2 Good Prompting Practices

First, to set things straight about using Copilot (for Microsoft 365).[i]

Copilot's capabilities are available in most Microsoft 365 applications, but Copilot works most reliably when using the Microsoft apps through a web browser (at **https://microsoft365.com/**).

Copilot takes directions from your *prompt*. It *augments* the prompt with other *contextual* information in whatever document, presentation, or meeting you're in. It gleans context from your email, chat messages, and files that you can access in OneDrive and SharePoint. This added context (and its privacy) makes Copilot different than ChatGPT or Claude. It then generates a *response* for you to review and perfect.

> When prompting, it helps to remember what Copilot's capabilities are (and aren't).

Setting Expectations

You can interact with Copilot in the chat box on the right of the Microsoft 365 app you're in, or in the body of the document, spreadsheet, or slide. Copilot can add words, sections, slides, or calculations, and create new presentations and documents.

Copilot isn't magic. It's not aware of all of Microsoft Office's formatting, styles, headers, images, nor page numbers. Those are all very specific Microsoft formatting mechanics. LLMs have primarily been trained on text.
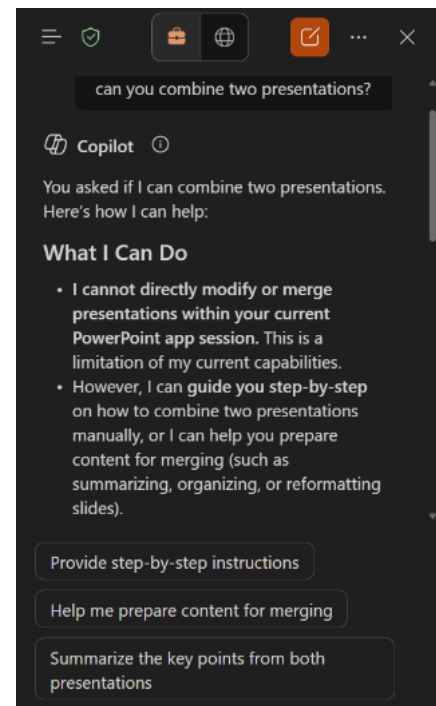
Copilot does not know how to move data, save files in different places, nor pass content between files. To do that, see Chapter 13, on Copilot Agents.

Copilot may politely say when it cannot do something it was asked. It may seem less agreeable than public LLMs, where you'll get an answer to nearly any prompt. It may suggest steps to manually do what you asked it to do.

Copilot can insert copyright free images into PowerPoint slides, and it can create AI-generated images.

Throughout this book, you'll see explanations about why Copilot is doing what it does. Interested in foundational knowledge about large language models and Copilot? See Chapter 14 ("How Copilot Works").

Now, with no further prompting, let's get to the prompts!

Prompting Tips

If you've already started using Copilot, you may want to simply scan the bold text. If Copilot is brand new to you, **before getting creative with prompts, start simple.** Use these eight tips.
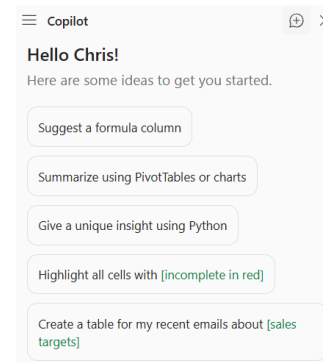
1. Keep it simple.

Simple prompts can be the most helpful. In M365 Chat, start by typing "Summarize" or "Prepare" and see what productive prompts follow. **"Summarize my week and provide action items"** or **"Prepare for the upcoming workday"** tells Copilot to scroll through meetings, emails, chats, and files, and gives a list of to-dos and reminders that you may have missed.

2. Follow the Prompts.

Results are quite reliable using the prompts that Copilot expects. Follow the prompts offered in each Microsoft 365 application, especially at first (and especially in Excel (at right)).

    Out of the box prompts exist in all the Copilot workspaces. **To see all *out of the box prompts* available, check out the Copilot Prompt Gallery App.[ii]** You can also find this index at the bottom of your "Work" tab at **www.microsoft365.com**, and clicking twice (once on "See more" and then again on "Prompt Gallery").

3. Ask Copilot What it Expects.

When you're not following a standard prompt, it can be helpful to have Copilot explain its capabilities. When you ask, use words like **"Are you able to do <X>"** rather than "Can you do <X>." That's because it may interpret "Can you" as a command, not a question.

    If in doubt, ask Copilot to write its own prompt. **"What is the best prompt that I can give you to have you do <X>?"**

4. Tell Copilot Who to Be.

Give Copilot a persona. Let it know the role you want it to play. For instance, you can say, "You are a financial analyst with expertise in analyzing market trends and making investment recommendations. You have a talent for explaining complex financial concepts in a way that is easy for lay people to understand." Then write the instructions you actually want, like "Please write a report on the current state of the stock market, including your analysis of recent trends and your recommendations for investment strategies."[1]

    Copilot generates better responses when given this perspective. **According to Copilot itself, "Providing a persona before your prompt can help me give better responses.** By providing a persona, you are giving me more context about the audience you are trying to reach, which can help me tailor my response to better meet their needs and interests."

    You can even create content using your own persona by using Copilot's memory. That way, the 'voice' of Copilot sounds less like an LLM, and more like you! See Chapter 3, "Pro Tips Not to Miss."

5. Be Specific.

One of the best ways to help Microsoft 365 Copilot generate useful and accurate content is to provide clear and specific prompts. Vague or ambiguous prompts can confuse Copilot and lead to irrelevant or inaccurate results. A good prompt uses **simple but precise language**.

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[1] Saying "please" and "thanks" don't improve outcomes, but if machines take over one day, they may remember that you were one of the polite humans!

For example, consider the following (vague) prompt: "Write a pitch about a smartwatch that has some industry-leading features. The pitch should be short and catchy and convince people to buy it." This prompt does not specify what features, target market, or what level of detail is expected. Expect Copilot to generate a generic pitch or even a silly one.

A better prompt includes more information and context, such as: "Create a sales pitch for a smartwatch that tracks your heart rate, sleep quality, and calories burned. The pitch should be one paragraph long and emphasize the benefits of the product for health-conscious customers in the USA and Asia."

If Copilot understands the purpose, scope, and audience of the task, it generates relevant and accurate content. **Taking that extra time will pay off.**

6. Follow Up.

If you don't like the initial response, ask Copilot to change something. **Try "Be more concise" or "Add detail about <X>."** If that doesn't work, copy / paste the original prompt, and start a new conversation, and add more detail, a better persona, or different instructions.

7. use lower case letters

Unless you're looking for proper nouns, or for the names of fields or attributes, use small case. Words with capital letters may be interpreted more literally by the LLM, reducing the search set. For example, capitalizing "Apple" will return information about the company, whereas "apple" will specify the fruit. But if you do want to search specific fields or attributes in your files like 'Primary Contact' or 'Customer Name,' then do capitalize them.

8. Use a Framework for Consistency.

Try out a couple of easy-to-remember frameworks, like TAG and RISE, to create good prompting habits.

TAG

Describe the **T**ask
Outline the **A**ction
State the **G**oal
Let's break down an example TAG.
Task: Prepare a project status report for the executive team.
Action: Compile key project metrics, milestones, and risks into a concise document.
Goal: Provide an overview of project progress and highlight any potential issues.
Example prompt: "As the project manager, please prepare a project status report for the executive team. Compile key project metrics, milestones, and risks into a concise document. The goal is to provide an overview of project progress and highlight any potential issues."

RISE

Describe the **R**ole
Explain the **I**nput
Ask for the **S**teps
Describe **E**xpectations
Let's break down an example using RISE.
Role: You are a project manager overseeing a major software development initiative.
Input: You have several detailed reports on the current project status, including metrics on code completion, testing progress, open issues/risks, resource utilization, budget expenditures, and milestones.

Steps: Please compile the key details from these reports into a clear and concise project status update. Highlight any major risks, roadblocks, or areas requiring executive attention. Suggest next steps to keep the project on track.

Expectations: The project status report should provide leadership with an accurate high-level overview of progress to date. It should flag any significant concerns proactively while indicating what is being done to mitigate issues. The update should be objective, data-driven, and roughly 2-3 paragraphs in length.

Another example prompt using the **RISE** framework:
"You are a salesperson for a company that sells high-end outdoor gear. (R) You have information about a customer's recent purchases and their interests in outdoor activities. (I) Please use this information to create a personalized email to the customer, recommending new products that they may be interested in based on their purchase history and interests. (S) The email should be helpful[2] and engaging, highlighting the features and benefits of the recommended products. It should be no longer than two paragraphs and include a call to action to encourage the customer to make a purchase. (E)"

After that prompt responds, you can add more specific info by referencing applicable files. "Add additional information from /<<filename>> to the prior response."
Microsoft's own prompt ingredients include similar steps: Goal, Context, Expectations, and Source.[iii]

Practice + Patience = Success

Prompting is an art, not a science. Use several types of prompts, such as questions, instructions, examples, and frameworks to elicit the desired response from the LLM.

Converse with Copilot like it's a librarian, or when need be, like an eager five year old… willing to help but needing direction. **Copilot is more likely to meet your needs when you provide prompts that it expects, with the supporting detail it needs.** Think critically, like you're giving instructions to your intern. Coming up, the following chapters cover some general tips followed by specifics to **use Copilot in each Microsoft 365 application!**

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[i] Reminder: "Copilot" is a brand name for many products, but "Microsoft 365 Copilot" is the focus here.
[ii] https://m365.cloud.microsoft/copilot-prompts displays all available prompts (after logging in with a Microsoft 365 (Entra) ID).
[iii] **https://support.microsoft.com/en-us/topic/learn-about-copilot-prompts-f6c3b467-f07c-4db1-ae54-ffac96184dd5**

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[2] "Helpful" is carefully chosen. "Friendly" would likely have made the response disingenuously exuberant.