

Getting Better Results with Microsoft 365 Copilot: A Step-by-Step Guide to Custom Instructions (For Non-Technical Users)

Microsoft 365 Copilot is like having a smart assistant in your Office apps – it can draft emails, summarise documents, create presentations, and a lot more, just by typing a request. But did you know you can *tell Copilot how you like things done*? That's where **custom instructions** come in. Think of custom instructions as giving Copilot a little “cheat sheet” about your preferences – your writing style, the tone you like, or what details to focus on – *so it can tailor its responses to suit you*.

This guide is written in plain English for small business employees and managers who **aren't tech experts**. We'll explain **why custom instructions are important**, show you **how to set them up step-by-step**, and give you **clear examples** of the difference they make. By the end, you'll know how to “tune” Copilot to act more like a helpful coworker who *already* understands your needs, instead of a one-size-fits-all robot.

What Are Custom Instructions (and Why Do They Matter)?

Custom instructions are simply *guidelines you give to Copilot* about how it should respond to you. Instead of just typing a question or command and hoping Copilot guesses the style or context you want, you **tell it upfront what you prefer**. This could include things like the tone of voice (friendly or formal), the format (bullet points or paragraphs), length of answers, or any other style tips that matter to you.

Imagine you hired a new assistant on your team. On their first day, you might say, “*When you write emails to clients, keep them short and friendly, and always include our company greeting at the end.*” That's exactly what custom instructions let you do with Copilot – you're coaching it on how to help you best.

Why bother with custom instructions instead of just typing requests? Here are the key benefits:

Personalised, “Human-Like” Responses

Copilot will respond in a way that matches **your style and needs**, rather than giving a one-size-fits-all answer. It can adopt your tone (be it casual or formal) and terminology, so the output sounds more like it came from you.

Less Editing & Faster Results

By guiding Copilot upfront, you **save time on revisions**. With your instructions, Copilot’s first draft is much closer to what you want, meaning you don’t have to tweak the wording or format as much afterwards.

Consistency in Communication

Your emails, documents, and replies will have a **consistent tone and format** every time. This is great for maintaining a professional image or sticking to your brand’s voice (even if you’re a small business, consistency looks polished!).

To put it simply, custom instructions help Copilot **give better answers with less effort from you**. In fact, one early user found that after adding personal instructions, “*Copilot became 10× more useful for me in my day-to-day tasks*”^[1]. Instead of correcting Copilot each time or re-typing preferences (like “make it friendlier” or “keep it short”), you set it once and Copilot remembers.

Example: Without vs. With Custom Instructions

Let’s illustrate the difference. Suppose you want Copilot to draft a quick shipping notification email to a customer.

- **Without custom instructions:** Copilot might do its best but sound a bit generic or too formal. For example: “*Dear Customer, Your order has been shipped. Thank you for your purchase. Sincerely, XYZ Store*”
- **With custom instructions:** If you had told Copilot your preferred tone is casual and friendly, it would draft something more personal, like: “*Hi Sam, Great news – we’ve shipped your order today! It’s on its way to you now. Thanks so much for shopping with us, and let us know if you need anything else. Cheers, Jamie from XYZ Store*”

See the difference? In the second case, Copilot **knew** to use the customer's first name, add a warm tone, maybe even an emoji and a friendly sign-off – because *you instructed it to do so*. The content of the email is the same (the order shipped), but the **style** is tuned to what you wanted. This means you'd likely be happy with the draft on the first try, instead of spending time making it sound friendlier.

Bottom line: Custom instructions act like a shortcut to better results. You give Copilot a few cues about *how* you want answers, and in return, it produces output that's more on-point, in your voice, and ready to use. Now, let's see how you can set this up for yourself.

How to Set Up Custom Instructions (Step by Step)

Setting up custom instructions in Microsoft 365 Copilot is easy and doesn't require any technical skill. We'll walk through the general process, and use **Outlook** (email Copilot) as an example since many people start there. The idea will be similar in other Copilot-enabled apps once they support custom instructions.

Step 1: Identify Your Preferences

Think about how you write and what you want from Copilot. Take a minute to consider your style. Do you write in a friendly tone or a formal one? Do you love using bullet points for clarity? Are there phrases or greetings you always use (e.g. "Hi team," or "Kind regards")? Jot down a few of these key preferences. This will help you formulate your instructions.

Step 2: Find the Custom Instructions Setting

Open Copilot's settings to enter your instructions. In Outlook for example, open the Copilot sidebar (by clicking the Copilot icon in a new Outlook email). Click the **Settings** option (usually a gear ⚙️ or a menu). Look for "Draft Instructions" or a similar option. (In the new Outlook on the web or desktop, there is a dedicated section for this.)

Step 3: Enter Your Instructions

Write a short description of how Copilot should draft or answer for you. In the text box for custom instructions, type out your guidelines. Be clear and specific, but you can keep it simple. For example, you might write: *"Keep responses short and to the point. Use a friendly, informal tone. Whenever possible, use bullet points for lists, and end emails with 'Cheers, [Your Name]'"*. Once you've written your instruction, turn on or check the toggle that enables custom instructions. (In Outlook's case, you toggle "Use custom instructions when drafting email" to On.)

Step 4: Save and Test

Save your instructions and try asking Copilot something! Click **Save** (or the equivalent button) to save your new instructions. Now, go ahead and use Copilot. Ask it to draft an email or answer a question as you normally would. You should notice that the response it gives already follows the style or tone you set. If it's not quite right, you can go back into settings and tweak the wording of your instructions. This is a one-time setup – you can update it anytime, but you don't need to re-enter it for every prompt.

In Outlook (Email) Copilot – A Closer Look

To make it even clearer, here's how you would do the above steps in Outlook's new Copilot feature for emails:

- **Open Copilot in a new email draft** (in Outlook web or the new Outlook app). You might see Copilot's icon or a prompt saying something like "Draft with Copilot".
- **Go to Settings:** Click the drop-down arrow next to the Copilot icon and choose **Settings** > **Draft Instructions**[\[2\]](#).
- **Enable custom instructions:** You'll see a toggle for **"Use custom instructions when drafting email."** Turn that on (it should turn blue or show as enabled)[\[2\]](#).
- **Type your instruction:** There will be a text box where you can describe how you want your emails. For example, you could type: *"Write emails in a warm, helpful tone. Start with a casual greeting (Hi), keep them under 200 words, and include bullet points if listing multiple items. Sign off with my first name."*[\[2\]](#) This is your personal template – tell Copilot whatever will make the draft more "you."
- **Save:** Click **Save**. That's it! Now Copilot will follow these guidelines for every draft it creates.

If you're using **Copilot in Teams, Word, or the Business Chat** interface, look for similar settings or simply remember to *include your style preferences in your prompt*. Microsoft is rolling out more custom instruction options across apps (for instance, a **Copilot Chat setting for personal instructions** in the future). But even if an app doesn't have a dedicated "custom instruction" toggle yet, you can achieve the same effect by **stating your preferences in your prompt each time**. For example, in Word you might ask: *"Draft a two-paragraph introduction. Use a formal tone and third-person voice."* The more you tell Copilot what you want, the better it can deliver[\[3\]](#).

Tips for Writing Good Custom Instructions

When you write your custom instructions, here are a few tips to make them most effective:

- **Be clear and specific:** Copilot follows detailed instructions well, so don't shy away from specifics[\[3\]](#). Instead of "Write professionally," say **what** that means to you (e.g. *"Use a polite, professional tone with no slang."*). If you want bullet points or a certain format, mention it explicitly (e.g. "If giving steps, use a numbered list"). The Microsoft Copilot team notes that adding details like desired format, tone, or length leads to more relevant responses[\[3\]](#).
- **Describe the tone and style:** Think of adjectives for your writing style: *friendly, informal, conversational, formal, concise, enthusiastic*, etc., and include those. For example: *"Keep the tone friendly and helpful, like I'm talking to the customer one-on-one."* Copilot will adjust its language to match (it can *formalise or simplify language as directed*[\[4\]](#)).
- **Mention any always-use or never-use items:** If you have a greeting or sign-off you always use, put that in (e.g. "Begin emails with 'Hi team,' and end with 'Kind regards.'"). Likewise, if you *don't* want something, you can phrase it as a positive instruction. Instead of saying "don't be too wordy," you could say *"keep the message brief (3-4*

sentences).” Focus on what to do, since positive instructions are easier for the AI to follow.

- **Include relevant context if needed:** If you have a particular role or audience, you can mention it. For instance, *“I manage a small retail team – draft responses with that in mind (motivational tone, simple language).”* Or *“Our company style is very casual – feel free to use emojis and exclamation marks.”* Copilot will take this context into account. You can even specify language or locale preferences: *“Use Australian English spelling and phrasing.”* (It’s similar to telling Copilot to respond in Spanish or include certain branding terms[5].)
- **Keep it short:** Usually 1–3 sentences of instruction are enough. You’re giving Copilot a **cheat sheet, not an essay**. If your instructions get too long or complicated, try to simplify them to the most important points. You can always refine later.
- **Test and refine:** After setting instructions, pay attention to Copilot’s responses. If something is off – maybe it’s still too formal, or it’s not using bullet points when you wanted – go back and edit your instructions wording. It might take a little tweak to get perfect. Copilot learns from what you wrote in the instructions, so adjusting that will guide it differently. *Providing more detail or examples can guide the AI to improve its output*[6]. It’s a bit of trial and error at first, and that’s okay.

Remember, these custom instructions aren’t permanent rules – you can update them anytime as your needs change. For example, if you start finding the tone *too casual*, you can dial it up a notch to “semi-formal” in your text, and Copilot will adapt. The goal is to **make Copilot work the way you work**.

Examples of Custom Instructions for Different Roles

Every job is a little different. Here are some **practical example templates** of custom instructions that people in common small-business roles might use. You can use these as a starting point and adjust the details to fit your situation. The idea is to show what a good custom instruction might look like for your day-to-day tasks.

Role	Sample Custom Instruction
Team Manager	<i>“Use a positive, encouraging tone. Keep updates brief and clear. Whenever giving next steps or action items, list them as bullet points. Address the team as ‘Hi team,’ and sign off with ‘Thanks, [Your Name]’.”</i>
Administrative Assistant	<i>“Keep responses concise and factual. If listing multiple items (like meeting times or tasks), use bullet points or a numbered list. Maintain a polite, professional tone (not too casual). For scheduling emails, always include the date, time, and location clearly.”</i>
Customer Service Rep	<i>“Always respond with empathy and helpfulness. Start with a friendly greeting using the customer’s name (if given). Apologise sincerely if there’s an issue, and then provide a clear, brief solution or next step. Use a warm tone, and avoid technical jargon.”</i>

Role	Sample Custom Instruction
Sales/Marketing	<i>“Be enthusiastic and convincing. Use an informal, upbeat tone – like you’re excited about our product. Keep paragraphs short. Include a call-to-action at the end (e.g. ‘Let me know what you think!’). Use exclamation marks sparingly, but feel free to be a bit playful.”</i>
Small Business Owner (general)	<i>“Write in a personal, friendly voice as I would. Use ‘we’ or ‘I’ where appropriate. Keep it clear and jargon-free. When explaining anything complex, break it down into simple terms. End messages with a friendly sign-off like ‘Cheers’ or ‘Thanks.’”</i>

Feel free to copy these and tweak the wording. The best custom instructions *sound like something you’d actually say*. If you’re not sure, imagine you’re telling a new employee **“Here’s how we communicate here.”** That’s exactly what you type in for Copilot.

Notice a few things about the examples above: they mention **tone** (e.g. positive, empathetic), possibly the **format** (bullet points for lists), maybe an element of **content** focus (include next steps, avoid jargon), and **greetings/sign-offs** if relevant. That’s a great formula to use for your own instructions.

Getting the Most Out of Copilot with Custom Instructions

By now, you should have a good understanding of what custom instructions are, why they can turbo-charge your Microsoft 365 Copilot experience, and how to set them up. To recap a few final pointers and best practices:

- **Custom instructions are your Copilot’s “cheat sheet.”** They ensure the AI knows your preferences from the get-go, *saving you time and effort* in getting to the result you want^[2]. Think of it as configuring a tool to fit you – once it’s set, it works smoother.
- **The more context you give, the better the response.** Copilot is pretty smart at picking up details. Microsoft’s own guides say that providing context like your intended audience, desired tone, or format will guide Copilot to produce more relevant output^[3]. Don’t be afraid to spell out what you need.
- **Keep instructions up-to-date.** If your role changes or you find Copilot’s outputs aren’t exactly right, revise your instructions. It’s normal to tweak them. For example, if you start working with a new client who prefers very formal communication, you might adjust your Copilot instructions to use a more formal tone for a while.
- **Use it across applications:** Once you’ve set instructions (say, in Outlook or in the Copilot Chat interface), Copilot will try to apply that style everywhere. So your Word drafts, Teams message suggestions, etc., will all carry that tone if applicable. (If an app doesn’t yet support automatic custom instructions, just remember to include your preferences in the prompt manually. For instance, ask: “Summarise this document in a casual tone” – adding “*in a casual tone*” is effectively an ad-hoc custom instruction for that one response.)

- **Maintain a professional balance:** While it's great to have Copilot mimic your style, always review the content it produces. Ensure it still fits the context. For instance, if you set a very casual tone, double-check that the output is appropriate for the recipient (you might not want an overly casual tone in a formal proposal, for example). Copilot will follow your instructions quite literally, so use good judgment on when to apply certain styles.

Finally, remember that **Copilot learns from you** in the sense that it's designed to use the information and context you provide. By giving it custom instructions, you're training your AI helper to be more effective and aligned with your work style. This means *less time editing and more time getting things done*. Microsoft 365 Copilot is there to make your work life easier – and with a little personalisation, it can feel less like a generic AI and more like *your* AI.

Now it's your turn: go ahead and set up your custom instructions, and then ask Copilot to help with a task you do often. You'll likely be pleasantly surprised at how much closer the first draft is to what you imagined. Happy prompting, and here's to working smarter with a Copilot that "gets" you! [\[2\]](#)[\[1\]](#)

References

[1] [Custom Instructions disappeared? | Microsoft Community Hub](#)

[2] [Ask Copilot to make email drafts sound like you](#)

[3] [Getting Started with Microsoft 365 Copilot A Step-by-Step Guide](#)

[4] [Copilot in Microsoft 365 Comprehensive Guide to Usage and Workflow Integration](#)

[5] [Provide custom instructions for your Microsoft 365 Copilot Notebook](#)

[6] [Roadmap to Mastering Microsoft 365 Copilot for Small Business Users](#)