

QSF-Outlook: Summarize Conversations and Write Clear Replies

Purpose

This SOP explains how to use Outlook's built-in tools to quickly understand long email conversations and draft clear replies without losing time or context.

Step-by-Step Summarize Conversation

Step 1. Open Outlook and select a real, multi-message email thread. This should be the original thread you intend to analyze; not a summary or filtered view.	Step 2. Click the Copilot icon. Use Prompt 1 below.
Step 3. In the original email thread, click Reply or Reply All. Next, choose "Draft with CoPilot". Use the Prompt 2 below. Ask clarifying prompts if needed (e.g. clarify what this thread is asking me to do in one sentence)	

Prompt 1

[CONTEXT] I need to understand what this email thread is actually asking for so I can decide next steps. [ROLE] Business Owner. [AUDIENCE] Internal use only. [FORMAT] Short bullet points with no full sentences. [TOPIC] The key facts, deadlines, decisions needed, and open questions in this email thread.

Prompt 2

[CONTEXT] I need to reply to this email thread clearly and efficiently without rehashing the full conversation. [ROLE] Business Owner. [AUDIENCE] Colleagues and stakeholders included on this thread. [FORMAT] A short, professional email reply with clear next steps. [TOPIC] Responding to the latest message, addressing what is being asked, and stating decisions, actions, or clarifying questions.