



How to Get the Most Out of Microsoft Copilot

A practical, SMB-friendly guide to saving the most time and boosting productivity.

Save 10-20 hours a week for just \$1 a day



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Why AI Integration Matters

Most SMB teams using Copilot correctly save 5–11 hours per week; without changing the way they work.



- **30–40%** of SMB time is repetitive work. Copilot turns those tasks into quick prompts.
- Immediate wins in email cleanup, meeting summaries, and document drafting.
- Works inside the tools you already use: Outlook, Teams, Word, PowerPoint.
- Better decisions, fewer bottlenecks: summaries, next steps, recaps, and quick analysis.
- No big rollout required: Start small and build momentum with your team.

Hint: Copilot works best when your data and permissions are configured correctly.

Readiness Checklist

Are you Copilot-ready? (60-second self-check)



	Yes	No/Not Sure
Data Location: Files live in SharePoint/OneDrive (not desktops or old file servers).	<input type="checkbox"/>	<input type="checkbox"/>
Identity & Access: MFA enforced for all; admin accounts separated.	<input type="checkbox"/>	<input type="checkbox"/>
Permissions Hygiene: Teams & SharePoint are organized; sensitive data labeled.	<input type="checkbox"/>	<input type="checkbox"/>
External Sharing: Defaults reviewed; no oversharing or outdated links.	<input type="checkbox"/>	<input type="checkbox"/>
Licensing: Microsoft 365 Business Premium + Copilot licensed to correct users.	<input type="checkbox"/>	<input type="checkbox"/>

No/Unsure on 2+ Items? Contact SBT Partners for free info on how to get Copilot ready.

The 5 Biggest Ways to Save Time With Copilot

SMBs typically save up to 30 hours a week (per employee) using these 5 workflows alone.

Email Triage & Drafting (Fastest Immediate Wins)

- Summaries of long threads
- Draft replies in your tone
- Suggested next steps

Time saved: 1–4 minutes per email



Meeting Recaps & Action Items

- Instant recap of Teams meetings
- Extract action items, deadlines, and owners

Time saved: 10–15 minutes per meeting



Document & Proposal Drafting

- Turn bullet notes into proposals, policies, or reports
- Rewrite content in the tone/grade level you need

*Time saved:
20–40 minutes
per document*



PowerPoint Slide Creation

- Convert Word docs to slides
- Create decks from scratch (6–10 slide starter outlines)

*Time saved:
30–60 minutes
per deck*

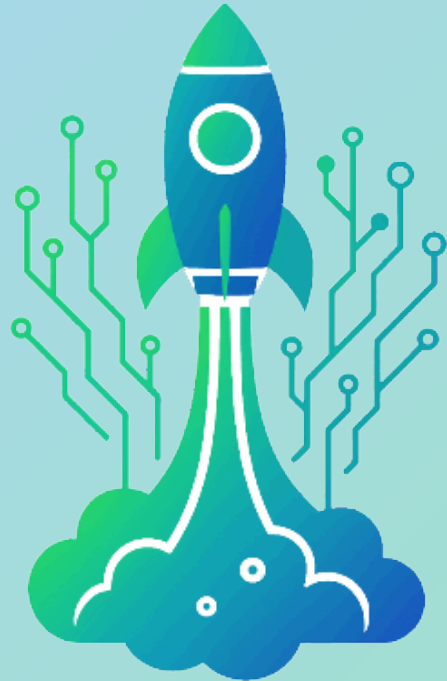


Research

- Ask Copilot to extract insights from internal documents
- “Tell me what’s important here,”
“Summarize risks,”



How to Optimize Copilot for Your Team



Follow these tips to make Copilot part of the way you work

- Train your team on prompts (include 5 per role).
- Build “Copilot moments” into your schedule (email blocks, pre-meet, post-meet).
- Label sensitive data; keep permissions clean.
- Keep MFA/device compliance tight: if access is broken, Copilot is blind.
- Create templates for proposals, QBRs, SOWs, and updates.
- Start where the volume is highest.

Hint: The quicker your team gets used to Copilot, the more time you will save.

The First 10 Prompts You Should Try



Paste these prompts into Copilot to get wins today!

Outlook

1. "Summarize this thread, list decisions, and propose a 3-bullet reply in my tone."
2. "Draft a reply that confirms X, asks Y, and offers two meeting slots next week."

Teams

3. "From today's meeting, summarize key points, owners, and due dates in a checklist."
4. "Turn these chat notes into a clear update for the leadership channel."

Word

5. "Create a one-page proposal based on these bullet notes..."
6. "Rewrite this policy in plain language at a 9th-grade reading level."

PowerPoint

7. "Build a 6-slide deck: problem, solution, ROI, case snapshot, next steps."
8. "Convert this Word outline into slides with speaker notes."

Cross-App

9. "Draft a customer update email from this meeting summary."
10. "Create an action-item list grouped by owner."

Ready to See What Copilot Can Do for Your Business?

Copilot is one of the fastest ways for SMB teams to save hours every week — but only when the Microsoft 365 environment behind it is configured correctly.

If you want to know:

- Whether your organization is Copilot-ready
- Where your biggest security or productivity gaps are
- How many hours your team could realistically save each week
- Which workflows will deliver the fastest ROI

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