

3 Pro Tips not to Miss

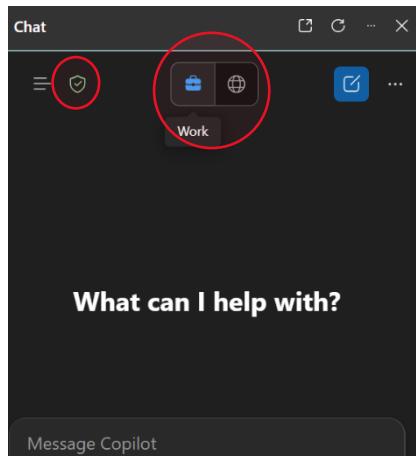
This chapter details some of the emerging practices that are helpful no matter where Copilot is being used. The best prompts are your own, so keep trying variations and new concepts!

Work the “Web” and “Work” tabs

After logging in with a work ID, the “Work/Web” tabs appear. The “Web” tab only uses the LLM to pull content from the general Internet, while the “Work” tab pulls information you have access to in your Microsoft 365 environment.

You can toggle between “Web” and “Work.” If you only see the “Web” option active, you’re using Microsoft 365 Copilot Chat (Free). When “Work” is active, you’re using the licensed Microsoft 365 Copilot tool.

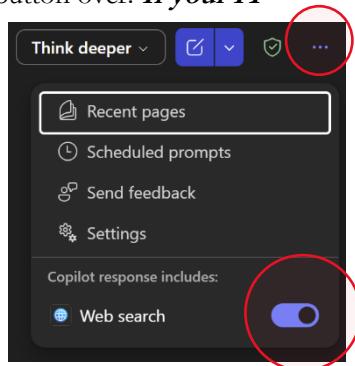
In either case, if you see the little green shield with a checkmark in it, you’re safe within your organization’s M365 environment boundary. **Prompts and responses do not traverse the Internet and are not used to train the public LLMs when using either tab.**



Add web content to your Work search

To augment your “Work” prompts with info from the “web,” click the “...” button in the Copilot Chat page, then slide the button over. *If your IT department has enabled web search,* Copilot’s response will include info from the Internet.

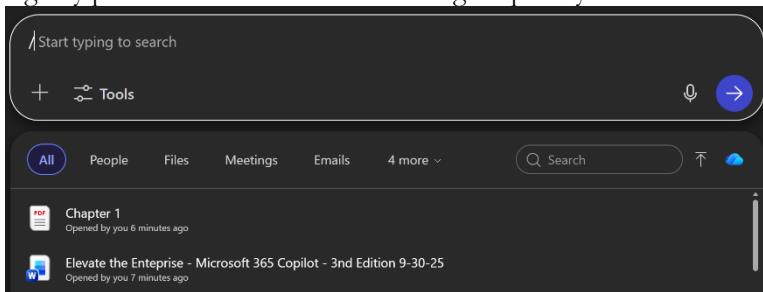
CISOs and CIOs may opt to deactivate Web content, because at the time writing, keywords from the prompt and parts of (referenced) files will cross out of the internal Enterprise Data Protection boundary and be sent to Bing’s search engine. See section “[One Plugin Every Organization Might Try](#)” in Chapter 22 for more detail.



Use Specific Content to Augment Prompts

When creating a new doc in Word, or a new deck in PowerPoint, or a fresh brainstorm in Chat, it’s helpful to reference another file to help you. Start by typing “Create a draft from /” or “Create a presentation from /.”

When in the “Work” tab, the slash brings up a menu. After the slash, start typing the filename you want to use. If you don’t know the specific filename, typing any part of the filename should bring it up for you to select.

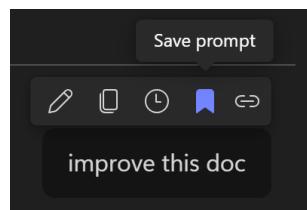


There are selections to narrow in on the people, files, meetings, emails, and sites. You might want to reference the transcript from a specific meeting, or find what a specific person emailed to you.

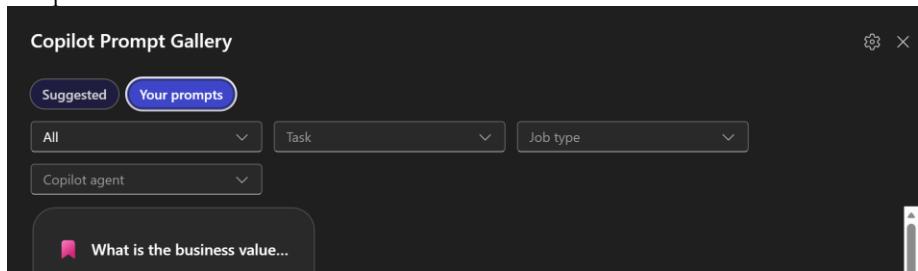
In either case, the only files that appear after typing “/” are those on your OneDrive, or files that were shared with you that you recently opened. **You cannot auto-search for items your hard drive or non-Microsoft 365 source.** If you wish to reference a file on your hard drive or on-premises file share, select “Upload from this device.” You can also use the “Attach Cloud Files” button to pick specific files using a familiar (Explorer/OneDrive) experience.

Improve and Save Prompts

At the end of an interaction, ask Copilot “Based on this conversation, how can I improve my original prompt to immediately get the result I am looking for?” Copy/paste that new prompt into your .doc or OneNote of helpful prompts so that next time, you start with a new, improved prompt.



Once you get the prompt you really like, hover over the prompt to use Copilot’s native “Save prompt” feature (the little ribbon, as shown above). You can access your saved prompts through the **Copilot Prompt Gallery**, introduced in Chapter 2.



View Your Prompt History

If your IT department allows, Copilot saves your prompts for a period of time.

When using Copilot Chat at www.microsoft365.com, you’ll see the conversations towards the very bottom on the left-hand rail, as shown.



When using Copilot in the Edge browser, the prompt history is hidden to save space. To see history, expand the stack/sandwich icon in the upper left, and look for “All Chats” all the way at the bottom.

When in an app, like PowerPoint or Word, look for the “Chat history” button in the exact same way – behind the sandwich / stack icon within the top left of the Copilot chat box on the right of the screen. Note that in-app chats aren’t kept (as of yet), only the chats that use the M365 Chat app.

Prompt history is not kept forever. Save your favorite prompts in a separate file or OneNote, or using the blue ribbon described above.

Make Copilot Sound Like You

Ever think it’s obvious when an LLM creates “AI slop?” Want to sound like yourself, and not a machine? It *is* possible to get responses from Copilot that sound more like you. First, you can ask Copilot to summarize your tone of voice and communication style, then save the description in a Word document. Later, you can refer to that document when you’re typing a prompt, so that the response sounds like you.

In Copilot Chat, enter this prompt: “Create a personalized communication style summary for me. Analyze the data from my past emails, Teams chats, content that I write, and recorded meetings. This summary will help you understand and emulate my communication preferences, ensuring that your responses align with my style.”

Copilot will come back with a summary of how you write. Copy and paste into a Word document, *alter as you see fit*, and save “My personal tone of voice.doc” to your OneDrive.

Then, when you want the response to sound like you (in a document or email draft), add this to your prompt: “Create the response using my personalized communication style as described in /“My personal tone of voice.doc.”¹

¹ The “/” activates up a menu where you can find and insert files (or people, meetings, etc.)

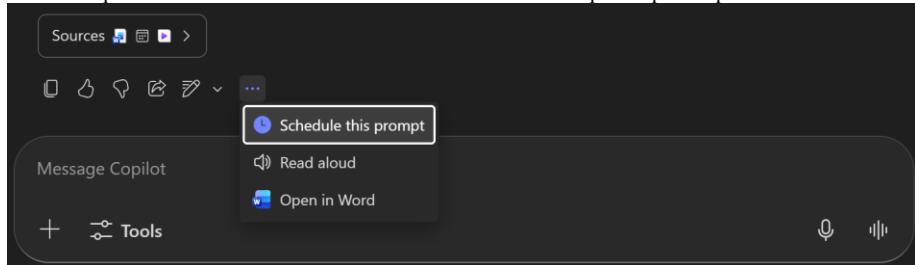
Remember to use Memory

Copilot can automatically alter its responses based on your past interactions, too, if you allow it. It's a bit like how cookies work on shopping sites, remembering preferences and past interactions at work. This provides *context* to all interactions. It's like telling your intern how you like your reports and memos created.

Memory and personalization currently work best in Copilot Chat and Outlook, and are configured differently for both. See chapters 4 and 6 for how to make Copilot sound more like you in these apps. You can get a head start by copying and pasting the content of your “Personal tone of voice.doc” into the Instructions in Chat and Outlook.

Schedule Prompts you Like

If you'd like Copilot to help you start your day or summarize your week, you can schedule prompts. This is available via the Copilot Chat app, behind the “...” ellipsis at the bottom of the screen below the prompt response.



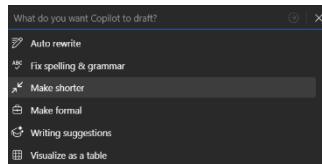
Use Copilot to Check its Own Quality

If working on an important or high-stakes prompt, you can build a short “QA loop.” After Copilot produces an answer, ask it to “Explain your reasoning, list your assumptions, call out what other information could help you, and identify where your confidence may be lower.” This helps you spot hallucinations, missing inputs, or overly generic answers before inserting the AI-generated text into a document. Treat Copilot like an eager intern: capable, fast, and helpful—but still needing supervision. With such review and refinement, you’ll improve output quality and reduce rework later.

Split Up Large Prompts

There is a limit to the length of a prompt that the LLM will accept. At the time of writing, the limit is 16,000 characters in Word, PowerPoint, and Excel , and more in Chat and OneNote.¹

If necessary, to shorten the prompt, you could cut some text, or copy and paste the prompt into Word, then highlight the text and select “Rewrite with Copilot.” When it’s finished, select the “Adjust Tone” settings button, then “Make shorter” then “Replace.” Then copy and paste that shortened prompt into Copilot.



Save Your Fingers

Try to text speech! See the microphone in a Copilot Chat box? Click and tell Copilot what you want it to do. Say “period” or “comma” so your prompt uses sensible grammar. You can also click the Windows+H keys simultaneously from any app. Speak into your mic, and Copilot will generate the response you requested.

Use Shift + Enter for Bulleted Lists

When adding bullets to a list in Copilot’s chat box, when it’s time to advance to the next line, hit “Shift-Enter.” Just hitting “Enter” will send your prompt straight to Copilot, which will leave your prompt incomplete.

Now, onto app-specific info. Which app do you most often use? Or where is Copilot not behaving as you’d expect it to? You can skip ahead to that chapter, open that app on your device, and try the prompts and Pro Tips!

¹ This number increases occasionally.