Set up a Workspace your team will actually use.

A Workspace is where your team and Copilot work on the same project with the same context. This kit gets you from empty to useful in about 30 minutes.

Workspace or Project?

A **Project** is your desk: personal chats, tasks, files and results. A **Workspace** is the team's project room. If you'd say "I'm working on it," use a Project. If you'd say "we're working on it," use a Workspace.

One Workspace per workstream, not one per team.

Setup checklist

- [ ] **Pick one workstream with a finish line.** "Q1 product launch," not "marketing stuff."
- [ ] **Name it so search finds it.** Team · Workstream · Timeframe.
- [ ] **Add 5 to 10 references on purpose.** The brief, the plan, last year's version, key meeting recaps. Leave out old drafts and outdated numbers.
- [ ] **Write the team brief first** (page 2) and add it as the first page.
- [ ] **Invite the team** with Invite in the upper-right corner.
- [ ] **Run the kickoff prompt together** (page 3). If the summary's wrong, fix your references now.
- [ ] **Set agent ground rules:** every agent draft has a human owner, ask in comments, nothing leaves unreviewed.

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TEMPLATE

Team brief

Fill in the brackets and save this as the first page in your Workspace. Tell your team it's the source of truth.

```
TEAM BRIEF: [Workstream name]

GOAL
[One sentence. What will be true when we're done?]

DEADLINE / FINISH LINE
[Date, or the event that ends this work]

WHO OWNS WHAT
- [Name]: [area they own and approve]
- [Name]: [area]
- Copilot / agents: [what they can draft; a person reviews before anything ships]

WORDS WE USE
- [Term]: [what we mean by it]

SOURCES OF TRUTH
- [File]: [what it's the source of truth for]
- If two files disagree, [file] wins.

WHAT GOOD LOOKS LIKE
- Tone: [e.g. friendly, plain language, no jargon]
- Format: [e.g. one-page summaries, tables for numbers]
- Never: [e.g. share pricing before it's approved]

OPEN QUESTIONS
- [Question] (owner: [name])
```

Don't skip "Sources of truth" and "Never." They tell Copilot which file wins when two disagree and what it should never assume.

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WORKED EXAMPLE + PROMPTS

Cafe Events · Spring Open Mic Series · Mar–May

April's Acoustic Cafe (fictional) is launching a spring open mic series.

Goal	Six open mic nights, 12+ performers each, and 300 new mailing list sign-ups.
People	Maya (events, approves schedule) · Theo (marketing, approves posts) · Jules (store manager, approves budget)
References	Last year's recap, 2027 events budget, performer sign-up responses, venue capacity and safety notes
Agents	Draft social posts and performer emails. Theo reviews everything public.

Five prompts for your first week

1 Kickoff. "Using the team brief and the references in this workspace, summarize our plan in five bullets and list the open questions we haven't answered."

2 Gaps. "What information would you need to do this work well that isn't in this workspace yet?"

3 Owners. "Turn the plan into a task list with an owner and due date for each item, using the owners in the team brief. Flag anything without an owner."

4 Draft. "Draft [the first deliverable] for [owner] to review. Follow 'What good looks like' in the brief and list any assumptions you made."

5 Weekly check-in. "What changed in this workspace this week, what's at risk, and what decision do we need from someone?"

Want your team set up in one session? I run hands-on Workspaces sessions built around a real project. learnwithapril.com/training