

Copilot prompts for executive directors

Four kinds of work. Twelve prompts to try this week.

Works from your work, not the open web.

With a Microsoft Copilot license. Copilot Chat alone uses the web and what you paste or upload.



Your files

Documents and workbooks in SharePoint and OneDrive



Your email and chats

Outlook mail and Teams conversations



Your meetings

Teams recaps and who agreed to what



Your permissions

Only what you can already open

01

Board and governance

Word · Teams · Forms · Excel



Word

Brief the board chair before the meeting

Try: From last quarter's board minutes and this month's finance report, write a one-page brief for our board chair: the decisions on the agenda, what changed, and where I expect questions.



Teams

Draft minutes from the meeting transcript

Try: From the transcript of tonight's board meeting, draft minutes in our usual format. Record each motion with who moved it, who seconded, and the vote, and list every follow-up I agreed to.



Word

Check a policy against the bylaws

Try: Compare this draft whistleblower policy with our bylaws and employee handbook. List any conflicts, gaps, or terms that don't match, with section numbers.

02

Running the organization

Copilot app · Outlook · Excel · Word · Teams



Copilot app

Find the commitments you've made

Try: Look across my email, Teams chats, and meetings from the past two weeks. List the commitments I made, who I made them to, and which ones are now overdue.



Excel

Test a hiring delay against cash

Try: Using this budget workbook, show our cash position through June if we delay two open hires by one quarter and our spring event comes in 20 percent under goal.



Word

Plan a senior hire's first 90 days

Try: Draft a 90-day onboarding plan for our new operations director from our org chart, last year's priorities memo, and the staff handbook. Include who they should meet in week one.

03

Funders, partners, and the public

Copilot app · PowerPoint · Word · Outlook



Copilot app

Get ready for a funder call

Try: Before my call with this foundation's program officer, pull together our email history with them, our last report, and open items from our last meeting. Give me five talking points.



PowerPoint

Bring a partner a proposal, not just an update

Try: Turn our annual report into an eight-slide deck for a community partner meeting: who we serve, what we did together this year, and two proposals for next year.



Word

State a public position the board can review

Try: Write a one-page statement on the proposed county budget cuts for our board to review before we go public. Use our program data and keep the tone factual.

04

Planning ahead

Word · Excel · PowerPoint · Copilot app



Word

Refresh the strategic plan's goals

Try: From our strategy session notes and current strategic plan, draft the goals section of a refreshed plan. Show which goals carry forward, which are new, and which we dropped.



Excel

Model three revenue futures

Try: Build three-year revenue scenarios from this workbook: government contracts flat, government contracts down 15 percent, and our new earned-income program at target.



Word

Write the emergency succession plan

Try: Draft an emergency succession plan for the executive director role from our bylaws and org chart: who steps in, what authority they hold, and who tells funders and staff.

Copilot drafts; a person checks every name, number, and fact. Keep individual case, health, and student records out of prompts, and follow your organization's AI and data policies.



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All 100 prompts
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