summarize this email thread: what's the ask, who's waiting on me, and what's the deadline?

Draft the reply: still in the thread:

Draft a reply to this thread in my voice — warm and concise. Confirm I can join, answer their two questions, and propose Thursday afternoon. Keep it under 120 words.

What good looks like A two-line summary that tells you who's waiting on you and by when, and a reply in your voice that needs only light edits. You still read it and hit send.

~Time 5 minutes.

Exercise 6 · Stretch: a Copilot Page or a simple agent (optional)

Goal Dip a toe into the “build once, reuse” side of Copilot. Totally optional. Skip it if you're short on time, and come back when you're curious.

Try one of these:

Option A: a Copilot Page. *In Copilot Chat, ask:*

Create a Copilot Page that summarizes the Maple Commerce Center renewal from my recent emails and files, with a short status, open items, and next steps — so my team and I can edit it together.

Option B: a simple agent. *When you have a task you repeat the same way every week:*

Help me set up a simple agent that takes a lease I upload and returns the standard abstract table above, the same way every time. Walk me through it step by step.

What good looks like A living page your team can edit together, or a little helper that does one repetitive task the same way every time. Don't overthink it. Pick one repeatable thing and keep it small.

~Time 10–15 minutes (optional).

Time-yourself challenge

Pick one exercise above. Before you start, jot down how long the task usually takes you the old way. Do it with Copilot. Then write down the new time, and what you'll do

with the minutes you just got back. Bring that number to the group; the before-and-afters are always the best part!

Pitfalls to keep in mind

- **Selective data.** Share only the files the task needs. It's tidier, and it keeps sensitive material out of scope.
- **Hallucinations.** Copilot can sound certain and still be wrong. Ask it to cite sources and click them; spot-check names, numbers, and dates every time.
- **Final review.** You're the expert in the loop. Copilot gets you to a strong first draft fast. The judgment, and the sign-off, stay with you.

That's the whole kit. Do one exercise this week, not all six. Momentum beats perfection. You've already got the tool; now let's make it earn its keep.

Have fun with it, and let me know what you learned!

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