Session 1 Handout: Inbox and Calendar

FAST-04 AI Productivity with Microsoft Copilot and Google Gemini · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

Email is where most office time goes and where AI saves the most, as long as nothing goes out unchecked. A summary that narrows "Tuesday or Wednesday" to "Tuesday," or a reply that waives a fee nobody offered, becomes a promise with your name on it. This session gives you a summarize → draft → check routine and a permissions primer you'll use in every later session.

Key concepts

1. What the assistant can see

Copilot (Microsoft) and Gemini (Google), in your work account, work **within your permissions**. They can draw on mail, chats, calendar, meetings, and files *you* can open: including folders someone shared with you years ago. Two consequences:

- The assistant won't show you files you can't open.
- Anything over-shared to you (or to "everyone") can surface in an answer. Session 4 shows how to fix that.

Naming note: Microsoft's work assistant is now branded **Microsoft Copilot** (formerly Microsoft 365 Copilot). Copilot Chat may be available to users without the full license, with less access to your work data. Your employer's IT team can confirm which you have.

2. Summarize, then draft, then check

Step	Copilot in Outlook	Gemini in Gmail	What you check
Summarize	Summarize (top of thread) or Copilot pane	Summarize this email (side panel)	Decisions, asks, deadlines match the thread
Draft	Draft with Copilot / reply suggestions	Help me write	Built from the checked summary, not memory
Check	You	You	Names, dates, numbers, commitments, tone

Tell the assistant **what you can promise** and **what you can't**: "Confirm the Tuesday pickup; don't promise fee waivers, discounts, or delivery dates."

3. The commitment hunt

AI drafts like to please. Before sending, highlight every:

- **price, fee, discount, credit, or refund;**
- **date or deadline** (pickup, delivery, response by);

- **guarantee** ("will arrive," "won't happen again");
- **promise of action** by someone ("your account manager will call").

Each one must be true, already agreed, or approved by someone with authority. Otherwise, remove it.

4. Scheduling and follow-ups

Assistants can suggest meeting times, draft follow-ups, and turn email asks into tasks. Common errors: invented deadlines, wrong time zones, missing attendees. **Never auto-send invitations to customers.** Draft, confirm, send yourself.

5. Tone

Read the draft as the customer would. Cut filler and over-apologizing; keep it short, specific, and accountable. You send it, so you own it.

Worked example: Granite Ridge pickup change

Thread: shipper offers "Tuesday 8-10 AM or Wednesday afternoon," asks about a $150 detention charge, mentions a new receiving contact.

AI summary (first try): "Shipper agreed to Tuesday pickup; asked to waive detention." ✖ Two errors: they offered two options, and they *asked whether it applies*, not for a waiver.

Draft prompt: "Draft a reply confirming pickup Tuesday 8-10 AM (dispatch confirmed). Don't promise fee waivers, discounts, or delivery dates; billing will answer the detention question. Ask for the new receiving contact. Under 90 words."

Commitment hunt result: one line removed ("we'll make sure this never happens again"); detention routed to billing.

Checklist: before you send

- ☐ Summary checked against the thread.
- ☐ Draft built from the checked summary.
- ☐ Every price, date, refund, and guarantee true or approved.
- ☐ Time zones, attendees, rooms confirmed.
- ☐ No auto-sent customer invitations.
- ☐ Read as the customer; filler removed.

Do and don't

Do	Don't
Tell the assistant what you can't promise	Let it decide fees or credits
Route billing and rate questions to the owner	Answer them in a friendly AI draft
Convert relative dates ("Thursday") to real dates	Trust "end of week" in a follow-up
Keep the reply short and specific	Pad with apologies

Do	Don't
Use your work account	Paste work mail into a personal AI app

Try this at work

1. Pick three long threads this week (no sensitive data per policy).
2. Summarize, check, draft, hunt commitments.
3. Time it, including checking, and compare with your usual time.
4. Note one commitment you caught.

Glossary

Term	Meaning
Permissions	Who can open a file, mailbox, or chat; the assistant inherits yours
Thread summary	AI digest of an email conversation
Commitment	Any promise of price, date, action, or outcome
Commitment hunt	Highlighting every commitment in a draft before sending
Detention charge	(Freight) Fee when a truck waits beyond free time at pickup or delivery
Copilot Chat	Microsoft's chat assistant; capabilities depend on license

Key takeaways

- The assistant sees what you can see.
- Summarize → draft → check.
- Commitments and dates always get a human check.