

# QSFOutlook: Summarize and Decide from Long Email Threads

## Purpose

This SOP explains how to use Microsoft Copilot in Outlook Desktop to quickly understand long or confusing email threads and decide what action to take. The goal is faster clarity, fewer re-reads, and confident responses.

## When to Use This SOP

Use this SOP when:

|                                                        |                                                         |
|--------------------------------------------------------|---------------------------------------------------------|
| An email thread is long or hard to follow              | Multiple people are replying with different information |
| You need to decide what to do next, not reread history | You want clarity before replying                        |

## Step-by-Step: Summarize Before You Respond

|                                                                                               |                                                                      |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| Step 1. Open the full conversation in Outlook Desktop.                                        | Step 2. Highlight the relevant portion of the thread if needed.      |
| Step 3. Click the Copilot icon > Summarize or select the Summarize tab.                       | Step 4. View the Summary to view key facts, deadlines, and requests. |
| Step 5. Use the summary to determine whether to reply, delegate, schedule, or close the loop. |                                                                      |

## Example CRAFT Prompt: Summarize the Thread

[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.

## Common Decisions After Summarizing

|                                         |                                  |
|-----------------------------------------|----------------------------------|
| Reply with a clear answer or next step  | Ask a clarifying question        |
| Schedule a meeting only if necessary    | Delegate or forward with context |
| Close the loop if no action is required |                                  |

## Common Mistakes to Avoid

|                                             |                                         |
|---------------------------------------------|-----------------------------------------|
| Responding before understanding the request | Letting Copilot write a reply too early |
| Re-reading the entire thread manually       | Confusing emotion with intent           |