Copilot for Microsoft 365

The art and science of prompting

DIAMOND
Helping you Succeed

Prompts are how you ask Copilot to do something for you — like creating, editing, summarising, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- **Learn** about projects and concepts:

  "What is [Project X] and who are the key stakeholders working on it?"

- **Edit text:**

  "Check this product launch rationale for inconsistencies."

- **Transform** documents:

  "Transform this FAQ doc into a 10-slide onboarding guide."

- **Summarise** information:

  "Write a session abstract of this [presentation]."

- **Create** engaging content:

  "Create a value proposition for [Product X]."

- **Catch-up** on missed items:

  "Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients you need

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal — **What** response do you want from Copilot?

Context — **Why** do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. **Focus on Email and Teams chats since June.** Please use simple language so I can get up to speed quickly.

Source — **Which** information sources or samples should Copilot use?

Expectations — **How** should Copilot respond to best meet your expectations?

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3. Keep the conversation going

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.

Generating content ideas

Lead with broader requests, then give specific details about the content.

Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.

Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.

Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.

Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.

Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations.

Copilot is limited to your current conversation, so give lots of details.

Be professional.

Using polite language improves Copilot's response.

Communicate clearly.

Pay attention to punctuation, grammar, and capitalization.

Use quotation marks.

This helps Copilot know what to write, modify, or replace for you.

Start fresh.

Avoid interrupting and type "new topic" when switching tasks.

Important Note

Before deploying Copilot for Microsoft 365, businesses should verify user licenses, app compatibility, user accounts, Teams settings, and data security. Robust data governance practices, including classification, sensitivity labels, and access management, are essential for maintaining compliance and safeguarding information.