

Draft and Refine Business Content

Turn one idea into client-ready material with Microsoft Copilot.

~25 MIN · Word · Researcher agent · PowerPoint · Outlook

Scenario. You are the marketing coordinator at **Oasis Greenhouse Co.**, a Dubai-based vertical-farming company launching an AI-powered crop-yield forecasting platform. You must produce a case study, supporting research, a short deck and a status email for your manager.

OBJECTIVES

By the end of this workshop you will be able to:

- Draft and refine a document with **Copilot in Word**.
- Gather trend research with the **Researcher agent** and verify it.
- Convert a Word document into slides using the / file reference in **Copilot in PowerPoint**.
- Draft and coach an email in **Copilot in Outlook** using attached sources.

BEFORE YOU START

- Microsoft 365 account with a **Microsoft 365 Copilot** license.
- Word, PowerPoint, Outlook (desktop or **m365.cloud.microsoft**) and the Copilot app at **copilot.cloud.microsoft**.

Modes to know: in the Copilot pane, **Allow editing** lets Copilot change your file directly; **Chat only** answers questions without touching it. Keep the **model selector** on **Auto**.

YOUR TASKS

1 Draft content in Word

Where: Word > **Copilot** pane (bottom right of the document).

1. Create a blank Word document and open the Copilot pane.
2. Switch to **Allow editing** mode.
3. Paste Prompt A and let Copilot generate the first draft.
4. Select one paragraph at a time and use Prompts B and C to refine it.
5. Save the file to OneDrive as **Oasis Case Study**.

PROMPT A - FIRST DRAFT

Draft a one-page case study about Oasis Greenhouse Co., a vertical-farming company that uses an AI-powered platform to forecast crop yields. Include the sections Introduction, Challenge, Solution and Results. Audience: prospective grocery-chain buyers.

PROMPT B - CONCISE

Shorten this paragraph without losing the key facts.

PROMPT C - TONE

Rewrite this paragraph in a more confident, client-facing tone.

Checkpoint: Your document has the four sections and at least two paragraphs refined by prompt.

2 Add research with the Researcher agent

Where: Word Copilot pane > + in the prompt area > **Researcher**, or Microsoft Copilot app > **Researcher** (left navigation).

1. Send Prompt D. If Researcher asks clarifying questions, answer them.
2. Narrow the scope with Prompt E.
3. Ask for a short version with Prompt F and copy it into the **Results** section of your document.
4. Use Copilot in Word to blend the pasted text smoothly into the paragraph.

PROMPT D

I'm preparing a case study for grocery-chain buyers. Research current trends in AI-powered crop-yield forecasting for indoor farming, including adoption rates and key statistics, and write a structured report.

PROMPT E

Focus on the last 12 months and on the Gulf region where possible.

PROMPT F

Summarize the key finding in two sentences I can use in the Results section.

Tip: The Researcher agent combines your work files and the public web. It cites its sources - always open at least one.

Checkpoint: You verified one statistic against its cited source before keeping it.

3 Turn the document into a presentation

Where: PowerPoint > **Copilot** pane.

1. Create a blank presentation, open the Copilot pane and choose **Allow editing**.
2. Type *I* and select your **Oasis Case Study** document, then send Prompt G.
3. Make the bullets shorter with Prompt H, then generate a visual with Prompt I.
4. Save as **Oasis Case Study - Overview**.

PROMPT G

Create a 4-slide presentation based on /Oasis Case Study with the slides Introduction, Challenge, Solution and Results.

PROMPT H

Make the bullet points shorter and action-oriented.

PROMPT I

Create an image of a modern indoor farm monitored by AI dashboards for the title slide.

Checkpoint: Four slides exist, bullets are short, and one slide has a generated image.

4 Share a status update

Where: Outlook > new email > **Copilot** pane.

1. Open a new email and the Copilot pane.
2. Select **Add and manage sources** and attach both files you created.
3. Send Prompt J, then use **Get coaching** to review tone and clarity.
4. Apply the suggestions you agree with. Send the email to **yourself** (or your trainer).

PROMPT J

Draft an email to my manager saying the Oasis Greenhouse case study and overview deck are ready for review. Mention the two attached files and ask for feedback by Friday.

Checkpoint: The email mentions both files and you applied at least one coaching suggestion.

FINAL CHECKLIST

- **Audience:** tone, length and detail fit the reader. **Goal:** the content supports a clear next step.
- **Format:** the right deliverable for the use. **Accuracy:** facts, figures and citations are verified.

REFLECT

Which step saved you the most time? What did Copilot get wrong that you had to correct?