

Using Copilot with Outlook

Imagine opening Outlook and discovering over 100 new messages in your inbox. Although you want to promptly reply to each email, your workday is already booked with meetings. Fortunately, Copilot allows you to stay on top of your emails by summarizing email threads and quickly write professional responses using Copilot prompts.

Lesson Objectives:

- Summarize email threads in Outlook with Copilot
- Use Copilot to respond to emails and write new emails
- Identify when to use Copilot vs. when to write manual emails
- Apply ethical and privacy guidelines when using AI in Outlook

Summarize an Email Thread

Copilot's email summarization feature can save you a lot of time by summarizing the most important details within emails in just seconds.

- 1 Open the email thread you want to summarize.

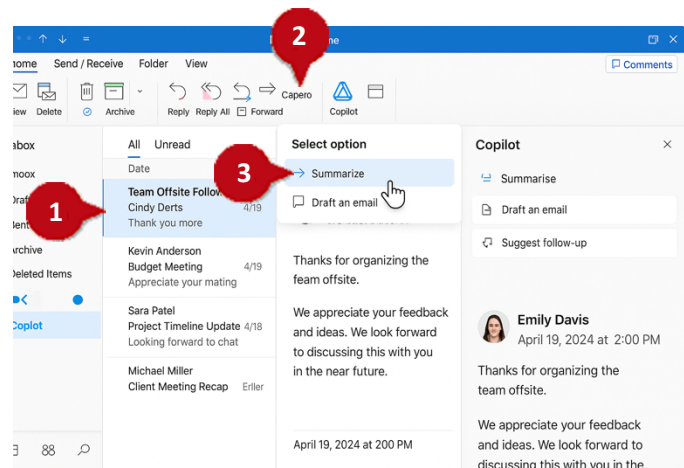
Make sure the message is part of a conversation with multiple replies so Copilot has enough context to analyze.
- 2 Click the **Copilot** icon in the ribbon.

Copilot opens a panel on the side of the screen where AI-powered actions are available for the selected email.
- 3 Select **Summarize** to generate a summary of the email.

Copilot analyzes the entire conversation and produces a concise summary highlighting key points, decisions, and action items. The summary appears in the Copilot panel and can be reviewed before you take action or respond.

Instructor Notes:

- Emphasize that Copilot does not replace reading critical emails, but helps users quickly understand context before deciding what requires deeper review.
- Point out that summaries may vary depending on email length, clarity, and writing quality of the original messages.
- Remind learners to verify important details (dates, commitments, approvals) before acting on a summary.



Draft a Reply Using Copilot

Once you've reviewed the email summary, Copilot can help you draft a complete response in seconds. By generating a first draft based on the email context, Copilot reduces writing time while allowing you to maintain control over tone, accuracy, and intent.

Instructor Notes:

- Provide examples where Copilot is appropriate:
 - Responding to status updates or scheduling emails
 - Summarizing meeting outcomes or next steps
 - Drafting polite, professional replies where tone is predictable
- Clarify situations where manual writing is recommended:
 - Sensitive or emotionally nuanced messages
 - Conflict resolution, disciplinary actions, or performance feedback
 - Emails involving confidential, legal, or regulatory content

1 Open the email you wish to reply to.

2 Click **Draft with Copilot** on the ribbon.

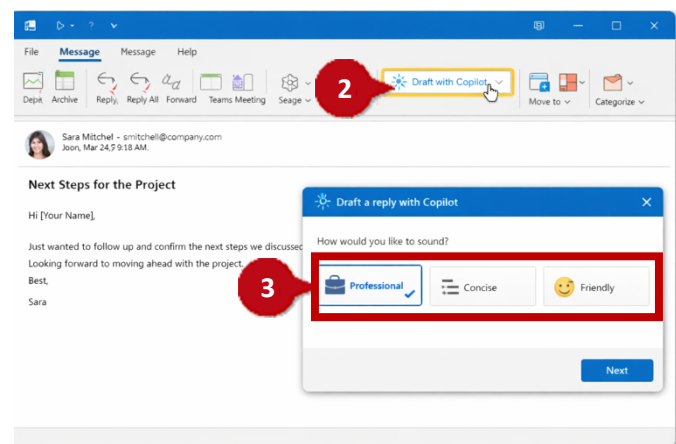
Outlook analyzes the email thread and generates a suggested reply based on the context of the conversation. The draft appears directly in the reply window, formatted as a complete email that includes an appropriate greeting, body text, and closing.

Instructor Notes:

- Emphasize that Copilot's draft is a *starting point*, not a final answer. Learners should always review the content before sending.
- Point out that Copilot pulls information from the *entire email thread*, which helps ensure responses are relevant and consistent with prior messages.

3 Select a tone:

- **Professional:** Produces a formal, polished response suitable for executive communication or external stakeholders.
- **Concise:** Generates a shorter reply focused on key points and next steps.
- **Friendly:** Creates a warmer, more conversational tone appropriate for colleagues or informal communication.



Instructor Notes:

When selecting a tone in Copilot, remind learners that the tone should align with the **audience, purpose, and level of formality** required for the message.

- **Professional:** Use for formal communications such as messages to clients, leadership, regulators, or unfamiliar stakeholders, where clarity, neutrality, and structure are essential.
- **Concise:** Use when delivering quick updates, confirmations, or clear next steps—especially in internal communications where recipients value brevity and efficiency.
- **Friendly:** Use for informal or collaborative messages with colleagues or partners when maintaining rapport and approachability is appropriate.

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Review the draft and edit as needed.

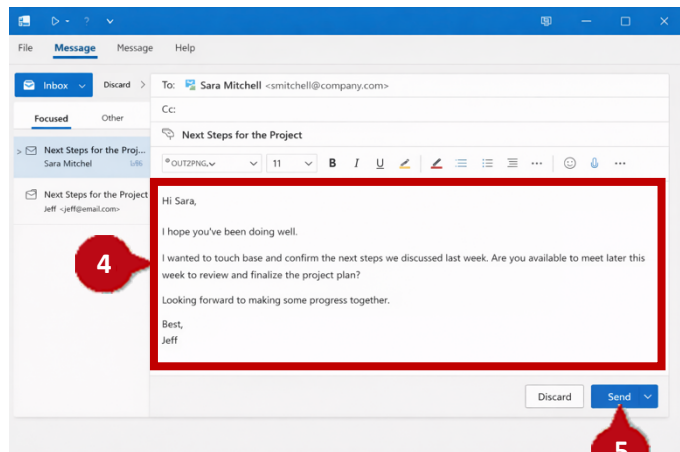
Confirm that the content is accurate, complete, and contextually appropriate, and make any necessary edits so the message clearly reflects your intent, tone, and responsibilities.

Instructor Notes:

- Instruct learners to pause and review for accuracy, tone, and unintended commitments before sending.
- Remind learners to use *extra caution* with sensitive, external, or high-impact communications.
- Encourage learners to treat Copilot output as a draft to refine, not a finished response.

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Send the email.



Identify When to Use Copilot vs. When to Write Emails Manually

Microsoft Copilot is a powerful productivity tool, but it is not appropriate for every email. Knowing when to rely on Copilot—and when to write manually—helps ensure messages remain accurate, appropriate, and aligned with organizational expectations.

When Copilot Is Most Appropriate

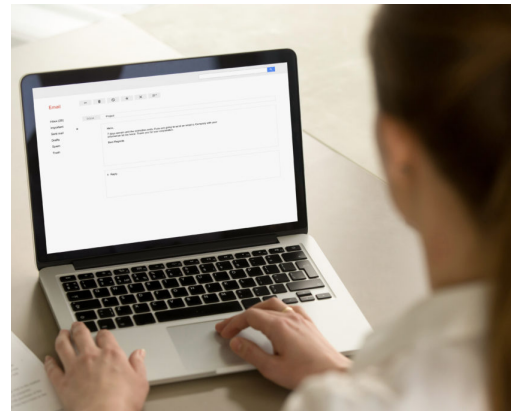
Copilot works best when the goal is to **save time, reduce cognitive load, or summarize existing information**, such as:

- Drafting routine or low-risk responses
- Summarizing long email threads
- Rephrasing messages for tone or clarity
- Creating first drafts that will be reviewed and edited
- Responding to emails that follow a familiar or repeatable pattern

When Manual Writing Is Necessary

Manual writing is recommended when emails require personal judgment, sensitivity, or accountability, including:

- Messages involving confidential, legal, or regulatory content
- Performance feedback or disciplinary communication
- Emotional, high-stakes, or highly personal messages
- Situations where nuance, context, or intent could be misinterpreted
- Emails that reflect leadership decisions or formal commitments



Instructor Note:

Remind learners that they—not Copilot—are responsible for the content they send. If an email could have consequences if misunderstood, it should be written manually.

Best-Practice Guidance

- Use Copilot to **accelerate drafting**, not to bypass thinking
- Always verify names, dates, facts, and commitments
- Edit Copilot output to reflect your own voice and intent
- When in doubt, write the email manually



Summary: Copilot vs. Manual Writing	
Scenario	Recommended Approach
Routine follow-ups or confirmations	Copilot
Summarizing long email threads	Copilot
Tone refinement (professional, concise, friendly)	Copilot
Sensitive or emotional messages	Manual
Legal, regulatory, or confidential content	Manual
Messages requiring personal accountability	Manual
Leadership or high-stakes communication	Manual

Apply Ethical and Privacy Guidelines When Using AI in Outlook

While Microsoft Copilot can significantly improve efficiency, it must be used responsibly. Employees remain fully accountable for the content they send, even when AI assists in drafting or summarizing messages. Understanding ethical and privacy considerations helps protect individuals, the organization, and sensitive information.

Protect Confidential and Sensitive Information

Copilot should **not** be used to generate or summarize emails that contain:

- Personally identifiable information (PII)
- Financial, legal, or medical data
- Proprietary or confidential business information
- Information covered by regulatory or compliance requirements

Instructor Note:

Reinforce that Copilot does not replace organizational data-handling policies. If content would normally require discretion, approval, or restricted access, it should be written manually.

Maintain Accuracy and Accountability

AI-generated content may sound confident but can still contain inaccuracies or unintended implications.

- Always verify facts, names, dates, and commitments
- Ensure the message accurately reflects your intent and authority
- Never send Copilot-generated content without reviewing and editing it

Instructor Note:

Stress that responsibility for the message lies with the sender—not the AI. Copilot assists, but the employee owns the outcome.

