

SUB-SECTION D

Office Operations with Copilot & Microsoft 365

Same AI — inside the programs your office already opens.

Same pairs as this afternoon



**Scan for the meeting notes, the job
table, and every prompt.**

No login. Also in your workbook.

faulknercob.com/apps/lot14/office

Three ways in. The same prompt works in all three.



WAY 1

Copilot Chat

copilot.microsoft.com or the
Microsoft 365 Copilot app

Sign in with your work account.
Paste text or attach a file.



WAY 2

The Copilot button in Word, Excel & PowerPoint

Many small-business plans now
include a basic version.

The paid version adds speed and a
search of your company's files.



WAY 3

Any chatbot

ChatGPT · Gemini · Claude

Copy the text. Paste it in. Same
prompt.

See the button? Use it. Don't see it? Paste.

The open file is the window. Searching your files is RAG.



Basic button · any chatbot

Sees only what's in the window: the file you have open, or what you paste.

Not in the window? It doesn't know it.



search



Paid Microsoft 365 Copilot

Searches your email, files, and meetings first, loads what it finds into the window, then writes.

That search step is RAG.

Grounded is not the same as verified. You still check.

Company files go in your company account — never a free personal one.

Round 1: Turn meeting notes into an action list.

Pairs • 5 minutes

- 1 Open the page (scan the code) or your workbook.
- 2 Copy the prompt and the notes (one button on the page).
- 3 Paste into your tool — or the Copilot panel in Word.
- 4 Read the table against the notes.

Check before you send

- ☐ Did it catch the job nobody took?
- ☐ Did it invent an owner or a date?
- ☐ Would you send the email with your name on it, as written?

Round 2: Find the problems in a job cost table.

Pairs • 6 minutes

- 1 Copy the prompt and the table (one button on the page).
- 2 Run it in your tool.
- 3 Pick one flagged row. Do the math yourself.
- 4 Look at what it did with the blank rows.



In Excel, Copilot writes a formula and the spreadsheet does the math. In a chat, the model predicts the math — make it show its work.

Check the numbers

- ☐ Does one flagged row match your calculator?
- ☐ Did it follow your rule exactly?
- ☐ What did it do with the blanks?

Watch: a new-buyer orientation deck in about a minute.

Demo — watch, don't type

- 1 Welcome
- 2 What happens next
- 3 Your selection deadlines
- 4 How we'll keep in touch
- 5 Who to call

The prompt is on your page. Try it Monday.

Read the tags

- ☐ [CONFIRM] marks something it doesn't know about your company.
- ☐ Specifics without a tag are the dangerous ones.
- ☐ Replace every one before a buyer sees it.

Your two-week pilot.

4 minutes on your own • 2 with your partner

- 1 Get out your lunch card: the task that eats your week.
- 2 Put your task and company size into the pilot prompt.
- 3 Run it. You get a one-page plan.
- 4 Swap with your partner. Check the two lines on the right.

Partner check

- ☐ A named person checks the AI's work before anything goes out.
- ☐ A rule for what never gets pasted in.
- ☐ Missing one? Write it in — use this morning's exit-ticket rule.

Start Monday.



One task



One person



Two weeks

Save your pilot plan and your best prompt where you'll find them Monday.

Easiest way: email them to yourself — now.