



Mastering Microsoft 365 Copilot: Effective Prompting Techniques

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DEVICIE

The logo for highmonkey, featuring a small orange monkey icon to the left of the word 'highmonkey' in a grey, sans-serif font.





For Individuals

	Copilot (Free)	Copilot in M365 Personal and Family (\$2.5/month)	Copilot Pro (\$20)
Foundational Capabilities	●	●	●
Web Grounding	●	●	●
Commercial Data Protection	●	●	●
Priority Model Access	—	●	●
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote	—	●	●
Copilot in Teams	—	—	—
Microsoft Graph Grounding	—	—	—
Enterprise-Grade Data Protection	—	—	—
Customization Copilot	—	—	GPT Builder
Limitations	Unlimited chat 15 fast generated images	Unlimited chat 60 AI credits for advanced features	Unlimited chat and advanced features 100 fast generated images



For Organizations

Microsoft 365 Copilot Chat (Free)	Microsoft 365 Copilot (\$30)
●	●
●	●
●	●
—	●
—	●
—	●
—	●
●	●
Copilot Studio	Copilot Studio
Limits on image generation, file upload and code interpreter	Unlimited



Microsoft 365 Copilot

Natural Language



Large Language
Models



Microsoft Graph
- Your Data -



Microsoft 365
Apps



The Web



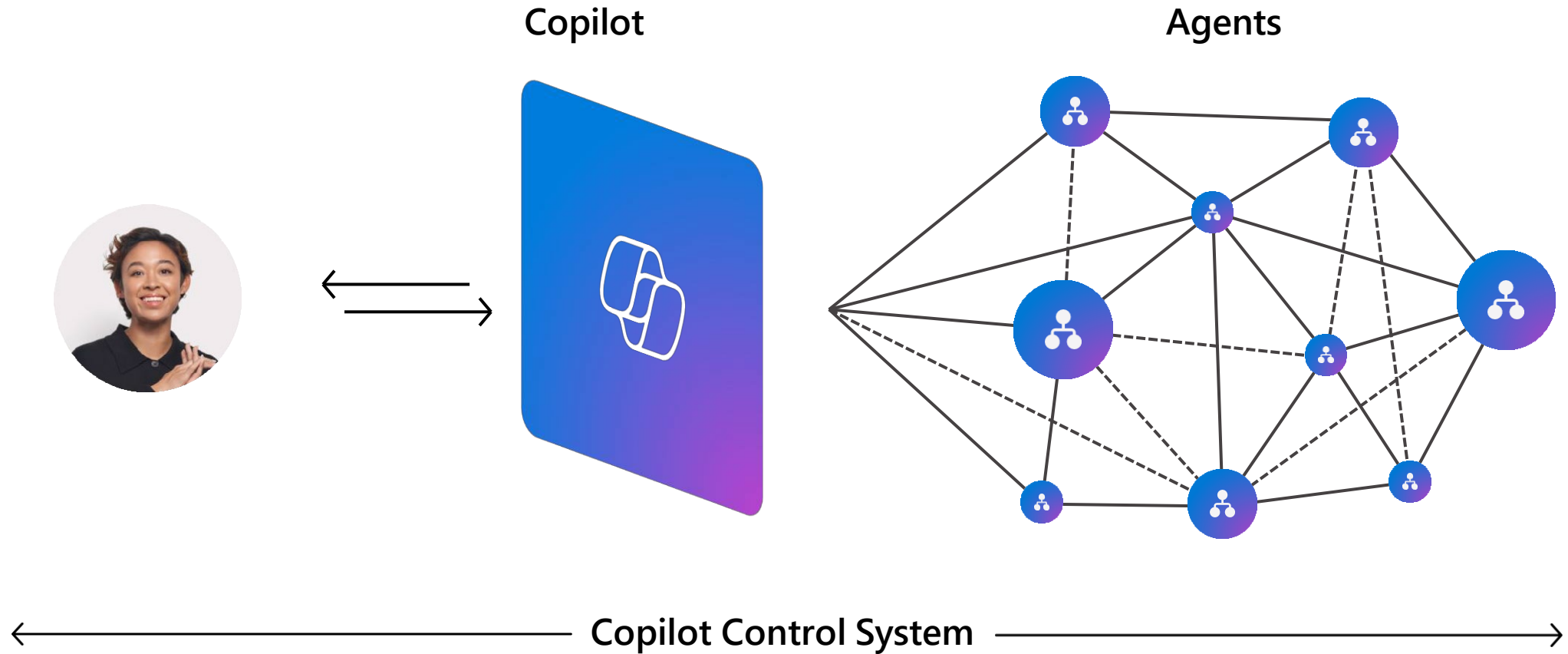


Microsoft 365 Copilot

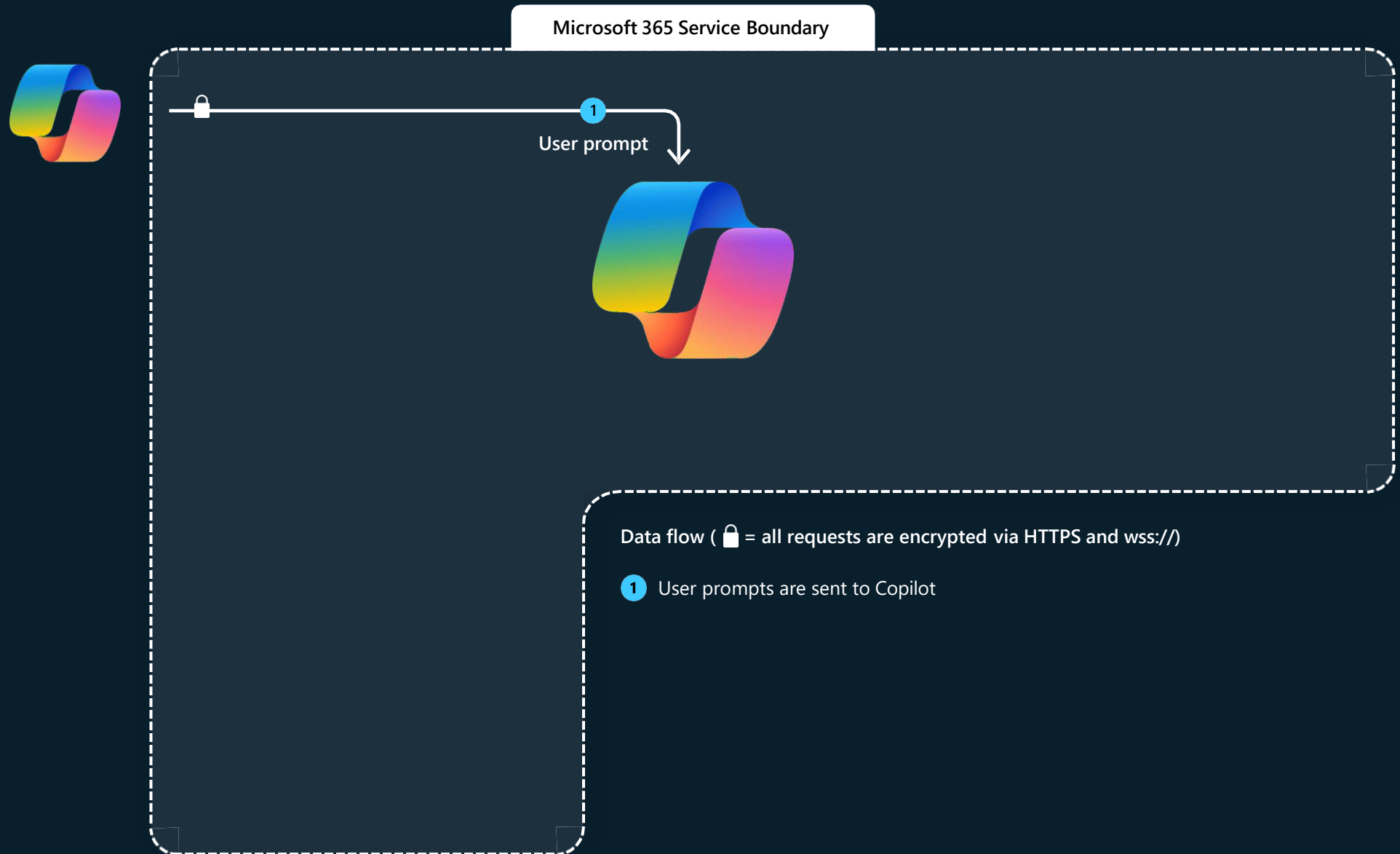
Cross-app experience



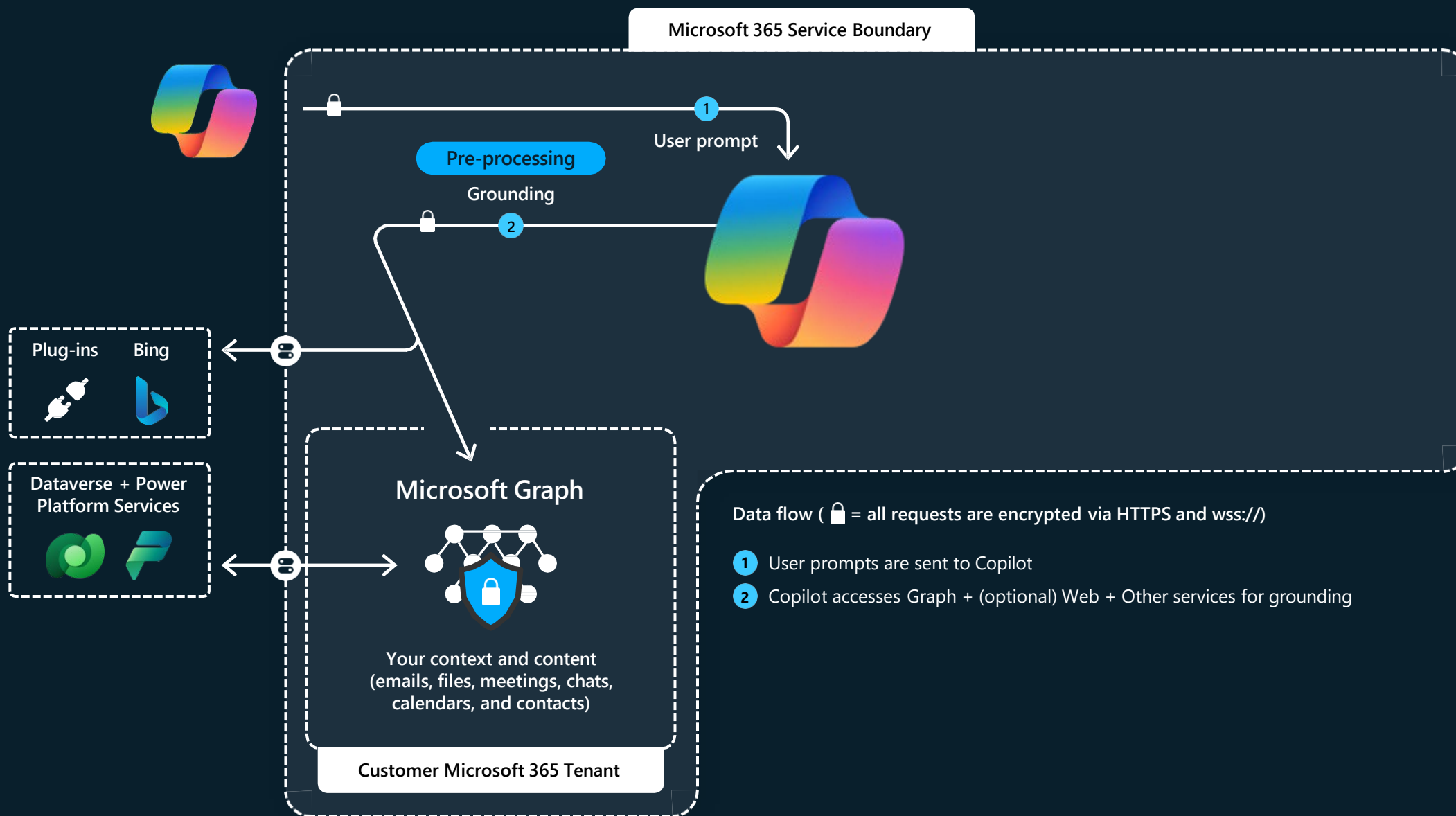
Copilot is the UI for AI



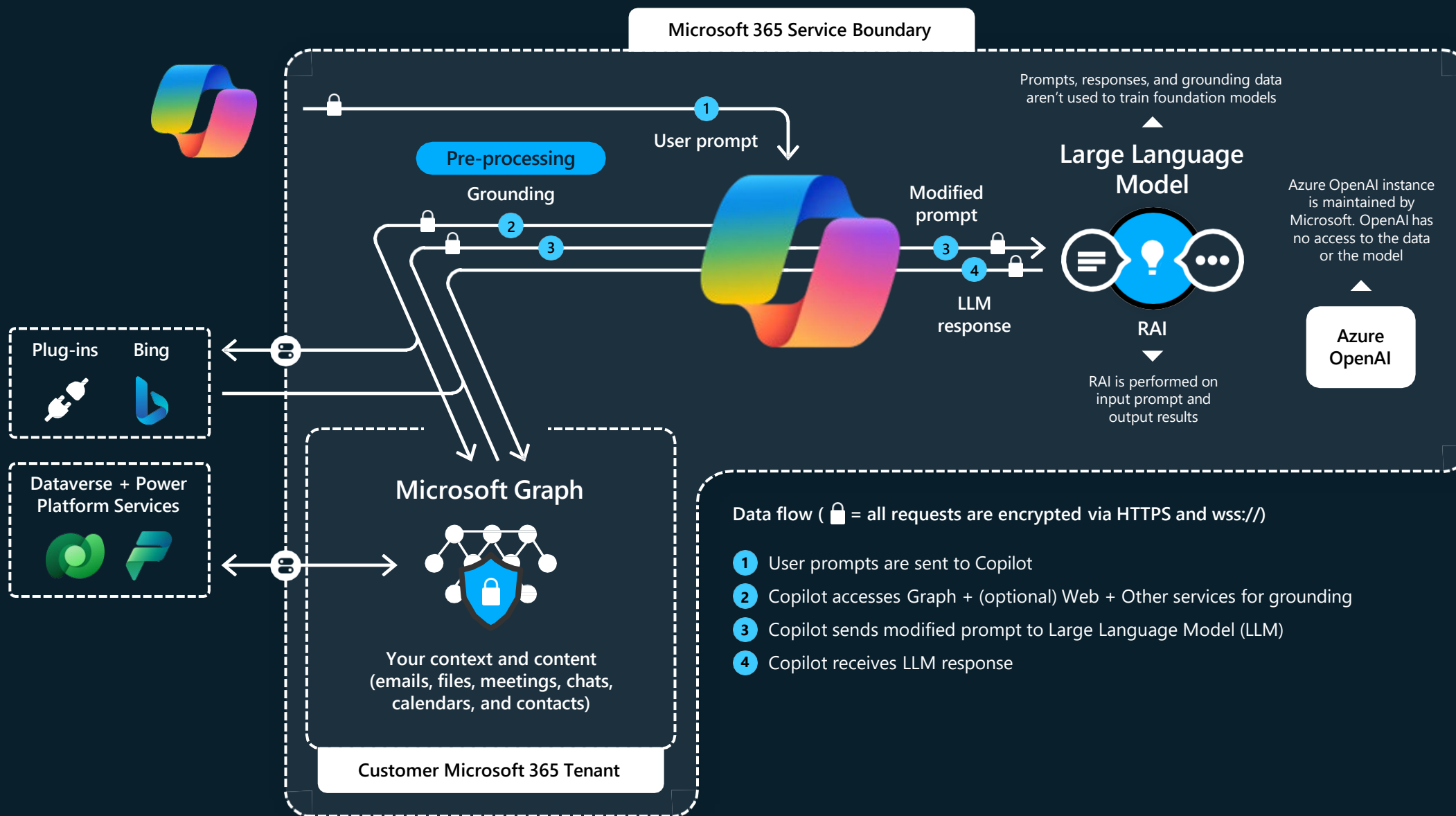
Microsoft 365 Copilot



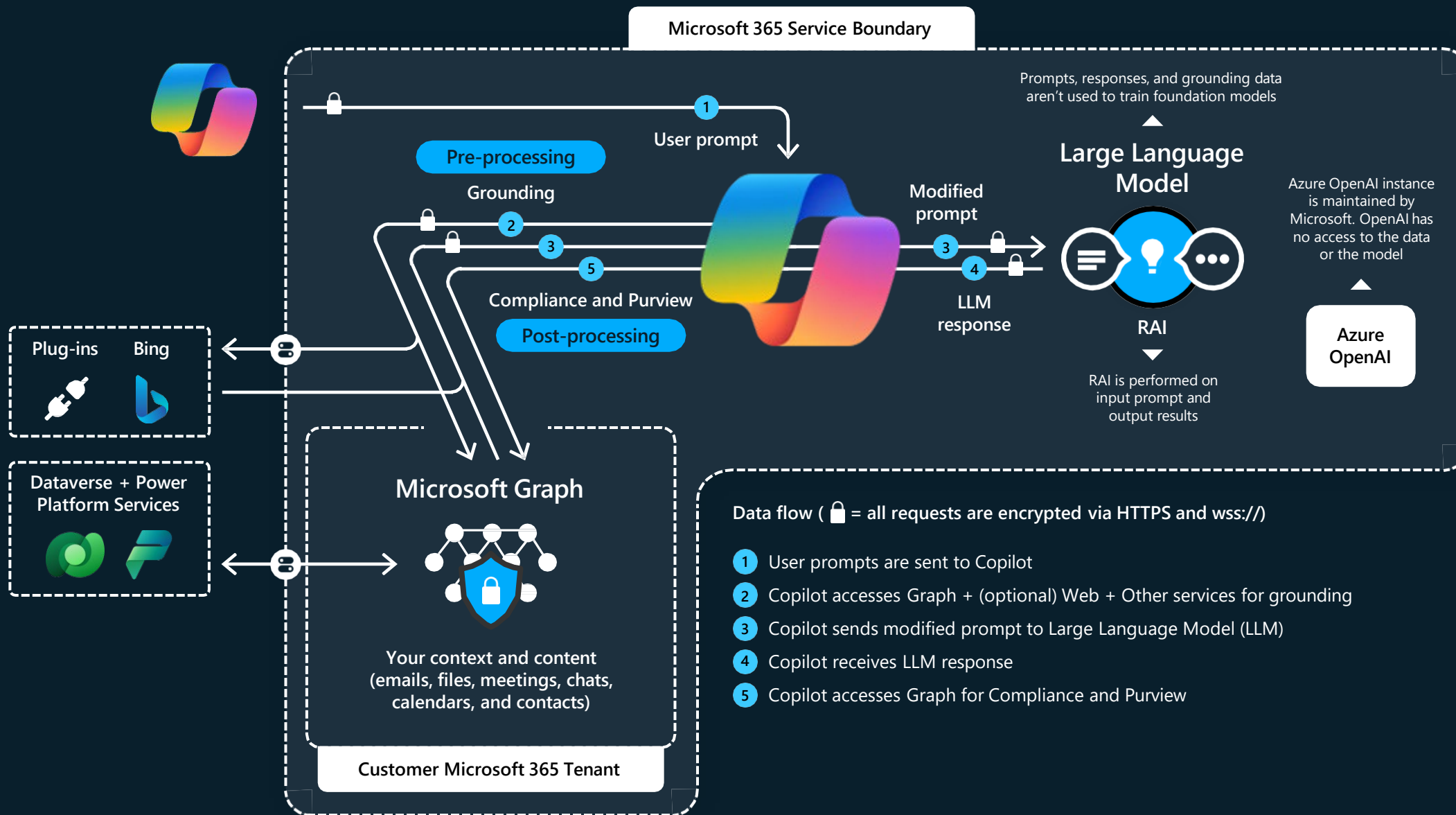
Microsoft 365 Copilot



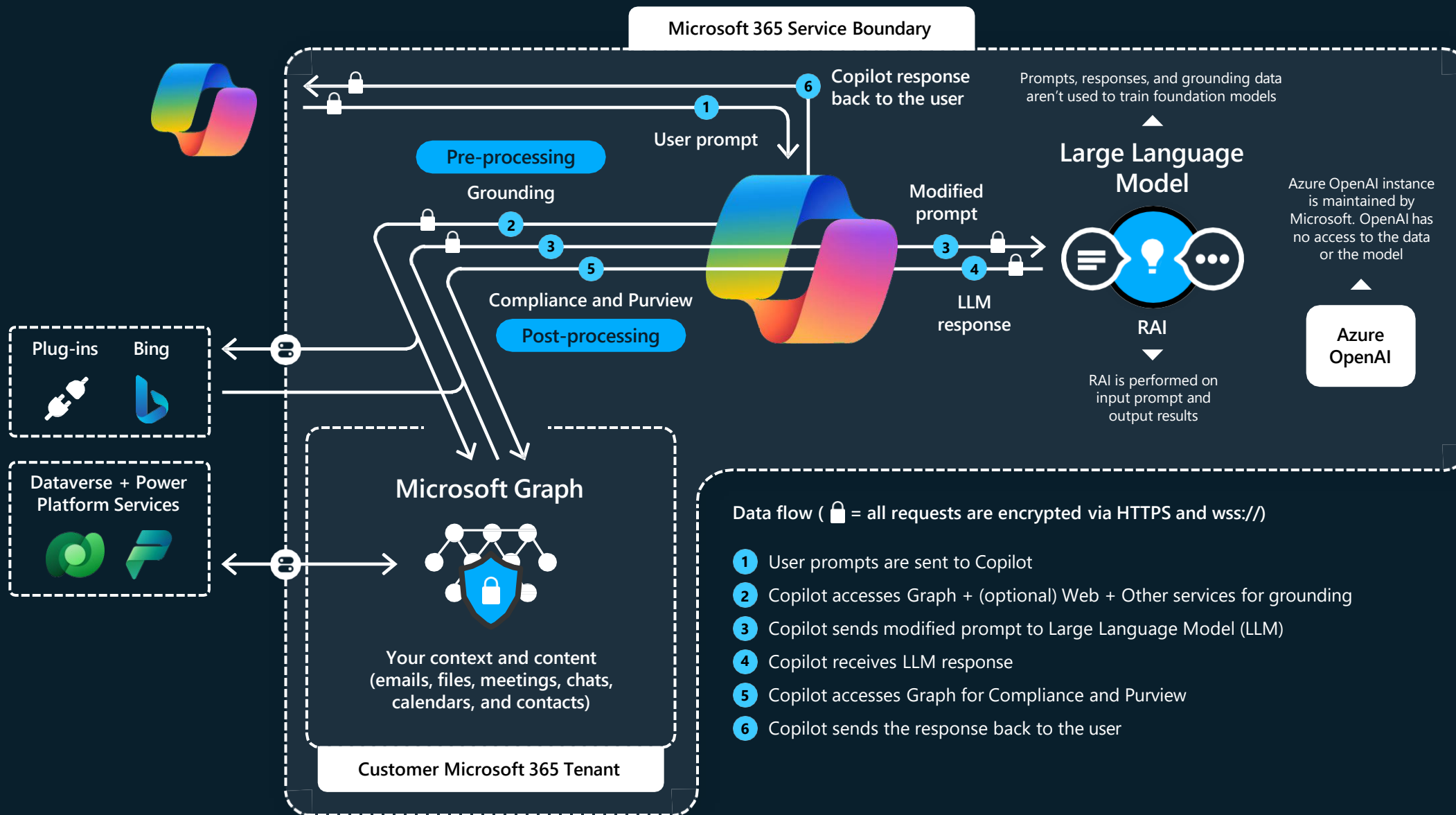
Microsoft 365 Copilot



Microsoft 365 Copilot



Microsoft 365 Copilot



What is Prompt Engineering?

- A prompt is a **piece of text** that instructs the Copilot system on what kind of output to produce.
- Prompt engineering is a form of human-in-the-loop interaction with Copilot, where **you provide some guidance or constraints** to the system through the prompt, and the system generates an output (may be text, an image, audio, or video) based on the prompt.



What makes an effective prompt?



Less Effective

- × Vague
- × Just a few words
- × No context on preferred output

Example: *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.



More Effective

- ✓ Specific and detailed
- ✓ In full sentences, with instructions
- ✓ States the tone, purpose, preferred format, etc.

Example: *I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.*

But there are no 'wrong' prompts because **natural, conversational language is welcome.**
Experiment away!

The art and science of prompting

Prompts are how you ask Copilot to do something for you — like creating, summarizing, editing, 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

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."

Summarize 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]."

Recap a meeting



- ➔ Draft an email with notes and action items from **meeting**

Summarize an email thread



- ➔ Click on the Summarize icon

Draft an email



- ➔ Draft an email to [name] that informs them about Project X ..

Summarize a document



- ➔ Give me a bulleted list of key points from **file**



How can **Copilot** help you with your work?

Tell me about a topic/project



- ➔ Tell me what's new about **topic** organized by emails, chats, and files?

Give me some ideas for ...



- ➔ Suggest 10 compelling taglines based on **file**

Help me write...



- ➔ Generate three ways to say [x]

What did they say ...



- ➔ What did **person** say about **topic**



How can we improve these prompts to make them more effective?

The art and science of prompting

2. Include the right prompt ingredients

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

Goal

What
response do
you want
from
Copilot?

Context

Why do
you need it
and who is
involved?

Source

Which
information
sources or
samples
should Copilot
use?

Expectations

How should
Copilot
respond
to best meet
your
expectations?

Good

“Draft an email about a product launch.”

Better

“You’re an IT professional. Draft and email about a product launch with three paragraphs, one expressing excitement, the second asking for leadership support, and the third sharing resources.”

Best

“You’re an IT professional. Draft and email about a product launch with three paragraphs, one expressing excitement, the second asking for leadership support, and the third sharing resources. Include links to the appropriate support documents.”

Goal

Context

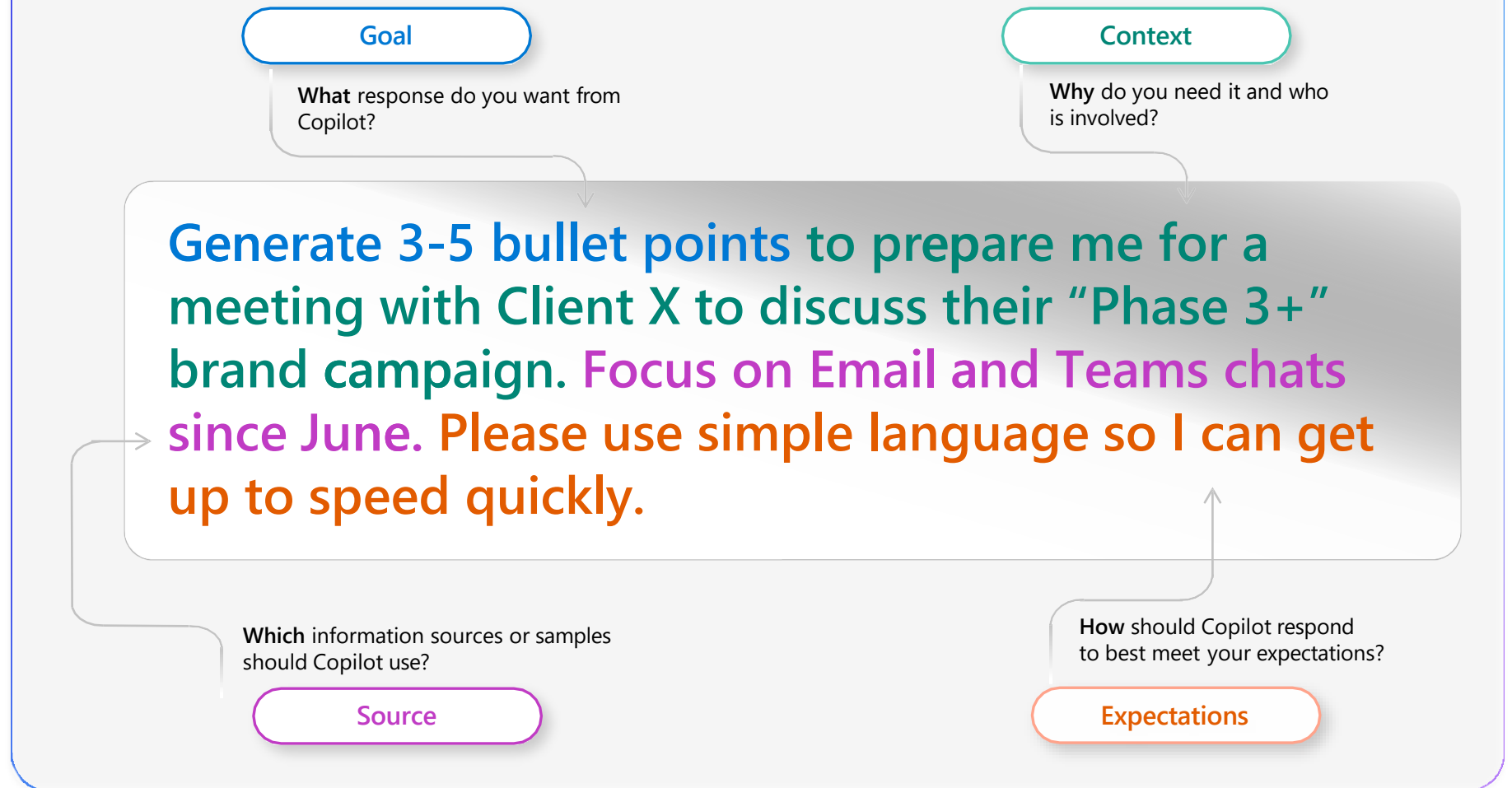
Source

Expectations

The art and science of prompting

2. Include the right prompt ingredients

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



The art and science of prompting

Consider how to make your prompts more **impactful** by thinking about how Copilot can help in your **entire** workflow.

3. Ask yourself these questions when prompting



Why am I using this prompt?

What is the context for this task.



What will I do with the output of this prompt?

Am I going to send it on to someone else?
Transform it into a different format?



Can I extend Copilot's remit to save more time

Can I ask Copilot to do a bigger task to automate more work?

The art and science of prompting

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

4. Keep the conversation going



Generating content ideas

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



Enabling insightful meetings

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



Storytelling assistance

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



Gaining insights

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



Translating languages

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



Solving technical problems

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

Bad Prompt 👎

Create me a Statement of Work

Why this is it bad?

This prompt has one simple element:

- **Task:** This is a document creation task with no other instructions or constraints.

Expected Result: Copilot will struggle to interpret this and may not create you a document.



Good Prompt 👍

*Create me a Statement of Work **for the client Contoso Electronics***

Why this is a good?

- This is **slightly** better. It mentioned the client's name however, it still lacks crucial details

Expected Result: Copilot will create you a simple document with no context relevant to your goal

Better Prompt 🙌

Create me a Statement of Work for the client Contoso Electronics, with the objective to deliver a SharePoint migration project

Why this is a good?

- This prompts provides more detailed information that defines the goal of this document

Expected Result: Copilot will create you a more detailed document with detailed information about a migration project related to SharePoint Online

Best Prompt

*Create me a Statement of Work for the client Contoso Electronics, with the objective to deliver a SharePoint migration project. **Make sure you include timelines, pricing, and terms.***

Improvements:

- Adding more context to the prompt
- Being more precise
- Giving it more tasks to do

Best Prompt 🏆 🏆

*Create me a Statement of Work for the client Contoso Electronics, with the objective to deliver a SharePoint migration project. Make sure you include timelines, pricing, and terms, **and add exclusions related to custom development, new information architecture, and anything not included in the scope.***

Improvements:

- Added more context around exclusions
- Added more constraints (no custom dev or new IA)

Best Prompt 🏆🏆🏆

*Create me a Statement of Work for the client Contoso Electronics, with the objective to deliver a SharePoint migration project. Make sure you include timelines, pricing, and terms, and add exclusions related to custom development, new information architecture, and anything not included in the scope. **Draft the document based on <file URL>, that should have similar timelines and pricing.***

Improvements:

- Provided a reference to an existing similar document
- Gave guidance to be more accurate on timelines and pricing

Best Prompt

*Create me a Statement of Work for the client Contoso Electronics, with the objective to deliver a SharePoint migration project. Make sure you include timelines, pricing, and terms, and add exclusions related to custom development, new information architecture, and anything not included in the scope. Draft the document based on <file URL>, that should have similar timelines and pricing. **The recipients of this document are in the IT department***

Improvements:

- Added the audience to the prompt

The art and science of prompting

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

Goal

What
response do
you want
from
Copilot?

Context

Why do
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and who is
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Source

Which
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sources or
samples
should Copilot
use?

Expectations

How should
Copilot
respond
to best meet
your
expectations?

Elaboration prompt image formatted output

Initial

Create an image of a group of product people in a virtual meeting.



Continued

Regenerate the image. The focus of the image should be a view of the female speaker and a data slide. The rest of the audience should look engaged, and one person is giving a thumb up sign.



Prompt Demos

How to Make a Good Prompt

What have we learned so far?

Possible elements of a prompt:

- Specify a **Task**, or pose a **Question**
- Provide a **Role**
- Describe the **Audience** and or the **Purpose**
- Set a **Context** or a **Scene**
- Set a **Tone**
- Provide **Constraints**
- Specify a **Format**
- Specify a **Style**
- **Repeat** important instructions
- Put most **Critical Instructions** last
- Describe **Complex Elements** to direct the output
- Provide **Details** to direct the output
- Insert **Emotions** when appropriate
- Provide a **Narrative** to set up a story to direct the output
- There is **Wide creative freedom**
- Build upon existing work and **Iterate**

You could include **all of these elements**, including **iterating** on a long multi-element prompt. But only use what you need to get your desired result.



Question Refinement pattern

- The Question Refinement pattern is a technique used to improve the quality of prompts for an LLM system such as Copilot.
- The pattern involves refining a prompt through a series of follow-up questions.
- The goal of the pattern is to produce more accurate and relevant outputs from the LLM system.
- ***Whenever I ask a question, suggest a better question and ask me if I would like to use it instead***



Graph grounded examples with elements tagged

Work Mode Prompt:

Please turn the following document /*reference document* into a FAQ format

Work Mode Prompt:

The company has recently acquired a large publicly traded company. You are a Financial Analyst preparing a quarterly financial report for Senior Management, please use this document /*reference document* and prepare a summary of the financial report and prepare an assessment of the financial health and the performance of the acquired entity since January 2023.

Work Mode Prompt:

I would like you to list the files that my co-worker has edited recently. List the results in a table with the following headings |Date |Activity |Description |Reference |Source |Author |. acknowledge that you have read this prompt and then I will give you their name followed by a comma and the time period to check

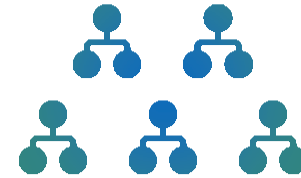
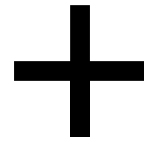
Audience
Constrains
Context
Format
Graph Data
Role
Task

Copilot Agents



Copilot

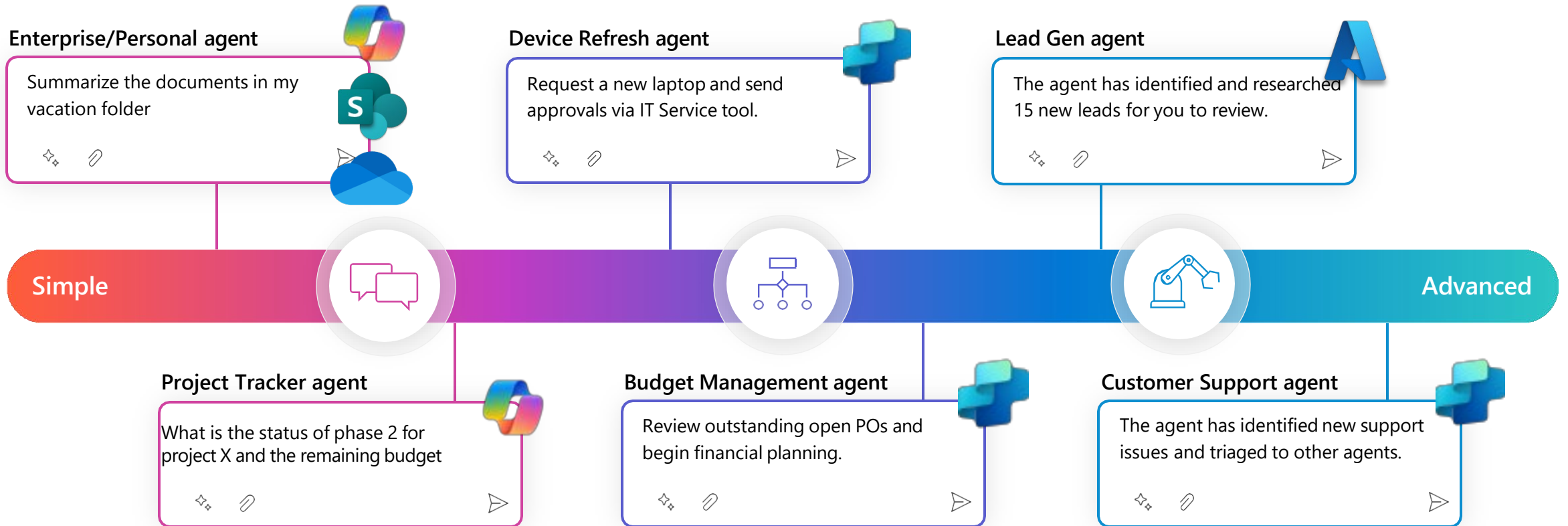
Every employee
has a Copilot



Agents

Every business process
transformed by agents

Spectrum of agents



Effective Prompts Best Practices

How to Write an Effective Prompts

Dos

- Be clear and specific
- Keep it conversational
- Give examples
- Ask for Feedback
- Write legibly
- Check for accuracy
- Provide details
- Be Polite

Don'ts

- Be Vague
- Request inappropriate or unethical content
- Use slang, jargon, or informal language
- Give conflicting instructions
- Interrupt or change topics abruptly

Additional best practices to keep in mind



Know Copilot's limitations

Copilot is limited to your current conversation, so give lots of details. Copilot is also evolving quickly, but there are many things it is unable to do at this moment.

Use quotation marks

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

Explore with Copilot Lab

Copilot Lab has a lot of example prompts that you can edit to make your own. Some editable parts are obvious, denoted by a pair of square brackets, like [topic], [file], and [your title].

Verify Copilot's response

Generative AI is a new technology, it can make mistakes too! Always refer back to the references to verify the responses you get from Copilot.

Start fresh

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

Copilot Wave 2 Spring Release Innovations

	Product / Feature	Description	Availability
UI for AI	M365 Copilot app	The Microsoft 365 Copilot app is Redesigned for the new way of working with generative AI at the forefront, ensuring you stay productive.	End of May 2025
	Copilot Chat	Copilot Chat now has a streamlined UI, better quality and performance and offers a personalized experience to help you create content and accomplish tasks faster.	End of May 2025
	Copilot Search	Copilot Search is an AI search experience designed to provide precise, contextually relevant results based on natural language queries. It connects to Microsoft and third-party apps, such as ServiceNow, Google Drive, Slack, or Confluence, to give relevant results no matter where your data lives.	End of June 2025
	Copilot Notebooks	Copilot Notebooks are AI-powered notebooks that bring together relevant resources , like Copilot Chats, files, pages, or meeting notes. By grounding Copilot in a specific notebook, it focuses on the most relevant information to help you achieve your goals.	End of May 2025
	Create	Create brings the power of OpenAI's GPT-4o AI image generation to work. By combining it with brand kits and visual editing tools, it helps you create high-quality content like images, banners, and more.	End of May 2025
	Memory and personalization	Copilot Memory makes Copilot even more personalized to you and your work. It learns how you work and understands your preferences through your chats, job profile, custom instructions, and more. Memory is private to you and can be controlled on what it remembers.	End of May 2025

Note: all the above value will be available to users with a Microsoft 365 Copilot license (some limits may apply). We are still finalizing which features will also be available to Copilot Chat users. Final packaging and pricing will be communicated prior to GA.

Copilot Wave 2 Spring Release Innovations, continued

	Product / Feature	Description	Availability
Agents and reasoning	Agent store	With Agent Store, you can easily find, pin, and use a range of agents. The Store offers pre-built agents like Researcher and Analyst, as well as agents from partners like Jira, Monday.com, Miro, and your company's custom agents —providing a single place for on-demand expertise.	End of May 2025
	Analyst	Analyst is built on OpenAI's o3-mini reasoning model and optimized to do advanced data analysis at work. Analyst agent acts like a skilled data scientist, so you can go from raw data to insights in minutes.	Available in Frontier early May 2025
	Researcher	Built on an optimized Open AI o3 reasoning model, Researcher is an agent that helps you tackle complex, multi-step research – delivering deeper, more complete findings.	Available in Frontier early May 2025
	Skill Discovery agent	The Skill Discovery agent enables employees to understand colleagues' skillsets and easily find experts in the organization. Leaders can use the agent to inform strategic workforce decisions and gain visibility into their talent landscape .	End of June 2025
Platform for AI makers	Copilot Control System	<i>The Copilot Studio Agents Report</i> helps you measure the adoption and business impact of Copilot Studio agents deployed in your organization as it relates to your key business metrics.	May 2025
		<i>The Message Consumption Report in the Microsoft 365 Admin Center</i> provides visibility into metered experiences in Microsoft 365 Copilot Chat. The report helps AI admins understand agent consumption in near real-time to ensure efficient use of resources .	Q2-Q3 CY2025
		<i>Microsoft 365 Admin Center – Agent Management</i> offers tools to manage agent deployment , allowing IT admins to enable, disable, or block agents for specific users or groups.	Q2-Q3 CY2025

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Prompting Tools



Prompt Gallery
(aka Copilot Lab)

[Aka.ms/copilotlab](https://aka.ms/copilotlab)



Originality
(Not Microsoft)

<https://originality.ai/blog/ai-prompt-generator>

Resources for your journey



Technical expertise via
our FastTrack partners

aka.ms/Microsoft/FastTrack



Tools, resources & training
on our Adoption Hub

adoption.microsoft.com



Events and real-world
knowledge in our
community

aka.ms/TechCommunity

Submit session feedback



Thank you!



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Let's stay in touch

