



Copilot Notebooks From Personal AI to Team Intelligence



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The problem is not information. It is context.

Projects fail when the facts live in different systems, versions and conversations.

SharePoint

documents

Outlook

commitments

Teams

decisions

Excel

numbers

PowerPoint

narrative

Copilot Pages

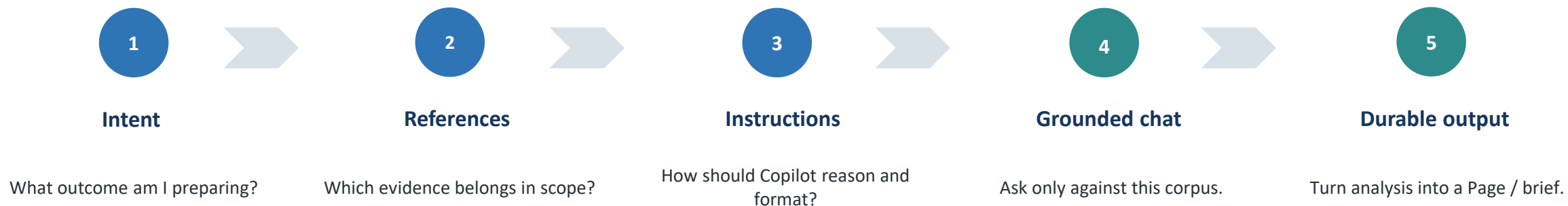
working output

The real cost is not finding information. It is deciding which version is authoritative, current and usable together.

A Copilot Notebook is useful when it turns that scattered evidence into a deliberately scoped context.

What a Copilot Notebook actually does

It creates a bounded AI context from references you intentionally choose.



Important: Copilot uses the references in the notebook for grounding. It does not automatically search all organizational content unless that content or location is added as a reference.

From individual work to shared context

The shift is not “personal AI → team AI.” It is “individual professional context → collectively reusable context.”

1 · Individual

Private-by-default professional workspace. workspace.

You choose the evidence, test questions, challenge the output and prepare a result.

2 · Structured context

A Notebook makes the boundary explicit:

- selected references
- persistent instructions
- grounded conversation
- reusable outputs

3 · Collective

A shared Notebook lets several people work from the same curated context.

Sharing does not remove source permissions, governance or human accountability.

The quality of team intelligence depends first on the quality of the shared context.

Project Atlas: one project, several competing truths

Contoso wants to launch a generative-AI adoption program. The source set is intentionally messy.

Topic	Charter	Program deck	Operational evidence
Target population	500 employees	350 employees	80-person pilot proposed
Launch	15 Oct 2026	1 Nov 2026	15 Oct still a target
Budget	\$120k envelope	\$100k proposal	\$135k forecast, licenses excluded
Adoption	70% active at 3 months	60% at 3 months	measurement method open
Ambassadors	not fixed	20 announced	12 actually confirmed

The demo is not about summarizing. It is about preserving status: fact, proposal, current state, constraint, or decision.

The live demo: 9 deliberate moves

Every move either improves the context, tests the context, or turns it into a reusable outcome.

01 Define outcome

Build context

02 Add references

Build context

03 Set instructions

Build context

04 Establish state

Interrogate context

05 Find contradictions

Interrogate context

06 Add new evidence

Interrogate context

07 Verify claims

Operationalize context

08 Create decision brief

Operationalize context

09 Share the context

Operationalize context

Step 1 - Define the outcome before you create the Notebook

A useful Notebook starts with a decision or deliverable, not with a pile of files.

1

DEMO STEP

LIVE · 2:00

DO

Create a new Notebook named:

Project Atlas — Individual Preparation

Do not share it yet.

WHY

The first workspace is an individual professional workshop. You need room to test the corpus before exposing it as a team context.

LOOK FOR

A clear name, a clear scope and no accidental sharing. The Notebook is a working context, not the official archive.

PROMPT / SCRIPT

Outcome for this Notebook: prepare a verifiable launch decision brief for the Project Atlas launch committee.

Step 2 - Add references deliberately

Start with the smallest corpus that can answer the question.

2

DEMO STEP

LIVE · 3:00

W01

Charter of Project Atlas — baseline authority

P01

Program Presentation — deliberate contradiction

X01

Atlas Forecast Budget — current working estimate

X02

Atlas Risk Register — open constraints

W02

Open Questions — Atlas — what is not decided

WHY THESE FIVE?

Together they provide authority, contradiction, numbers, risks and unresolved questions. That is enough to build a first state of the project without flooding the context.

DO NOT DO THIS

Do not add the whole project site “just in case.” More references can add noise, stale versions and ambiguous authority.

Step 3 - Set persistent instructions

Prompts ask a question. Instructions define how this Notebook should behave across questions.

3

DEMO STEP

LIVE · 2:00

DO

Open Notebook options → Instructions. Paste the instruction set below and save it.

WHY

Without instructions, every prompt must re-explain evidence handling. Persistent instructions make the analysis pattern reusable.

LOOK FOR

Responses separate confirmed facts, decisions, proposals, assumptions and missing information — with evidence references.

PROMPT / SCRIPT

Use only the Notebook references. Distinguish confirmed facts, decisions, proposals, assumptions and missing information. Flag contradictions. Never invent missing values. Cite the supporting reference. End with “To validate.”

Step 4 - Establish the current state before asking for a recommendation

First ask: “What do we know?” Only then ask: “What should we do?”

4

DEMO STEP

LIVE · 2:30

DO

Ask for a current-state brief. Do not ask for a recommendation yet.

WHY

Recommendations are weak when the model has not first exposed source status, gaps and contradictions.

LOOK FOR

A structured answer with confirmed anchors, current working values, open items and a “To validate” list.

PROMPT / SCRIPT

Build a current-state brief for Project Atlas. Separate: (1) confirmed anchors, (2) current working assumptions, (3) unresolved decisions, (4) blockers, and (5) information to validate. Cite the evidence for every critical statement.

Step 5 - Make contradictions explicit

A contradiction matrix is more useful than a polished summary.

5

DEMO STEP

LIVE · 3:00

DO

Ask Copilot to compare values across sources and classify why they differ.

WHY

The model should not silently reconcile conflicting numbers. The conflict itself is decision context.

LOOK FOR

At least four rows: population, date, budget, adoption. Each row identifies source, status and what must be decided.

PROMPT / SCRIPT

Create a contradiction matrix with columns: Topic, Value A + source, Value B + source, status of each value, likely explanation, decision or validation required. Include population, launch date, budget, adoption target and ambassadors.

Step 6 - Add new evidence that changes the picture

A Notebook becomes useful when the context can evolve without losing its reasoning rules.

6

DEMO STEP

LIVE · 2:30

W08

Preparatory Committee Minutes — 80 = working basis; Oct 15 target maintained

E02

Finance — Budget not approved — \$135k is not approved; licenses excluded

E03

Procurement — Acquisition lead time — ~3 weeks after volume/budget approvals

X04

Atlas Ambassador Network — 12 confirmed vs target 20

X05

Atlas Training Schedule — 120 trainable by Oct 15 vs 250 planning assumption

WHY NOW?

The first corpus exposed contradictions. These later operational sources explain which values are current constraints, which are proposals and which are still pending.

RE-RUN

Ask Copilot to update the contradiction matrix and explicitly state what changed because of the new evidence.

Step 7 - Verify a claim before you trust the synthesis

Grounded does not mean infallible. Verification is part of the workflow.

7

DEMO STEP

LIVE · 3:00

DO

Pick one high-impact claim from Copilot and inspect the cited source. Example: “The pilot is 80 people.”

WHY

The same number appears in several documents. Repetition can make a proposal look like a decision.

LOOK FOR

W05/W08: 80 is a proposed or working basis. W07: final pilot size remains open. Correct the wording.

PROMPT / SCRIPT

For the statement “The pilot will include 80 participants,” identify every supporting reference and tell me whether 80 is a confirmed decision, a recommendation, a working assumption, or an unresolved item. Quote no more than needed and explain your classification.

Step 8 - Turn analysis into a decision brief

A Notebook is not the destination. The output must support a real business action.

8

DEMO STEP

LIVE · 3:00

DO

Ask Copilot to draft a one-page decision brief, then create a Copilot Page from the result.

WHY

A durable Page can be refined, reviewed and used outside the immediate chat. It converts analysis into a working deliverable.

LOOK FOR

A brief with: executive summary, state, 3 scenarios, recommendation with conditions, decisions required and verifiable evidence.

PROMPT / SCRIPT

Create a one-page decision brief for the Project Atlas launch committee. Include: 5-line executive summary; current state; “To validate”; three scenarios (maintain Oct 15 / limited launch / postpone); recommendation with conditions; rationale; Decisions Required; supporting references.

Step 9 - Build the collective context deliberately

Do not simply share your entire individual workshop. Curate what the committee needs.

9

DEMO STEP

Create: Project Atlas — Launch Committee

Start the collective Notebook with the artifacts the committee needs to decide, not every artifact you used to think.

Why not copy everything?

Because the committee needs a governed decision context, not your entire exploratory workspace. Curate for purpose and audience.

LIVE · 3:00

PAGE

Decision Brief — Working Version

X01

Forecast Budget

X02

Risk Register

W08

Preparatory Committee Minutes

E03

Procurement lead time / later legal summary

Step 10 - Share, then test the experience as another person

A shared Notebook is only useful if the recipient can actually use the references behind it.

10

DEMO STEP

LIVE · 2:30

DO

Invite Sophie. Then verify the shared Notebook, reference access and instructions from the recipient perspective.

WHY

Sharing can grant or request access to linked files, but it does not magically bypass source permissions or licensing differences.

LOOK FOR

Sophie sees the Notebook and instructions, can edit the Notebook, and may need access to restricted references. Premium sources depend on license.

PROMPT / SCRIPT

Ask Sophie's view: "What decisions are still required before launch?" Compare the answer with yours and inspect any unavailable references.

What changed when the work became collective?

The value is not “more AI.” The value is a shared, inspectable context with fewer hidden assumptions.

INDIVIDUAL EXPLORATION



COLLECTIVE CONTEXT



Sharing is not an ownership transfer

The collective experience still sits on a user-owned technical container. Plan the lifecycle.

Technical storage

Copilot Pages and Notebooks are stored in a user-owned SharePoint Embedded container. The container follows the principal owner's lifecycle.

Member model

Invited Notebook members currently have editing access. Read-only members are not supported, and groups cannot currently be added as members.

Operational ownership

Name a functional owner, business owner and handoff process. "Shared with the team" is not enough for continuity.

Lifecycle check before production use: Who owns the context? Who can reassign it? What happens when the creator leaves? Which content is the official record?

Licensing and reference limits change the experience

Ask three questions before the demo, and before the invoice.

Question	Copilot Chat user	Microsoft 365 Copilot-licensed user
How many references?	Up to 50	More than 300 can be added; first 300 ground answers
What can be referenced?	Standard supported content	Standard + premium work sources such as Outlook emails, Teams meetings and SharePoint locations
What is required to create a Notebook?	SharePoint or OneDrive service plan	SharePoint or OneDrive service plan
Does sharing equalize the experience?	No	No — source access and license still matter

Healthy question: “Included with what, grounded by what, shareable with whom?”

Three questions I expect after the demo

The answers are less exciting than “AI magic”, which is exactly why they matter.

1 · Can I make members read-only?

Not currently. People invited to a shared Copilot Notebook have editing access.

Design the audience and ownership model accordingly.

2 · Can I share with a Microsoft 365 group?

Not currently. Notebook membership is person-based because the Notebook lives in the creator’s user-owned container.

Group-managed Notebooks are not the current model.

3 · Does sharing bypass file permissions?

No. Sharing can invite recipients to linked files when you have sharing rights, but restricted content can still require access. License differences also affect premium sources.

A good Notebook is a governed context... Not a pile of files

The workflow is simple. The discipline is the value.

1 · Scope

Start from an outcome. Add the evidence required for that outcome — not everything you can access.

2 · Verify

Make contradictions visible. Inspect the evidence behind high-impact claims before they become decisions.

3 · Operationalize

Turn the result into a durable deliverable, then share a curated context with explicit ownership and lifecycle.

The Copilot button is not a delegation of responsibility.

Questions

Session Evaluations

- Rate the session topics, learnings, and level.
- Rate the presenter and provide feedback.
- During closing remarks, a different QR code will be shown for the overall event evaluation.
 - Submit that with your name to be part of end of day raffle prizes.
 - You must be present to win.
- Please share general feedback to help us improve.



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Please be safe and responsible.

Have fun – in Good Spirits. :)



Questions?

Thank you!

Glossary



Grounding

The evidence Copilot uses to generate an answer in this context.

PLAIN ENGLISH

The evidence Copilot uses to generate an answer in this context.

WHY IT MATTERS

A fluent answer is not enough; you need to know what evidence it was grounded on.

PROJECT ATLAS EXAMPLE

In Atlas, the Notebook is grounded on the selected charter, budget, risk register, minutes and emails — not every file Contoso owns.

Remember

A fluent answer is not enough; you need to know what evidence it was grounded on.

Reference

A file, email, meeting, Page, site, folder or other supported item explicitly added to the Notebook.

PLAIN ENGLISH

A file, email, meeting, Page, site, folder or other supported item explicitly added to the Notebook.

WHY IT MATTERS

References define the evidence boundary. Curating them is a design decision.

PROJECT ATLAS EXAMPLE

W01, P01, X01, X02 and W02 form the first Atlas evidence set. Later references change the current-state analysis.

Remember

References define the evidence boundary. Curating them is a design decision.

Instructions

Persistent guidelines that Copilot follows when responding inside the Notebook.

PLAIN ENGLISH

Persistent guidelines that Copilot follows when responding inside the Notebook.

WHY IT MATTERS

They make the reasoning pattern repeatable across prompts and across shared members.

PROJECT ATLAS EXAMPLE

Atlas instructions force separation of confirmed facts, decisions, proposals, assumptions and missing information.

Remember

They make the reasoning pattern repeatable across prompts and across shared members.

Copilot Page

A durable, editable output created from Copilot work — useful for briefs, plans and shared working documents.

PLAIN ENGLISH

A durable, editable output created from Copilot work — useful for briefs, plans and shared working documents.

WHY IT MATTERS

It moves valuable work out of a transient chat into an artifact that can be refined and reviewed.

PROJECT ATLAS EXAMPLE

The Atlas decision brief becomes a working Copilot Page before it is included in the launch committee Notebook.

Remember It moves valuable work out of a transient chat into an artifact that can be refined and reviewed.

SharePoint Embedded

The storage layer used for Copilot Pages and Copilot Notebooks in the organization.

PLAIN ENGLISH

The storage layer used for Copilot Pages and Copilot Notebooks in the organization.

WHY IT MATTERS

Storage and lifecycle affect ownership, handoff, compliance and what happens when the creator leaves.

PROJECT ATLAS EXAMPLE

The launch committee Notebook may feel collective, but its technical container is still user-owned until admins manage or reassign it.

Remember

Storage and lifecycle affect ownership, handoff, compliance and what happens when the creator leaves.



THANK YOU

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