PRACTICAL GUIDE

Understand & Summarize Documents with AI in Microsoft Word

Find what matters. Understand the details. Prepare your next step.

06

Mastering AI
Make AI Work for You

From a long report to a useful brief

A project report arrives before a meeting. You need to understand what has changed, what needs attention, and which questions to raise. Use Copilot in Word to turn it into a short brief you can bring to the discussion.

You will need a Word document and an account with access to Copilot in Word.

---

01 / Open your document and Copilot

Open the report in Word, then select Copilot to open the chat pane. If you see a choice of modes, select Chat only to ask questions about the document.

For this example, imagine you are preparing for a project meeting. You want a quick overview first, then a closer look at the decisions that need attention.

---

02 / Get a useful summary

Tell Copilot what you need the summary for. Try this request:

> *Summarize this project report for our next meeting. Give me five bullet points covering progress, delays, decisions needed, and next steps. Use only information from the document.*

Read the result to get your bearings. You now have a starting point for exploring the parts that matter to you.

Want a quicker overview? Ask: "Shorten this to the three most important points."

---

03 / Ask about what matters

Keep the conversation going. Ask about an unclear passage, a decision, or something the summary only touched on.

> *Which decisions still need to be made, and what does the report say is holding up progress?*

If the wording is hard to follow, try: "Explain the section about project dependencies in plain English, with a simple example."

You can also ask: "What questions should I bring to the meeting?" This helps turn your reading into preparation for the conversation.

---

04 / Put it to use

Turn what you have learned into something you can take to the meeting:

> *Create a meeting brief of no more than 200 words with three parts: current status, decisions to discuss, and open questions. Include owners and dates only when the report states them.*

Before sharing it, check important names, dates, figures, and conclusions against the original. Then copy the brief into your meeting notes and keep the document link alongside it.

Try it with another document

Study notes: Ask for the main concepts and three questions to test your understanding. Meeting notes: Pull out decisions, actions, and unresolved questions. A proposal: Identify the suggested approach and the questions you want to ask its author.

Further help: Microsoft Support. Guidance checked September 22, 2026.

> **Your result: a clearer understanding of the document and a useful brief for your next conversation.**

References and currency

Official Copilot guidance
https://support.microsoft.com/en-us/word/welcome-to-copilot-in-word

Summary guidance
https://support.microsoft.com/en-us/word/copilot/create-a-summary-of-your-document-with-copilot-in-word

KEEP LEARNING

Make AI Work for You

Find more practical guides, books, articles, and resources at masteringai.ai.