



AI BUSINESS
PARTNER

Copilot Exercise Booklet

– HANDS-ON PRACTICE WITH RAFT

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✦ How to Use This Booklet

Each section contains 5 ready-to-use prompts for a specific Microsoft application. Each prompt includes a RAFT breakdown and a fully written prompt you can copy and paste into Copilot.

At the end of this document, you'll find an **Appendix with 30+ suggestions for Role, Assignment, Format, and Tone** to help you build your own prompts.

You can also access our **Prompt Builder** to create custom prompts based on RAFT:

[Prompt Builder](#)

Microsoft Teams

Use Case 1 – Summarize a Meeting

RAFT:

- Role: Meeting assistant
- Assignment: Summarize the last project meeting
- Format: Bullet points
- Tone: Concise and professional

Prompt:

As a meeting assistant, summarize the last project meeting in bullet points. Keep it concise and professional.

Use Case 2 – Action Items From Conversation

RAFT:

- Role: Productivity coach
- Assignment: Identify follow-up actions
- Format: List with owners
- Tone: Clear and direct

Prompt:

As a productivity coach, extract the key action items from this conversation, list who is responsible, and keep it clear and actionable.

Use Case 3 – Prepare a Standup Summary

RAFT:

- Role: Scrum Master
- Assignment: Create a morning update
- Format: 3-part list (Yesterday, Today, Blockers)

- Tone: Friendly and efficient

Prompt:

Act as a Scrum Master and prepare a daily standup summary with what was done yesterday, today's focus, and blockers. Keep it friendly and efficient.

Use Case 4 – Draft Meeting Agenda

RAFT:

- Role: Project coordinator
- Assignment: Draft agenda for weekly check-in
- Format: Numbered list
- Tone: Professional

Prompt:

As a project coordinator, create an agenda for our weekly project check-in. Include 4-6 items in a numbered list. Keep the tone professional.

Use Case 5 – Generate Discussion Questions

RAFT:

- Role: Team leader
- Assignment: Suggest team-building questions
- Format: List
- Tone: Supportive and open

Prompt:

As a team leader, suggest 5 team-building questions for a team meeting. Format as a list and keep the tone supportive and open.

Microsoft Outlook

Use Case 1 – Write a Client Follow-up Email

RAFT:

- Role: Account manager
- Assignment: Write follow-up email after meeting
- Format: Email
- Tone: Warm and professional

Prompt:

As an account manager, write a follow-up email to a client after our recent meeting. Use a warm and professional tone.

Use Case 2 – Summarize Long Email Thread

RAFT:

- Role: Communication assistant
- Assignment: Summarize key points from long thread
- Format: Summary paragraph
- Tone: Neutral and informative

Prompt:

As a communication assistant, summarize the key points from this long email thread. Keep the tone neutral and informative.

Use Case 3 – Draft Calendar Invitation Email

RAFT:

- Role: Event planner
- Assignment: Draft calendar invite email for workshop
- Format: Email with agenda

- Tone: Friendly and clear

Prompt:

As an event planner, write an email to invite team members to a 2-hour workshop. Include the agenda and use a friendly, clear tone.

Use Case 4 – Respond to Customer Inquiry

RAFT:

- Role: Customer service rep
- Assignment: Draft polite reply with information
- Format: Email
- Tone: Polite and solution-focused

Prompt:

As a customer service rep, write a polite and helpful reply to a customer asking about our pricing structure."

Use Case 5 – Rewriting for Clarity

RAFT:

- Role: Language editor
- Assignment: Improve clarity of draft email
- Format: Rewritten version
- Tone: Professional

Prompt:

As a language editor, rewrite this draft email to improve clarity and professionalism."

Microsoft Word

Use Case 1 – Draft a Project Proposal

RAFT:

- Role: Proposal writer
- Assignment: Draft proposal for client project
- Format: Structured document
- Tone: Professional and persuasive

Prompt:

As a proposal writer, create a draft proposal for a new project with Client X, including background, objectives, timeline, and deliverables."

Use Case 2 – Summarize a Long Report

RAFT:

- Role: Analyst
- Assignment: Condense report to 1-page summary
- Format: Executive summary
- Tone: Objective and concise

Prompt:

As an analyst, summarize this report into a one-page executive summary. Keep it objective and concise.

Use Case 3 – Rewrite for Tone

RAFT:

- Role: Editor
- Assignment: Adjust tone for internal audience
- Format: Email draft

- Tone: Friendly and encouraging

Prompt:

As an editor, rewrite this message to make it sound friendlier and more encouraging for an internal team audience.

Use Case 4 – Create a Contract Template

RAFT:

- Role: Legal assistant
- Assignment: Draft a basic NDA template
- Format: Legal document
- Tone: Formal

Prompt:

As a legal assistant, create a simple NDA contract template for consultants. Use a formal tone.

Use Case 5 – Translate Technical Language

RAFT:

- Role: Technical communicator
- Assignment: Simplify technical content for client
- Format: Paragraph
- Tone: Clear and approachable

Prompt:

As a technical communicator, simplify this paragraph so that a non-expert client can understand it.

Microsoft Excel

Use Case 1 – Analyze Consultant Hours

RAFT:

- Role: Data analyst
- Assignment: Find average hours billed per consultant
- Format: Bullet point findings
- Tone: Objective

Prompt:

As a data analyst, analyze the sheet to find the average hours billed per consultant last quarter. Present findings in bullet points.

Use Case 2 – Identify Cost Trends

RAFT:

- Role: Financial advisor
- Assignment: Spot trends in monthly costs
- Format: Chart and explanation
- Tone: Analytical

Prompt:

As a financial advisor, review the cost data and identify trends over the past six months. Create a visual and explain it.

Use Case 3 – Forecast Next Quarter's Revenue

RAFT:

- Role: Financial forecaster
- Assignment: Predict next quarter's revenue
- Format: Table with assumptions

- Tone: Confident and clear

Prompt:

As a financial forecaster, use current data to predict next quarter's revenue. Display results in a table and explain assumptions."

Use Case 4 – Create a Dashboard

RAFT:

- Role: Business analyst
- Assignment: Build overview dashboard of project KPIs
- Format: Interactive dashboard
- Tone: Visual and informative

Prompt:

As a business analyst, create a dashboard to visualize KPIs for Project Y, including budget, hours, and deadlines.

Use Case 5 – Explain a Complex Formula

RAFT:

- Role: Excel tutor
- Assignment: Break down formula logic
- Format: Step-by-step
- Tone: Clear and educational

Prompt:

As an Excel tutor, explain how this formula works step-by-step so I can understand each part."

Microsoft PowerPoint

Use Case 1 – Create a Presentation from Notes

RAFT:

- Role: Presentation designer
- Assignment: Turn notes into slides
- Format: 5-slide deck
- Tone: Corporate

Prompt:

As a presentation designer, create a 5-slide deck summarizing the following meeting notes. Keep it concise and suitable for leadership."

Use Case 2 – Summarize a Report for Slides

RAFT:

- Role: Strategy consultant
- Assignment: Translate report into slide format
- Format: Slide bullets
- Tone: Executive

Prompt:

As a strategy consultant, summarize this report into key takeaways formatted as slide bullets. Use an executive tone."

Use Case 3 – Suggest Visuals for Concept

RAFT:

- Role: Visual strategist
- Assignment: Recommend slide visuals
- Format: List

- Tone: Creative and modern

Prompt:

As a visual strategist, suggest visual elements (diagrams, icons, images) to explain the concept of 'AI Readiness' in a slide.

Use Case 4 – Rewrite Slide Text for Clarity

RAFT:

- Role: Communication expert
- Assignment: Improve wording
- Format: Slide text revision
- Tone: Clear and engaging

Prompt:

As a communication expert, revise this slide text to be clearer and more engaging."

Use Case 5 – Customize Slides for Audience

RAFT:

- Role: Audience analyst
- Assignment: Adapt presentation for client meeting
- Format: Slide suggestions
- Tone: Formal and persuasive

Prompt:

As an audience analyst, adjust this presentation to better suit a pharma-industry client. Focus on clarity and relevance."

Appendix: RAFT Prompt Suggestions

Roles (30+)

Manager	Analyst	Editor	Legal advisor	Sales rep
Scrum Master	Data analyst	Finance controller	Consultant	Recruiter
Technical writer	Project manager	Visual designer	Business developer	HR coordinator
Marketing lead	Strategy consultant	Customer support agent	Internal auditor	Team lead
Policy advisor	Researcher	Onboarding trainer	Executive assistant	Risk manager
System administrator	Product owner	Business analyst	Content strategist	Stakeholder manager
Copywriter				

Assignments (30+)

Summarize a report	Draft a proposal	Analyze data	Generate email	Rewrite content	Improve tone
Forecast revenue	Identify risks	Create slide deck	Build a dashboard	Explain a concept	Prepare agenda
Translate technical content	Design a process	Propose solution	Review document	Compose instructions	Write follow-up
Develop Q&A	Outline project plan	Create checklist	Answer FAQs	Highlight milestones	Identify trends
Build outline	Generate insights	Create training material	Clarify communication	Draft contract	Format slides

Formats (30+)

Bullet points	Paragraph	Slide deck	List	Table	Summary
Visual chart	Email	Agenda	Checklist	Flowchart	Timeline
Graph	Infographic	Q&A format	Matrix	Comparison table	Newsletter draft
Press release	Instructional guide	Blog post	Social media post	Dashboard	Chart pack
Survey summary	SWOT analysis	Mind map	Script	Template	Briefing note
Report extract					

Tones (30+)

Professional	Friendly	Confident	Encouraging	Persuasive	Diplomatic
Supportive	Assertive	Neutral	Clear	Motivational	Formal
Conversational	Energetic	Direct	Calm	Reassuring	Humorous
Engaging	Respectful	Reflective	Optimistic	Collaborative	Empathetic
Inquisitive	Ambitious	Honest	Cautious	Structured	Warm

Prompt Builder Link: [Click here to create your own RAFT prompt](#)