

QSGOneNote: Turn Messy Notes into Clear Action Lists

Purpose: This SOP explains how to use Microsoft Copilot in OneNote to transform unstructured notes into clear, actionable task lists. The goal is to move from raw thinking to practical next steps without rewriting notes manually.

When to Use This SOP

Use this SOP when:

Notes contain ideas, decisions, and to-dos mixed together	You need to identify next actions quickly
You want clarity without reorganizing everything manually	You are preparing to follow up or delegate work

Step-by-Step: Create Action Lists from Notes

Step 1. Navigate to the page containing your messy or unstructured notes.	Step 2. OpSelect Copilot from the OneNote interface.
Step 3. Use the CRAFT Prompt below in Copilot to extract tasks, follow-ups, and next steps from the notes.	Step 4. Confirm which actions matter now, adjust wording, and set priorities.
Step 5. Use the list directly in OneNote or move actions into your preferred task or communication tool.	

Example CRAFT Prompt: Extract Action Items from Notes

[CONTEXT] I need to turn these rough notes into a clear list of actions I can work on next. [ROLE] Business Owner.
[AUDIENCE] Myself and internal team members. [FORMAT] A short, prioritized bullet list of action items. [TOPIC] Tasks mentioned or implied in the notes, including follow-ups and decisions.

Common Decisions After Reviewing

Decide which actions to do now versus later	Delegate tasks to team members
Schedule follow-ups	Discard non-actionable items
Leave reference notes untouched	

Common Mistakes to Avoid

Treating every note as a task	Overloading the action list
Skipping human review	Rewriting notes instead of extracting actions