Best Practices for Copilot Generative AI Prompting

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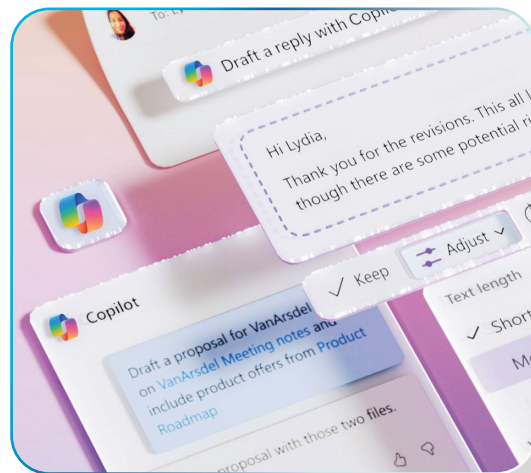
Elevating Productivity Through Effective Prompting

In an era defined by rapid technological advancement, Microsoft 365 Copilot technology stands out as a game-changer for productivity. By harnessing the capabilities of artificial intelligence, Copilot transforms the way we work—automating tasks, accelerating workflows, and providing real-time insights that empower decision-making.

However, the **true potential of Copilot** lies not only in its algorithms but also in how we interact with it. Effective prompting is the key to unlocking precise, relevant, and actionable outputs from AI.

Just as a skilled conductor guides an orchestra to create a masterpiece, well-crafted prompts direct Copilot to deliver results that drive efficiency and innovation. Yet, many users encounter challenges such as inconsistent responses and inefficiencies caused by poorly crafted prompts, limiting their ability to fully leverage Copilot's power.

A new wave of AI power users is emerging saving 10 hours a month but the key to unlocking this efficiency lies in mastering the art of prompting.
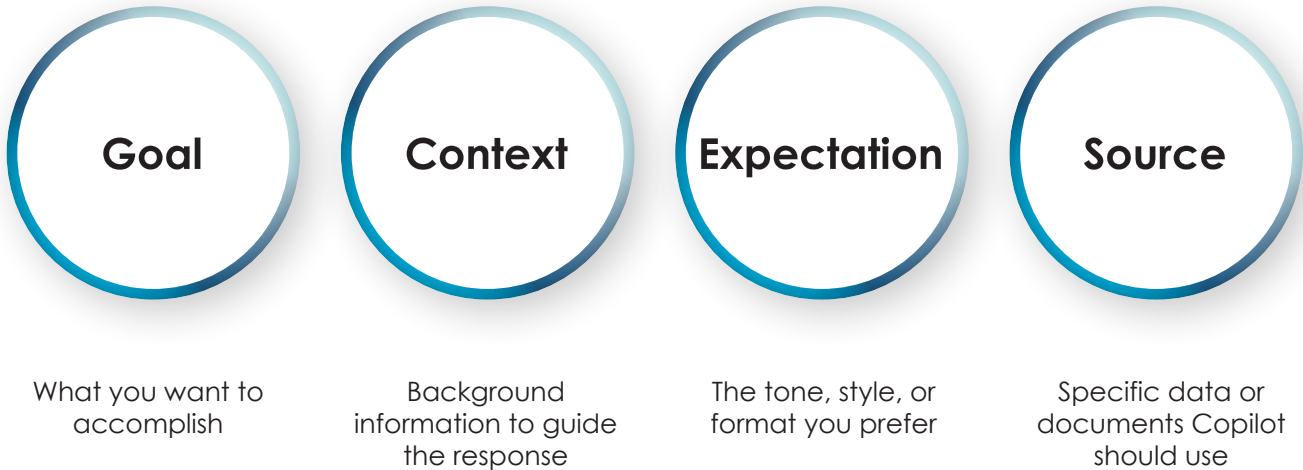
This guide lays the foundation for your business, exploring how Copilot technology works and how effective prompting can amplify its impact. Whether you're a tech expert or new to AI, you'll gain the insights needed to harness Copilot and boost productivity.

Getting the Best Results with Copilot Prompts

Understanding Copilot Prompts

Copilot prompts are instructions or questions that guide Copilot to deliver the results you want. Effective prompts typically include four key components:

Goal	**Context**	**Expectation**	**Source**
What you want to accomplish	Background information to guide the response	The tone, style, or format you prefer	Specific data or documents Copilot should use

Crafting Effective Prompts with Context and Clarity

While a clear goal is essential, adding context, expectations, and source details can significantly improve the output. Copilot tools allow prompts up to 2,000 characters, so the more specific and detailed your prompt, the better your output will be.

Prompt Examples:

1   (Goal) **+** (Source) ❯   **"Write a summary based on all emails from Sam in the past two weeks."**

2   (Goal) **+** (Context) **+** (Expectation) ❯   **"Draft an outline of a time management training manual. The audience is hybrid professionals attending virtual meetings and meeting deadlines. Use a friendly and suggestive tone."**

Expect an iterative process with Copilot, where follow-up prompts refine the results.

What Can You Accomplish with Copilot Prompts?

Microsoft Copilot, integrated with Microsoft 365 apps, unlocks productivity by accessing internal data from emails, reports, presentations, and more. Here are key use cases:

Catch Up on Initiatives
Use prompts like:
"What questions were asked during the meeting?"
"What ideas were presented?"

Ask Questions:
Get recommendations or ideas:
"Give me ideas for an article on the topic of best practices for managing technology spend for a non-profit group."
"Suggest team-building activities."

Find Specific Information
"explain the clause four of this document"
"Find information pertaining to phase 3 of the Feldman project"

Create Presentations
Simplify decks and proposals:
"Create a presentation from Example File highlighting cross sell opportunities in Q2"
(business subscription)

Edit
Improve or refine existing content:
"Rewrite this paragraph for readability and friendly tone."
"Add an image of a target with arrows." (PowerPoint)

Create Content
Use Copilot to generate content:
"Create a short presentation about time management." (PowerPoint)
"Write an email congratulating the project team on their launch." (Outlook)

Generate Ideas:
Get recommendations for projects and initiatives:
"Suggest inexpensive ways to optimize our website for organic search."

Summarize Content
Scrape the important aspects of a document or email thread:
"Create a list of initiatives and highlights of this email thread"

Best Practices when using Copilot Prompts

Review Responses Carefully

LLMs can produce incorrect or biased results, so always verify critical information for accuracy and reliability.

Expect Variability

Repeated prompts may yield different responses due to LLM randomness. Refine your prompts to drive more consistent results.

Use Responsibly

Follow ethical, legal, and responsible AI standards. Avoid sharing sensitive data and ensure compliance with company policies.

Provide Clear Context

The more specific your prompt, the better the output. Include details like audience, tone, and format.

Iterate for Improvement

Follow ethical, legal, and responsible AI standards. Avoid sharing sensitive data and ensure compliance with company policies.

Business Applications for Copilot Prompts

Enterprise users can leverage Copilot with internal data for added business value:

Email Drafting and Summarization

Copilot can draft responses, summarize long email threads, and extract key action items. This saves time by reducing email management overhead, enabling faster decision-making and response times.

> *"Summarize all emails from [Sender Name] in the past [timeframe] and highlight key action items. Then, draft a professional but concise response addressing the main points, confirming any decisions, and requesting any missing details."*

Report and Document Generation

Automatically create reports, proposals, and meeting minutes based on data from various sources (e.g., Teams, Outlook, SharePoint).This reduces time spent on documentation, freeing up resources for high-impact activities.

> *"Create a detailed project status report based on the following data: [insert bullet points or key details]. Structure the report with an executive summary, key milestones, current challenges, and next steps. Use a professional and concise tone suitable for senior leadership."*

Business Applications for Copilot Prompts

Meeting Recaps and Action Items

Generate concise meeting summaries, highlight decisions made, and list follow-up tasks from Teams meetings. This improves alignment and accountability, ensuring teams act swiftly on priorities.

> *"Give me a summary of the key takeaways from our [Meeting Name] on [Date]. Include decisions made, assigned action items with deadlines, and any unresolved questions. Format the response as a structured list for easy reference."*

Data Analysis and Insights

Analyze Excel spreadsheets, generate charts, and provide actionable insights based on business data. This speeds up decision-making by providing instant analysis without manual effort.

> *"Create a detailed project status report based on the following data: [insert bullet points or key details]. Structure the report with an executive summary, key milestones, current challenges, and next steps. Use a professional and concise tone suitable for senior leadership."*

Workflow Automation

Assist in creating automated workflows using tools like Power Automate by generating scripts and logic prompts. This streamlines repetitive tasks, boosts productivity, and reduces human error.

> *"Generate a Power Automate workflow script to automate [task, e.g., invoice approvals]. The workflow should trigger when [condition occurs], send a notification to [team], and log the action in [system]. Provide a brief explanation of each step."*

Helpful Resources

Copilot Prompt Coach

Designed to assist users in crafting well-structured and effective prompts for Microsoft 365 Copilot. It provides valuable feedback, examples, and actionable suggestions to help users generate new prompts and improve existing ones.

You can access the Prompt Coach through the Microsoft AppSource by searching for "Prompt Coach" and selecting the app from Microsoft Corporation.

Copilot Prompt Gallery

Designed to help users enhance their productivity by providing a variety of example prompts for Copilot across different applications. It offers quick tips for crafting effective prompts, such as making them specific, providing context, guiding the response, and reviewing and revising outputs.

https://copilot.cloud.microsoft/en-US/prompts

Using Copilot to achieve your KPIs

How Copilot Can Help Businesses Meet IT Data Management KPIs

Find out how Microsoft 365 Copilot enhances data management by automating tasks, ensuring data quality, and providing real-time insights, thereby helping businesses achieve their key performance indicators.

How Microsoft Copilot Can Improve Customer Retention

Discover how integrating Copilot into customer-facing roles enhances retention by enabling swift, empathetic responses to complaints, improving communication quality, and providing personalized interactions that foster loyalty.

How Copilot Can Help You Nail Sales Negotiations and Closings

Learn how Microsoft Copilot enhances sales negotiations by providing real-time insights, crafting personalized offers, and streamlining responses to Requests for Proposals (RFPs).

How Copilot Can Help Businesses Meet IT Data Management KPIs

Enhance lead generation strategies by improving SEO, content creation, PPC marketing, cold outreach, and lead nurturing.

Are You Ready?

Understanding best practices for Copilot prompts empowers users to unlock the full potential of AI-driven assistance, resulting in more accurate, relevant, and actionable outputs. Clear and well-structured prompts reduce misunderstandings, saving time otherwise spent revising responses. Providing context, specifying the desired format, and refining prompts through iteration ensures Copilot aligns with business objectives, from drafting emails to generating reports and analyzing data.

Looking to dive deeper into how Microsoft 365 Copilot can transform your business?
Apply for the Copilot Vision and Value Workshop here: Copilot Vision and Value Workshop

mobile mentor