Quick-Reference Card: AI Productivity with Copilot and Gemini

FAST-04 · 7formations · Instructor: Wadood Chaudhary

Where the assistant lives

Task	Microsoft Copilot	Google Gemini
Email	Copilot in Outlook: summarize, draft	Gemini in Gmail: summarize, Help me write
Meetings	Copilot in Teams: recap, questions	Gemini in Meet: Take notes for me
Documents	Copilot in Word: draft from files	Gemini in Docs: Help me write, side panel
Slides	Copilot in PowerPoint: create from file	Gemini in Slides: create slides, images
Spreadsheets	Copilot in Excel: questions, formulas, pivots	Gemini in Sheets: questions, formulas, tables

Features and names change; Microsoft's assistant is now "Microsoft Copilot" (formerly Microsoft 365 Copilot).

Five routines

1. **Email:** summarize → check → draft (say what you can't promise) → commitment hunt → send yourself.
2. **Meetings:** consent and policy → decisions / owner-action-date / open questions → mark every line → tasks with links.
3. **Documents:** your outline + named files + "use only" + [NOT IN SOURCE] → section by section.
4. **Slides:** from the checked doc → cut to target → replace generic images → fact and figure check sheet.
5. **Spreadsheets:** clean table, clear filters → ask, show formula/pivot → rebuild one answer → explain differences.

Always a human check

Prices · fees · refunds · dates · deadlines · guarantees · owners · every number on a slide.

Recap error marks

Correct · Wrong owner · Wrong date · Discussed, not decided · Not in meeting

Permissions

The assistant sees what **you** can see. Org-wide sharing = everyone's assistant can surface it. **Restrict, tell the owner, report.**

Massachusetts reminders

No personal information (G.L. c. 93H, 201 CMR 17.00) or PHI in prompts. No secret recording (G.L. c. 272, §99): everyone aware and agreed; follow policy. Training, not legal advice.

Honest time

Saved = by hand − (AI run + checking). No saving? Adjust or stop.