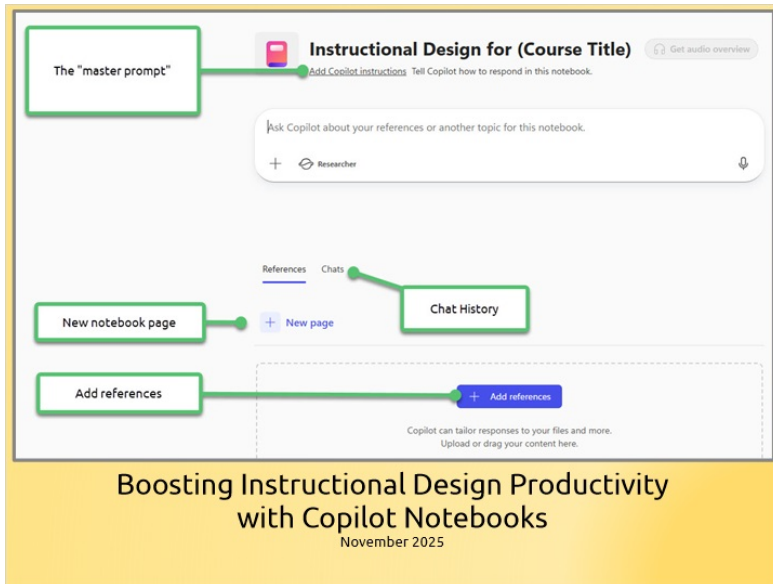


# Boosting ID Productivity with Copilot Notebooks

## 1. Intro Scene

### 1.1 Welcome



#### Notes:

Welcome to Boosting Instructional Design Productivity with Copilot Notebooks! Copilot Notebooks is a Microsoft 365 AI feature that can be applied to instructional design for consistent content across operational functions. In this video, we'll discover how Copilot Notebooks can become your personal AI assistant for course design. Imagine having all your source materials - manuals, prior course content, SMEs' notes - in one place, and an AI that helps you write and refine content from them. Let's see how it works.

## 1.2 Objectives

Boosting Instructional Design Productivity with Copilot Notebooks

### Objectives

- 01** Describe what Copilot notebooks are and how they function within M365 OneNote.
- 02** Implement the steps to create a Copilot notebook, adding project-specific references, pages and instructions.
- 03** Use Copilot to generate instructional content (e.g., outlines, scripts, quizzes) consistent and aligned with your sources of truth.
- 04** Identify strategies for applying Copilot Notebook across different courses and departmental training to maintain a unified learning experience.
- 05** Recognize best practices and limitations when integrating Copilot into your design process.

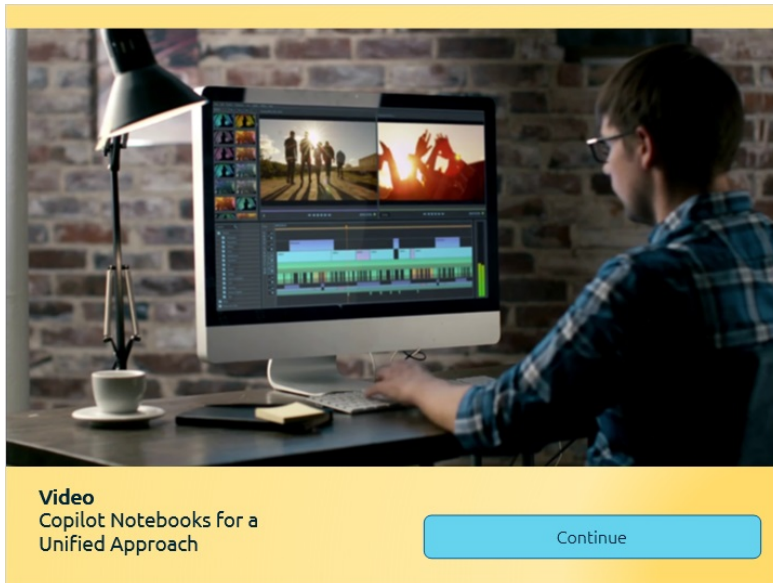
### Notes:

#### Learning Objectives

By the end of this module, you should be able to:

- Describe what Copilot notebooks are and how they function within M365 OneNote.
- Implement the steps to create a Copilot notebook, adding project-specific references, pages and instructions.
- Use Copilot to generate instructional content (e.g., outlines, scripts, quizzes) that is consistent and aligned with your sources of truth.
- Identify strategies for applying Copilot Notebook across different courses and departmental training to maintain a unified learning experience.
- Recognize best practices and limitations when integrating Copilot into your design process.

### 1.3 Video Copilot Notebooks for a Unified Approach



#### Notes:

##### Video Script:

Delivering impactful learning experiences across different courses and audiences requires more than just great content.

It demands a unified approach.

Maintaining consistency in tone, terminology, and instructional methods is essential for organizational credibility and learner understanding.

A strong foundation begins with establishing clear learning standards and templates.

By creating centralized style guides, defining preferred tone, terminology, and instructional approaches, teams ensure every course aligns with organizational values.

Templates for slides, guides, and assessments provide a consistent look and feel, reducing variation and reinforcing core messaging, whether in leadership or sales training.

Collaboration and technology play a crucial role in maintaining alignment,

Shared authoring platforms allow multiple designers to work together, track updates, and ensure everyone is referencing the latest approved content.

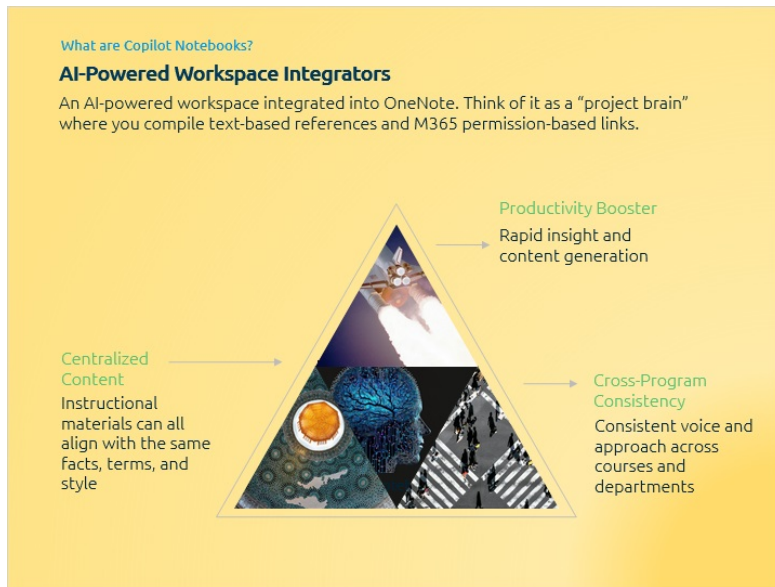
Version control and asset libraries make it easy to update terminology or messaging in one place, instantly propagating changes across all courses, ensuring marketing and operations onboards always deliver the same key facts without manual checks.

By leveraging standards, templates, and collaborative technology, instructional designers can deliver cohesive and credible learning experiences across programs and audiences.

This approach not only saves time but also ensures that every learner receives clear, consistent messaging, no matter the course or department.

## 2. What are Copilot Notebooks?

### 2.1 AI-Powered Workspace Integrators



#### Notes:

Copilot Notebooks are an AI-powered workspace integrated into OneNote. Think of it as a “project brain” where you compile all your references – Word docs, PowerPoint decks, Excel sheets, chats, OneNote pages, links, etc. – into a single notebook that Copilot can draw from.

#### Centralized Content, Consistent Output

Copilot Notebooks let you gather all relevant materials (docs, slides, notes) in one AI-powered workspace – ensuring answers and drafts stay grounded in your content. This means your instructional materials can all align with the same facts, terms, and style.

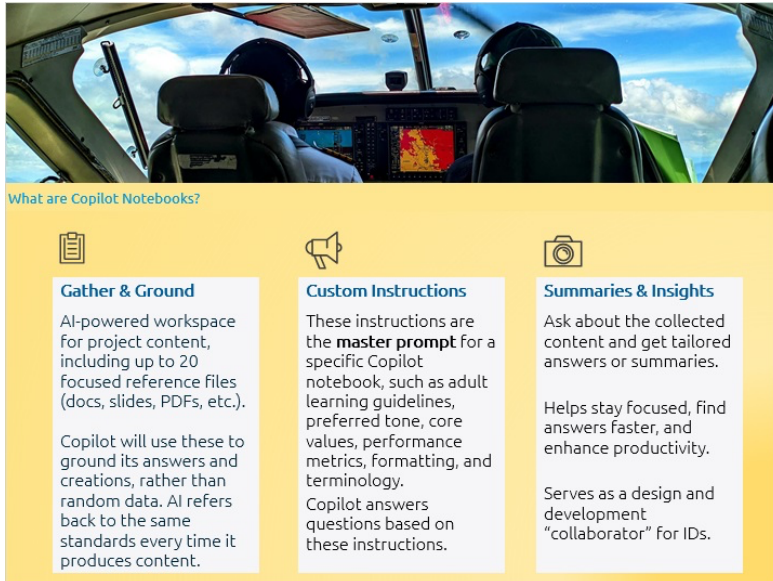
#### Productivity Booster

By focusing only on the content you provide, Copilot can quickly summarize sources, draft outlines, and suggest text – saving you time on research and first drafts. You get rapid insights without hunting through multiple windows.

#### Cross-Program Consistency

Using shared references (like style guides or prior modules) and custom instructions, Copilot helps maintain a consistent voice and approach across courses and departments. All functions share a unified framework and brand tone. When source documents are updated in the cloud, Copilot Notebooks automatically incorporate those changes, maintaining a centralized and consistent output across all course materials.

## 2.2 what Are ...? 1



### Notes:


Unlike the general-purpose Copilot, which searches broadly, a Notebook scopes the AI to only the content you've added, yielding focused, contextual responses. Key features include:

**Gather & Ground:** You can add up to 20 reference files (docs, slides, PDFs, etc.) into a Copilot Notebook. Copilot will use these for grounding its answers and creations, rather than random web data. For example, include your course design documents, style guides, and any cross-functional content (marketing brochures, product manuals, etc.).

**Custom Instructions:** Each notebook lets you set custom Copilot instructions (like guidelines for tone, formatting, terminology). This is crucial for instructional design – you might instruct Copilot to “use a coaching tone” or “learning objectives based on Bloom’s taxonomy,” ensuring outputs meet your standards.

**Summaries & Insights:** You can ask Copilot questions about the collected content and get tailored answers or summaries. “What are the key themes across these documents?” might produce a quick overview of all your source material. There’s even an Audio Overview feature that generates a spoken summary of the notebook’s content, useful if you want to listen to a recap on the go.

## What are Copilot Notebooks 3 (Slide Layer)



What are Copilot Notebooks?

**Draft Generation**

Copilot can generate drafts of lesson outlines or video scripts based on your notebook references, a huge time-saver in developing learning assets.

**Integrated Workspace**


Since it lives in OneNote, Copilot Notebook is easy to access through M365. Create a notebook from the M365 Copilot interface, give it a name, then start adding content.

**Why it Matters**

By confining AI to your curated content, you ensure that everything Copilot generates is relevant and consistent with your project. This is ideal for multi-course curricula where consistency is key, and for cross-functional training where content must align with diverse but related materials.

Continue

### 2.3 what Are ...? 2



What are Copilot Notebooks?

**Draft Generation**

Copilot can generate drafts of lesson outlines or video scripts based on your notebook references, a huge time-saver in developing learning assets.

**Integrated Workspace**

Since it lives in OneNote, Copilot Notebook is easy to access through M365. Create a notebook from the M365 Copilot interface, give it a name, then start adding content.

**Why it Matters**

By confining AI to your curated content, you ensure that everything Copilot generates is relevant and consistent with your project. This is ideal for multi-course curricula where consistency is key, and for cross-functional training where content must align with diverse but related materials.

#### Notes:

**Draft Generation:** Copilot can generate drafts of emails, reports, or outlines based on your notebook content. For instance, it can draft a lesson outline or video script by synthesizing the references you've added – a huge time-saver in developing learning assets.

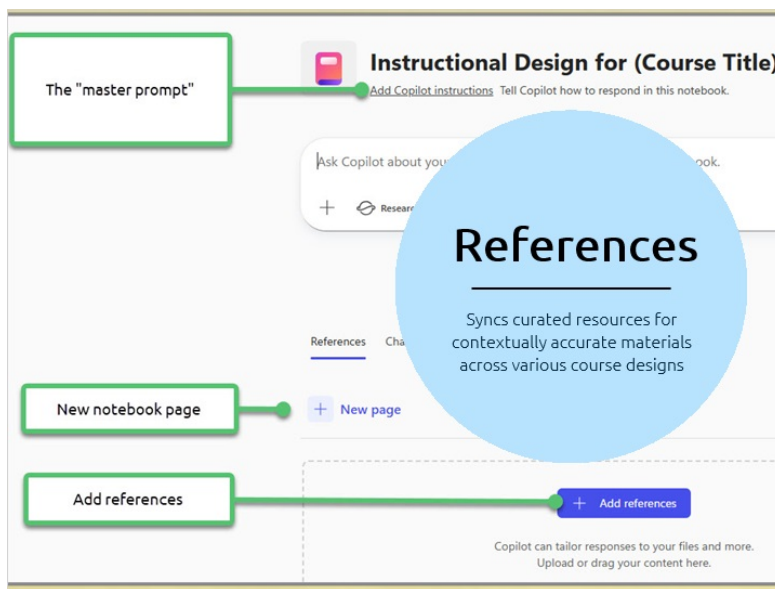
**Integrated Workspace:** Since it lives in OneNote, Copilot Notebook is easy to access through your Microsoft 365 environment. It's currently available to enterprise users with a Microsoft 365 Copilot license (so you'd need that enabled to use it). You create a new

Notebook from the M365 Copilot interface, give it a name, then start adding content.

Why it matters for instructional design: By confining AI to your curated content, you ensure that everything Copilot generates is relevant and consistent with your project. This is ideal for multi-course curricula where consistency is key, and for cross-functional training where content must align with diverse but related materials.

## 3. References

### 3.1 References



#### Notes:

### References

Syncs curated resources for contextually accurate materials across various course designs.

## 3.2 References | Supported Elements

**Copilot Notebook's Library**

### References | Supported Elements

These references serve as the foundational "source of truth" to generate consistent, contextually accurate materials across courses and departments.

<p><b>Documents</b></p> <p>Word, PowerPoint, Excel and PDFs*</p>	<p><b>New Pages</b></p> <p>Loop-based Copilot Notebook pages (different from OneNote pages)</p>
<p><b>M365 Content</b></p> <p>OneNote pages, Copilot chats, and meeting notes</p>	<p><b>Web Links</b></p> <p>Supported M365 file types and Teams communication artifacts</p>
<p><b>M365 Collaboration</b></p> <p>Loop pages and components</p>	<p><b>Cannot Add</b></p> <p>Images, videos, most external websites</p>

File Explorer:  
Microsoft Cloud > Microsoft Copilot Chat Files > Copilot Notebook Uploads

### Notes:

T2S:

Copilot Notebook references are curated content sources integrated into M365 to support, in this learning session, instructional design. These references serve as the foundational "source of truth" to generate consistent, contextually accurate materials across courses and departments.

You can add Microsoft 365 and OneNote pages. Copilot will use these documents for grounding prompt responses. Additionally, you can add other resources like Copilot chats, meeting notes, and Loop pages. You can also add links to supported file types within your Microsoft 365 account and to team or communication sites.

Notes:

You can add various Microsoft 365 elements to a Copilot notebook, including references to Word documents, PowerPoint presentations, Excel spreadsheets, PDFs, and OneNote pages. Additionally, you can add other resources like Copilot chats, meeting notes, and Loop pages. You can also add links to supported file types within your Microsoft 365 account and to team or communication sites.

### Supported elements

**Documents:** Word documents, PowerPoint presentations, Excel spreadsheets, and PDFs.

**Microsoft 365 content:** OneNote pages, Copilot chats, and meeting notes.

**Collaboration tools:** Loop pages and components.

**Web links:** Links to supported Microsoft 365 file types and to Team or Communication sites.

**New pages:** You can also create new Loop-based Copilot Pages directly within the notebook.

### What you cannot add

**Images or videos** are not currently supported.

Most external websites cannot be added as references.

**Microsoft Office documents are also accessible from File Explorer:**

Microsoft Cloud > Microsoft Copilot Chat Files > Copilot Notebook Uploads

references are curated content sources integrated into M365 to support instructional design. These

references serve as the foundational “source of truth” to generate consistent, contextually accurate materials across courses and departments.

You can add Microsoft 365 and OneNote pages. Copilot will use these documents for grounding but cannot reference web links or other external URLs.

### 3.3 References | Limitations

**Copilot Notebook's Library**  
References | Limitations

Copilot reads Word documents better than PDFs because its native integrations are built for the Word format.

<p><b>Closed Captioning</b></p> <p>No VTT or SRT uploads; include multimedia scripts in an acceptable format</p> <p><b>OneNote</b></p> <p>OneNote pages only, not section links</p>	<p><b>Native Integration</b></p> <p>Copilot's native integration is built for Word for seamless Q&amp;A</p> <p><b>More Reliable than PDFs</b></p> <p>Copilot can process OneDrive-based PDFs or OCR*-scanned documents. Performance is generally more reliable with the format of a Word document.</p> <p>*Optical Character Recognition</p>
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The infographic also features three diamond-shaped icons: a blue diamond with a white 'W' (Word), a black diamond with white 'CC' (Creative Commons), and a white diamond with a red Adobe logo and 'PDF' (PDF).

#### Notes:

T2S:

Let's touch on PDF limitations. Copilot reads Word documents better than PDFs because its native integrations are built for the Word format, allowing for seamless summarization, Q&A, and editing. While Copilot can process PDFs, especially when used with features like OneDrive for summarization or Optical Character Recognition, or OCR, for scanned documents, its performance is generally more reliable with the editable and structured format of a Word document.

Copilot's Notebook Library  
References | Limitations

#### Closed Captioning

No VTT or SRT uploads; include multimedia scripts in an acceptable format

#### OneNote

OneNote pages only, not section links

#### Native Integration

Copilot's native integration is built for Word for seamless Q&A

#### More Reliable than PDFs

Copilot can process OneDrive-based PDFs or OCR\*-scanned documents. Performance is generally more reliable with the format of a Word document.

\*Optical Character Recognition

### 3.4 References | How Teams Works

**Copilot Notebook's Library**

## References | How Teams Works

Copilot can access Teams meeting recap data if you have M365 access permission and provide the URL in a Notebook.

**Permission-Based Access**  
Accesses data from a Teams meeting recap link if you have access to the original meeting transcript

**Data Privacy & Compliance**  
Meeting recap data is processed and stored securely within M365 and not used to train foundational LLMs (large language models).

**Unified Workspace**  
Reasoning over various content types, including files, links, and meeting notes.

**Data Processing**  
Processes information in the transcript and any AI-generated content to respond to your Notebook prompt.

#### Notes:

T2S:

Copilot can access the data in a Teams meeting recap if you provide the URL, because it can access files and links that the user has permissions for within your M365 environment. The notebook will use the transcript and other data associated with the recap, such as notes or AI-generated summaries, to provide answers based on that information.

Copilot's Notebook Library  
References | How Teams Works

#### Permission-Based Access

Accesses data from a Teams meeting recap link if you have access to the original meeting transcript

#### Data Privacy & Compliance

Meeting recap data is processed and stored securely within M365 and not used to train foundational LLMs (large language models).

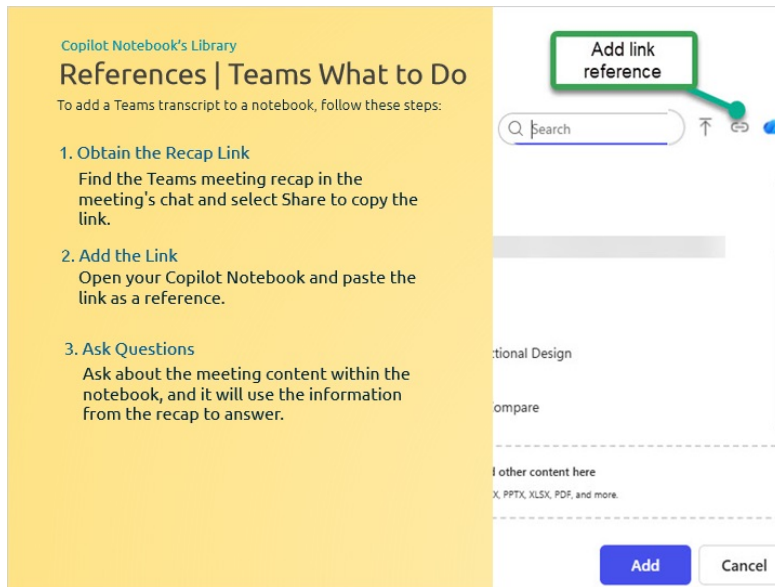
#### Unified Workspace

Reasoning over various content types, including files, links, and meeting notes.

## Data Processing

Processes information in the transcript and any AI-generated content to respond to your Notebook prompt.

### 3.5 References | Teams What to Do



#### Notes:

T2S:

To add a Teams transcript to a notebook, follow these steps:

First, Obtain the recap link. Find the Teams meeting recap in the meeting's chat and select Share to copy the link.

Second, Add the link to a notebook. Open your Copilot Notebook and paste the link as a reference.

Third, ask questions. You can then ask Copilot questions about the meeting content within the notebook, and it will use the information from the recap to answer.

Copilot's Notebook Library

References | Teams

to add a Teams transcript to a notebook, follow these steps:

First, Obtain the recap link. Find the Teams meeting recap in the meeting's chat and select Share to copy the link.

Second, Add the link to a notebook. Open your Copilot Notebook and paste the link as a reference.

Third, ask questions. You can then ask Copilot questions about the meeting content within the notebook, and it will use the information from the recap to answer.

### 3.6 References to Include and Why

Copilot Notebook's Library

#### References to Include and Why

Select a number on the circle to reveal more information about these reference categories:

References Categories

1. Learning Goals & Objectives
2. Related Lesson Titles & Topic Outlines
3. Instructional Design Framework
4. Operations & Strategy
5. Activities & Engagement Notes
6. Why It Matters

#### Notes:

T2S

In instructional design, curated references—such as objectives, lesson outlines, source materials, and stakeholder feedback—are essential for clarity, consistency, and impact. Grounding learning assets in approved materials ensures scalable, efficient, and high-quality programs. Select a number for more information.

Notes:

References

Copilot's Notebook Library

References to Include and Why

Instructions

Select a number on the circle to reveal more information.

1 Learning Goals and Objectives

Clearly defined outcomes that guide content creation and assessment

2 Related Lesson Titles and Topic Outlines

Clearly defined outcomes that guide content creation and assessment

3 Source Material References

External links and toolkits that support evidence-based design

Branding guidelines and current campaigns

Editorial checklist

Neurodivergent inclusion

2025 Strategic Plan Booklet

#### 4 Activities and Engagement Notes

Most recent and historical stakeholder feedback and subject matter expert (SME) input (Excel)

Operational and policy updates (e.g., Lighthouse links, neurodivergent inclusion)

Updated storyboards in Word format for Copilot comprehension

#### 5 For cross-functional audiences, these references:

Enable alignment between instructional designers, SMEs, and project managers by providing a shared framework

Support scalability by allowing repeatable structures across multiple courses and initiatives

Improve efficiency in development cycles by reducing ambiguity and rework

Facilitate analytics by linking objectives to measurable outcomes and assessment types

Ensure quality control through documented review and approval processes

### 1 Learning Goals and Objectives (Slide Layer)

Copilot Notebook's Library

## References to Include and Why

Select a number on the circle to reveal more information about these reference categories:

### References Categories

01. Learning Goals and Objectives 1

- Clearly defined outcomes that guide content creation and assessment
- Course outline
- Project plan
- Key performance indicators (KPI)

Back Continue

The screenshot shows a yellow background with a blue header bar. On the right, there is a large circular graphic with three concentric rings (outer blue, middle grey, inner white) and a small blue circle with the number '1' on the outer ring. Below the graphic, there are two buttons: 'Back' and 'Continue'.

## 2 Related Lesson Titles and Topic Outlines (Slide Layer)

Copilot Notebook's Library

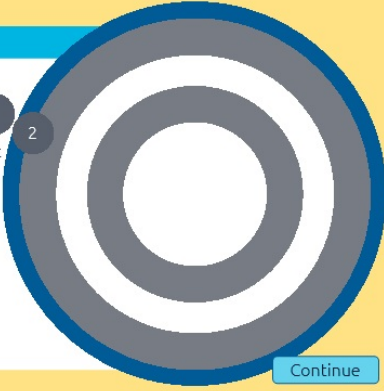
### References to Include and Why

Select a number on the circle to reveal more information about these reference categories:

**References Categories**

**02. Related Lesson Titles and Topic Outlines**

- Storyboards of legacy content
- Course outlines and storyboards of related modules if this is a multi-course program
- Notebook pages that contain Lighthouse subject matter content



Back Continue

## 3 Instructional Design (Slide Layer)

Copilot Notebook's Library

### References to Include and Why

Select a number on the circle to reveal more information about these reference categories:

**References Categories**

**03. Instructional Design**

- Toolkits that support evidence-based design
- Style guide & editorial checklist
- Branding
- Neurodivergent inclusion guidelines



Back Continue

## 4 Operations and Strategy (Slide Layer)

Copilot Notebook's Library

### References to Include and Why

Select a number on the circle to reveal more information about these reference categories:

**References Categories**

**04. Operations & Strategy**

- Operational and policy updates
- 2025 Strategic Plan Booklet
- Core Values
- Monthly President's Report



Back Continue

## 5 Activities and Engagement Notes (Slide Layer)

Copilot Notebook's Library

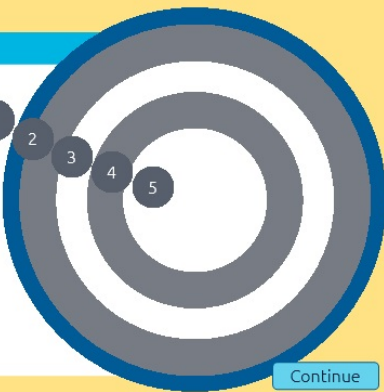
### References to Include and Why

Select a number on the circle to reveal more information about these reference categories:

**References Categories**

**05. Activities and Engagement Notes**

- Most recent and historical stakeholder feedback and subject matter expert (SME) input
- Updated storyboards in Word format for Copilot comprehension and assimilation



Back Continue

## 6 Why It Matters (Slide Layer)

Copilot Notebook's Library

### References to Include and Why

Select a number on the circle to reveal more information about these reference categories:


**Why it Matters**

06. These curated references:

- Enable alignment between instructional designers, SMEs, and project managers by providing a shared framework
- Support scalability by allowing repeatable structures across multiple courses and initiatives
- Improve efficiency in development cycles by reducing ambiguity and rework
- Facilitate analytics by linking objectives to measurable outcomes and assessment types
- Ensure quality control through documented review and approval processes

Back Continue

### 3.7 Video - Providing Notebook Access to Rise and Storyline Storyboards



**Video**  
Providing Notebook Access to Rise and Storyline Storyboards

Continue

#### Notes:

##### Video Script:

Uploading well-prepared RISE and Storyline storyboards, especially in accessible formats, allows Copilot to intelligently refine your course content.

By establishing an iterative workflow and keeping your storyboards updated, you ensure Copilot provides accurate, context-aware support throughout your instructional design process.

Begin by exporting your Rise and Storyline storyboards, preferably in Word format.

For Storyline, ensure all on-screen text is clearly included in the notes section, making it fully

accessible for Copilot to analyze and refine.

Upload your prepared storyboards directly into your Copilot notebook.

This gives Copilot complete access to the latest course materials, enabling it to provide targeted suggestions and improvements.

Adopt an iterative workflow.

Each time you make significant design changes or after subject matter expert review, update your storyboard and re-upload it to the Copilot notebook.

This habit keeps Copilot synchronized with your latest instructional decisions.

With up-to-date storyboards in your Copilot notebook, you'll receive precise, context-aware support for each phase of course development.

Copilot's guidance is only as accurate as your most current materials.

By consistently uploading and refining your course storyboards, you empower Copilot to deliver smarter, more effective support throughout your instructional design journey.

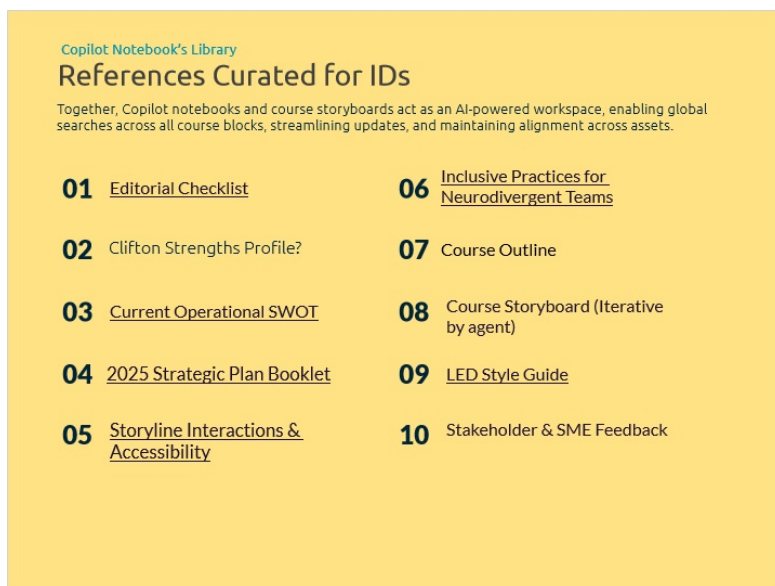
Maintaining this workflow keeps your projects aligned and ensures your training materials always benefit from Copilot's latest insights.

#### Notes:

By uploading Rise and Storyline storyboards—especially in Word format—and including readable screen text in Storyline's Notes section, you empower Copilot to access and refine your course content intelligently.

As you begin curating your project-based Copilot Notebook, commit to an iterative workflow. Copilot Notebooks access relies entirely on the course content you provide, emphasizing the need to refine and re-upload a storyboard after a major design change or SME review. This habit ensures Copilot remains aligned with your most current instructional design decisions, enabling it to support you with precise, context-aware responses every step of the way.

### 3.8 References Curated for IDs



**Copilot Notebook's Library**

#### References Curated for IDs

Together, Copilot notebooks and course storyboards act as an AI-powered workspace, enabling global searches across all course blocks, streamlining updates, and maintaining alignment across assets.

<b>01</b> <a href="#">Editorial Checklist</a>	<b>06</b> <a href="#">Inclusive Practices for Neurodivergent Teams</a>
<b>02</b> <a href="#">Clifton Strengths Profile?</a>	<b>07</b> <a href="#">Course Outline</a>
<b>03</b> <a href="#">Current Operational SWOT</a>	<b>08</b> <a href="#">Course Storyboard (Iterative by agent)</a>
<b>04</b> <a href="#">2025 Strategic Plan Booklet</a>	<b>09</b> <a href="#">LED Style Guide</a>
<b>05</b> <a href="#">Storyline Interactions &amp; Accessibility</a>	<b>10</b> <a href="#">Stakeholder &amp; SME Feedback</a>

**Notes:**

T2S

Together, Copilot notebooks and course storyboards act as an AI-powered workspace, enabling global searches across all course blocks, streamlining updates, and maintaining alignment across assets. Whether you're building compliance modules or onboarding programs, leveraging Microsoft 365 Copilot Notebooks can transform your instructional design workflow.

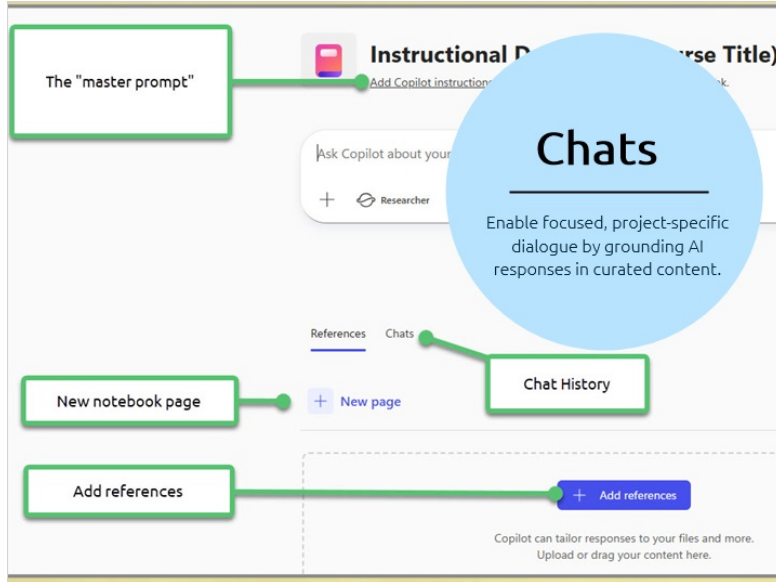
**Notes**

References Curated for IDs

[Copilot's Notebook Library](#)[Editorial Checklist](#)[Clifton Strengths Profile?](#)[Current Operational SWOT](#)[2025 Strategic Plan Booklet](#)[Storyline Interactions &](#)[Accessibility](#)[Inclusive Practices for Neurodivergent Teams](#)[Course Outline](#)[Course Storyboard \(Iterative by agent\)](#)[LED Style Guide](#)[Stakeholder & SME Feedback](#)

## 4. Chats

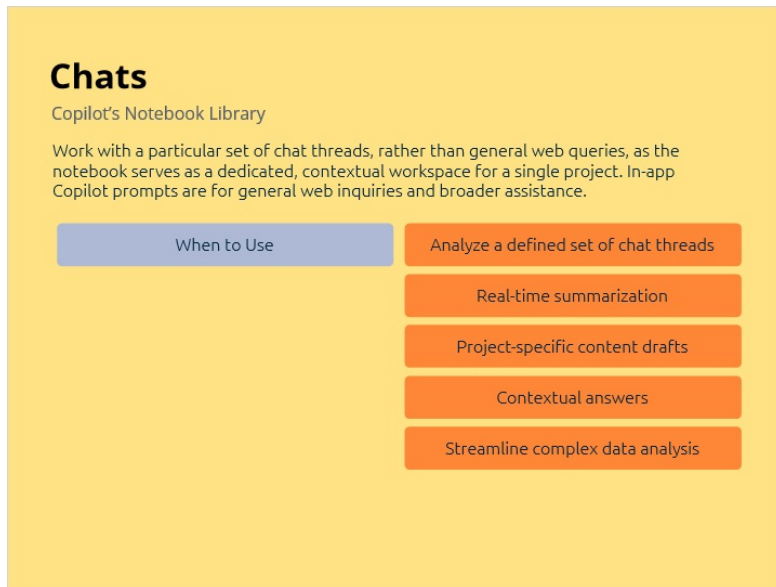
### 4.1 Chats



Notes:

Chats

### 4.2 Chats | When to Use



Notes:

T2S

Copilot Notebook chats let you work with a particular set of chat threads, rather than general web queries, as the notebook serves as a dedicated, contextual workspace for a single project. In-app Copilot prompts are for general web inquiries and broader assistance.

Chats

Copilot's Notebook Library

Work with a particular set of chat threads, rather than general web queries, as the notebook serves as a dedicated, contextual workspace for a single project.

When to use

Analyze a defined set of chat threads

Real-time summarization

Project-specific content drafts

Contextual answers

Streamline complex data analysis

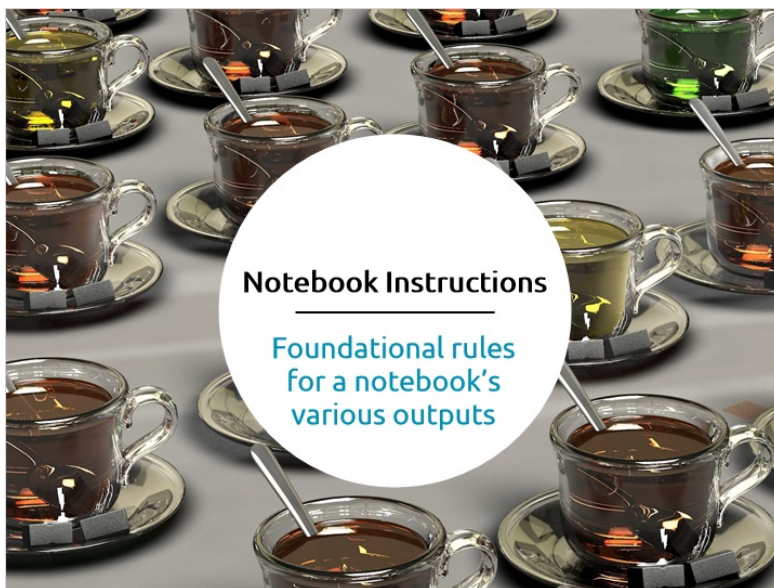
Contextual answers

Contextual answers

Contextual answers

## 5. Copilot Instructions

### 5.1 Notebook Instructions

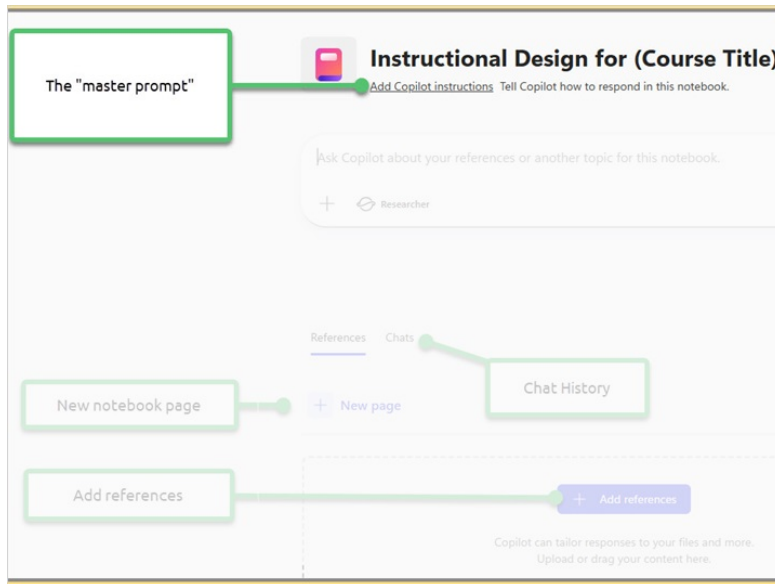


Notes:

Notebook Instructions  
(aka Master Prompts)

## Foundational rules for a notebook's various outputs

### 5.2 8000 Character Limit



#### Notes:

T2S

Copilot Notebook instructions are the foundational rules you provide to AI to guide its behavior and output format for an entire notebook. It is comparable to a “master prompt” in that it presents custom directives to shape Copilot's responses based on a notebook's references and the user's ongoing prompts. It has a maximum 8 thousand character limit. How much is 8 thousand characters? About 2 and a half to 3 single-spaced pages using a 12 point font.

What Does 8,000 Characters Look Like?

To put it into perspective:

Words: About 1,300–1,600 words (depending on word length and spacing)

Pages: Roughly 2.5 to 3 pages of text in a Word document (using 12pt font, single-spaced)

Time to Read: Around 5–7 minutes for the average reader

### 5.3 Categories

Notebook Instructions  
Categories

References provide the what (the content to analyze). Instructions provide the how (the desired way for Copilot to respond). Select each category to learn more.

01 Tone & Style Preferences	06 Performance Metrics
02 Audience & Scope	07 Stakeholder & SME Process(es)
03 Activity Types	08 Brand Messaging
04 Learning Frameworks	09 Tool Ecosystem
05 Assessment Design	

#### Notes:

Earlier, we learned that references are the source documents and materials to be analyzed by Copilot Notebooks. Instructions are the custom commands you give to Copilot to guide its behavior, tone, and output format when processing those references. In essence, references provide the what, or, the content to analyze, and instructions provide the how, or the desired way for Copilot to respond. Select each category to learn more.

#### Master Prompts

##### Notebook Instruction Categories

##### **Copilot's Master Prompt**

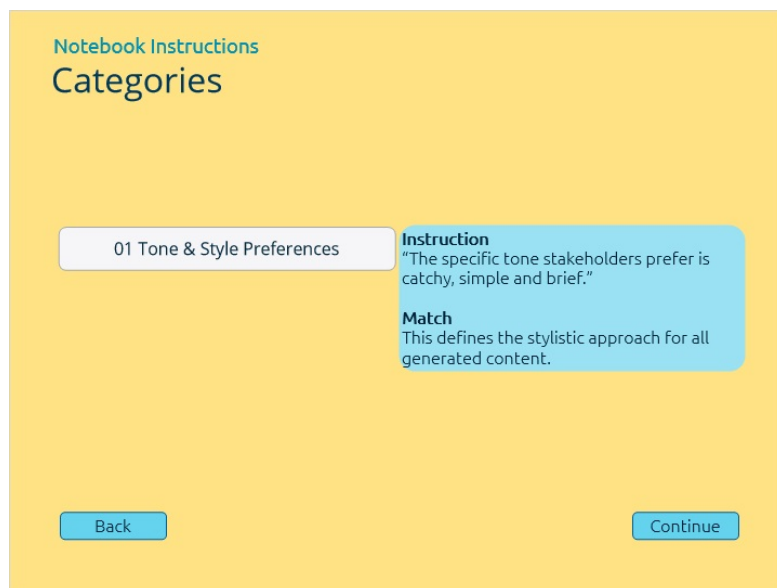
01 Tone & Style Preferences

Stakeholder's preferred tone  
(e.g., catchy, simple, brief)

- 02 Audience & Scope
- 03 Content Structure
- 04 Learning Frameworks
- 05 Assessment Design
- 06 Performance Metrics
- 07 Resource Organization
- 08 Stakeholder & SME Process(es)
- 09 Brand Messaging
- 10 Tool Ecosystem

what is the crossover between notebook instructions and references? Is crosses over here.

## 1 Tone & Style Preferences (Slide Layer)



## 2 Audience & Scope (Slide Layer)

Notebook Instructions  
Categories

02 Audience & Scope

**Instruction**  
"All topics are related to Golden 1 Credit Union MSCC and Branch employees..."  
"Use U. S.-based ninth grade vocabulary."

**Match**  
Specifies the learner group and organizational context.

Back Continue

## 4 Learning Frameworks (Slide Layer)

Notebook Instructions  
Categories

04 Learning Frameworks

**Instructions**  
"All content must be around the four pillars framework: Spend, Save, Borrow, Plan."  
"Align all learning objectives within the framework of Bloom's Taxonomy."

**Match**  
These define the conceptual and cognitive frameworks guiding the learning design.

Back Continue

## 5 Assessment Design (Slide Layer)

Notebook Instructions  
Categories

**Instructions**  
"Provide learner feedback for both correct and incorrect responses..."

"Acceptable Articulate Rise question formats are multiple choice (single answer), multiple response (select all that apply), matching and fill-in-the-blank (FITB)."

"Scenario blocks... character count limitations..."

**Match**  
Specifies question types, feedback expectations, and technical constraints.

05 Assessment Design

Back Continue

## 6 Performance Metrics (Slide Layer)

Notebook Instructions  
Categories

**Instructions**  
"Include these key performance metrics..."

"Recent financial performance results or other internal metrics..."

**Match**  
Defines KPIs and data to be embedded in content.

06 Performance Metrics

Back Continue

## 8 SME & Review Process (Slide Layer)

Notebook Instructions  
Categories

**Instruction**  
"Sponsored by the VP - Enterprise Member Experience"

**Match**  
Indicates executive sponsorship and stakeholder alignment

07 Stakeholder & SME Process(es)

Back Continue

## 9 Brand Messaging (Slide Layer)

Notebook Instructions  
Categories

**Instruction**  
"Current campaign: We care with heart. We serve with pride. We deliver with excellence."

**Match**  
Ensures brand voice is reflected in all content.

08 Brand Messaging

Back Continue

### 10 Tool Ecosystem (Slide Layer)

Notebook Instructions  
Categories

**Instruction**  
"Course authoring tools are Articulate Rise 360, Storyline and Vyond."

**Match**  
Specifies the tools used for development and delivery

09 Tool Ecosystem

Back Continue

### 3 Activity Types (Slide Layer)

Notebook Instructions  
Categories

03 Activity Types

- Knowledge check with feedback and alignment to desired outcomes
- Scenario exercise and/or questions
- Matching exercise
- Acknowledgement
- Job aid
- Informational video
- Interactive video
- Simulation
- Huddle guide for manager-led team meeting
- Download post-learning exercise
- Self-study activity/reflection
- Follow-up activity/reflection

Back Continue

## 6. Best Practices

### 6.1 Best Practices



**Notes:**

### Best Practices

Streamline course development with practical strategies for maximizing the value of Copilot Notebooks

### 6.2 Centralize Content | Enforce Consistency | Accelerate Production

**Best Practices**  
**Centralize Content | Enforce Consistency | Accelerate Production**

<p><b>01</b> Carefully curate your references.</p> <p><b>02</b> Use naming conventions.</p> <p><b>03</b> Think in terms of reusable prompts.</p> <p><b>04</b> Scope notebooks appropriately.</p>	<p><b>05</b> Stay updated.</p> <p><b>06</b> Verify critical content.</p> <p><b>07</b> Leverage audio overviews for review.</p> <p><b>08</b> Respect Copilot's limits.</p>
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## Notes:

T2S

Copilot Notebooks offer a unique opportunity to centralize content, enforce consistency, and accelerate production. This section distills best practices and tips to get the most out of Copilot Notebooks for learning design. By combining the precision of AI with human creativity and instructional insight, these best practices empower designers to deliver cohesive, credible, and learner-centered experiences across diverse programs and departments.

### Carefully Curate Your References

AI can only be as good as the info you give it. If a document is lengthy, trim irrelevant sections adding to the notebook to keep the focus sharp.

### Use Naming Conventions

Name your files clearly before adding. A file named `guide tone and style dot doc` is more descriptive than a file named `guide 1, 2, 3`.

### Think in Terms of Reusable Prompts

Develop a set of go-to Copilot prompts (and even keep them in a OneNote page). For example, List 3 objectives for fill in the blank. This helps maintain consistency in what you ask across projects, and you'll get familiar patterns in answers that you can fine-tune.

### Scope Notebooks Appropriately

If two projects are very different, use separate notebooks to avoid mingling content.

### Stay Updated

If policies or data change, update the reference in the notebook and re-ask Copilot to regenerate sections. Consider keeping track of your source dates so you know when to refresh them.

### Verify Critical Content

For any regulatory or highly sensitive information, double-check Copilot's output against the source. Ensure nothing important is lost in summarization.

### Leverage Audio Overviews for Review

The audio summary feature can be a cool way to review content you've compiled. For example, if you add a bunch of SME interview transcripts, generate an audio overview to listen for main themes while you commute. It's not a replacement for reading, but an augmentation that could spark ideas.

### Respect Copilot's Limits

Copilot Notebooks won't do all your thinking. It does not replace the need for creative instructional strategy. Also, they currently cannot be shared, so treat outputs as the shareable artifact. And remember, Copilot won't know anything outside your notebook - if you forget to include a crucial piece of content, its outputs will reflect that gap.

Notes:

- **Carefully Curate Your References:** The AI can only be as good as the info you give it. Ensure you include the definitive sources (policy docs, SME notes, etc.). If a document is lengthy, consider trimming irrelevant sections or highlighting key points before adding, to keep the focus sharp.
- **Use Naming Conventions:** Name your files clearly before adding ("`Guide_ToneAndStyle.docx`" is more obvious than "`guide123.docx`"). Copilot may sometimes refer to a document by name when providing answers or you might ask it "what does *Guide\_ToneAndStyle* say about language level?" etc.
- **Think in Terms of Reusable Prompts:** Just like you might have templates for lesson plans, develop a set of go-to Copilot prompts (and even keep them in a OneNote page). For example: "List 3 objectives for [topic]", "Give an analogy to explain [concept]", "Draft an email announcement for [course]". This helps maintain consistency in what you ask across projects, and you'll get familiar patterns in answers that you can fine-tune.
- **Scope Notebooks Appropriately:** If two projects are very different, use separate notebooks to avoid mingling

content. But if they're related, leveraging one notebook can create synergy. For instance, a series of compliance modules may benefit from one notebook so Copilot sees the big picture (just watch the 20-reference limit).

- **Stay Updated:** If policies or data change, update the reference in the notebook and re-ask Copilot to regenerate sections. This is faster than manually finding and replacing information. It's a good idea to note somewhere (maybe a title page in the Notebook) the date of your sources, so you know when to refresh them.
- **Verify Critical Content:** For any regulatory or highly sensitive information, double-check Copilot's output against the source. Copilot should be accurate if the source is in the notebook, but it might summarize or paraphrase; ensure nothing important is lost in summarization.
- **Leverage Audio Overviews for Review:** The audio summary feature can be a cool way to review content you've compiled. For example, if you add a bunch of SME interview transcripts, generate an audio overview to listen for main themes while you commute. It's not a replacement for reading, but an augmentation that could spark ideas.
- **Respect Copilot's Limits:** Copilot Notebooks won't do *all* your thinking. They don't replace the need for creative instructional strategy. Also, they currently cannot be shared, so treat outputs as the shareable artifact. And remember, Copilot won't know anything outside your notebook - if you forget to include a crucial piece of content, its outputs will reflect that gap.

Finally, always combine the AI's strengths with your own. Copilot excels at processing and regurgitating structured content quickly and uniformly. You excel at understanding learners, injecting empathy, humor, and context that might not be in any document. Together, you can produce learning experiences more efficiently than before, without sacrificing the consistency and quality that define great instructional design.

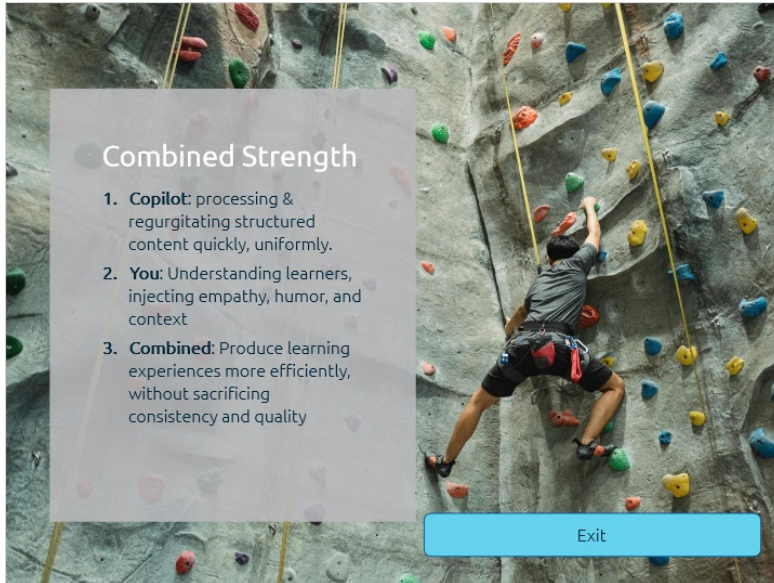
## 2 Best Practices (Slide Layer)

**Best Practices**  
Centralize Content | Enforce Consistency | Accelerate Production

**09 Brand Messaging Enforcement**  
Include the same branding and tone guidelines file in every notebook to ensure Copilot reflects consistent brand values across departments.

**10 Master + Derivative**  
Establish a "base notebook" (e.g., "Customer Communication - Core") and derivative notebooks for each function (Marketing, Operations), each inheriting core content but adding specialized references.

### 3 Combined Strengths (Slide Layer)



### 6.3 Brand and Master-Derivative Strategy

**Best Practices**  
**Brand Consistency | Master + Derivative**

**09 Brand Messaging Enforcement**  
 Include the same branding and tone guidelines file in every notebook to ensure Copilot reflects consistent brand values across departments.

**10 Master Notebook + Derivative Notebooks Strategy**  
 Establish a "Base Notebook" (e.g., "Customer Communication - Core") and derivative notebooks for each function (Marketing, Operations), each inheriting core content but adding specialized references.

**Notes:**

T2S

Brand Messaging Enforcement

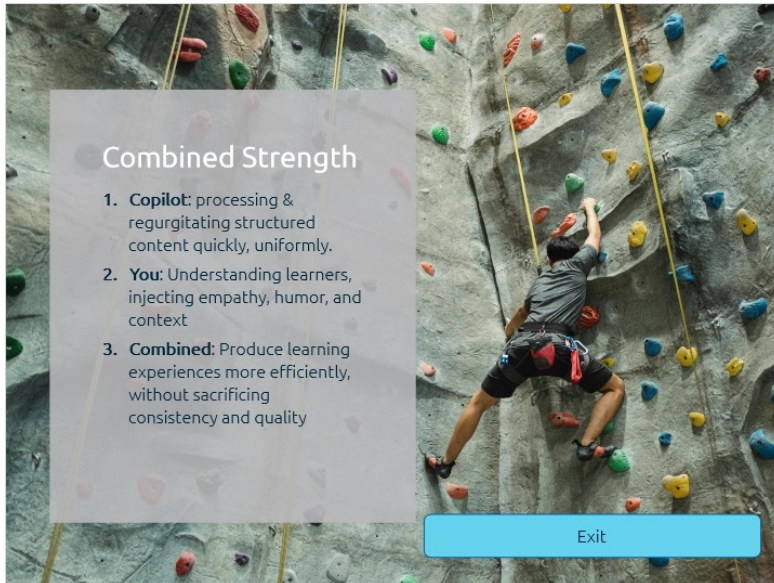
Include the same branding and tone guidelines file in every notebook.

Master Plus Derivative Strategy

Establish a base notebook, for example, Customer Communication Core. Create derivative notebooks for each function (Marketing, Operations), each inheriting core content but adding specialized references.

Finally, always combine the AI's strengths with your own. Copilot excels at processing and regurgitating structured content quickly and uniformly. You excel at understanding learners, injecting empathy, humor, and context that might not be in any document. Together, you can produce learning experiences more efficiently than before, without sacrificing the consistency and quality that define great instructional design.

### Combined Strengths (Slide Layer)

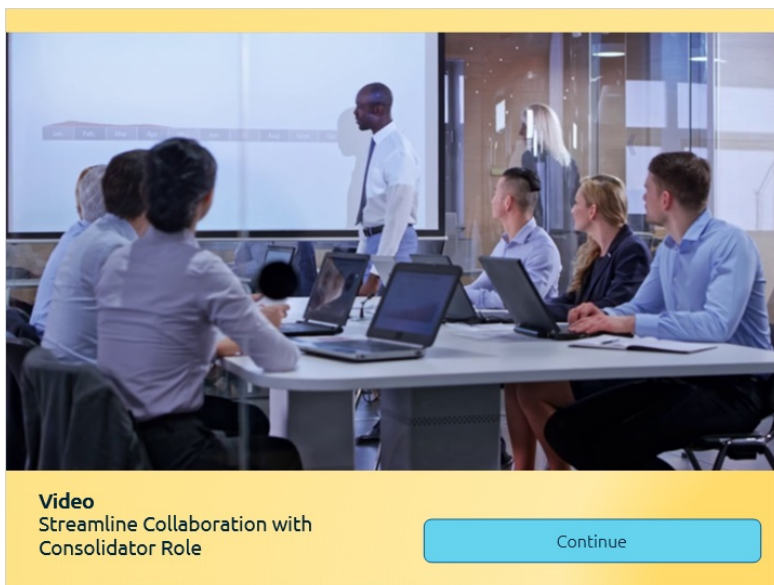


**Combined Strength**

1. **Copilot:** processing & regurgitating structured content quickly, uniformly.
2. **You:** Understanding learners, injecting empathy, humor, and context
3. **Combined:** Produce learning experiences more efficiently, without sacrificing consistency and quality

Exit

### 6.4 Video - Streamline Collaboration with Consolidator Role



**Video**  
Streamline Collaboration with Consolidator Role

Continue

**Notes:**

**Video Script:**

Developing effective cross-functional training requires input from multiple departments.

Copilot Notebook offers a unique workspace to streamline collaboration, even when direct multi-user editing isn't available yet.

Currently, Copilot Notebook is linked to an individual account, so multi-user editing is not directly supported.

To facilitate collaboration, one team member acts as the consolidator.

This person gathers input from subject matter experts across departments, collects their documents and references, and imports them into the notebook.

Copilot then helps generate draft training materials, which are shared with all stakeholders for feedback and refinement.

This workflow ensures every department's expertise is represented in the final content.

While Copilot Notebook doesn't yet support real-time sharing, collaboration is still enabled by distributing outputs, such as drafts or reference documents, to team members for review.

This facilitates iterative feedback and content alignment.

Looking ahead, Microsoft is working on enabling direct notebook sharing.

Once available, teams will be able to co-edit references and prompts, allowing immediate contributions from any member.

This advancement will further enhance cross-functional training development by making collaboration more dynamic and inclusive.

Copilot Notebook empowers teams to create cross-functional training by consolidating expertise from every department.

While real-time co-editing is on the horizon, today's workflow ensures effective collaboration and content alignment, preparing organizations for even greater teamwork in the future.

Notes:

**Collaborative Development Across Functions:** Often, developing cross-functional training involves multiple stakeholders (maybe a subject matter expert from each department). Copilot Notebook can be a collaborative space.

While currently notebooks themselves aren't multi-user sharable (as of late 2025, they're tied to one account), one person can serve as the "consolidator." In practice, that person collects input from each SME (each SME's documents, pointers, etc.), puts them into the notebook, and then uses Copilot to generate drafts. Those drafts can be reviewed by all stakeholders.

In lieu of real-time sharing, the collaboration feature likely refers to sharing the content or outputs facilitated by the notebook.

If Microsoft enables Notebook sharing in the future (there's indication that they're working on it), teams could directly co-edit the references and prompts. That will further enhance cross-functional content alignment, as any team member could contribute a reference file and immediately allow Copilot to use it.

## 6.5 Combined Strength



### Combined Strength

1. **Copilot:** processing & regurgitating structured content quickly, uniformly.
2. **You:** Understanding learners, injecting empathy, humor, and context
3. **Combined:** Produce learning experiences more efficiently, without sacrificing consistency and quality

### Notes:

T2S

Brand Messaging Enforcement

Include the same branding and tone guidelines file in every notebook.

Master Plus Derivative Strategy

Establish a base notebook, for example, Customer Communication Core. Create derivative notebooks for each function (Marketing, Operations), each inheriting core content but adding specialized references.


Finally, always combine the AI's strengths with your own. Copilot excels at processing and regurgitating structured content quickly and uniformly. You excel at understanding learners, injecting empathy, humor, and context that might not be in any document. Together, you can produce learning experiences more efficiently than before, without sacrificing the consistency and quality that define great instructional design.

## 7. Case Studies & Examples


### 7.1 Case Studies - Notebook Benefits

#### Case Studies | Notebook Benefits


Let's ground this in some concrete cases that demonstrate the benefits of Copilot Notebooks in instructional design workflows.



Speedy content drafting without sacrificing quality



Natural alignment of content when the same references are reused



The ability to encapsulate an ID team's best practices with and have AI apply them uniformly

#### Notes:

#### Case Studies and Examples

**Let's ground Copilot Notebooks in some concrete cases that demonstrate the benefits of notebooks.** These examples illustrate:

- Speedy content drafting without sacrificing quality,
- Natural alignment of content when the same references are reused,
- The ability to encapsulate an ID team's best practices (like master prompts or key frameworks) and have the AI apply them uniformly.

#### **Case Study 1: Streamlining a Course Update with Copilot**

*Background:* The L&D team at a credit union needed to update a compliance e-learning course and ensure the new version remained consistent with a related course on customer service. Two IDs, Alice and Bob, tackled it together.

- They created a Copilot Notebook and added: the **old compliance course storyboard**, the **customer service course outline** (for terminology consistency), the **new compliance regulations PDF**, and the **company's writing style guide**.
- Using Copilot, they first asked: *"Summarize differences between the old compliance course and the new regulations."* Copilot listed out what's new or changing (grounded in the PDF and old storyboard).
- They then prompted: *"Generate an outline for the updated compliance course, following the structure of the customer service course, and highlight where new content (from the*

*regulations) fits.”*

- Copilot produced a draft outline that mirrored the customer service course’s flow (introduction, scenarios, conclusion) and inserted the new compliance points where relevant. It even used similar language for the introduction and recap, maintaining the tone.
- Alice and Bob used this as a starting point, then fleshed out each section. When writing detailed content, whenever they were stuck, they’d ask Copilot questions in the notebook like, *“How exactly does the new policy define ‘fraud alert?’”* - Copilot answered with the precise wording from the PDF reference, saving them time searching.
- **Result:** They updated the course in a fraction of the time it normally takes, and on review, stakeholders found that the compliance course and customer service course felt **harmonized** - they referenced each other and used consistent terminology for things like “fraud alert procedures” (thanks to Copilot pulling the exact phrasing from references in both courses). The team credited the Copilot Notebook approach with helping them “ensure alignment with the earlier course and reduce duplicate work.”

## Case Study 2: Multi-Department Onboarding Program

*Background:* A company is rolling out a new onboarding program that includes modules for different departments (general orientation, plus specific training for Sales, Engineering, and Customer Support). They want a unified message about company culture, but also need to cover department-specific info.

- The ID lead creates one main Copilot Notebook, **“Onboarding Core”**, with references: the HR orientation guide, company history deck, and core values document.
- She then creates three additional notebooks: “Onboarding - Sales”, “Onboarding - Engineering”, “Onboarding - Support”. Each of these includes the **Core references** plus department-specific materials (sales playbook, engineering handbook, support procedures manual, respectively).
- She writes a common set of Copilot instructions for all notebooks emphasizing: “welcoming tone, emphasize collaboration, use company’s core values (reference doc) in introductions”.
- For each department, she asks Copilot to draft the module outline. For Sales: it adds segments about product knowledge and quotas (from the playbook). For Engineering: segments about code review and tech stack (from handbook). For Support: segments about ticket systems and communication scripts (from procedures manual). All drafts start with an identical welcome section about company culture (because that was in the HR guide reference) and end with a similar summary reinforcing core values - demonstrating consistency.
- She notices Copilot even reused a key phrase about the company mission statement verbatim across all three, which is exactly what she hoped for - every new hire hears the *same* mission in their training, regardless of department.
- After refining each module with SMEs, the program launches. Feedback is that the training feels cohesive: employees from different departments share a common understanding of the company and can even discuss parts of training they all experienced, while still learning the specifics of their own roles. The ID lead achieved her goal of consistency with efficiency,

essentially drafting three variant courses in the time of one by leveraging the Copilot Notebook method.

### Case Study 3: Collaboration and “Master Prompts”

*Background:* At Golden 1 Credit Union’s L&D team (LED), instructional designers Laurie and Brett experimented with Copilot Notebooks while developing a “Fraud Awareness” e-learning module for employees. They wanted to consolidate their design assets and also create a set of “**master prompts**” - reusable questions/commands to ask Copilot - to guide content creation.

- Laurie and Brett collated all relevant content: SME interview notes about fraud cases, a compliance checklist, and the outline of a prior related course. They also wrote a OneNote page listing their *master prompts* (like “Explain why this matters to the employee” or “Provide an example scenario”) - effectively a template of what they’d ask Copilot repeatedly for each topic.
- In the Copilot Notebook, they included the master prompts page and all content. They then collaboratively (sitting together) used Copilot to generate portions of the module. For each section of the course (phishing, identity theft, etc.), they’d copy a master prompt from their list (e.g., “Provide an example scenario illustrating this fraud type”) and run it. Copilot, informed by SME notes, would output a realistic scenario example each time, written in a consistent style.
- Brett found this approach reduced the need to open multiple windows (no more flipping through all the notes documents - Copilot was fetching what they needed). As noted in Laurie’s report, they were able to “*streamline their strategy and reduce ‘window clutter’*”.
- **Outcome:** They ended up with a well-structured module draft containing consistent scenario formats and language. The master prompts ensured uniform coverage (each fraud topic section had an example, a why-it-matters explanation, and a knowledge check, all generated through those standard prompts). The team saved time and maintained a high level of consistency across sections. Their approach of using a Copilot Notebook as a joint workspace and developing standard prompts could be reused for future courses, creating a more systematic design process.

## Case Studies Home (Slide Layer)

Case Studies | Notebook Benefits

Select a case study.




- Streamlining a Course Update with Copilot
- Multi-Department Onboarding Program
- Collaboration and "Master Prompts"

Back

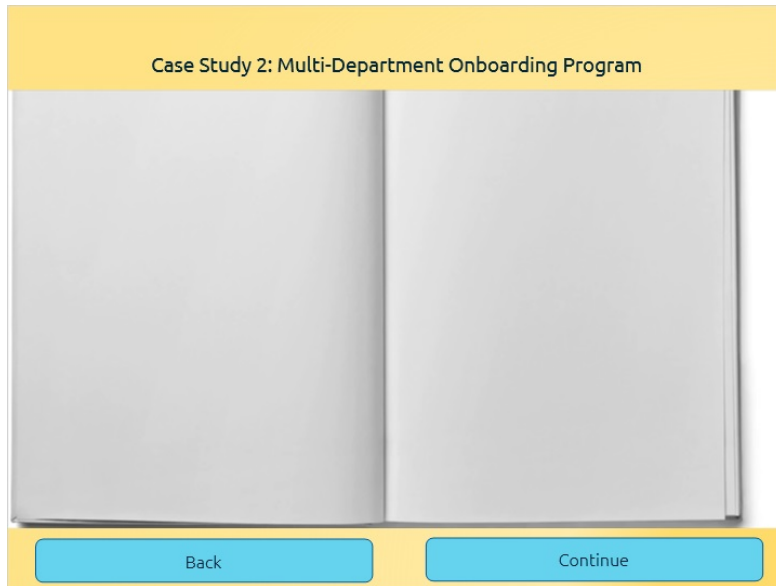
### 1 Streamlining a Course Update with Copilot (Slide Layer)

Case Study 1: Streamlining a Course Update with Copilot

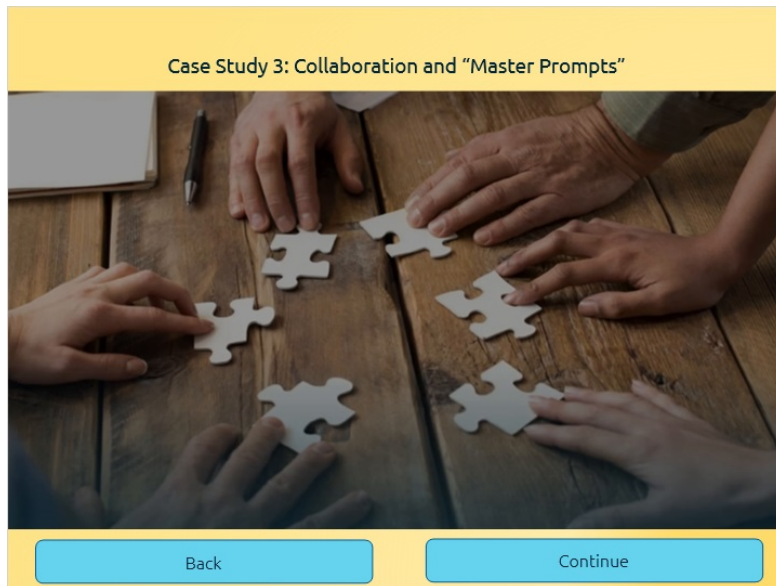


Back Continue

## 2 Multi-Department Onboarding Program (Slide Layer)



## 3 Collaboration and “Master Prompts” (Slide Layer)



## 7.2 Thank You



### Notes:

Welcome to Boosting Instructional Design Productivity with Copilot Notebooks! Copilot Notebooks is a Microsoft 365 AI feature that can be applied to instructional design for consistent content across operational functions. In this video, we'll discover how Copilot Notebooks can become your personal AI assistant for course design. Imagine having all your source materials - manuals, prior course content, SMEs' notes - in one place, and an AI that helps you write and refine content from them. Let's see how it works.