Quick Tips for AI Productivity (Featuring Microsoft Copilot)

A Video Learning Program by ***Randy Dean, MBA, CVP:*** **The E-mail Sanity Expert®**

Note: This is the **video "time stamp" directory**, showing key moments in the video if you'd like to jump to specific content. **Recommended exercises** for program viewers are also called out for real-time skill development in Copilot and other AI agents.

2:17 Using AI to help with **drafting and correcting e-mail messages** – prompting and "re-prompting"

3:58 A little bit about **using Copilot "Coaching"** feature to improve your writing/composition skills in Outlook plus using *both Copilot and the Editor tools* in Word to improve your writing skills/quality

7:09 Using **"re-prompts"** to get closer to your writing style/"voice" as well as add more specificity

10:04 **Recommended Exercise:** Try prompting and re-prompting to create the draft for a new e-mail message – *maybe also try the Coaching and Editor tools?*

10:47 Why I believe one of the single most useful "practical/tactical" tools/capabilities of AI is simply helping you **get over "writer's block"**. LLMs: Large Language Models

12:14 A Quick PPT Tip! ***Shift-Function-F5***

12:55 More on **email composition "voice"** – a humorous (yet relevant) example, including an example using the web browser version of Copilot (plus a bit about Copilot Pro – built right into several Microsoft 365 tools: Outlook, Word, etc. vs. just using the online version)

15:55 Copying output from **web Copilot into Outlook**

18:50 Using Copilot to **summarize *(wordy, long)* e-mails**, including the built-in Copilot "Summarize" button/feature

20:22 An important *"watch out"* when using browser versions of AI tools – be careful posting potentially confidential data/messages into browser Ais

21:31 When I believe using this email summary capability can REALLY help busy professionals **better manage their email/input overload** *(as well as what you lose/what you risk using it!)*

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23:00 Using this **AI summary capability in other 365 tools**, including MS Word, PowerPoint and even Excel

24:37 How Copilot **"cites" the source** text with number tags

26:06 **Recommended Exercise:** Test the summary capabilities in Outlook e-mail, MS Word, and even Adobe Reader

27:20 Another *"watch out"* – what you lose when using these AI summary capabilities: details, depth and nuance

29:00 Creating first **drafts of new documents in Word** – the "Performance Appraisal" example and how it can save SO much time! This includes where to use Copilot/prompts within MS Word and using re-prompts to refine information/add more content

33:49 **Recommended Exercise:** Test creating and refining a first draft in a Word Document

34:03 Using Copilot and other **AI tools for initial research** on just about any topic – including the big "watch out"/risk of using AI for upfront research and related content creation (internal vs. external use/copyright ownership) and related legal/litigation risks

36:27 **Recommended Exercise:** Find out if your company has a stated AI Usage Policy; if so, read it! If not, ask why.

37:00 How to actually **use AI to research a topic** and generate a document draft in Word

39:18 A little *technical watchout*: if you want to keep something that is generated by your AI, make SURE that text is not still highlighted before you enter another prompt. *(This is the global jet streams example, and also shows how AI agents aren't "quite there yet" when it comes to connecting separated prompts/actions. The AI agents can "forget" what they were just doing seconds ago.)*

43:00 Using Copilot to **create new PowerPoint presentations**, including several standard options of the kinds of things Copilot can do in PowerPoint

45:00 The example shared on using Copilot to create a standalone PowerPoint presentation on ***"Best Ways to Use Copilot"***

46:55 A little bit on the **PDF AI summary tool** now built into *Adobe Reader*

48:12 **Recommended Exercise:** Try creating a new PowerPoint presentation using Copilot, including testing some re-prompts to refine the content

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48:45 An important point to remember whenever you are using AI related to the output generated by AI and ***YOUR responsibility*** with that created output

51:05 One of the BEST uses of AI – **plan generation AND plan review and improvement** (on just about any project, activity, or task!) And, how it can help reduce internal "blind spots" and project/team "group think".

52:41 How I would both work with my team but also incorporate AI agents to **help build and improve my plans** and planning for projects, activities, events, and tasks

53:42 A *very personal example* of how I used AI to help me build a workout/fitness plan – an example using Google's Gemini AI tool, including even image generation on specific tips

57:12 **Recommended Exercise:** Test the plan research/creation capabilities of your favorite AI agent on any personal or professional project/activity/task of your choice

58:50 Using AI to provide published book or article summaries: the example featuring one of my favorite books: ***Don Aslett's Clutter's Last Stand*** – an example using the Copilot web browser AI tool

1:00:55 A quick discussion on **the ethics of using AI for reviews** of published/copyrighted works

1:02:36 **Recommended Exercise**: Ask your AI agent to summarize a nonfiction book you have already read – try re-prompting to go deeper into a content area

1:03:00 A personal example of how I used the **AI-generated raw transcripts** from my YouTube videos and Copilot's summary capabilities to quickly create new and very useful **collateral materials and summary handouts** for my programs

1:05:28 A quick point about how people are getting very creative at **using multiple AI agents** together to do some truly breakthrough things – creation of AI avatars, AI voice mimics, combinations to create AI videos using both (plus the ever increasing risk of "true to life" deepfakes

1:07:56 How you can **quadruple your daily "free" prompts** – surfing between multiple AI agents – *Copilot, Gemini, ChatGPT – even Claude* -- and more

1:08:48 **Recommended Exercise:** Test a similar prompt in all four of the major general AI Agents: Copilot, Gemini, ChatGPT, and Claude. Notice similarities and differences in outputs.

1:09:10 Some quick tips on using **Copilot in Excel**, including creating a PivotTable in a new spreadsheet tab

1:10:44 How Copilot in Excel can **suggest formulas** for actions you'd like to try within a spreadsheet when you don't know the formulas yourself

1:11:50 How Copilot can do some **analysis of the data**/analyze trends in the data, including **creating a line chart** from the data that was analyzed

1:12:53 **Recommended Exercise:** Immediately following completion of this program, if you are a heavy Excel user, go to YouTube and search "Best Copilot Tips in Excel" and "Best Copilot Tips in ChatGPT" and enhance your training in this specific area.

1:13:12 A listing of some of the **key Copilot in Excel capabilities** I found while searching YouTube

1:14:26 A quick discussion about the **creation of images in Copilot AI** and other AI tools *(and why I'm ethically VERY conflicted about this capability)*

1:16:45 A link to an **online resource detailing numerous 3rd party AI tools** that can do very specific AI-powered actions, from productivity tools to book/e-book creation to avatar/video creation to setting up online stores to automated software coding/creation and more

1:18:38 ***Program Close:*** **A List of MY Favorite AI Uses, Not Just in Copilot**

1:20:23 **AI Capabilities in Copilot/365/Power Automate** that are a bit beyond my skill level right now (but hopefully not for long) – **creation of my own AI chatbots & agents** for my business to automate client and customer response and improve customer service

1:22:00 **Final Recommended Exercise:** Send me YOUR favorite uses in Copilot and other AI tools that I didn't mention in this program

NOTE: This video learning program is one of ten planned videos in Randy's New **Mastering Microsoft 365 Video Learning series**, in production now. You can learn more about this new video series, including how to get full access to this video on Microsoft Copilot ***right now,*** by visiting the program "Pre-launch" information page **right here on Spotfund.**



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