

Microsoft CoPilot

Use Cases Cheat Sheet



This cheat sheet introduces the two main types of Microsoft Copilot: a general-purpose AI assistant and task-specific tools embedded in Microsoft Office apps. It highlights how each version supports different workflows, from everyday planning to professional document creation. Use cases are organized into tables for clarity and quick reference.

Example Use Cases

Task Area	Example Use Case	Copilot Tool Used
Member Communication	Drafting emails to explain coverage changes in plain language	Copilot in Outlook / Word
Policy Summarization	Summarizing CMS or Medicare.gov documents for internal teams	Copilot in Word
Claims Analysis	Identifying trends in claims data and visualizing them	Copilot in Excel
Meeting Preparation	Creating slide decks for executive briefings or compliance updates	Copilot in PowerPoint
Training Materials	Generating onboarding guides or FAQs for new employees	Copilot in Word / PowerPoint
Preventive Care Outreach	Writing member-facing messages based on CDC guidelines	Copilot in Outlook / Word
Internal Collaboration	Summarizing Teams chats or meeting transcripts for follow-up actions	Copilot in Teams
Document Review	Highlighting key changes in updated policy documents	Copilot in Word
Data Reporting	Creating charts and summaries from spreadsheets for leadership	Copilot in Excel

CoPilot Comparison

Feature	Microsoft Copilot (General)	Copilot for Microsoft Office
Where You Use It	Accessed via a web browser (copilot.microsoft.com), or built into Windows and Edge	Embedded directly in Word, Excel, PowerPoint, Outlook, and Teams
Main Purpose	Helps with general tasks like answering questions, summarizing web pages, or planning	Helps with document-specific tasks like writing, analyzing data, or building presentations
Examples of Use	<ul style="list-style-type: none">- Summarize a webpage- Plan a trip itinerary- Learn a new topic	<ul style="list-style-type: none">- Draft a policy memo in Word- Create charts in Excel- Build slides in PowerPoint
Best For	Everyday productivity, quick answers, learning, and planning	Professional work inside Office apps—writing, editing, analyzing, and presenting
Tone & Style Control	Yes — you can set tone (friendly, professional, casual, etc.) in your prompt	Yes — especially useful for writing emails, reports, and summaries
Prompting Required?	Yes — you type your request clearly in the browser or app	Yes — you type your request directly in the Office document or email

Microsoft Suggested Best Practices

Area	Microsoft Guidance Summary
Prompt Design	Use clear, specific prompts to get the best results. Include context, tone, and desired format.
Iterative Use	Treat Copilot as a collaborator—refine outputs through follow-up prompts and feedback.
Data Sensitivity	Avoid inputting sensitive or personal data unless using enterprise-secured environments.
Accessibility	Copilot supports inclusive writing and can help simplify complex language for broader audiences.
Learning Integration	Use Copilot to teach users how to perform tasks (e.g., formulas in Excel) rather than just doing them.
Workflow Embedding	Embed Copilot into daily workflows—e.g., use it to prep for meetings, summarize documents, or draft responses.

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