

AI FOR BUSY PROFESSIONALS

Chapter 9 – Using AI in Teams & Outlook

Quick Reference Guide



Manage Your Inbox with Purpose

- Focus on what needs action vs awareness
- Prioritise emails quickly
- Reduce reading time
- Keep responses clear and intentional

- ✓ “Summarise this email in 3 bullet points.”
- ✓ “What action is required from this email?”
- ✓ “Draft a short reply confirming next steps.”
- ✓ “Rewrite this email to be clearer and more concise: [paste].”

Draft & Refine Emails Faster

- Start with a rough idea, not a blank screen
- Adapt tone to suit audience type
- Keep messages short and structured
- Avoid over-explaining

- ✓ “Make this email more concise & direct: [draft].”
- ✓ “Rewrite this to sound more [friendly/formal].”
- ✓ “Turn these bullet points into an email: [points].”
- ✓ “Shorten this email without losing meaning.”

Organise Threads & Conversations

- Extract key decisions from long threads
- Identify unanswered questions
- Reduce back-and-forth

- ✓ “What questions are still unanswered in this conversation?”
- ✓ “List all action items and who is responsible.”
- ✓ “Highlight any risks or delays mentioned.”

Prepare for Teams Meetings Faster

- Clarify purpose before joining
- Know what matters
- Identify decisions needed
- Save prep time

- ✓ “Summarise this meeting invite and agenda”
- ✓ “What should I prepare for this meeting?”
- ✓ “List the likely discussion points based on this agenda.”
- ✓ “What questions should I ask in this meeting?”

Capture & Summarise Meetings

- Focus on listening, not note-taking
- Capture decisions and actions
- Reduce post-meeting confusion

- ✓ “List all actions, owners, and deadlines.”
- ✓ “What decisions were made in this meeting?”
- ✓ “Summarise this in under 5 bullet points.”

Turn Conversations into Actions

- Convert discussion into clear next steps
- Avoid missed follow-ups
- Create accountability

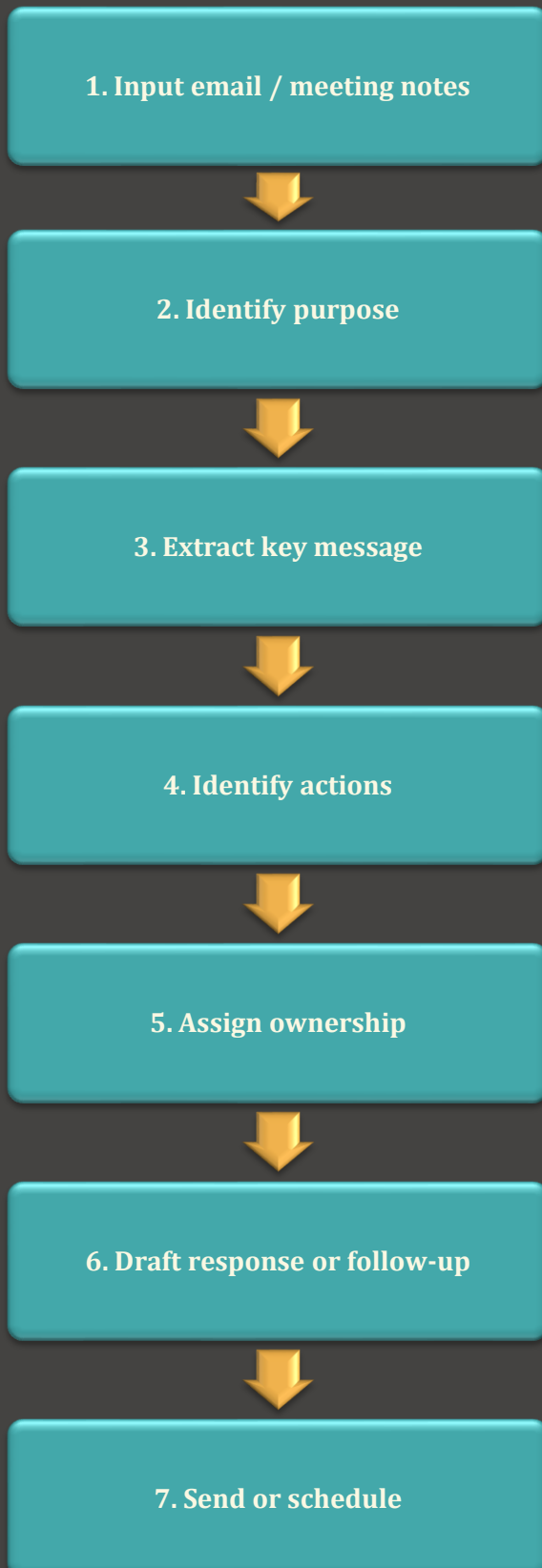
- ✓ “Turn these mting notes into a clear action plan.”
- ✓ “Create a follow-up email based on this meeting summary.”
- ✓ “List next steps with owners and deadlines.”
- ✓ “What should happen next based on this discussion?”

Reduce Cognitive Load

- Is this email/message clear in one read?
- Is the action obvious?
- Can anything be shortened or removed?
- Are next steps clearly stated?

- ✓ “Summarise this into the single key message.”
- ✓ “What is the main action required?”
- ✓ “Simplify this message without losing meaning.”
- ✓ “Rewrite this so it is clear in under 10 seconds.”

Teams & Outlook Workflow



SUCCESS CHECKLIST

- ✓ Emails are clear and concise
- ✓ Actions are easy to identify
- ✓ Threads are summarised before replying
- ✓ Meetings result in clear next steps
- ✓ Follow-ups are sent quickly
- ✓ Time spent reading emails is reduced

MISTAKES TO AVOID

- ✗ Copying AI responses without checking details
- ✗ Failing to tailor responses to the recipient (tone, seniority, technicality)
- ✗ Missing context from earlier emails
- ✗ Not verifying actions or deadlines
- ✗ Over-relying on summaries without checking key details
- ✗ Replying before clarifying the objective or outcome