



ChatGPT at Work — A Practical Guide for the Office

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Your First Day with ChatGPT at the Office

SOMEONE on your team is probably already using ChatGPT to write emails, summarize documents or hunt for errors in a spreadsheet. So the question is not whether to start, but how to do it so the tool actually saves time instead of generating another round of corrections. This chapter shows what the quality of an answer depends on, how to use memory and projects in ChatGPT, and which mistakes are avoided by the people who are still using it a month later instead of falling back on old habits.

A Conversation, Not an Oracle

The biggest difference between people who gain hours a week from ChatGPT and people who write it off as useless after two attempts comes down to a single habit. The first group treats the chat as a conversation with someone who does not know your company and has to be told the context in the opening sentence. The second group types one sentence, gets a generic answer and gives up.

 A typical scenario: two approaches to the same task

Picture an executive assistant who has to prepare a summary of quarterly results for the sales director. The first approach is the instruction “write a summary of the quarter’s results.” The model does not know the industry, the numbers or the reader, so it returns a universal outline with no substance. The second approach includes the figures from the spreadsheet, the fact that the reader is a sales director used to short formats, and a request for five bullet points with numbers and one recommendation at the end. The result is ready to send after one round of edits, not five.

The difference is not the length of the instruction but what is in it. The model does not guess your goal, your reader or your format until you supply them. The less guesswork you leave to the machine, the fewer rounds of corrections are waiting for you.

The same is true of simple tasks that seem to need no explanation. The instruction “edit this paragraph” leaves the model to decide what should actually change: the length, the tone, the level of formality or perhaps the order of the arguments. Adding one sentence with a specific direction, for example “cut it in half and remove the technical jargon,” turns a lottery into a predictable result.

Context

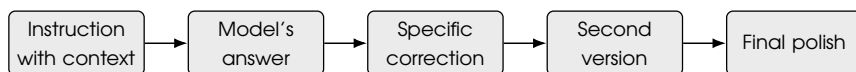
Everything the model receives before it carries out an instruction: earlier messages in the conversation, uploaded files, project instructions and the instruction itself. Without context the model answers as generically as it can, which in office work is rarely enough.

Iterate Instead of Starting Over

Beginners often treat a poor answer as a reason to close the window and start a new chat with a different sentence. That is a mistake, because ChatGPT remembers the whole conversation so far and can fix its own output far faster than you can explain the task from scratch to someone new.

💡 Fix it, don't start over

When an answer is close but something in it is off, say specifically what to change: “cut it in half,” “drop the third paragraph, the tone is too formal,” “add the numbers from the table you left out.” The model sees the previous version and modifies it instead of writing from scratch, which usually beats a fresh instruction in an empty window.



This cycle works best when the corrections are precise. “Fix this” forces the model to guess a second time, while “make the tone less formal and shorten the intro” gives it exactly what it needs. Keep in mind, too, that every further turn in the same conversation draws on what was settled earlier, so if you already agreed on length and reader in the third message, you do not have to repeat them.

 Context given once holds for the whole conversation

The information you type at the start of a conversation, that is the industry, the reader, the tone, the purpose of the document, applies to every later instruction in that same chat. Instead of repeating it every time, build on what the model already knows.

Three Levels of Memory: Instructions, Memory, Projects

ChatGPT offers three separate mechanisms that are easy to confuse and that serve completely different purposes. Telling them apart decides whether, after a month of work, the tool knows your style or still treats you as a new user.

Custom Instructions are a fixed set of rules you set once in your account settings and that apply to every new conversation, for example “answer in English, concisely, no emoji.” Memory is a collection of facts the model records on its own from your conversations, for example that you work in marketing and report monthly. Projects group related conversations around shared material: files, instructions specific to one task, and memory limited to that project alone.

The practical rule for dividing them up is simple. Answer rules that should always apply go into Custom Instructions. Leave changing facts about you to Memory, since it will record them anyway. Source material and the rules of a specific task, for example a report template for one client or the tone of voice of one brand, belong in a separate project so they do not bleed into your other conversations.

Table 1.1: Three context mechanisms in ChatGPT

Mechanism	What it is for	Scope
Custom Instructions	Fixed answer rules (language, tone, format)	Every conversation
Memory	Facts recorded from past chats	Whole account
Projects	Files and rules for one task or client	That project only

💡 One project per recurring duty

If you do the same thing every week, say a sales report or an internal newsletter, set up a separate project with the template uploaded and a short note on style. Every conversation inside that project starts with the full context of the task, so you are not explaining it from scratch each time.

The number of files you can upload to a single project depends on your account plan and grows with it, from a handful on free plans to several dozen on business plans. In practice that means a project built for a department, not just one person, can hold the complete set of material the work needs: templates, earlier versions of documents, a glossary of industry terms, brand tone guidelines. The more of that material the model sees at the outset, the less you have to explain in each individual conversation, and that is exactly what separates a project set up properly once from a pile of random chats.

Where It Pays Off Fastest at the Office

Before you move on to the specific uses in later chapters, it is worth knowing where the time savings are felt most from day one. Companies rolling out the newer GPT-5 models for everyday work reported savings on the order of several dozen minutes a day for typical office staff, mainly on writing and editing text and on tidying up data. For people who use the tool heavily and deliberately, those savings grow considerably.

40–60 min

a day saved by a typical office worker using ChatGPT for everyday tasks, according to reports from companies rolling out the newer GPT-5 models

Those numbers are not magic. They come from the fact that ChatGPT works best on tasks that repeat but need to be adapted to a specific situation: no two emails to a client are identical, yet the structure of a good email repeats dozens of times a month. The same goes for summaries, first drafts of documents and cleaning up raw spreadsheet data. The following chapters walk through each of these areas in turn, from writing and editing, through working with data, to organizing meetings and using automation safely.

What to Avoid at the Start

The most common mistake among new users at the office is instructions that are too general, followed by disappointment at a general answer. The

second and more serious mistake is blind trust in numbers and facts the model states without clearly pointing to a source.

⚠ The model can sound confident and be wrong at the same time

ChatGPT phrases its answers fluently even when it is unsure of a fact or a figure. Check every concrete value you intend to pass on, for example financial data, legal deadlines or proper names, against the source before it lands in a document with your name on it.

The third mistake is treating every conversation as a separate, isolated event, even though within one session you can return to earlier decisions, ask for variants and build a document in stages. People who quickly become fluent with the tool usually share one trait: they write to the model the way they would brief a new intern, giving the goal, the context and the expected format instead of counting on it to fill in the rest.

The fourth mistake, less obvious, is abandoning the tool after one weak answer on a task that genuinely needed several attempts. Writing text tuned to a particular brand or analyzing an unusual spreadsheet rarely comes out perfect on the first try, even when you hand it to a colleague. The difference is that revising the model's answer takes seconds rather than another working day, so it is worth giving it a second and third chance before you decide the task cannot be done without human help.

☑ Checklist: First steps with ChatGPT at the office

- ☐ Set Custom Instructions with your language, tone and preferred answer length



Figure 1.1: Working with an AI tool takes patience and an iterative approach – much like working with a new member of the team.

- ☐ Create one project for your most frequently repeated task and upload the template
- ☐ In the first instruction on a new topic, give the goal, the reader and the format
- ☐ Phrase corrections specifically instead of writing “fix this” or starting a new chat
- ☐ Verify every number and fact that goes into a company document before you send it
- ☐ Build longer documents in stages within one conversation, not in a single instruction

Writing and Editing Office Documents

MOST office correspondence follows a repeatable structure, even though every message concerns a different matter. An email to a client, a report for the board and an internal memo differ in content, but they do not differ in having to reach a specific reader in a specific tone at a specific length. This chapter shows how to phrase prompts for writing tasks so that the first draft is ready to send after one round of edits rather than five.

Anatomy of a good writing prompt

Before you ask for anything written, it pays to have four elements ready: the purpose of the message, the reader, the tone and the length. Leaving out even one of them forces the model to guess, and guesswork rarely matches the taste of the particular person doing the reading.

Purpose, reader, tone, format

Four elements worth stating in a prompt for any office text. Purpose answers the question of why the text is being written. Reader defines who will read it and how much they already know about the subject. Tone says how formal it should sound. Format decides length and structure, for example paragraphs, bullet points or a table.

The order in which you give these elements does not matter; what matters is that none of them is passed over in silence. The prompt “write to Mr. Smith asking to move the deadline, tone polite but firm, six sentences at most” contains all four elements and usually produces a finished text on the first attempt.

Format deserves separate attention, because it is the one most often skipped. The same subject may call for a running paragraph in an email, a bulleted list in an internal memo, or a short table in a report comparing several options. If you do not specify a format, the model defaults to continuous prose, which for many office uses, such as a summary of quotes or an action plan, is a worse choice than a list or a table.

Emails that do not need rewriting

The most common use of ChatGPT in an inbox is not writing from scratch but phrasing difficult messages: refusals, reminders about an overdue payment, notices of a delay. In those situations tone decides everything, and finding the right one can take a while when you do it yourself under time pressure.

A typical run: replying to a customer complaint

A customer service manager receives a sharply worded complaint by email. Instead of firing back a reply while still annoyed, she pastes the complaint into ChatGPT with the prompt: draft a reply that is factual and empathetic, without excessive apologizing, with a concrete proposed solution in the second paragraph. The first version goes out almost unchanged, because

the model has no emotional stake that would make a calm tone harder to hold.

The second common situation is shifting the register of a finished text. A message written quickly and casually for the team sometimes has to go to an external client in a more formal version as well. Instead of writing it twice, just paste the original with the prompt “rewrite this in a formal tone, without changing the substance”.

 Give an example instead of describing the tone in words

If you have an earlier email that sounded exactly the way you want, paste it as a model: “write in a tone similar to the example below”. The model reproduces register and length far more accurately than it does from adjectives like “professional” or “friendly”, which everyone understands differently.

From a long document to five bullet points

Summarizing is the task where the difference between a good and a bad prompt shows most clearly. The prompt “summarize this document” returns a general description that you still have to read in full to work out what matters. A prompt that states the number of points, the reader and the purpose of the summary returns something you can forward as is.

It is also worth keeping in mind that ChatGPT summarizes only what it actually received. If a document is very long and exceeds what the model can handle in a single message, it is better to split it into parts and

Table 2.1: A summary matched to its purpose, not to the document

Purpose of the summary	What to add to the prompt
A decision by the board	Number of points, hard figures, one recommendation at the end
Passing information to the team	Less formal tone, action items as bullets
Archiving for future employees	Fuller summary with context, no trimming

summarize in stages, then ask at the end for the partial summaries to be merged into one.

 A summary without a purpose is useless

Before you ask for a summary, answer for yourself what the reader will do with it: make a decision, pass it on, or file it away. That single piece of information changes the length, tone and content of the summary more than any other instruction.

Editing someone else's text

Shortening, simplifying and improving style are tasks where ChatGPT can be faster than editing by hand, especially when someone else wrote the text and you have to preserve their meaning while changing only the form. The key rule is this: always ask for the substance to be preserved while the form changes, otherwise the model sometimes adds phrasing of its own instead of sticking to the facts in the original.

Editing does not mean adding new facts

Asked to “improve” a text, the model sometimes adds details that were not in the original in order to sound more convincing. Always add “do not add new information, form only” to the prompt and compare the result with the original text before passing it on.

A useful technique is asking for several variants at once: a shorter one, a longer one, a more formal one. Instead of three separate rounds of edits you get three versions to choose from right away, which often finishes the work on a text in one prompt instead of five.

On business plans ChatGPT is sometimes available directly as a panel inside Word, not only in a separate browser window. You select a passage of the document, type the prompt in the panel beside it, and the result goes straight into the text with no copying between applications. For short edits, such as fixing a single paragraph while writing, that is faster than switching between two windows, although for longer tasks requiring several rounds of edits many users still prefer a separate chat window, where the whole history of changes is easier to see.

A separate category of editing is matching a text to the style of a particular brand or a particular person. If the company has a style guide or the department has an agreed way of writing, it is worth uploading a few well-written sample texts to a project and asking for editing “in the same style as the attached examples”. The model picks up patterns in sentence length, word choice and paragraph structure far more effectively than it would from a verbal description of that style.

Longer documents built in stages

A report running to several pages, a presentation for the board or project documentation rarely comes out of a single prompt, even if in theory the model could generate it in one go. The more practical approach is to build the document in stages: structure first, then the individual sections, then the coherence of the whole.

A typical run: a monthly report for the team

A marketing specialist prepares the monthly campaign results report. Instead of asking for the whole report at once, he starts with the prompt “propose a structure for a monthly campaign results report, five sections, for a team that knows the campaign context”. Once the structure is approved he pastes in the spreadsheet data and asks for each section to be developed separately, then at the end for a single transitional paragraph tying the sections into a coherent whole. The whole process takes fifteen minutes or so instead of an hour of writing from scratch.

This method has an added benefit: controlling the length and level of detail of each part separately is easier than reworking a whole finished

document at once. If one section comes out too general, you fix only that section instead of regenerating the entire report.

 Ask for the structure first, the content second

Before you commission a whole document, ask for the bare structure as bullet points: section titles and one sentence describing each. Approving or correcting the structure takes a moment, and it saves rewriting the whole document when it turns out an important section is missing.

Shifting register and translating tone between readers

The same message often has to reach several different groups of readers in different versions: a full, technical version for the team, a simplified one for the client, a formal one for the board. Writing three separate versions from scratch takes three times as long as writing one and asking for two variants.

 One good source text is enough for several versions

Instead of writing separately for each reader, write one solid version with the full substance, then ask for variants: a shorter one without jargon for the client, a more formal one for the board. Changing the form takes far less time than writing from the ground up.

It is worth watching, as you do this, that the model does not lose key facts from the original with each successive version. Good practice is to ask

at the end for a short comparison: did the simplified version keep all the figures and dates from the full one. That one extra request takes a few seconds and catches omissions before the text reaches the client.

Outlook and email drafts from inside the inbox

Since 2026 some organizations have used the ChatGPT integration directly in Outlook, where, once an administrator enables it, the model can prepare a draft reply to an email from a short prompt. One important limitation: the feature only creates a draft in the mailbox, the decision to send is always a person's, and access to write functions of this kind is often disabled by default and requires IT approval.



Even when this integration is available at your company, the rule from the previous chapter still holds: every draft has to be read before it is sent, especially when it concerns prices, deadlines or commitments to a client.

It is also worth agreeing with the team on a shared way of marking which emails may be created with the help of drafts and which are better written yourself from start to finish. Correspondence with an important client or a message concerning a legal dispute are situations where even a good draft needs more than one quick glance, because the cost of a mistake is higher here than in an ordinary organizational message. A sensible division of labor has the tool taking over the routine while the person keeps full control wherever the stakes are high.



Figure 2.1: An employee reviews and approves a generated message draft before sending it, keeping full responsibility for the content of the correspondence.

☒ **Checklist: Writing and editing with ChatGPT**

- ☐ Give the purpose, reader, tone and length in every writing prompt
- ☐ For difficult emails (complaints, refusals) ask for a factual tone free of emotion
- ☐ Paste a sample text as a model of tone instead of describing it with adjectives
- ☐ For summaries, state what the reader will do with the text
- ☐ Ask for several lengths at once instead of a series of separate prompts
- ☐ Read every Outlook draft or other finished text before sending it

03

Data and Spreadsheets

A spreadsheet is where ChatGPT starts doing more than writing text: it reads the file, runs code, calculates, draws charts and points out anomalies you would not spot at a glance. The feature is called Advanced Data Analysis, and for many office workers it is the most practical part of the whole tool, because it cuts hours of clicking through formulas down to a few minutes of conversation.



Figure 3.1: Spreadsheet analysis that used to take hours now comes down to a short conversation with an AI model.

What Advanced Data Analysis is

Once you upload an .xlsx, .csv or similar file, the model does not guess what the spreadsheet contains; it actually reads it and writes Python code that runs in the background. The result can be a table, a chart, a single number or a list of problems found in the data. The difference from an ordinary conversation matters: answers to questions about numbers come from the file being genuinely recalculated, not from the model's guesswork.

Advanced Data Analysis

A ChatGPT feature in which the model writes and runs computational code on an uploaded file instead of answering from the text of the prompt alone. As a result, the numbers in the answer come from an actual calculation on the data rather than from the model's estimate.

💡 Start by asking about data quality

Before you ask for any analysis, ask: "check whether this spreadsheet has missing values, duplicates or outliers". That single step catches problems that would otherwise distort every number that follows, and it costs you one prompt at the start.

Two modes of working with a spreadsheet are worth separating right away. The first is a quick question about a single number, say total sales in a given month, where the answer appears in a few seconds. The second is multi-step work in which you first clean the data, then calculate statistics, and finally ask for a chart, with each stage building on the result of the

previous one. In that second mode it pays to stay in one continuous conversation, because the model remembers what was established earlier, such as which columns have already been cleaned, so you do not have to describe them again with every new question.

Cleaning data step by step

Raw data from company systems is rarely fit for analysis without being tidied up first. Duplicate customers entered twice with different spellings, empty cells where a number should be, dates written in several formats at once, this is daily reality in any department that exports data from a CRM or an accounting system.

A typical run: tidying a customer list before an email campaign

A marketing specialist receives a customer database export from the CRM in which some email addresses repeat and some records have an empty company name field. She uploads the file to ChatGPT with the prompt: find and remove duplicates based on the email address, fill in missing company names wherever they can be inferred from the email domain, flag the rest for manual review, and return a file ready to import. The whole operation, which would take an afternoon by hand, finishes in a few minutes, with a clear list of the records that still need a human eye.

Automatically filled data is not the same as known data

When you ask for missing values to be filled in, the model may propose the statistically most likely value rather than the actual one. For data that will feed into further business decisions, always ask for the automatically

filled cells to be marked explicitly, instead of letting them disappear into the finished file without a trace.

The same approach works for dates written in several formats at once, which happens often when data comes from several systems merged into one export. Instead of standardizing each column by hand, one prompt is enough: “standardize all dates in this spreadsheet to year-month-day format and point out the rows that could not be recognized”. That last part, flagging the problem rows, matters more than it might seem, because it prevents a wrong date from being quietly swapped for another, equally incorrect value.

Statistics, segmentation and charts

Beyond cleaning, the most common task is quickly understanding what the spreadsheet actually says: averages, medians, distributions, customers split into groups by a chosen criterion. Instead of building a pivot table by hand, you simply describe what you are looking for.

Segmentation is especially useful when you need a fast answer to a question like “which customers generate the largest share of revenue”. The model can not only work out that split but also describe it in sentences a person who is not looking at the raw numbers can follow, which helps when the result goes straight into a report for your manager.

For recurring analyses, such as a monthly sales report built on the same column layout, it pays to describe the exact calculation method once in a project dedicated to that task, as in the first chapter. Later months then

Table 3.1: Common data tasks and the prompts that match them

Task	Example prompt
Numeric summary	Calculate the mean, median and standard deviation for the revenue column
Customer segmentation	Split customers into three groups by purchase value and describe each group
Anomaly detection	Find rows where the value differs significantly from the rest of the column
Trend visualization	Draw a monthly sales chart with the trend marked

come down to uploading a new file and one sentence, “run the usual analysis”, instead of restating the methodology every time.

 Ask for an interpretation of the numbers

A table of results alone is rarely enough in a report. Add “describe what these numbers mean in practice” or “point out one conclusion worth attention” to your prompt, and you get a paragraph ready to paste instead of raw data.

Data visualization is an area where it pays to be specific about the chart type instead of leaving the choice to the model. A sales trend over time reads best as a line chart, a comparison of several categories as a bar chart, and each segment’s share of the whole as a pie chart, though the last one only works well with a small number of categories. If you do not name

the chart type in your prompt, the model picks whatever seems to fit, which sometimes lands and sometimes produces a chart that is hard to read at a glance, such as a pie with a dozen thin slices.

💡 Ask for short labels, not a bare chart

A chart with no axis labels and no title needs extra explanation when you talk the reader through it. Add “label the axes, add a title and one sentence of interpretation under the chart” to your prompt to get something you can paste straight into a presentation or report.

Combining several spreadsheets at once

The real power of Advanced Data Analysis shows up in questions that require joining two separate data sources, for example a customer list from one file and a purchase history from another. Joining such tables by hand in Excel takes knowledge of VLOOKUP or pivot tables, while in ChatGPT you just upload both files and ask the question directly.



A sample combined question is “what is the total purchase value of the Gold plan customers from the first file”, and the model finds the shared column on its own, the customer ID for instance, then runs the calculation on the joined data. A task that takes several intermediate steps in a traditional spreadsheet comes down to one sentence here.

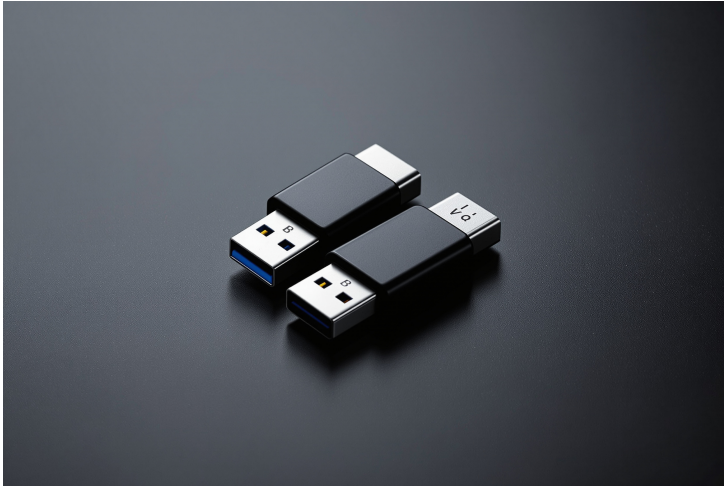


Figure 3.2: Combining data from two separate sources yields answers that used to require advanced spreadsheet formulas.

Three files at once is rarer but still realistic, for example sales data, marketing cost data and customer service data for the same period. The model handles that kind of join as long as every file has a shared column that lets the rows be linked, such as a date or a customer ID. When the shared column is missing or is named differently in each file, say so in the prompt right away, for example “in the first file the column is called `customer_ID`, in the second just `ID`”, rather than counting on the model to guess the match.

⚠ Check the joined result against a few known examples

Before you use the result of joining two spreadsheets in further work, ask to see a few individual rows from the joined data and compare them by

hand against the original for a customer you know well. That is a fast way to catch a wrong column match before the error reaches the final report.

Excel formulas on demand

Beyond working directly on data, ChatGPT also serves as a source of ready-made Excel formulas, especially the ones you have to assemble from several functions at once. Instead of searching online for how to combine IF with VLOOKUP, you simply describe what the formula should do.

Describe the result, not the function

Instead of asking “how does the INDEX function work”, describe the goal: “I want a formula that returns the name of the best-selling product in a given month”. The model picks the right functions itself, and along the way explains how the finished formula works, which makes it easier to modify later without asking again.

The same feature works in the other direction: a pasted formula nobody on the team can decipher, because it was written by someone who left the company long ago, can be explained step by step, which is particularly useful when you inherit spreadsheets from a predecessor.

 Ask for the formula and its explanation in one prompt

A finished formula with no explanation is a black box that is hard to modify on your own later. Adding “and briefly explain what each part of the formula does” costs one sentence in the prompt and saves you another question when something in it needs fixing a month from now.

A separate category is conditional formulas that pull data from several sheets in the same file, for example a bonus calculation for employees based on sales results stored on a separate tab. Describing that task in words, for example “calculate the bonus as five percent of the sales value from the Results tab, but only for employees on the Active tab”, usually produces a working formula faster than building it by hand through trial and error.

The ChatGPT add-in inside Excel

Business plans sometimes include an add-in that puts a ChatGPT panel inside Excel, so you do not have to switch between applications. You select a range of cells, type a prompt into the panel, and the result, a new column of calculations or a chart for instance, appears directly in the spreadsheet.

The difference between working in the panel inside Excel and in a separate chat window with an uploaded file comes down mostly to the size of the task. The panel works well for short, targeted prompts on the visible part of the sheet, such as adding one formula or quickly summarizing the selected range. A separate chat window handles multi-step tasks better, the ones where you return to earlier decisions, ask for more charts from

the same data or export partial results for further work. Choose between them based on how many steps the task has, not out of habit for one of the two options.

⚠ Large datasets need extra verification

With very large spreadsheets, in the tens of thousands of rows, the model may work on a sample of the data rather than the whole thing, which affects the accuracy of the result. For key financial numbers, always ask for confirmation of how many rows the calculation actually covered before you treat the result as final.

✓ Checklist: Working with data in ChatGPT

- ☐ Start by checking data quality: duplicates, missing values, outliers
- ☐ When filling in gaps, ask for the changed cells to be marked clearly
- ☐ For reports, ask for a short interpretation alongside the numbers
- ☐ For questions joining two data sources, upload both files at once
- ☐ Describe formulas by the result you want, not by the function name
- ☐ With large datasets, verify how many rows the calculation covered

Meetings, Notes and Staying Organized

AN hour of meeting rarely ends when the meeting does. Afterward you have to write down what was agreed, send a summary to the people who missed it, add tasks to your list and sometimes prepare another document based on what was said. This chapter shows how to shorten that second part of the day, the administrative work around meetings, and how to use ChatGPT to organize your own workload day to day, not only to write and calculate.

Recording and summarizing a meeting

Recording mode in ChatGPT lets you capture the audio of a meeting, a brainstorming session or a phone call, and then automatically produce a transcript and a summary. The result is saved as a separate document in your chat history, and you can keep transforming it, for example into an action plan, a summary email or a task list with named owners.

For someone who used to take notes by hand during the conversation, the biggest change is that you can take full part in the discussion instead of splitting your attention between listening and writing. Notes taken on the fly usually capture only part of what was agreed, because it is hard to talk, listen and write with the same care at once. A recording removes

that trade-off by moving the documentation work to after the meeting, when nobody is waiting for your answer.

Meeting summary

A shortened version of the transcript containing the key agreements, decisions and tasks to be done, generated automatically from a recording. It differs from a full transcript in that it skips digressions and repetitions, leaving only the content that matters for the work ahead.

A typical run: the weekly project team meeting

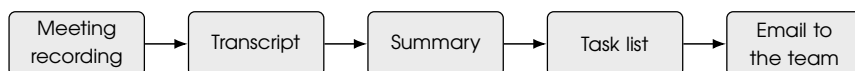
A project manager records the weekly status meeting instead of taking notes by hand during the conversation. Afterward she asks for a summary in three parts: what has been done since the last meeting, what decisions were made, and what tasks came out of the conversation and for whom. The finished summary goes to the team channel unchanged, and the people who were absent read it instead of asking someone for a verbal recap the next day.

Recording requires everyone's consent

Before you turn on recording, make sure every person present knows about it and agrees, especially when people from outside the company are taking part. In many organizations this also touches internal policy on storing recordings and the personal data discussed during the conversation.

From a summary to a specific document

A raw meeting summary is rarely what you finally need to send. A manager needs a short status for their supervisor, the team needs a task list with deadlines, and an external client needs a formal record of what was agreed without the internal organizational details. A single summary in a ChatGPT conversation can be turned into each of these forms with a separate prompt, without going through the whole recording again.



💡 Ask for a send-ready format right away

Instead of asking for a general summary and then reworking it, state the target format immediately: “draft an email to the team with this summary, with a task list at the end, each task with the person responsible”. You save one round of edits, because the model knows from the start what the text is for.

Teams integration and searching for decisions

On Enterprise plans ChatGPT can be connected directly to Microsoft Teams, which lets you refer to transcripts of scheduled meetings without copying the content by hand, as long as the user has the right access permissions to those materials. The practical use of this integration goes beyond summarizing a single meeting: it also lets you search the team’s

earlier conversations for a specific decision, for example “when did the team set the budget for this project and who made the call”.

 Your team’s decision history becomes searchable

Instead of scrolling back through chat messages or asking colleagues whether anyone remembers what was agreed a month ago, an integration with meeting transcripts lets you ask the question outright and get an answer that points to which meeting the decision was made at and in what context.

This feature has a clear limit, though: it covers only meetings that were actually recorded and transcribed with the right access permissions in place. Meetings from before the integration was rolled out, or ones where recording was turned off, stay out of its reach, so treat it as an addition to your existing notes rather than a complete replacement from day one.

The practical consequence of that limit is that it pays to agree on one consistent habit across the team, for example recording every status meeting but not brainstorming sessions, where a free-flowing conversation matters more than a literal record of it. Without such an agreement some meetings end up documented in great detail and others are not documented at all, which later makes decision search harder to use, because you never know in advance whether a given conversation is available to search at all.

Templates for recurring tasks

A large part of organizational office work consists of the same activities done on a regular rhythm: the weekly status report, the monthly budget summary, the quarterly supplier review. Instead of describing the structure of such a document from scratch every time, write it down once in a project and treat it as a template.

Table 4.1: Recurring organizational tasks as templates in projects

Rhythm	What to store in the project
Weekly status	Report structure, recipient list, length, tone
Monthly summary	Last month’s version, data sources, chart format
Quarterly review	Scoring criteria, previous results for comparison

Once such a template is saved, the following cycles come down to uploading new data and a short prompt: “prepare this edition following the agreed template”. The difference in working time between the first cycle and the fifth can be enormous, because each time you no longer have to describe from scratch what was already settled earlier.

It is also worth going back to the template itself now and then to check whether it still matches what the readers actually need. A report structure that worked half a year ago may need a new section added or another one shortened when the team changes or company priorities shift. A project holding a template is not a set-and-forget setting but a working document,

and it deserves an update along with the rest of the process from time to time.

Working with long project documents

Beyond meetings themselves, the office regularly produces long documents to process: agendas, minutes, project specifications, tender documentation. ChatGPT handles such documents much as it handles the summaries from chapter two, with one extra option: you can ask it to pull out specific elements, for example every deadline, everyone responsible for something, or every open question that still needs a decision.

Pull out specific elements instead of rereading the whole document

Instead of rereading a long set of minutes looking for one piece of information, ask the model to extract a specific category: “list every deadline mentioned in this document along with the context it appeared in”. That is far faster than searching a dozen pages by hand.

This technique is especially useful when you take over a project from someone else and have to get your bearings in months of documentation without reading every document end to end. Instead you can ask a series of specific questions and build up the picture gradually, the same way as in the data analysis from the previous chapter.

 Build the picture with questions, not one prompt

Instead of asking for a full summary right away, start with broad questions and then narrow down: who is involved, what is still open, what has already been settled. Each new question builds on the answer to the previous one, so the picture comes together faster than with a single very long opening prompt.

Sorting out your own task list

Beyond the work around meetings, ChatGPT also works well as a first step in sorting out your own day, when the task list grows faster than you can work through it. Pasting in a messy list of notes from the week and asking for them to be grouped by urgency or by project takes a moment, and it often reveals that some of the items are already out of date or duplicate one another.

 A typical run: sorting out the task list after vacation

A department head comes back from vacation to an inbox with several dozen unread emails and a notebook full of hastily jotted items. Instead of going through everything in order, he pastes the contents of the notebook into ChatGPT with a prompt: group this by urgency into today, this week and can wait, and for each item suggest one specific first action. In ten minutes he has an ordered plan for the day instead of spending an hour sorting his own thoughts.

The same technique works for planning a larger project from scratch. Describing the goal of the project and asking for it to be broken into stages



Figure 4.1: Back at work after vacation — the moment of sorting out the backlog and setting priorities again.

with a rough duration for each gives you a starting point for further work, even if the final schedule still needs correcting by someone who knows the team's reality and the resources available.

💡 Treat a proposed plan as a draft to fix, not a finished schedule

The model does not know how available people on the team really are, or the unexpected delays that happen in every project. Check the generated schedule against the team calendar right away and ask for corrections wherever the dates do not add up, instead of passing it on unchecked.

When a handwritten note still wins

For all these conveniences, there are situations where a quick handwritten note or a short message to yourself is still faster than opening ChatGPT and phrasing a prompt. A short, one-off reminder during a meeting, for example “call the supplier tomorrow morning”, gains nothing from going through the whole recording and summarizing process.

Not every task needs a tool

Automation makes sense where it saves real time on repetitive or complex tasks. For a single simple reminder the cost of phrasing the prompt can be higher than the cost of an ordinary note, so keep some common sense about where the tool actually helps.

Checklist: Meetings and staying organized

- ☐ Get consent from everyone present before you record a meeting
- ☐ State the target format of the summary up front instead of asking for a general description
- ☐ Check whether the Teams integration covers a given meeting before you rely on it
- ☐ Save the structure of recurring reports as a template in a separate project
- ☐ With long documents, ask for specific elements to be extracted, not a full summary
- ☐ Treat automatic summaries as an addition to your own notes, not a replacement

Automation, Integrations and Company Data Security

THE previous chapters showed ChatGPT as a tool you talk to in a single window: you upload a file and wait for an answer. In 2026 that boundary is starting to blur. The model can work in the background, connect to other company applications and carry out multi-step tasks without you watching every step. This final chapter shows what that really changes for an office worker, where the limits of trusting such features lie, and how to bring ChatGPT into the daily work of a team safely, not just into your own.

ChatGPT Work: an agent that carries out tasks on its own

In July 2026 OpenAI added Work mode to the desktop app, alongside the existing chat mode. Instead of answering single questions, the agent in this mode can carry out a multi-step task on its own: prepare a set of documents, analyze data from several sources or build a simple web application. While it works, you answer its questions and approve the key decisions rather than supervising every individual step.

Agent mode

A way of working with the model in which, instead of answering one instruction at a time, the model plans and carries out several steps toward a goal on its own, reporting progress and asking for a decision wherever it needs human guidance.

The most distinctive feature of this mode is Computer Use, the model's ability to take over the mouse cursor and perform operations directly in other applications when standard integrations are not enough. In practice this means the agent can click a specific button in a company system, fill in a form or move through several screens of an application that has no ready-made connector.

Computer Use is for tasks where a mistake costs little

When the model takes over the cursor, every mistake it makes really happens, exactly as if a person had clicked. Before you hand the agent a task with access to systems holding financial or personal data, check whether your company allows the feature at all and whether there is a way to undo a wrong action, before it becomes an everyday tool rather than an experiment.

The integrations productivity actually rests on

An agent with no connection to the tools you use every day would be limited to work inside the chat itself. The key part of Work mode is a standing connection to company applications: Slack, Microsoft Teams, Google Drive, SharePoint, mail, calendars and CRM systems. Because of

that, the agent can check your calendar before proposing a meeting time, find the file it needs on the company drive without asking you to upload it by hand, or update the status of a case directly in the CRM.

Table 5.1: Levels of office automation with ChatGPT

Level	Oversight	Example
Chat	Full, every reply read	Writing an email
File analysis	Full, output verified	Cleaning a spreadsheet
Multi-step agent	Partial, key decisions	A report from several sources

Integrations also bring asynchronous work: a task you give the agent on your phone can continue remotely, and you come back to it later to check progress or answer a question that came up along the way. For many office workers this means handing over a time-consuming task in the morning and picking up a finished result after a run of meetings, instead of sitting in front of the screen waiting for the process to end.

The practical value of these integrations grows with the number of systems your team actually uses. A company that keeps most of its documentation on one shared drive and communicates mainly through one messenger gains more from consistent integration than a company spread across a dozen tools, some of which will never get a ready-made connector. Before you plan a wider rollout in your team, check which of the systems you use every day your ChatGPT plan actually supports, instead of assuming everything will connect by itself.



Figure 5.1: Asynchronous work with an AI agent lets an employee hand over a task in the morning and pick up a finished result after a run of meetings.

■ The agent works in the background, but the decisions stay with a person

Asynchronous work does not mean full autonomy. A well-configured agent stops at the key judgment calls and asks for approval instead of settling weighty questions on its own. If the agent never asks for confirmation on a task that deserves it, check the oversight settings before your trust in it grows beyond what it has earned.

Where trust in automation ends

Not every task is suited to being handed to an agent, even if it is technically capable of doing it. The practical line runs between tasks where a mistake is easy to spot and fix, and tasks where a mistake goes straight to a client, a financial system or a legal document before anyone has a chance to check it.

A useful question when you weigh up a new task is: who will notice the mistake, and when, if the agent makes one. If the answer is “I will, before anyone else sees it”, the task is a safe candidate for automation. If the answer is “the client, when they get the wrong invoice”, the task needs an extra round of human review before the result goes any further, no matter how well the agent handled similar work before.

A typical case: where one team drew the automation line

The customer service department of a mid-sized company let the agent sort and categorize incoming tickets on its own, but blocked it from sending replies to customers without human approval. The result was a shorter response time on simple tickets while keeping full control over what actually reached the customer. The team reviews that line regularly and moves it gradually, as trust in the quality of the agent’s work on specific ticket types grows.

Start with reversible tasks

When you first bring automation into a team, pick tasks whose effects are easy to undo: sorting files, first-pass categorization, preparing drafts

for review. Only once the agent's work proves reliably good should you extend the scope to tasks where a mistake costs more.

Company data security

The write access and the ability to act automatically in other systems, described earlier in this chapter, are often turned off by default for exactly that reason: security. A company administrator has to switch them on deliberately and approve the scope of access the agent gets to mail, calendars or documents. For an ordinary employee this means that the availability of individual features differs from company to company, and not every capability described in this book will show up in your account right away.

Personal data and trade secrets call for extra care

Before you paste customer personal data, financial information or details of an unpublished company strategy into a chat, check your internal policy on the use of AI tools. Some organizations restrict the kinds of data that may be processed outside internal systems, however convenient pasting them straight into the chat would be.

It is also worth remembering that company plans differ from individual accounts in how they process data, which is usually one of the reasons companies choose a paid team plan at all rather than leaving employees on private accounts. A conversation with IT about which account and

which settings apply in your organization is a step to take before, not after, you paste the first sensitive document.

Good practice at team level is a short written list of what may and may not be pasted into ChatGPT, available to every new employee from day one. It does not have to be a long policy document; a few clear sentences are enough: which categories of data are allowed, which account to use for work tasks, and who to ask when a task looks borderline. Such a list prevents a situation where everyone on the team guesses for themselves where the line runs, and the lines differ depending on who you happen to ask.

How to build this habit in a team

One person using ChatGPT well saves their own time. A team that agrees on the same techniques, templates and limits of trust saves far more, because not everyone has to learn the same lessons separately by trial and error.



The simplest way to start is to pick one case that works well, for example the weekly report template from chapter four, and show it to the team as a finished pattern to copy, instead of explaining every capability of the tool at once. People learn faster from one concrete example they can

apply to their own work immediately than from a general presentation of features, most of which have nothing to do with their daily duties.

This whole book, from the first chapter on context and memory, through writing and editing, working with data and organizing meetings, to automation and security, leads to one conclusion: ChatGPT works best in the office not as a magic tool that does everything for you, but as a colleague who needs clear instructions, verified results and trust built up step by step. Companies and individuals who treat it that way gain real hours every week. Those who expect miracles without putting effort into good prompts usually go back to their old habits after a month and write the tool off as overhyped.

One thing to do this week

Pick one repeatable task from your own work, ideally something you do every week or every month, and build one well-described ChatGPT project for it with a specific template. That single action, repeated consistently, saves more real time than reading another ten articles about new model features.

Checklist: Automation and data security

- ☐ Check which Work mode and Computer Use features are enabled at your company
- ☐ Start automating with tasks whose effects are easy to undo
- ☐ Agree with your team which decisions the agent may make alone and which need approval

- ☐ Read the internal policy on personal and confidential data before pasting any
- ☐ Ask IT which account and which settings apply in your organization
- ☐ Pick one recurring duty and build a project template for it this week