

QSGForms: Collect Information Once, in a Way You Can Actually Use

Purpose: This SOP explains how to use Microsoft Copilot in Forms to collect information in a consistent, structured way. The goal is to reduce back-and-forth communication and ensure responses are usable without cleanup.

When to Use This SOP

Use this SOP when:

Information arrives inconsistently by email or chat	You repeatedly ask the same follow-up questions
Data needs to be reviewed or summarized later	You want fewer interruptions during the day

Step-by-Step: Create a Useful Form with Copilot

Step 1. Open Microsoft Forms Create a new form.	Step 2. Select Copilot within Forms.
Step 3. Use the CRAFT prompt below in Copilot with the purpose of the form and who will complete it.	Step 4. Remove unnecessary questions and clarify wording.
Step 5. Send the form link and direct all related responses there.	

Example CRAFT Prompt: Create an Intake Form

[CONTEXT] I need to collect consistent information so I can review it without follow-up. [ROLE] Business Owner.
[AUDIENCE] Customers or internal team members. [FORMAT] A short intake form with clear questions. [TOPIC] The information required to understand requests and take action.

Common Decisions After Reviewing

Decide which questions are truly required	Adjust wording to reduce confusion
Set expectations for response completeness	Determine how responses will be reviewed

Common Mistakes to Avoid

Asking too many questions	Designing forms without a clear purpose
Allowing responses to continue arriving in email	Treating forms as surveys instead of intake tools