

AI Quick Wins

For Small Microsoft 365 Service Teams



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How To Use This Guide

This isn't a textbook. Treat it like a one-week field manual.

1. Skim the three workflows and pick one to start with (email, proposal, or status).
2. Use the matching **GCSE** (**G**oal, **C**ontext, **S**olution, **E**xpectation) prompt with a real client email or document, not a fake example.
3. Check the AI Safety Checklist before you paste anything sensitive.
4. Use the 7-Day Action Plan page to spread your experiments over a week instead of one long binge.
5. When you find a prompt that works, copy it into your own SOPs or templates so your team can reuse it.

Mini Readiness Check

Before you start, jot quick answers to these in the margin or on a notepad.

1. Top 3 repetitive tasks you'd *love* to stop doing manually.
2. Tools your team already uses most days (Outlook, Word, Excel, Teams, something else).
3. One client or internal process where a "good enough" draft is fine (not legal, not high-stakes).
4. Who else on your team needs to be looped in as you experiment?
5. How much time per week can you realistically spend testing AI (30, 60, 90 minutes)?

Workflow 1: Clean Up Client Reply Emails in Outlook

Your inbox is where most of your service work starts and stalls. This workflow helps you turn messy client threads into clear replies in a few minutes using Outlook and AI.

Goal

Write clear, confident replies to common client emails in less time, without losing your own voice.

Where in Microsoft 365

- Outlook on the web or desktop
- Use the email body and any attached notes as your starting point

Prompt: Draft a clear reply

Goal: Help me draft a clear, professional reply to this client email.

Context: I run a [1–10 person] service business. Client is asking about [briefly describe the request: timeline, scope change, invoice question, etc.]. I want to sound calm, confident, and helpful, not salesy.

Source: Use the client email thread below and any bullet notes I add after it.

Expectations: Write a reply I could send as-is, in 2–3 short paragraphs, plain language, up to 3 options or next steps, keep my existing sign-off.

What To Do Next

- Pick one real client email from this week.
- Run the prompt to draft a reply.
- Tweak any wording and send.

Workflow 2: Draft a Client Proposal in Word

This workflow helps you turn a short project brief into a client-ready proposal.

Goal

Draft a structured client proposal in less time, so you can spend your energy on pricing and scope instead of formatting.

Where in Microsoft 365

- Word on the desktop or web
- Start from your usual proposal template or a blank document

Prompt: Build the first draft

Goal: Help me draft a clear, structured proposal for this client project.

Context: I run a [1–10 person] service business. Client is [describe client briefly] and the project is about [one-sentence description]. I want the tone to be confident and easy to skim.

Source: Use the project notes and bullet points I paste below.

Expectations:

- Organize the proposal into sections like Overview, Goals, Scope, etc.
- Use short paragraphs and bullets where helpful.
- Flag any assumptions you had to make so I can review them.

What To Do Next

- Paste real project notes under the prompt.
- Run it to draft the proposal.
- Adjust scope and pricing, then save.

Workflow 3: Send a Quick Status Update in Outlook

Status updates should be short and predictable. Use this workflow to turn scattered notes into a clear weekly email in Outlook.

Goal

Send simple status updates so clients know what happened, what's next, and what you need from them.

Where in Microsoft 365

- Word on the desktop or web
- Use your calendar, task list, or meeting notes as input

Prompt: Draft a status email

Goal: Help me draft a short, structured status update email for this client.

Context: I run a [1–10 person] service business, and this client wants quick proof of progress without long emails.

Source: Use the bullet notes I paste below about what we did, what's planned next and any blockers.

Expectations:

- Organize the email into three sections: This week, Next week and info needed.
- Use short bullet points that are easy to read on a phone.

What To Do Next

- Add a few bullets for this week's work and next week's plan.
- Run the prompt to draft the email.
- Tweak details, then send.

Prompt Library: GCSE Email Prompts You Can Reuse

Use these prompts as starting points in Outlook and Word. Each one follows GCSE (Goal, Context, Source, Expectations) so you get clearer results with less editing.

Email Prompts (Outlook)

Prompt 1: Draft a clear client reply

Goal: Help me draft a clear, professional reply to this client email.

Context: I run a [1–10 person] service business using Microsoft 365. This client is asking about [timeline, scope change, invoice question, etc.]. I want to sound calm, confident, and helpful, not salesy.

Source: Use the client email thread below and any bullet notes I add after it.

Expectations: Write a reply I could send as-is, in 2–3 short paragraphs, plain language, up to 3 options or next steps, and keep my existing sign-off.

Prompt 2: Shorten and simplify my reply

Goal: Shorten my draft reply so it's easier for a busy client to read.

Context: This reply is for a long-time client who skims emails on their phone.

Source: Use the draft reply I paste below.

Expectations: Keep the meaning the same, remove filler or repetition, and aim for 5–8 sentences in short paragraphs.

Prompt Library: GCSE Proposal Prompts You Can Reuse

Use these prompts as starting points in Outlook and Word. Each one follows GCSE (Goal, Context, Source, Expectations) so you get clearer results with less editing.

Proposal and Status Prompts (Word & Outlook)

Prompt 3: Draft a client proposal (Word)

Goal: Help me draft a clear, structured proposal for this client project.

Context: I run a [1–10 person] service business that uses Microsoft 365. The client is [describe client briefly] and the project is about [one-sentence description]. I want the tone to be confident and easy to skim.

Source: Use the project notes and bullet points I paste below.

Expectations: Organize the proposal into sections like Overview, Goals and Next Steps; use short paragraphs and bullets; flag any assumptions you had to make.

Prompt 4: Draft a weekly status email (Outlook)

Goal: Help me draft a short, structured status update email for this client.

Context: I run a [1–10 person] service business, and this client wants quick proof of progress without long emails.

Source: Use the bullet notes I paste below about what we did, what's next, and any blockers.

Expectations: Organize the email into three sections (This week, Next week, Decisions or info needed) and use short bullets that are easy to read on a phone.

AI Safety Checklist



Use this page before you paste anything into Copilot or other AI tools. It keeps you away from trouble while you experiment inside Outlook and Word..

What not to paste

- Patient or health information (PHI).
- Sensitive personal details: full SSNs, bank or card numbers, passwords, or security answers.
- Confidential contracts, NDAs, or active legal documents.
- Unannounced pricing, salary data, or internal performance reviews.

Smart habits in Outlook and Word

- Remove names or identifying details when a summary will do.
- Paste only the part of an email or document the AI needs.
- Double-check that the “to” and “cc” lines in email are correct before sending.
- Never let AI send or share files automatically without your review.

Double-check the AI’s work

- Skim for wrong numbers, dates, or names.
- Make sure the tone matches your relationship with the client.
- Confirm that any commitments in the draft are ones you actually intend to keep.

Bias & Fairness Check

- If AI adds details about someone’s identity you didn’t state, delete or correct them.
- Watch for language that stereotypes people by gender, age, or race.
- Avoid prompts that stereotype groups (“make this sound more [X]”).
- When in doubt, choose neutral, factual wording over assumptions.

7-day Action Plan

Spend 15–30 minutes each day this week testing AI in small, low-risk ways..

Day	Focus	Tiny Task
1	Pick your first workflow	Choose one workflow (email replies, proposals, or status updates) and flag 2–3 real examples you could practice on this week.
2	Set up your tools	Open Outlook and Word, confirm you can find Copilot or your AI tool, and test copy/paste once.
3	Draft with a prompt	Use the GCSE prompt for Workflow 1 on one real client email and save the AI draft (don't send yet).
4	Edit and send	Edit yesterday's AI draft so it sounds like you, then send it and notice what you changed.
5	Try a second workflow	Use the proposal or status prompt on one real document or update and compare it to how you'd normally write it
6	Capture one win	Write down one concrete benefit you saw this week (time saved, clearer message, less stress) and one thing that still felt clunky
7	Decide what to keep	Choose 1–2 prompts to use next week. Add them into your own templates, or bookmarks

What This Guide Can't Do For You

This guide gives you a few safe, fast ways to try AI in your day-to-day work. It doesn't replace real implementation, team alignment, or ongoing practice.

What this guide doesn't cover

- It doesn't align your whole team on how you'll use AI.
- It doesn't configure your Microsoft 365 or security settings.
- It doesn't write full SOPs for how your firm will use AI.



Sprint Invitation

Want help turning this into a real system?

If you want your team using AI the same way, every week, you need more than a starter guide. That's what my 30-Day AI Sprint for small Microsoft 365 service teams is for

- Clarify where AI fits in your services, not just in tools.
- Set simple guardrails and SOPs your team will actually follow.
- Capture real wins (time saved, better quality, less stress) and decide what to scale.

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Interested? Reach out at [\[james@theagilephoenix.com\]](mailto:james@theagilephoenix.com) with '30-Day Sprint' in the subject line and I'll send the details.

— James

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