

## Purpose of this guide

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This guide provides practical, low-risk examples of how University of North Carolina System Office employees can use Microsoft 365 Copilot Chat to support everyday work.

Copilot Chat is intended to assist with thinking, drafting, organizing, and summarizing, not to replace employee judgment, approved processes, or subject-matter expertise.

System Office access note: Most employees should expect to use Copilot Chat through the standalone Microsoft 365 chat experience, Outlook, and Teams. Full native Copilot features inside every Microsoft 365 app may not be available to every account. Some approved accounts may see additional capabilities based on role, license assignment, app availability, Microsoft rollout timing, and System Office configuration.

This guide focuses on appropriate use cases that:

- Save time
- Improve clarity
- Help employees get unstuck
- Stay within approved data-use and access boundaries

## Before using any use case

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### Before using Copilot Chat

- Use only information appropriate for AI use
- Do not enter, paste, upload, or expose Tier 3 data
- Review all outputs before using them in emails, documents, decisions, or work products
- Remember that Copilot Chat does not automatically know your files, email, or systems

When unsure, pause and ask for guidance before proceeding.

## Ten everyday use cases

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Practical workflow: If you do not have native Copilot access inside a specific Microsoft 365 app, use Copilot Chat to draft, summarize, outline, create CSV-style content, or generate text. Review the output carefully, then move the final content manually into Word, Excel, PowerPoint, Outlook, Teams, or another approved app.

## 1

### Draft a first version

Copilot Chat can help create a starting draft when you know what you need to say but want help getting started. For users without native Copilot access in a specific app, draft in Copilot Chat first, review the output, and then move the final text into the appropriate Microsoft 365 app.

#### Good for

- Internal emails
- Announcements
- Talking points
- Project updates
- Plain-language explanations
- Meeting follow-ups

#### Example prompt

*Draft a short internal email to [audience] about [topic].  
Use a professional, clear, and helpful tone.  
Keep it under 200 words.*

#### Follow-up prompt

*Make the message shorter and add a clear subject line.*

#### Review before using

- Is the tone appropriate?
- Did Copilot Chat add facts that were not provided?
- Is the message accurate and appropriate for the audience?

## 2

### Rewrite for clarity

Copilot Chat can help improve wording when you already have an approved draft.

#### Good for

- Simplifying long sentences
- Making text more concise
- Adjusting tone
- Improving structure
- Making instructions easier to follow

#### Example prompt

*Rewrite the following approved text to make it clearer and more concise.  
Keep the meaning the same.  
Do not add new facts.*

**Follow-up prompt**

*Give me a version that is more direct but still professional.*

**Review before using**

- Did the meaning stay the same?
- Did anything important get removed?
- Is the revised tone appropriate?

### 3 Summarize appropriate content

Copilot Chat can help summarize public or approved content that is appropriate for AI use.

**Good for**

- Long approved text
- Public webpages
- Non-sensitive meeting notes
- Project background material
- General research notes

**Example prompt**

*Summarize the following approved text into five key points, three action items, and any open questions.  
Do not add information that is not in the text.*

**Follow-up prompt**

*Turn this summary into a short internal briefing note with headings.*

**Review before using**

- Is the summary accurate?
- Were important details omitted?
- Did Copilot Chat add unsupported claims?

### 4 Brainstorm options

Copilot Chat can help generate ideas and options when you are exploring approaches.

### Good for

- Project ideas
- Communication approaches
- Training topics
- Meeting questions
- Ways to explain a concept
- Options for organizing work

#### Example prompt

*Help me brainstorm ten practical options for [task].  
For each option, include a short description, one benefit, and one limitation.*

#### Follow-up prompt

*Group these ideas into quick wins, medium-effort options, and ideas that need more review.*

#### Review before using

- Are the ideas realistic?
- Do any options require approval?
- Are any ideas inappropriate for the context?

## 5 Create checklists

Copilot Chat can help organize work into clear, actionable steps.

### Good for

- Project kickoff planning
- Routine work processes
- Meeting preparation
- Document review
- Training preparation
- Event or communication planning

#### Example prompt

*Create a practical checklist for [task].  
Organize it into before, during, and after steps.  
Include risks, assumptions, and questions to confirm.*

#### Follow-up prompt

*Turn this into a shorter checklist with only the most important steps.*

#### **Review before using**

- Are the steps complete?
- Are the assumptions correct?
- Does anything need to be confirmed with another office or team?

## **6 Prepare for meetings**

Copilot Chat can help you think through meetings before they happen.

### **Good for**

- Draft agendas
- Questions to ask
- Risks to clarify
- Follow-up email templates
- Stakeholder discussion points

#### **Example prompt**

*Help me prepare for a meeting about [topic].*

*The purpose is [purpose].*

*Create a short agenda, five questions to ask, risks to clarify, and a follow-up email template.*

#### **Follow-up prompt**

*Make the agenda shorter and organize the questions by priority.*

#### **Review before using**

- Are the questions appropriate?
- Does the agenda match the meeting purpose?
- Are sensitive topics handled correctly?

## **7 Explain concepts plainly**

Copilot Chat can help explain unfamiliar or complex concepts in plain language.

### **Good for**

- Beginner-friendly explanations
- Internal training support

- Translating jargon into practical language
- Explaining concepts to non-technical audiences

#### **Example prompt**

*Explain [concept] for an employee who is new to the topic.*

*Use plain language.*

*Include a short definition, why it matters, and one practical example.*

#### **Follow-up prompt**

*Make this explanation shorter and appropriate for an internal resource page.*

#### **Review before using**

- Is the explanation accurate?
- Is it oversimplified?
- Does it need review by a subject-matter expert?

## **8 Review a draft before revising**

Copilot Chat can help identify issues in a draft before you rewrite it.

### **Good for**

- Internal messages
- Webpage copy
- Guides
- Project summaries
- Instructions
- Meeting materials

#### **Example prompt**

*Review this approved draft for clarity, organization, tone, and possible reader confusion.*

*Do not rewrite it yet.*

*First, list suggested improvements.*

#### **Follow-up prompt**

*Now revise the draft using those suggestions, but keep the tone professional and human.*

#### **Review before using**

- Are the suggestions reasonable?
- Did the revision preserve the intended meaning?
- Does the final version need approval?

## 9 Get unstuck

Copilot Chat can help when you are not sure where to begin.

### Good for

- Clarifying a task
- Identifying first steps
- Organizing messy notes
- Figuring out what questions to answer
- Turning a vague idea into a plan

### Example prompt

*I need to work on [task], but I am not sure where to start.  
Ask me up to five clarifying questions, then suggest a practical first step.*

### Follow-up prompt

*Based on my answers, create a simple plan with next actions and open questions.*

### Review before using

- Is the suggested first step realistic?
- Does the plan match actual constraints?
- Do any steps require approval?

## 10 Compare options

Copilot Chat can help compare general options when you provide criteria.

### Good for

- Communication approaches
- Training formats
- Project options
- Agenda structures
- Pros and cons of general approaches

### Example prompt

*Compare these three options for [task].  
Use the criteria of time, effort, audience impact, risk, and approval needs.  
Present the comparison in a table.*

### Follow-up prompt

*Recommend the safest option and explain the tradeoffs.*

### Review before using

- Are the criteria correct?
- Did Copilot Chat make unsupported assumptions?
- Does the recommendation need human review?

## Quick use-case checklist

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### Before using one of these examples, ask

- Is the task appropriate for Copilot Chat?
- Is the information appropriate to use with AI tools?
- Am I avoiding Tier 3 data?
- Did I provide enough context without oversharing?
- Will I review and verify the output?
- Do I need approval before using or sharing the result?

## Final reminder

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### Pair Copilot Chat with human judgment

Copilot Chat is most effective when paired with human judgment and review. Use it to draft, organize, and explore ideas — then verify and refine before using the output.