

★ **Set it once, and every answer gets better — forever.** Custom instructions tell CoPilot your role, tone, and format so you stop re-explaining yourself. The catch: you must set them in **two separate spots**, and Microsoft names them differently in each.

1 Set It in Both Places Same idea, two apps.

PLACE 1 The CoPilot app

Chat settings → Personalization →

Custom instructions → Edit

Type how you want CoPilot to respond, then save. It applies across your CoPilot chats.

PLACE 2 Outlook (email)

File → Settings → Copilot → Draft instructions

The gotcha: in Outlook it's **not** called "custom instructions" — it's under **"Draft instructions."** Toggle on *"Use custom instructions when drafting email,"* then type.

2 What to Put in It Keep it short — a few lines is plenty.

Cover four things

- **Role:** who you are & what you do
- **Tone:** warm, professional, direct...
- **Format:** short paragraphs, bullets, no jargon
- **Avoid:** filler, hype, over-apologizing

STEAL THIS — THEN MAKE IT YOURS

A ready sample

"Write in a clear, professional, human tone. Assume the reader is intelligent and busy. Be concise, thoughtful, and direct. Use clean formatting and bullets when helpful. Avoid filler language. Close with confidence and warmth. Apply these instructions to all revisions."

PUT IT ALL TOGETHER — AUTOMATE YOUR INBOX

Set the switches once, then let one prompt do the work

In the CoPilot app, with **Work IQ on**, try:

"Look at my unread and unanswered email from [date] to [date], sort it by priority, and draft a reply to the top five."

- ⚡ **Custom + Draft instructions** → the drafts already sound like you.
- ⚡ **Work IQ on** → it can actually see your inbox.
- ⚡ **Prioritize rules** (Invoices low, your boss high) → it knows what matters to you.
- ⚡ **Schedule it** (the clock under a prompt) → runs every morning on its own.

Set the switches once → one prompt → your inbox triaged and drafted in your voice → schedule it, and it runs itself.