

QSGOneNote: Summarize Meetings and Ideas from Notes

Purpose: This SOP explains how to use Microsoft Copilot in OneNote to summarize long, unstructured notes from meetings or brainstorming sessions. The goal is to distill key points, decisions, and themes into a concise summary that can be referenced or shared.

When to Use This SOP

Use this SOP when:

Notes span multiple pages or sections	Meetings covered many topics
Ideas were captured informally	You need a quick, accurate overview

Step-by-Step: Summarize Notes with Copilot

Step 1. Navigate to the notes you want to summarize.	Step 2. Select Copilot from the OneNote interface.
Step 3. Using the CRAFT Prompt below in Copilot to summarize the notes, highlighting key themes and decisions.	Step 4. Ensure the summary reflects what actually matters and adjust wording if needed.
Step 5. Keep the summary in OneNote or copy it into email, Word, or Teams as needed.	

Example CRAFT Prompt: Summarize Notes

[CONTEXT] I need a clear summary of these notes so I can quickly recall what was discussed and decided. [ROLE] Business Owner. [AUDIENCE] Myself and internal team members. [FORMAT] A short summary with bullet points. [TOPIC] Key discussion points, decisions made, and important ideas.

Common Decisions After Reviewing

Share the summary with others	Use it to prepare follow-up communication
Identify missing or unclear decisions	Archive detailed notes for reference
Plan next steps based on key themes	

Common Mistakes to Avoid

Treating summaries as substitutes for decisions	Skipping review of Copilot output
Over-summarizing and losing nuance	Deleting original notes