Getting More Out of Copilot

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A plain-English guide for Central West NSW businesses.

So, you've heard about AI. Now what?

If you've got Microsoft 365, Copilot is either already available to you or sitting one licence upgrade away.

The question most business owners ask us isn't "should we use AI?" It's "where on earth do we start?"

This guide answers that. No jargon, no fluff. Just a plain-English rundown of the easiest, most practical ways to use Copilot in your day-to-day work, starting with the stuff that saves you the most time for the least effort.

Think of it as the low-hanging fruit guide. Grab the easy wins first, then keep going.

⚠ **Pick a handful of real use cases rather than trying to transform everything at once. Start small, get comfortable, then build from there.**

What's inside

Each section covers a different tool or area of your business. You don't need to read it front to back. Find the bit that applies to you and start there.

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All of the use cases in this guide work within Microsoft 365 with a Copilot licence. Not sure if you have one? Give us a call on 02 6361 1116.

Outlook - Taming your inbox

If your inbox is the bane of your existence, this is your first win.

What Copilot can do:

- Read long email threads and give you a plain-English summary of what happened and what needs to happen next
- Write a reply draft based on your previous emails, so you're not starting from scratch every time
- Pick out follow-up actions from a conversation
- Help you work out which emails actually need your attention today

Real example:
You come back from a site visit with 47 unread emails. Instead of working through them one by one, Copilot gives you a summary of what came in, what needs a reply, and what can wait. You're across it in five minutes instead of forty-five.

Teams - Getting your time back from meetings

Meetings take time. The admin after them takes even more. Copilot handles the notes so you can stay focused on the conversation happening in front of you.

What Copilot can do:

- Generate a summary of what was discussed in a meeting, automatically
- Pull out action items and who owns each one
- Let you catch up on a meeting you missed without watching the full recording
- Answer questions about decisions made in a previous meeting

Real example:
Your team meets every week. Instead of one person scribbling notes and spending an hour typing them up afterwards, Copilot produces a clean summary with action items within minutes of the call ending. Everyone knows what they're doing and nothing gets forgotten.

Word - First drafts done fast

Staring at a blank page is a productivity killer. Copilot gets you to a first draft fast, so you can spend your time refining rather than starting from zero.

What Copilot can do:

- Write a first version of a document from a few bullet points or a brief description
- Adjust the tone of something you've already written, more formal or easier to read
- Summarise a long document into a short overview
- Compare two documents and show you what's changed

Real example:
A local business needed to pull together information from multiple site reports into one document. They gave Copilot clear instructions and a template to work from. A job that used to take the better part of a morning came back in minutes, and it was right first time.

Excel - Making sense of your data

You don't need to be an Excel expert to get useful information out of your spreadsheets anymore. Copilot does the number-crunching and explains what it found in plain English.

What Copilot can do:

- Look at a dataset and flag trends or anything that looks unusual
- Build formulas based on a plain-English description of what you need
- Create charts and PivotTables on request
- Give you a summary of a spreadsheet so you can see the big picture quickly

Real example:
A rural services business tracks jobs, costs, and hours across multiple sites. Instead of building reports by hand each week, Copilot pulls together a summary showing which jobs are running over budget and which team members have capacity. A job that used to take a couple of hours now takes about ten minutes.

PowerPoint - Presentations without the pain

Copilot won't win any design awards, but it'll get you to a solid starting point fast, and save you hours in the process.

What Copilot can do:

- Turn a Word document or a rough brief into a draft presentation with slides
- Summarise a presentation into key talking points
- Write speaker notes for each slide
- Tidy up and reformat an existing deck

Real example:
You've got a board update due next week. Drop your project notes into Word and ask Copilot to turn them into a 10-slide deck. You spend 20 minutes tweaking it rather than three hours building from scratch.

Calls and Voicemail - Cutting through the noise

If your team handles a lot of phone calls, AI-powered transcription is one of the quickest wins going.

What Copilot can do:

- Transcribe voicemails and pull out the key information automatically
- Triage messages so urgent ones go to the top of the list without anyone having to listen to everything
- Log call details directly into your ticketing or CRM system
- Summarise call history before a follow-up conversation

Real example:
A health organisation gets dozens of voicemails every day. Instead of staff listening to every message and manually working out what to do with each one, AI transcribes them, pulls out the key details, and flags anything urgent. What used to take a good chunk of the morning now gets done in a few minutes.

Power Automate - Stop doing things manually

Power Automate sits alongside Copilot and lets you build workflows that run on their own. You don't need to know how to code to set them up.

What you can automate:

- Staff onboarding checklists that kick off automatically when someone new starts
- Leave requests that go to the right person and send a confirmation back without anyone chasing anything
- Client feedback forms that log responses into a spreadsheet as they come in
- Invoice reminders that go out on schedule without anyone having to remember

Real example:
Businesses across Central West NSW are already using these tools to handle staff onboarding, run site audits from their phones, keep certifications up to date, and track timesheets and client feedback, all without the usual back-and-forth.

Client Communications

Copilot helps your team communicate faster and more consistently, without everyone reinventing the wheel every time.

What Copilot can do:

- Write client emails and proposals from a few rough notes
- Make sure everyone on the team is responding to similar queries in the same way
- Pull together a client's history before you pick up the phone
- Turn notes from a site visit into a tidy, professional client report

ew minutes.

HR and Onboarding

There's a lot of admin that goes with hiring and onboarding people. Copilot handles the document side of it so your time goes on the people side.

What Copilot can do:

- Write a job ad from a position description
- Put together onboarding checklists and welcome documents
- Summarise training materials into something people will actually read
- Draft performance review templates and structured feedback frameworks

A few things worth getting right before you dive in

1. **Sort your data and permissions first**
   Copilot can access your SharePoint, your emails, and your documents. Before you switch it on, ask yourself: "If AI could see everything in our systems right now, would that be okay?" If the honest answer is "probably not", sort that out before you start. That's exactly the kind of thing we help with.

2. **Train your people properly**
   This includes whoever reviews and approves work, not just the people producing it. A half-day of practical training makes a real difference to what your team actually gets out of Copilot day to day.

3. **Keep humans in the loop**
   AI speeds things up, but someone still needs to read the output before it goes to a client or gets acted on. Don't let Copilot have the final say.

4. **Start with one or two use cases**
   Pick the thing that takes the most time and causes the most frustration. Start there, get comfortable, then keep going.

Where to start based on your role

Role	Best place to start
Business Owner	Meeting summaries and email drafting
Office Manager	Workflow automation and document creation
Sales or Account Manager	Proposal drafting and email follow-ups
Finance	Excel data analysis and report summaries
HR	Job ads, onboarding documents, and policy drafts
Tradesperson or Site Manager	Voicemail transcription and site report generation



The businesses that come out ahead won't just have access to good AI. They'll have teams who know what to do with it.

Want to see where Copilot can save your business the most time?

We work with businesses across Orange, Bathurst, and Dubbo to get Microsoft 365 and Copilot working the way it should.

If you want a no-pressure chat, a training session for your team, or help getting your data in good shape before you start, we're here for it.

Book a free consultation: **www.coltoncomputers.com.au/get-in-touch**

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