Adoptive Technologies

COPILOT GUIDE FOR EDUCATION

Microsoft 365 Copilot in education

Where Copilot genuinely saves time for teachers, trainers and administrators, and what to put in place before you switch it on.



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WELCOME

Before you start

Most schools, colleges and training providers I speak to are curious about Copilot and cautious in equal measure.

That is the right balance. Used well, Copilot takes the repetitive writing, summarising and admin out of the day so staff have more time for learners. Used carelessly, it can expose information to the wrong people or produce confident nonsense that nobody checks.

This guide is written for headteachers, principals, business managers and training leads. It explains what Copilot is, what to sort out first, the everyday jobs where it helps most, and the rules worth agreeing with your team. It is not a sales pitch for licences. Some settings will get plenty from the free Copilot Chat, and others will not need Copilot at all yet.

If anything here raises a question, pick up the phone. I would rather talk it through.



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How to use this guide

Read it end to end, or jump to what you need. If you are deciding whether to start, begin with the readiness checklist on page 4. If you already have licences and want ideas, go to pages 5 to 8. If you are worried about safeguarding and data, page 9 is the place to begin.

CHAPTER 1

Copilot in two minutes

Copilot is not one product. There are three things people mean by the name, and it helps to know which is which.

1 Copilot Chat

An AI chat assistant that is included with many work and education Microsoft 365 accounts. It is good for drafting, summarising, explaining and brainstorming. It works with what you type, paste or attach, and it carries enterprise data protection when staff sign in with their organisation account.

2 Microsoft 365 Copilot

A paid add-on licence. It works inside Word, Excel, PowerPoint, Outlook and Teams, and can draw on your own emails, meetings and files. It can only show a person what they already have permission to see.

3 Agents

Optional extras built for one repetitive job, for example answering staff questions from your policy documents. They are worth considering later, once the basics are in place, rather than first.

The point to remember

Copilot works within the permissions you already have. If a file is shared too widely today, Copilot will find it for anyone who can open it. That is why tidying access comes before switching anything on. Microsoft states that prompts and responses for work and education accounts are not used to train its underlying models, which is reassuring, but it does not fix loose permissions.

IF THIS SOUNDS LIKE YOU	START WITH
Not sure it is worth it yet	Copilot Chat with a few volunteers. It is included with many accounts, and it shows you what people actually use.
Writing, planning and reporting all day	Microsoft 365 Copilot for that small group, once the readiness steps in the next chapter are done.
One repetitive task that eats time	Talk to us about an agent, after the basics are in place.

Licensing, names and features change often. We confirm the current position for you before you buy anything.

CHAPTER 2

Get ready before you switch it on

A few weeks of preparation make the difference between a pilot that quietly works and one that causes a safeguarding or data protection incident.

- [ ] **Check who can see what.** Review shared drives, Teams and SharePoint sites for staff records, pupil or learner information, safeguarding notes and anything confidential that is open to everyone.
- [ ] **Separate staff and learner access.** Make sure learners cannot reach staff files, and that sensitive groups, such as safeguarding or HR, are properly locked down.
- [ ] **Switch on multi-factor authentication.** Every account that can reach Copilot should be protected by it. Copilot makes a stolen password more valuable, not less.
- [ ] **Agree what must never go into an AI tool.** For example named learner details, safeguarding concerns, medical or SEND information, and anything covered by an NDA.
- [ ] **Decide who gets licences.** Start with a small group who write, plan and report a lot, such as heads of department, office staff and senior leaders. Spread out later.
- [ ] **Read the guidance for your sector.** The Department for Education has published guidance on generative AI in education, and your awarding bodies have rules on AI in assessed work. Check what applies to you.
- [ ] **Update your policies.** Add AI to your acceptable use, data protection and assessment policies, and tell staff and learners where the lines are.

What we check first

We review your Microsoft 365 permissions, sensitive-data exposure, sign-in protection and device security, then give you a short list of fixes in priority order. Nothing is switched on until the list is dealt with.

CHAPTER 3

Where it helps: teaching and learning

These are the jobs where teachers and trainers tell us the time saving is real. Copilot drafts, you decide.

WORD

Lesson planning

Turns a topic and learning objectives into a first-draft plan with starter, main activity and plenary, ready for you to adjust.

TRY ASKING

Draft a 60-minute lesson on fractions for Year 8 with a starter, two activities and a plenary.

WORD

Differentiated materials

Produces a simpler or more stretching version of the same worksheet, or adjusts the reading level, so you are not rewriting from scratch.

TRY ASKING

Rewrite this worksheet at a lower reading age and add a stretch task for the most able.

WORD, EXCEL

Assessments and rubrics

Suggests question types, mark schemes and grading criteria from your learning outcomes, including more practical, applied tasks.

TRY ASKING

Create a marking rubric for this assignment brief with four levels of achievement.

OUTLOOK, WORD

Feedback drafts

Helps shape constructive written feedback from your own notes, which you then personalise and check before it goes anywhere.

TRY ASKING

Turn these bullet points into encouraging feedback that names two strengths and one next step.

EXCEL

Spotting who needs support

Looks at results or attendance data and points out patterns, so you can target a revision session where it is needed.

TRY ASKING

Which topics had the lowest scores in this sheet, and which learners fell below 60 per cent?

POWERPOINT

Slides from your own material

Builds a presentation from a document you already have, such as a scheme of work or a parents' evening briefing.

TRY ASKING

Create a ten-slide presentation from this scheme of work for the autumn term.

CHAPTER 4

Where it helps: running the organisation

The office, the leadership team and the governors or board spend a lot of time on reading, writing and reporting. This is where Copilot pays back.

TEAMS

Meetings you missed

Gives you a recap, the decisions and the actions, so you do not have to watch the recording.

TRY ASKING

Summarise the curriculum meeting and list the actions assigned to me.

OUTLOOK

Inbox catch-up

Summarises a long thread or a week of messages, and drafts a reply that outlines next steps.

TRY ASKING

Summarise the emails from the last week about the trip and list anything I need to do.

WORD

Policy drafting

Gives you a first draft of a policy and pulls together points from stakeholder comments, which you then check against statutory requirements.

TRY ASKING

Draft an acceptable use policy for AI tools in our setting, in plain language for staff.

WORD, POWERPOINT

Governors and board papers

Helps prepare the agenda, summarise reports and draft the headline messages for the pack.

TRY ASKING

Summarise these three reports into a one-page update for governors with key risks.

EXCEL

Budget and enrolment insights

Helps explain trends in budgets, enrolments or survey results, and builds charts you can drop into a report.

TRY ASKING

Show enrolment by programme for the last three years and highlight where numbers are falling.

OUTLOOK, WORD

Communications to families and employers

Drafts newsletters, letters and updates in the right tone, and adapts them for different audiences.

TRY ASKING

Write a short letter to parents about the new drop-off arrangements, friendly and clear.

CHAPTER 5

A day with Copilot

A short, illustrative day for a secondary school teacher. Your own timings and tools will differ, but the pattern is familiar.

P

Priya, secondary school teacher
An illustrative example, not a real person. Typical gains are in admin and drafting rather than teaching itself.

7:30

Catch up before the day starts

Priya asks for a summary of the emails and Teams chats since Friday, with the actions that need her attention.

OUTLOOK, TEAMS

9:15

Adapt tomorrow's lesson

She uses Copilot to produce an easier version of a worksheet and add an extension task for the most able.

WORD

11:00

A meeting she could not attend

Priya reads the recap and the action list for the curriculum meeting she missed, then replies to one request.

TEAMS

13:00

Where are they struggling?

She asks Copilot which topics scored lowest in the latest assessment, so Thursday's revision session focuses on the right areas.

EXCEL

15:30

Parents' evening slides

Copilot drafts a presentation from the scheme of work. Priya reshapes it and adds her own examples.

POWERPOINT

16:30

A message to parents

She asks for a friendly draft about the evening's arrangements, checks every fact, and sends it.

OUTLOOK

What to take from it

Every task ends with a person checking and deciding. Copilot gets the draft started, and the teacher's time goes to learners rather than formatting.

CHAPTER 6

Ten things to try first

Start with low-risk tasks that involve your own work, not learner data. These prompts work in Copilot Chat or inside the apps.

THE TASK	A PROMPT TO START FROM
Recap a meeting	*Summarise the key decisions and actions from this meeting, grouped by owner.*
Catch up on an email thread	*Summarise this thread in five bullet points and tell me what I need to reply to.*
Draft a lesson	*Draft a lesson plan on [topic] for [year group], with timings and a plenary.*
Change the reading level	*Rewrite this at a reading age of 9, keeping the key vocabulary.*
Quiz questions	*Write ten quick quiz questions on this text with a mark scheme.*
Parent or employer letter	*Draft a short, friendly letter about [subject]. Keep it under 150 words.*
Summarise a long document	*Give me a one-page summary of this report and list the three main risks.*
Turn notes into a plan	*Turn these notes into an action plan with owners and dates.*
Explain a data pattern	*What are the main trends in this spreadsheet and what might explain them?*
Improve my writing	*Make this clearer and shorter without changing the meaning.*

Make your prompts better

Tell Copilot who the audience is, what you want back and how long it should be. Give it your own source document rather than asking it to make facts up, and always say what to leave out. A prompt with a goal, some context and a format gets far better results than a vague request.

CHAPTER 7

Using it responsibly

Education carries extra responsibilities. These are the rules we suggest agreeing before anyone starts.

1 A person is always accountable

Copilot drafts and a member of staff decides. Marking, grading, references and anything about an individual learner should always be your professional judgement.

2 Protect learner data

Do not paste named learner information, safeguarding concerns or SEND and medical details into any AI tool unless your data protection lead has approved it.

3 Check everything

AI can sound confident and be wrong, so check facts, figures, references and tone before anything leaves the building.

4 Respect assessment rules

Be clear with staff and learners where AI is and is not allowed in assessed work, and follow your awarding bodies' guidance.

5 Mind age and licensing rules

Learner access to AI tools depends on age and on how your licences are set up. Confirm what is allowed before offering it to students.

6 Be open about it

Tell parents, learners and staff how you use AI. It builds trust and prevents surprises.

A word on safeguarding

Treat AI like any other tool that touches learner information. Involve your designated safeguarding lead and data protection officer early, record your decisions, and review them each term, because the products change quickly.

CHAPTER 8

Your first 30 days

You do not need a big programme. A small, well-run pilot teaches you more than a launch.

Week 1

Tidy and protect

Review permissions and sensitive data, switch on multi-factor authentication and agree what must not go into AI tools.

Week 2

Start a small pilot

Choose five to ten volunteers across teaching and the office, give them licences and a few starter tasks.

Week 3

Train and share

Run a short session using your own documents. Gather the prompts that worked and share them.

Week 4

Review and decide

Ask what saved time, what did not and what worried people. Decide who is next, or whether to stop.

How to tell whether it is working

- [ ] **Time saved** on the tasks you chose, as reported by the pilot group
- [ ] **Still in use** after four weeks, rather than tried once and forgotten
- [ ] **No incidents** involving data, accuracy or inappropriate content
- [ ] **Confidence** among the people using it, and honest feedback on what was not useful

Where we can help

We can run the readiness review, set up licences safely and run a hands-on session built around your own lessons, forms and reports. You get a clear view of whether it is worth buying more, before you commit.

TALK TO US

Let's work out where Copilot fits in your school or training provider

If this guide has raised questions, we would be glad to talk. A complimentary call takes around 15 to 20 minutes, and you will speak to a real, named person, usually me.

- ✓ We ask how your team works and where the time goes
- ✓ We give you an honest view on whether Copilot is worth it yet
- ✓ No pressure and no obligation

BOOK A CALL

adoptivetechnologies.co.uk/contact

Choose a time that suits you

CALL US

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Straight through to a real person

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