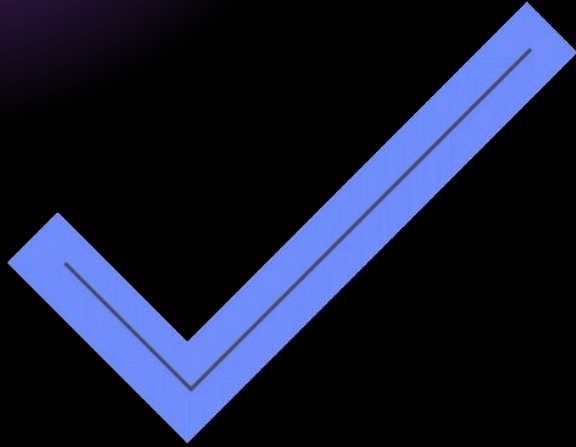


# Hacks for Working with Copilot

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Ontario Public Service

October 7, 2025

# Streamlining repetitive work



- Drafting documents
- Searching for and summarizing information in files
- Editing communications (e.g. copyediting; for particular audiences)
- Generating images
- Brainstorming
- Comparing content in documents

# Copilot hacks: Sandboxed version

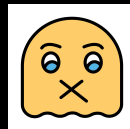
## 1. Contextual memory

Settings → Copilot  
personalization



## 2. Custom instructions

Settings → Copilot  
personalization



### Copilot Personalization

Copilot uses insights from your conversations and custom instructions to enhance the quality of its responses.



#### Custom Instructions

Provide Copilot with specific details and guidance to improve the quality of its responses.

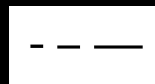


#### Copilot Memory

Copilot will use details recalled from your conversations and information from your work profile to provide more relevant responses.



**Bold**



# Copilot hacks: Copilot 365 enterprise license

## 3. Copilot Notebooks

Leverages an Artificial Intelligence assistant to answer questions, summarize information and draft content based on materials in your notebook

## 4. Copilot scheduled prompts

Allows users to automate the execution of prompts at a user-defined schedule



# Public Policy development - Copilot Notebooks

## “From Raw Data to Insight”

Use Case : Senior Policy Analyst developing a Policy Options Note using **Copilot’s Notebooks** feature

| Element     | Instruction                                                                                                                                          |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role        | You are a senior policy analyst                                                                                                                      |
| Task        | Draft a 2-page policy options note using the attached Excel files as sources.                                                                        |
| Style       | Plain, concise, public-sector tone; use bullets and short paragraphs.                                                                                |
| Format      | Sections: Problem, Evidence, Fiscal (table), Risks & Legal, Stakeholder Views, Implementation & KPIs, Recommendation in a downloadable Word Document |
| Constraints | Cite cell ranges/sheets inline (e.g., <i>Projections!B2:G7</i> ), reflect distributional impacts, and keep to ≤900 words.                            |

M365 Copilot

Search

Chat

Conversations

Pages

**Notebooks**

Create

Apps



## Your notebooks

All

Favorites



New notebook



Apolitical demo

Just now



New notebook

References

Chats



New page

## Add your first reference to get started

Copilot can tailor responses to your Microsoft 365 files, notes, PDFs and more.

+ Add references

Upload or drag your content here.

All

Excel



New page



01\_Problem\_Definition\_Evidence

Just now



02\_Stakeholder\_Inputs

Just now



03\_Fiscal\_Options\_Analysis

Just now



04\_Risk\_and\_Legal

Just now



05\_Implementation\_and\_ME

Just now



Apolitical demo > Drafting a Concis...

You are a senior policy analyst

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Sections: Problem, Evidence, Fiscal (table), Risks & Legal, Stakeholder Views, Implementation & KPIs, Recommendation.

Constraints

Cite cell ranges/sheets inline (e.g., Projections!B2:G7), reflect distributional impacts, and keep to  $\leq 900$  words.

## Policy Options Note

### Problem

Service access and equity gaps persist across regions and populations. In 2025, Toronto had the highest satisfaction rate (94%) and lowest wait time (28 days), while Central had the lowest satisfaction (67%) and shortest wait time (11 days), indicating uneven service experiences (Indicators!A2:F27). Despite improvements since 2020, rural and low-income populations continue to face barriers (Distributional\_Impacts!A2:D17).

### Evidence

- Access: Service Access Rate rose from 0.63 (North, 2020) to 0.83 (North, 2025), but regional disparities remain (Indicators!A2:F27).
- Cost: Cost per case varies widely—Toronto at \$1600 vs. Central at \$1336 in 2025 (Indicators!A2:F27).
- Satisfaction: Client satisfaction improved overall, but equity gaps persist (Indicators!A2:F27).
- Stakeholder feedback: Concerns include eligibility clarity, data burden, training gaps, and interoperability (Consultation\_Log!A2:G11; Coded\_Themes!A2:C12).

### Fiscal

| Option                       | Avg. Annual Direct Cost (\$M) | Avg. Admin Cost (\$M) | Avg. Monetized Benefit (\$M) | Avg. Clients Served | Benefit Index (Low Income) |
|------------------------------|-------------------------------|-----------------------|------------------------------|---------------------|----------------------------|
| Status Quo                   | 54.7                          | 6.6                   | 50.3                         | 13,296              | 1.03                       |
| Option A: Targeted Expansion | 83.2                          | 10.0                  | 91.6                         | 14,754              | 1.13                       |

Raw Data (viz.  
Excel sheets,  
guidance  
documents,  
legislations)  
inside the CoPilot  
Notebook

PROMPT accordingly  
for different end  
products

Data  
Analysis

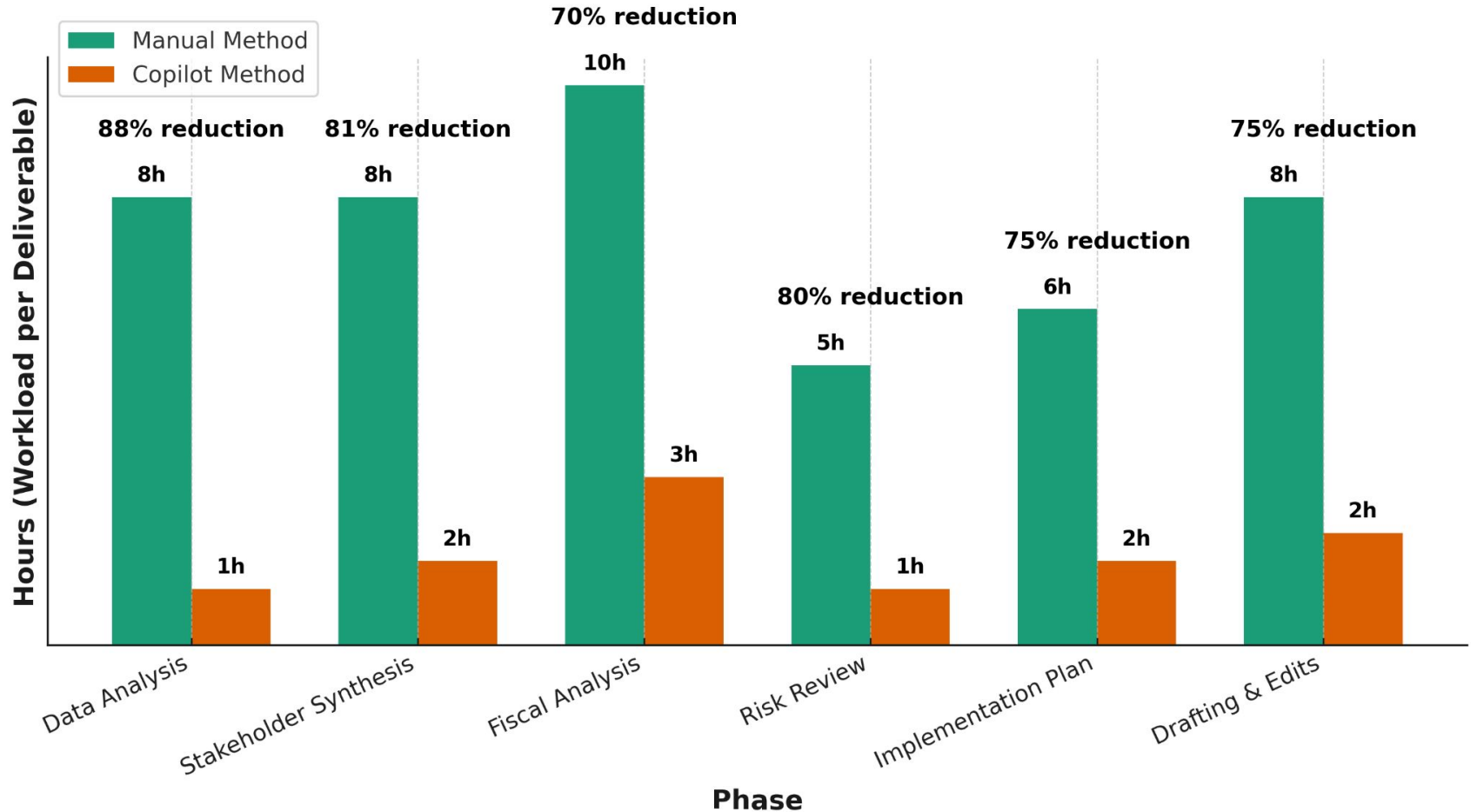
Stakeholder  
Synthesis

Fiscal  
Analysis

Risk  
Review

Implementation  
Plan

## Policy Development Time Savings with Copilot



# Executive Support Automation - Scheduled Prompts

## “From Meetings to Insight”

Use Case: Executive Assistant supporting a Senior Leader to automate daily deliverables using Copilot’s **Scheduled Prompts**

| Key Benefit           | Use Case                                                                  |
|-----------------------|---------------------------------------------------------------------------|
| Automation            | Avoid re-entering the same prompt multiple times.                         |
| Regular Updates       | Stay informed on recurring items like weekly summaries or task reminders. |
| Efficiency            | Automate routine tasks and streamline information gathering.              |
| Improved Organization | Prevent tasks and reminders from being overlooked.                        |

Today

Schedule this prompt



Summarize the Deputy Minister's calendar and meeting priorities for today. Include location, prep notes, and key participants



Schedule a prompt



**Summarize the Deputy Minister's calendar and meeting priorities for today.  
Include location, prep notes, and key participants**

↻ Repeat this prompt **every week on Monday, Tuesday, Wednesday, Thursday, Friday at 8:00 AM until Tuesday, January 13**

Starts

10/07/2025



At

08:00 AM



Every

Week



M

T

W

T

F

S

S

Run

15



times



Receive an email when responses are ready

Save

| Time / Frequency        | Prompt                                                                                                                                   | What Copilot Does                                         | Deliverable / Outcome                                       |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------------------------|
| 7:45 AM (Daily)         | “Summarize the Deputy Minister’s calendar and meeting priorities for today. Include location, prep notes, and key participants.”         | Scans Outlook calendar + meeting invites + Teams chats.   | Generates the Daily Schedule Brief for the Deputy.          |
| 9:00 AM (Daily)         | “List all new stakeholder emails marked urgent since yesterday and draft acknowledgment responses.”                                      | Searches shared inbox for flagged/urgent items.           | Drafts email replies or templates for approval.             |
| 11:30 AM (Daily)        | “Summarize this morning’s meetings using Teams transcripts or notes tagged ‘DM_Meeting’ and extract action items by owner and due date.” | Parses Teams recordings/transcripts or OneNote summaries. | Updates the Action Tracker table (Excel or Loop page).      |
| Friday 2:00 PM (Weekly) | “Summarize all DM action items completed this week, remaining items, and stakeholder follow-ups due next week.”                          | Pulls weekly data from Action Tracker + Outlook tasks.    | Generates the Weekly Executive Summary for Senior Executive |

# Summarizing - Copilot Hacks

|                                  |                                                                                                                                                 |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contextual Memory</b>         | Enables Copilot to remember key work details and preferences, so responses stay personalized without repeating information.                     |
| <b>Custom Instructions</b>       | Users can set preferences for role, tools, environment, and response style, which Copilot applies automatically without repeated input.         |
| <b>Copilot Notebooks</b>         | Leverages an Artificial Intelligence assistant to answer questions, summarize information and draft content based on materials in your notebook |
| <b>Copilot scheduled prompts</b> | Allows users to automate the execution of prompts at a user-defined schedule                                                                    |

# THANK YOU

Any questions?