FREE TO DO YOURSELF

EMAIL PRIORITIES

Get the gist. See what needs you.

Less time rereading long email threads. One short brief for each job.

Helps you catch clashes early, such as a late drawing against a booked pour.

Quick reply drafts. You check and send them yourself.

Every point links to its source email, so you can check before you act.

For growing NZ residential builders. No prior AI skills needed.

YOU NEED

A Windows computer with internet access.
Microsoft 365 Business Basic or above, with work email. Business Basic is the lowest-cost option.
Company approval to use work email with AI.
No paid Copilot add-on is needed for your own work mailbox.
This method uses your own work mailbox, not a shared one (accounts@, info@).
A shared mailbox may need the paid Copilot add-on. Test it first: see page 4.

Free guide. Microsoft 365 is a paid subscription.
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For NZ residential builders

SET IT UP

STUCK? ASK COPILOT FOR HELP.

Type: Explain that more simply. Give me one next step.

1. Open outlook.office.com/mail in Edge or Chrome. Sign in with your work email.
2. Select the Chat button with the Copilot icon, at the top right of Outlook. The Copilot panel opens on the right.
3. Start a new chat for each job. In the chat list, select New chat. Do this even when two jobs are for the same client.

Stuck? Ask Copilot for help.

NO COPILOT BUTTON?

Ask your Microsoft 365 administrator to check your licence and Copilot Chat access before paying for anything extra.

Before you use customer information

Confirm company approval. Complete a privacy impact assessment for personal information. Use only the information this job needs.

NZ Privacy Commissioner: assess AI use

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COPY THIS PROMPT

The brief shows what changed, what needs your decision and what could hold up the next milestone. It links to the emails so you can check the evidence before you act.

> Find the sent and received Outlook emails for [job name or reference]. In three bullets, tell me what needs my attention first, why it matters, and what I need to decide. Link the emails that support your answer. Skip unsent drafts, distinguish proposals from confirmed plans, and flag anything the emails don't establish.

1. Paste into Copilot

Copy the whole box. Paste it into the Copilot message box. Replace [job name or reference] with the job name as it appears in Outlook, such as Smith Renovation. Remove the brackets and select Send.

2. Save it to reuse

To reuse the prompt, save the filled-in text in the job folder as Email Brief - Smith Renovation.txt.

Rename the chat after your first brief

Copilot names each chat after the first words of the prompt. Rename it so you can find the job later.

1. In the Copilot panel, select the menu button (three lines) at the top left. The chat list opens.
2. Under Chats, point to the chat for this job. Select ... (three dots) next to it.
3. Select Rename.
4. Type the job reference and today's date, for example Smith Renovation | 5 Nov. Press Enter.

Select Pin from the same menu to keep a live job at the top of the list.

Run it again or draft a reply

Use the prompt again in a new chat. Ask for a reply draft once you decide what to do. Check it before sending.

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CHECK THE PRIORITY

WORKED EXAMPLE | DEMO-5

Booking email: The footing drawing is needed by Thursday noon to keep the Friday 8 am pour.
Designer email: The designer proposes Friday at 10 am for the drawing.
First decision: Ask if the drawing can arrive by Thursday noon. If it cannot, decide whether to move the pour.

Open both source emails

Check which date was confirmed and which was proposed before you act.

IF A THREAD IS MISSING

Check the job reference. If you narrow the search, include the original booking and the later change. Search for the email in Outlook. If company policy allows, paste the relevant excerpt into Copilot and ask it to revise the brief.

SHARED MAILBOX? TEST IT FIRST

1 In Outlook, find the shared mailbox in the folder list on the left, under your own mailbox.
2 Select its Inbox.
3 Select the Copilot button at the top right.
4 Type: Summarise the latest 3 emails in this mailbox. Press Enter.
5 If Copilot answers from your own inbox, or there is no Copilot button, your plan does not cover shared mailboxes. Ask your administrator about the paid Copilot add-on.

Microsoft: Copilot Chat in Outlook | Microsoft: NZ plans and prices
Microsoft: shared mailbox access | Microsoft: work-account data protection

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THREE WAYS TO RUN IT

One short brief for each job, and you still decide what to send. Each way teaches you the method, so you can use it again in other parts of your business.

DO IT YOURSELF FREE	DO IT WITH ME PAID	DONE FOR YOU PAID
WHAT HAPPENS You have everything in this guide. You learn the method as you go. **BEST FOR** Owners who like to try it themselves first. **START** **Turn to page 2.**	**WHAT HAPPENS** Bring one job. I coach you through it on your own inbox. You learn the method, so you can use it again. **BEST FOR** Owners who want to learn it properly and run it themselves. **START** **Book a call.**	**WHAT HAPPENS** I set it up for your jobs. Then I show you and your team how it works. For larger builds, I source and oversee a developer or recommend one. **BEST FOR** Owners who want it running without doing the setup. **START** **Book a call.**

WANT IT DONE WITH YOU, OR FOR YOU?

Book a call: calendly.com/riozziedeb/discovery-call
Email me: deb@riozzieai.com

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