

Free Microsoft 365 Tips for Business Owners

When you're running your own business, there's no IT to show you the quick wins. These are some of my favourites: small things that save time or stop a headache.

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Finding your files

1. **Start file names with the date, backwards.** Writing 2026-10-21 first means your files sort into date order automatically.
2. **The three-second rule.** If you can't tell what a file is within three seconds of seeing its name, rename it.
3. **Check Version History.** If you've overwritten a file in OneDrive or SharePoint, right-click it and open Version History before you panic.

Setting up your business email

4. **Add email aliases.** Addresses like info@ or bookings@ can all land in your one inbox, so you don't need separate mailboxes.
5. **Set up your signature first.** Do it before you send anything, because an email without one looks unfinished.
6. **Turn on two-factor authentication straight away.** Your business email is the gateway to everything else.

Getting more from Copilot

7. **Try the role trick.** Start your prompt with a role, such as "You are a plain-English editor", and the tone shifts immediately.
8. **Paste and ask.** Paste in an email or document and ask Copilot a question about it directly.
9. **Give it context.** Say who the writing is for and what it's for. It improves the results, even on the free version.

Everyday Office

10. **Teams: mark as unread.** Right-click a message to flag it, so you remember to come back to it.
11. **Outlook search operators.** Type hasattachments:yes into the search box to see only emails with attachments.
12. **Excel: filter by colour.** It also works on colours applied by Conditional Formatting, not just ones you've added by hand.

Better prompts for Copilot

A framework for presentation prompts

When Copilot gives you something generic, the prompt is usually too vague. Before I type anything, I answer four questions:

- **Audience:** who is this for?
- **Structure:** how many slides, and what should each one cover?
- **Content:** what points, facts or numbers must be included?
- **Tone:** plain English, formal or friendly? Anything to avoid?

Fill-in-the-blank version:

“Create a [X]-slide presentation about [topic] for [specific audience]. Slide 1: [title/purpose]. Slide 2: [content]. Slide 3: [content]. Slide 4: [content]. Keep the tone [plain English / formal / friendly] and avoid [jargon / technical terms / anything specific to skip].”

Sample prompt: a short intro to Teams

“Create a 5-slide presentation about Microsoft Teams for small business owners who are new to it. Slide 1: title only. Slide 2: what it is, in plain English, no jargon. Slide 3: three practical benefits, one sentence each. Slide 4: one common misconception. Slide 5: three next steps the audience can take this week. Keep language simple and avoid technical terms.”

Sample prompt: a client pitch

“Create a 6-slide presentation pitching my bookkeeping services to a prospective client who runs a small retail business. Slide 1: title only. Slide 2: the problem — time lost on manual admin. Slide 3: how I can help, three services. Slide 4: pricing overview. Slide 5: a simple case study or example result. Slide 6: next steps to get started. Keep the tone warm and confident, avoid heavy financial jargon.”

Sample prompt: make a deck look consistent

“Apply a consistent design across all slides, using slide 1’s colours and typography as the anchor. Keep all existing text and content — just align backgrounds, headings, accents and spacing so the deck feels like one set.”

A framework for Custom Instructions

If you'd rather Copilot sounded like you from the start, answer three questions in plain sentences:

1. **Who am I?** "I run [business], and I work with [who you help]."
2. **How should responses sound?** "Keep things friendly and plain English, not corporate-sounding."
3. **How should responses look?** "Use bullet points where possible. Keep things concise. Avoid jargon like 'synergy' or 'leverage.'"

Each sentence should tell Copilot something specific enough that leaving it out would change the answer.

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