

7 steps to start with Copilot

Starting with Copilot today? Skip the detours. These seven steps build the habits that make everything else easier — from day one. Set up personalisation first, use it in every meeting, schedule the prompts you repeat, and block time to explore real work. Copilot rewards the curious, not the occasional visitor.

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Personalise first

Before anything else, tell Copilot who you are: your role, your priorities, how you communicate, what output you expect. Ten minutes that change everything — a Copilot that knows you beats one that doesn't.

SETUP · „I'm a senior manager in consulting. I prefer concise, direct language. I always want action items at the end of meeting summaries. If you're unsure, ask me.“

Use it in every meeting

Meetings are the gateway to Copilot. Activate the meeting agent before the meeting, not after: it drives the agenda, takes structured notes, captures action items. And clear agendas and goals make the output better.

PRO TIP · „Better meeting hygiene means better output — Copilot even drafts the agenda for you.“

Create your shortcuts

A hidden gem: add shortcuts to your personalisation to speed up your most frequent interactions. Define them once, reuse them in every chat.

SETUP · „#sum = summarize this document, key points as bullets plus a three-sentence executive summary · #int = internal answer, short and personal · #ext = external answer, friendly and clear · #de-en = translate German to English“

Start and end your day

Before you open a single email, let Copilot set up your day. Five minutes every morning — a compounding effect that turns chaos into clarity.

„What should I focus on today? Catch me up on what I missed. What meetings do I have, and what do I need to prepare?“

Build your first agent

Watch your own repetition: the prompt you type for the third time, the same five-step process for a deliverable — those patterns are your first agents. You don't need to be a developer.

PRO TIP · *„Start small, start personal, think bigger later — your repeated workflows are the agents waiting to be built.“*

Set up your sources

The pace of innovation is intense — if you're not intentionally staying current, you're falling behind without noticing. Follow a few quality voices, subscribe to the roadmap, join a community.

PRO TIP · *„Make staying informed a habit, not an accident.“*

Block time to explore

One to two hours a week — not tutorials, but real use cases, real data, real workflows. Pick one process from your actual work, open Copilot, start experimenting. Copilot rewards the curious.

PRO TIP · *„There's no shortcut for habit change — and the pre-investment pays off massively.“*

A companion, not a one-time try

Copilot is not a tool you try once. It's a companion you grow with. The more you invest, the more it gives back — and the best time to start is today.