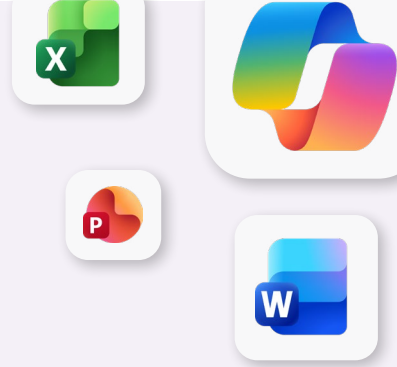




Copilot for project managers: The essential cheat sheet

Effective project management is crucial for successful outcomes. Microsoft 365 Copilot streamlines this process with powerful AI-driven assistance.

This essential cheat sheet is designed specifically for project managers using Microsoft 365 Copilot. It offers invaluable Copilot prompts to enhance productivity and efficiency.

By leveraging Copilot, you can automate tasks, create detailed documents, and analyse data effortlessly. Let's explore how these prompts can elevate your project management experience.



Copilot in PowerPoint

Copilot in PowerPoint generates slide drafts from prompts or documents, enabling users to quickly create a structured initial draft. Outputs may require manual refinement for branding, storytelling, and restructuring.

KEY FEATURES

- ✓ Project status deck generation
- ✓ Stakeholder-ready summaries
- ✓ Agentic deck building
- ✓ Narrative restructuring
- ✓ Formatting consistency at scale
- ✓ Document-to-slides conversion
- ✓ Narrative Builder

EXAMPLE PROMPTS

- Create a 7-slide project status update for the senior leadership team. Include: headline progress, milestones achieved, risks, mitigation actions, and 3 decisions needed. Use a concise, data-driven tone.
- Create a 10-slide summary of this project plan, highlighting milestones and risks for steering committee approval.
- Standardise all fonts, font sizes, and bullet styles across this deck. Use only the existing template layouts. Maintain brand colours. Do not override fonts.

STRENGTHS

- Rapid first drafts: Can help create a first draft presentation quickly.
- Document-to-slides conversion: Copilot can create a presentation from a Word document. (Copilot works best with Word documents smaller than 24 MB).
- Agentic multi-step actions: Agent Mode co-edits presentations, responding to prompts and making reasoned changes.
- Style alignment: Using "Edit with Copilot," fonts, sizes, and bullet styles can be standardised across all slides at once, eliminating manual adjustments.
- Research-to-deck conversion: Copilot Researcher reports can now be converted directly into a PowerPoint, PDF, infographic, or audio overview with a single click.

LIMITATIONS

- Prompt length cap: The 2,000-character prompt limit makes it tough to include the kind of rich context business presentations often need.
- Limited deep editing: Copilot is helpful for small edits but not for deeper changes; it can rewrite sentences and make basic layout tweaks but does not rethink or reorganise slides in a meaningful way.
- No standalone design intelligence: Copilot works within PowerPoint, not beyond it; you are still dealing with fixed layouts, manual positioning, and the usual slide-by-slide editing process.
- Human review required: Copilot-generated content can be useful as a starting point, but users should review facts, data, structure, and tone before sharing externally or using the output for decisions.



Copilot in Excel

Copilot in Excel is an AI assistant that enhances Excel with natural language processing and automated data analysis. Users can perform complex tasks using conversational commands without needing advanced knowledge of Excel formulas or functions within Microsoft 365. For deeper analysis, users can ask Copilot to use Python.

KEY FEATURES

- ✓ Project data analysis & insights
- ✓ Automated chart & PivotTable creation
- ✓ Multi-step authentic task execution
- ✓ Data classification & prioritisation
- ✓ Cross-app reporting
- ✓ Natural language querying of project data
- ✓ Conditional formatting on request
- ✓ Anomaly detection & root-cause prompts
- ✓ Personalisation & workbook rules

EXAMPLE PROMPTS

- Create a detailed project plan from this list of tasks and deadlines, sequence the tasks, and estimate completion times.
- Add a column to compare the current date with the Due Date column and label each row as 'On Track', 'At Risk', or 'Overdue'.
- Recap the last three status updates for this project and highlight any recurring issues.
- Add a column that calculates budget variance between Planned Cost and Actual Cost and highlight in red where variance exceeds 10%.

STRENGTHS

- Natural language data analysis: Users can ask plain-language questions about data and receive insights as charts, PivotTables, summaries, trends, or outliers.
- Formula generation & explanation: Can create new columns and rows that perform calculations based on existing data and can also explain how each formula works.
- Agentic multi-step automation: Agent Mode in Excel is an agentic workflow where Copilot plans, executes, iterates, and validates multi-step spreadsheet tasks, building tables, writing formulas, producing charts, and checking results as it goes.
- Data import & organisation: Copilot can help import data from the web, saved files in OneDrive or SharePoint, or communications from within an organisation, and can highlight, sort, and filter data with custom filters.
- Dynamic outputs: Results remain live, so when underlying data changes, AI-generated outputs update automatically, eliminating the need for manual refreshes.
- Personalisation rules: Users can define natural-language formatting, naming, and reporting standards that apply throughout the workbook.

LIMITATIONS

- Requires table format: Copilot cannot effectively process data in standard cell ranges or complex spreadsheet structures that don't conform to table formatting.
- Storage and file requirements: Copilot in Excel mainly supports files in OneDrive or SharePoint with AutoSave. Support for local files is expanding. Confirm tenant, channel, and licence before assuming access.
- Accuracy concerns: If Copilot suggests the wrong formula, it may be recognised by experienced users, but more junior team members might not notice.
- Struggles with complex structures: The system works best with simple, well-organised datasets; it struggles with multiple interconnected sheets, complex formula relationships, or non-standard data arrangements.
- Numerically unreliable: Microsoft itself warns that the Copilot function can give incorrect responses and shouldn't be used for calculations with compliance implications.
- Data handling limitations: It performs well with simple queries but is limited when handling messy or unstructured data, such as data cleaning, converting images or PDFs into structured tables, or complex data transformations.



Copilot in Word

Copilot in Word is an AI-powered writing assistant built into Microsoft Word that helps you create, edit, summarise, and refine documents using simple natural language prompts.

KEY FEATURES

- ✓ AI-powered drafting
- ✓ Reference other documents
- ✓ Document Q&A
- ✓ Idea generation
- ✓ Text-to-table conversion
- ✓ Writing coaching
- ✓ Track Changes integration
- ✓ Comment management
- ✓ Document structure tools
- ✓ Agentic multi-step editing
- ✓ Progress transparency

EXAMPLE PROMPTS

- Draft a project charter for [project name]. Include: project objectives, scope, key stakeholders, deliverables, timeline, budget, and success criteria.
- Create a RACI matrix for a [type of project] with the following roles: [list roles]. Format it as a table.
- Write a project scope statement for [project name]. Include in-scope items, out-of-scope items, assumptions, and constraints.
- Rewrite this status report in a more concise, executive-friendly tone. Remove technical jargon and lead with outcomes.
- Summarise this 20-page project report into a one-page overview with the three most important takeaways.

STRENGTHS

- AI-powered drafting: Generates complete drafts from simple or complex prompts.
- Summarisation: It can summarise long documents, emails, or reports into concise overviews.
- Rewriting & editing: Enhances tone, clarity, and style of content as needed, such as making the text more concise or adjusting the level of formality.
- Agentic multi-step actions: Copilot can take multi-step, app-native actions directly in documents, helping users move from first draft to final output faster while staying in control.
- Track changes & audit trail: Copilot can track changes when an audit trail is needed, supporting legal, finance, and compliance professionals doing high-stakes, detail-intensive work.
- Security & compliance: Copilot operates within the Microsoft 365 service boundary, honours data protection, access control, compliance capabilities, sensitivity labels, encryption, and Purview controls.
- File and document grounding: Copilot can use selected files and work content to ground responses, but limits vary by app, licence, and rollout channel. For best results, keep source materials focused and well-structured.
- Natural language interface: Intuitive for non-technical users, as it responds to plain-language prompts directly within the Word interface.

LIMITATIONS

- Word/prompt length cap: Copilot is currently limited in the number of words it can process per prompt.
- Potential inaccuracies: It writes fluent, grammatically correct text, but the content it generates can be inaccurate or inappropriate.
- Inconsistent formatting: Copilot may not always adhere to enterprise-specific templates, branding, or formatting standards.
- No real-time data access: Copilot does not access live databases, APIs, or ERP systems.
- License dependency: Requires an eligible Microsoft 365 subscription and appropriate Copilot licence; work/school accounts use Microsoft Entra ID.
- Ecosystem lock-in: Copilot is tightly integrated with Microsoft 365; organisations using hybrid or non-Microsoft tools may face compatibility limitations.
- No memory between sessions: Copilot cannot retain prior interactions, requiring repeated inputs each time a new session begins.
- Image generation availability: Copilot in Word can generate and insert images in some configurations, using Designer's Image Creator. Availability varies by platform, subscription, and organisational settings.
- Document length cap: Copilot for Word can only handle around 20 pages at a time, making it impractical for longer project documents.



Microsoft 365 Copilot

Microsoft 365 Copilot is a generative AI assistant integrated across Microsoft 365 applications, including Word, Excel, PowerPoint, Outlook, and Teams, that combines large language models, Microsoft cloud services, and user-approved organisational data to deliver context-aware assistance within familiar tools.

KEY FEATURES

- ✓ Create agents
- ✓ Meeting video and audio recaps
- ✓ Smart scheduling
- ✓ Cross-app agentic
- ✓ Copilot Notebooks for project grounding
- ✓ Copilot Chat across teams
- ✓ Memory & personalisation
- ✓ Implicit grounding & Glance Card
- ✓ File-to-summary sharing

EXAMPLE PROMPTS

- Summarise what I missed in today's project meeting. List key decisions made, action items assigned, and any risks raised.
- Find all open action items assigned to me across my emails and meetings from this week and list them by priority.
- Draft a project status update for the steering committee based on my last three project meetings and recent emails. Include: progress, risks, and decisions needed.
- Find a 1-hour meeting time next week that works for [names]. Send an invite with the agenda: project risk review.

STRENGTHS

- Deep M365 integration: Copilot operates inside the M365 productivity tools that business teams already use - Word, Excel, Outlook, PowerPoint, and Teams - making it the strongest enterprise execution AI inside Microsoft 365.
- Organisational context via Microsoft Graph: Copilot can ground responses in Microsoft Graph content the user has permission to access, such as emails, chats, documents, meetings, and related work context.
- Enterprise-grade security & governance: Copilot inherits your M365 security stack automatically, including role-based access controls, sensitivity labels, and data loss prevention, and won't expose confidential documents to users who can't already access them through existing permissions.
- Agentic multi-step automation: The 2026 update turns Copilot into an agent-style assistant that can run multi-step tasks across Word, Excel, PowerPoint, and Outlook, delivering deeper reasoning and more accurate responses for complex workflows.
- Memory & personalisation: Copilot remembers recent conversations and personal preferences to provide consistent follow-ups, with 'Version History' helping track changes and restore earlier outputs when iterating on results.
- Multi-model intelligence: Starting with Copilot Wave 3 in March 2026, Microsoft 365 Copilot offers access to multi-model selection, including Anthropic's Claude, a significant development for customers looking to harness agentic AI while preserving data security in M365.

LIMITATIONS

- Licence-dependent access: Access to Copilot features depends on account type, Microsoft 365 subscription, organisation settings, and whether the user has Copilot Chat Basic, M365 Copilot Basic, or M365 Copilot Premium.
- Data preparation overhead: Copilot requires more data preparation than general-purpose AI tools but delivers deeper organisational context in return; inconsistent permissions or poor file hygiene degrade output quality.
- Generic outputs without context: When context is unclear, Copilot answers become generic; outputs only become dependable when grounded in the right materials.
- Governance and oversight demands: Enabling Copilot in more apps accelerates workflows but also increases monitoring needs and potential regulatory exposure; organisations should adopt phased rollouts, define acceptable use policies, and invest in user education.
- Accuracy still requires human review: The real benefit depends on deliberate implementation; testing changes, aligning governance, and training users is essential to capture value while minimising harm.
- Oversharing risk: The biggest deployment blocker is uncertainty about what Copilot might surface when permissions and sensitive data controls are inconsistent across the organisation.
- External data requires integration: Copilot primarily operates on Microsoft 365 data via Microsoft Graph; accessing third-party systems (e.g. CRM, ERP) requires connectors or custom integration to bring that data into scope.

FAQ's



? Question: What's the difference between Copilot in Word/Excel/PowerPoint and Microsoft 365 Copilot?

App-specific Copilot features help you work inside each application, while Microsoft 365 Copilot orchestrates tasks across apps using your organisational context.

- Copilot in Word drafts, rewrites, and summarises documents, supports track changes, and can support reference of up to 20 files. File referencing limits vary by licence, app, and rollout channel.
- Copilot in Excel answers natural-language questions about data, generates and explains formulas, and can run multi-step spreadsheet tasks with Agent Mode, best with well-structured tables stored in OneDrive/SharePoint.
- Copilot in PowerPoint turns prompts or documents into slide drafts, applies bulk formatting, and assists with agentic editing, though deeper storytelling and design still require you.
- Microsoft 365 Copilot spans Word, Excel, PowerPoint, Outlook, and Teams, using Microsoft Graph to bring meeting context, files, and people together. It provides meeting recaps, smart scheduling, a Project Manager Agent, cross-app automation, and memory/personalisation for recent interactions.

? What licences and prerequisites do I need?

You need an eligible Microsoft 365 subscription and a paid Microsoft 365 Copilot licence; some features also require cloud storage.

- Copilot capabilities embedded in apps now require a paid Microsoft 365 Copilot licence; as of April 15, 2026, free users lost in app access.
- Word's Copilot notes has a dependency on a Microsoft 365 E3/E5 licence and Azure Active Directory.
- Excel Copilot only works with files saved to OneDrive or SharePoint/Teams (the Copilot icon is disabled for local files).

? How does Copilot handle security and permissions? Can it expose confidential data?

Copilot inherits Microsoft 365 security and respects existing permissions, but poor permission hygiene can still cause oversharing.

- It operates inside the Microsoft 365 trust boundary, preserving sensitivity labels and data loss prevention, and won't reveal content users can't already access.
- The main risk is inconsistent permissions and weak governance. Mitigate by using phased rollouts, setting acceptable use policies, educating users, and maintaining clean permissions and file hygiene.

? Does Copilot remember previous interactions? I see "no memory" in Word but "memory & personalisation" in Microsoft 365 Copilot, how do these fit together?

The in-document Copilot experience in Word doesn't retain session history, while Microsoft 365 Copilot provides short term memory and personalisation across conversations and agentic tasks.

- For best results in app-specific document work, provide relevant context each time; Microsoft 365 Copilot Memory may personalise broader Copilot Chat experiences where enabled.
- Microsoft 365 Copilot: remembers recent chats and preferences, supports Version History for iterating on outputs, and can maintain context across apps via Microsoft Graph.
- To sustain context, ground your work with Copilot Notebooks and by referencing the right files each time, and use Version History when refining outputs.

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Get in touch with us to learn how your organisation can use AI to reshape your project and portfolio management.

AI tools like Copilot are changing how PMOs plan, report, and make decisions, but knowing which features actually move the needle (and which are just hype) takes the right guidance. Our team can help you cut through the noise, identify quick wins, and build a practical roadmap for AI adoption across your project and portfolio environment.

📞 1300 SENSEI ✉ LetsChat@Sensei.Cloud 🌐 www.sensei.cloud