

Personalisation in Copilot

Work IQ already knows your work: mail, meetings, files, your network. What it doesn't know is you — how you work, what you repeat, the shape you need answers in. That gap takes about twenty minutes to close. After that you stop explaining who you are in every single chat.

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Work IQ is already set up

Mail, meetings, files, your network and what Copilot infers from your chat history — it knows all of that automatically. You start at step one.



About you 2 min

Start where Copilot has nothing: your role, the topics you work on, the tools you live in. Open the Copilot menu, go to chat settings, then Personalisation, and write it into the first field.

SETUP

„Toggles greyed out? Then personalisation is disabled for your tenant and you can't turn it on yourself. Ask your admin.“



Custom instructions 5 min

Now define the standing behaviour: language, tone, format, shortcuts. Written once, it applies to every chat without you repeating it.

„Analyse how I work and draft custom instructions for me in Markdown, ready to copy and paste.“



Kickstart interview 5 min

Let Copilot do the work. It asks, you answer, and every answer becomes part of your personalisation.

„Ask me 10 questions about myself so you can improve my custom instructions. Then write an optimised version.“



Pascal Brunner-Nikolla



Targeted memory 5 min

The formula is simply: remember that. Projects, stakeholders, specific knowledge, format preferences — tell Copilot directly instead of hoping it infers them.

„Remember that: always structure meeting summaries into decisions, tasks and open questions.“



Chat history

Microsoft Frontier programme only

The fourth setting lets Copilot draw on your earlier conversations, so it carries context across sessions. Turning it off doesn't delete anything — it only stops Copilot using it.

SETUP

„Not in every tenant. If you can't see the setting, your organisation isn't in the Microsoft Frontier programme.“



Stay in control 3 min

Your memories, your rules. Review them, edit them, delete what's wrong. Three minutes a week keeps it from drifting.

„What have you remembered about me so far?“

Pro move: shortcuts

Put recurring prompts into your custom instructions as shortcuts. #DE-EN translates from German to English, #ExS writes an executive summary — the rest is yours to invent.

Your Day