

SIME MOTORS LEADERSHIP PROGRAMME

Microsoft 365 Copilot

The Leadership Playbook

From Information to Action — your complete step-by-step reference from the two-day programme

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All resources: <https://arif.works/sime/>

How to Use This Playbook

This playbook turns everything covered across the two training days into a practical reference you can keep beside you while you work. It is organised the way you use Copilot, not the way it was presented:

- Part 1 — Foundations: what Copilot is, the settings that matter, and how to set it up once so it serves you every day.
- Part 2 — The Prompt Formula: the C-G-S-E method with ready-to-use leadership prompts.
- Part 3 — Copilot in the Productivity Apps: Word, Excel, PowerPoint — drafting, analysis and decks.
- Part 4 — Copilot in the Flow Apps: Calendar, Outlook, Teams and OneNote — meetings, mail and notes.
- Part 5 — Automate the Routine: Prompt Lab, Prompt Scheduler, and agents (Researcher, Analyst, Facilitator).
- Part 6 — Your 30-Day Plan: turning today's practice into a daily operating rhythm.

TIP Every shaded orange box is a prompt you can copy, adapt and run as-is. Replace anything in [brackets] with your own names, projects and files.

Part 1 — Foundations: Set Up Once, Benefit Daily

1.1 What Microsoft 365 Copilot Is

Copilot is an AI assistant built into the Microsoft 365 apps you already use — grounded in your organisation's own data, with the permissions you already have. It combines four ingredients: Large Language Models + Microsoft Graph (your data) + Microsoft 365 apps + the internet.

Access it anywhere you work: m365.cloud.microsoft, or the Copilot button inside Word, Excel, PowerPoint, Outlook and Teams.

The four ground rules

- Copilot is not autopilot — you are the pilot. Be specific about what you want; use plain language. You keep the judgment and the final call.
- Your data is secure and private — Copilot uses and shows only data you already have access to.
- Check your facts — AI-generated content can be incomplete or hallucinated. Review before you rely on it.
- Keep, modify, or disregard — treat every output as a first draft. Revise and refine your prompt.

TIP Documents must be stored in the cloud (OneDrive or SharePoint) for Copilot to see and reference them. A file on your desktop is invisible to Copilot.

1.2 One-Time Setup (15 Minutes That Pay Off Forever)

Do these once and every future interaction becomes more personal, more relevant and faster.

In Copilot Chat (m365.cloud.microsoft → Settings → Personalization)

1. Turn ON Custom Instructions and describe how you want Copilot to respond — your role, your markets, your preferred output style.
2. Turn ON Saved Memories so Copilot remembers details between conversations.
3. Check Work IQ is ON (default) — it is the brain that helps Copilot find information across your company systems.
4. Know your Web Search toggle (Settings → Advanced): ON for current outside information; OFF when you want answers grounded only in your work data.

EXAMPLE — CUSTOM INSTRUCTION

Remember that when I write business emails, I always want three bullet points, a clear subject line, and a call to action.

EXAMPLE — MEMORY

Remember that I'm working on Project ORION, and I prefer suggestions to be relevant to that.

Choose your AI Mode

Copilot lets you choose how the AI thinks. Use the mode selector at the top of Chat:

Mode	When to use it
Auto	Let Copilot decide the best way to answer (good default)
Quick Response	Fast answers for simple questions
Think Deeper	More detailed reasoning for complex tasks
GPT	Everyday work, creativity, problem-solving
Claude	Reading, summarising and analysing long documents

Add capabilities when you need more

Use the + menu in the prompt box to Add work content, Upload images and files, Attach cloud files, or Add capabilities. Type @ to chat with a specialised agent such as Researcher or Analyst (covered in Part 5).

Part 2 — The Prompt Formula: C · G · S · E

The single highest-impact skill from the programme. Every strong prompt has four ingredients:

Ingredient	Question it answers	Example fragment
C — Context	Who are you & why are you asking?	"I am a Country Managing Director preparing for a business review..."
G — Goal	What do you want Copilot to do?	"Summarise the key operational and sales trends..."
S — Source	What data should Copilot use?	"...using the attached operational reports and sales dashboard"
E — Expectation	How should the answer be presented?	"Provide a board-ready summary with top risks and recommended actions"

TIP Type / in the prompt box to attach files, people, meetings and emails instantly — this is how you give Copilot the S (Source) without leaving your sentence.

2.1 Leadership Prompt Library

Three worked examples from the training, ready to adapt to your function:

Business performance review (Managing Director)

PROMPT

I am a Country Managing Director preparing for a business performance review with senior leadership (C). Summarize the key operational, sales, and customer service trends impacting business performance during the quarter (G) using the attached operational reports, sales dashboard, and customer satisfaction survey results (S). Provide a board-ready summary with top opportunities, top risks, and recommended actions for the next quarter (E).

Dealer performance review (Sales leadership)

PROMPT

I am a Sales Manager preparing for a monthly dealership performance meeting (C). Compare vehicle sales performance across regions and identify the top-performing and underperforming dealerships (G) using the attached Sales Dashboard (S). Provide a summary of key insights and a ranked table showing sales volume, growth rate, and recommended actions (E).

Monthly financial performance (Finance)

PROMPT

I am a Finance Business Partner preparing for an executive business review (C). Analyze revenue, operating costs, and profitability across business units and identify the largest variances from budget (G) using the attached monthly financial results (S). Present an executive summary followed by a variance analysis table and recommended management actions (E).

Iterate like a leader

The first output is a draft, not the destination. Coach it:

- “Make it firmer.” • “Shorten to 5 sentences.” • “Turn this into a table.”
- “Rewrite for a board audience.” • “Add a clear ask and a deadline.”

Part 3 — Copilot in the Productivity Apps

3.1 Copilot in Word — First Draft in Minutes

Set up for success

1. Switch on AutoSave so Copilot always works with the latest version of your file.
2. Pin Copilot (Dock / Move to ribbon) where it's most convenient.
3. Choose Allow editing (Copilot can edit the document directly) or Chat only, depending on how much control you want.
4. Pick the AI model (Auto / Claude / GPT) from the ... menu, or let Auto decide.

Use it

- Draft from a prompt plus a referenced file: “Draft a business update on [topic] using /[document]”.
- Iterate: rewrite sections, change tone, tighten, expand, summarise for a different audience.
- Open Copilot's response in an editable page to review and refine before inserting into the document.
- View and continue previous Copilot conversations to keep context across sessions.

PROMPT — BOARD-READY DOCUMENT

Draft a 1-page business update on [topic] using /[reference document]. Structure: context, performance, risks, decisions required. Formal but plain language. Then summarise it in 3 sentences so I can pressure-test whether the argument lands.

3.2 Copilot in Excel — From Data to Insight

Set up for success

1. Open Customize Copilot (Personalization) and record your preferred formats — e.g. “Always format currency with a \$ prefix and two decimal places; use date format DD-MMM-YYYY.”
2. Use Plan mode (“Come up with a plan before editing”) so Copilot outlines its recommendations and editing strategy before touching your workbook.
3. Toggle Web ON only when you need outside information; keep it OFF to focus Copilot on your company data and workbook content.
4. Turn on Skills (Manage Skills) to give Copilot a specialist role — e.g. Finance — for more relevant help.

Use it

- Add formula columns by describing them in plain language (margin %, YoY growth) — no formulas typed.
- Analyse and highlight trends and outliers; ask “which outlets are >10% below target?”.
- Create pivot-style summaries and charts by prompt.

PROMPT — KPI REVIEW

Analyse this data. Show performance by [brand/outlet/unit] against target, add columns for YoY growth % and margin %, highlight anything more than 10% below target, and create a chart of the 6-month trend. Then summarise the 3 most important insights in plain language I can say in a leadership meeting.

3.3 Copilot in PowerPoint — From Paper to Podium

The golden pattern

Word first, PowerPoint second. Draft the narrative in Word, then let Copilot turn it into a deck — the fastest route to a strategy briefing.

Use it

- Create a presentation from a Word document: “Create a presentation from /[document]”.
- Choose a Skill for specialised tasks: Visualize this slide, Review this presentation, Prepare for questions.
- Select brand to apply the Sime brand kit so every deck is on-brand from the start.
- Tighten wordy slides, restructure, and generate speaker notes by prompt.

PROMPT — LEADERSHIP DECK

Create a presentation from /[Word briefing] for a 10-minute leadership update. Max 6 slides. Add speaker notes in a calm, in-control tone. Then tighten slides 2–3 to one message per slide and move detail to the notes.

Part 4 — Copilot in the Flow Apps

4.1 Calendar — Meetings That Organise Themselves

Step by step

1. Creating an event? Ask Copilot to Draft an agenda for me — a professional agenda keeps participants focused and prepared.
2. Turn on “If conflicts arise, let Copilot reschedule this event” — when attendees are unavailable, Copilot finds and schedules a better time automatically.
3. In Meeting options, enable Recording & transcription so Copilot can capture the conversation and produce summaries, notes and action items.
4. Turn on Facilitator — Copilot joins the chat, updates the agenda, takes notes and keeps the meeting organised. Set the spoken language; Interpreter can translate in real time.
5. In Outlook Settings → Copilot → Calendar instructions, create standing rules for how Copilot manages your calendar; review its actions any time under View actions.

PROMPT — SCHEDULE BY SENTENCE

Create a 1:1 meeting with [name] for next week on Tuesday/Wednesday/Friday between 10:00 and 10:30 am, with an agenda.

4.2 Outlook — Inbox Under Control

Step by step

1. Summarise: open a long thread and use Summary by Copilot to get key points, action items, deadlines and outstanding issues without reading everything.
2. Draft: use Help me write (Ctrl+L) — Copilot drafts the email, subject line and structure; then coach tone and length.
3. Prioritize: Settings → Copilot → Prioritize — let Copilot mark high-priority mail on arrival based on people, topics and projects; add your own high-priority rules (e.g. “It’s about Project [name]”).
4. Draft instructions: Settings → Copilot → Draft instructions — set your preferred tone, greeting and sign-off once (e.g. “Always draft in professional tone, concise, greet with Good Morning/Afternoon, end with Thank you in anticipation”) so every AI draft sounds like you.

PROMPT — THREAD TO ACTION

Summarise this thread and its attachments. What exactly are they asking for? Draft a reply that acknowledges the issue, states our position on [X], commits to a plan by [date], and proposes a call. Professional, firm tone. Then: make it shorter — executives read this on their phone.

4.3 Teams — Your AI Meeting Assistant

During the meeting

1. Start transcription (More → Record and transcribe) so the conversation is captured as text — the “AI in this meeting” indicator shows participants.
2. Open Copilot in the meeting toolbar and ask questions live — even if you joined late.

Ready-made in-meeting prompts from the training:

What you need	Ask Copilot
Catch up	"What have I missed?" / "Summarize the discussion."
Action items	"What actions were assigned and to whom?"
Decisions	"What decisions have been made?"
Risks	"Are there any unresolved concerns?"
Recap	"Create a meeting summary with next steps."
Specific topics	"What was said about the budget?"
Follow-ups	"Create a list of follow-up actions from this meeting."

After the meeting

- Open the Recap tab — Copilot automatically assembles summaries, notes, transcript, shared files, attendance and key discussion points.
- Meeting Notes (Loop) gives everyone a shared workspace for agendas, notes, decisions and action items across the meeting lifecycle.

4.4 OneNote — Notes Into Plans in Seconds

- Use Copilot in OneNote to turn raw notes into summaries, action items, plans and organised content.
- Meeting pages link to the Outlook item, attendees and date — ask Copilot to structure objectives, updates, challenges and next steps.

PROMPT — NOTES TO PLAN

Turn these notes into: 1) a five-line summary, 2) a table of action items with owners and dates, 3) an agenda for the follow-up meeting.

Part 5 — Automate the Routine

5.1 Prompt Lab — Never Lose a Good Prompt

- Save your best prompts with the bookmark (Save prompt) icon; browse templates by topic (Analyze, Ask, Assist, Catch up...).
- Build your personal library — and contribute your best prompt to the shared Sime Motors prompt library.

5.2 Prompt Scheduler — Copilot on a Timer

Schedule any prompt to run automatically at the right time using the clock (Schedule this prompt) icon. The pattern from the programme:

- Every morning — Copilot tells me what matters.
- Every afternoon — Copilot prepares the emails I need to send.

SCHEDULED PROMPT — MORNING CHIEF OF STAFF (7:30 AM)

Act as my Chief of Staff. From my unread emails, Teams messages and today's calendar: (1) Summarise what needs my decision, reply, or is FYI — flag anything from [key people]. (2) List today's meetings with a mini-brief each: prior context, open actions, 3 questions to ask; draft an agenda for any meeting lacking one. (3) Draft replies for straightforward emails and delegation notes for items my team should own. Start with a 5-line "Top of the Day": top 3 priorities and the one thing I must not miss. Keep it scannable in 5 minutes.

SCHEDULED PROMPT — END-OF-DAY SWEEP (5:30 PM)

Act as my Chief of Staff for my end-of-day sweep. From today's meetings, emails and chats: (1) List decisions made, my open commitments, and unanswered messages grouped by urgency. (2) Draft replies for must-answer items, meeting recap messages with action items and owners, and polite nudges to anyone who owes me something. (3) Preview tomorrow: meetings, genuine pre-work (max 3 items), a 5-line brief on the most important one, and my top 3 priorities. Open with a 5-line "Day in Review" ending with the one thing I must do before logging off.

5.3 Agents — Specialists on Demand

Type @ in Copilot Chat to bring in a specialist:

Agent	What it does	Example use
Researcher	Multi-step research with expertise on demand	"Research EV adoption trends in MY/SG/TH and implications for a multi-brand premium retailer"
Analyst	Complex data analysis over files in many formats	"Based on the quarterly budget, show me suggested areas to reduce operating expenditures"
Facilitator	Live meeting notes, action items and agenda-keeping in Teams	Turn on in Meeting options before an important review
Word / PowerPoint Agents	Draft documents and build presentations end-to-end	"Create a PowerPoint presentation from our quarterly report including a visual of key metrics"

Part 6 — Your 30-Day Operating Rhythm

The programme in four habits:

#	Habit	What it means
01	Mindset — Copilot is not autopilot	You keep the judgment and the final call. Check facts; keep, modify or refine.
02	Trust — Grounded in your own data	Answers come from content you already access. Work IQ and web search shape what Copilot sees.
03	Craft — Prompt like a pro	Context, Goal, Source, Expectation. Memory and custom instructions keep your style.
04	Impact — About an hour back a day	Proven in the executive scenarios. Scale with Prompt Lab, Scheduler and agents.

Your first week

1. Complete the one-time setup in Part 1 (custom instructions, memory, Outlook draft instructions).
2. Schedule the Morning Chief of Staff prompt — let it greet you tomorrow.
3. Run one C-G-S-E prompt on real work in each app you use daily.
4. Save your three best prompts to Prompt Lab.

Weeks 2–4

1. Add the End-of-Day Sweep scheduled prompt.
2. Move three recurring tasks permanently to Copilot (e.g. meeting prep, inbox triage, first drafts).
3. Try one agent — Researcher or Analyst — on a genuine business question.
4. Contribute your best prompt to the shared Sime Motors prompt library.

TIP Pick one task this week and let Copilot help. Keep practising your prompts — fluency comes from repetition, not memorisation.

Resources

- All training resources: <https://arif.works/sime/>
- Copilot Chat: <https://m365.cloud.microsoft/>