

Microsoft Copilot Prompting Cheatsheet

Basic prompt structure



I want a **[goal]** for **[context]**, respond in **[expectations]** and use **[source]**

Goal

What do you want from Copilot?

- A list of 3 bullet points to inspire me...
- Summary of *[book]*
- Email text about *[your topic here]*
- Steps that guide me to *[your challenge]*
- Image of a *[object]*
- Text for a letter about *[topic]*

Context

Why do you need it? For who do you need it?

- For an upcoming meeting with a professional audience
- To learn more about *[topic]*
- Explain to my coworker about *[topic]*
- To put on our website which is visited by potential customers in the *[sector]*

Expectations

What do you want from Copilot?

- A short but formal tone
- A friendly tone I would normally use with friends
- With a SEO optimized text which is optimized for Google.
- Simple but technical tone

Source

Where should copilot get its information?

- My calendar
- My e-mail conversations with *[contact]*
- My teams messages with *[contact]*
- Use *[document]*

Example Prompts

Work

- I want a list of 3 arguments I can use to be used in a discussion with my board of directors why we should implement AI in our primary business processes. Use a simple but convincing tone. You can use my research document (ai_research.docx) to get more information.

Work

- I want 3 impactful ideas on how to foster innovation in teams in an approachable and inspiring tone, based on insights for leaders and professionals.

Web

- I want a image of someone working in a lab to be used on our company website. I expect a clean room and people wearing white jackets.

Web

- I would like a business plan that covers a market analysis for a video streaming service about cat videos. I would like to check whether launching such a service is feasible. Respond in a simple tone and use the internet for the market analysis.

Work

- I would like a summary of my conversations with *[contact]*. In a few days I have a meeting with this person and freshen up my memory. Respond in a friendly tone. Use my e-mail and teams messages with *[contact]*

MICROSOFT COPILOT

CHEAT SHEET

by David Fortin



HOW TO PROMPT

Prompt such as: "Find emails Brown Project" is too generic and lack details
The prompt structure and hierarchy is the following:

- **GOAL:** What response do you want from Copilot?
Example: I need a 5-bullet-point recap of all of my emails related to the 'Brown Socks Product Launch'.
- **CONTEXT:** Why do you need it and who is involved?
Example: I need this information to prepare for an upcoming meeting with tons of non-boring accountants and to gather all key communications relevant to this project
- **EXPECTATION:** How should Copilot respond?
Example: Make sure you keep a professional tone as this is for a serious meeting.
- **SOURCE:** Which information sources should Copilot use?
Example: Focus on my email inbox, specifically emails on and after September 1st 2024.

PERFECT PROMPT FORMULA:

I need a 5-bullet-point recap of all of my emails related to the 'Brown Socks Product Launch'. I need this information to prepare for an upcoming meeting with tons of non-boring accountants and to gather all key communications relevant to this project. Make sure you keep a professional tone as this is for a serious meeting. Focus on my email inbox, specifically emails on and after September 1st 2024.

MS 365 APPS



- Analyze data trends. Visualize insights. Example: "Show all Data Insights"
- Generate formula suggestions. Complex calculations made easy. Example: "How do I do a XLOOKUP to get the Unique IDs of these invoices?"
- Highlight, filter, sort data. Example: "Show sales >\$5000."



- Summarize notes: Condense meeting notes for clarity.
- Create to-do lists: Organize tasks efficiently.
- Generate ideas/content: Spark creativity for projects.



- Request creative slides: "Craft vibrant presentation slides on climate change."
- Arrange meeting content: "Organize slides for a product launch meeting."
- Convert Word to slides: "Turn this Word document from SharePoint into PowerPoint."



- Create concise drafts by summarizing key points from documents, like project reports.
- Generate summaries efficiently, condensing complex content into brief insights.
- Obtain ideas on various topics, such as professional career advice, for blog posts or discussions.
- Transform text into structured formats like tables for better organization and clarity.
- Receive suggestions to enhance content, making it more concise or impactful.



- Summarize email threads efficiently.
- Provide polite meeting decline suggestions or client negotiation.
- Draft professional delay emails. (I'm so sorry type of emails :))
- Check out Piggy Bank Accountant's YouTube channel for more Copilot features!

DOS & DON'TS

DO'S

- Right prompt ingredients
Goal - Context -
Expectations - Source
- Be clear and specific
- Treat it like a conversation
- Give examples
- Use punctuation.
Decent grammar
- Check for accuracy.
It's a new tool
- In other words talk
to Copilot like it
was your mom (be
polite!)



DON'TS

- Type randomly like
you'd talk to your best
friend forever
- Be super vague
- Treat it like it's a dictionary
- Contradict yourself
- Use slang and
informal language
- Randomly trust the results
(use your critical judgment)
- Change topics in the
same conversation
(Start a new one)



USE CASES

For Excel, Email or Content Creation



- 1 Apply conditional formatting to your Data with just a command to Copilot
- 2 Write complex Excel functions such as nested IF or merge lists with XLOOKUP.
- 3 Generate data analysis such as a complete dashboard in a SINGLE CLICK.
- 4 Draft Emails (Bullet points only then copilot will draft the email)
- 5 Correct grammar issues so you have a professional email
- 6 Translate text from your main language to English
- 7 Generate LinkedIn post, video and infographics Ideas
- 8 Review LinkedIn posts for a better Hook & story
- 9 Generate AI image of you in a professional context

Prompt Example

Give me 25 lines of Excel Data. I am an accountant making a presentation to showcase Copilot to accountants and data analysts. I want a dataset based on the Piggy Candies, it is a company that sells candies. Let your imagination run the data and make it fun. I want to be able to build analysis, charts and other insights based on this data.

More on the topic



Microsoft Copilot
Full Tutorial



ChatGPT vs Microsoft
Copilot: Best For Your
Business?



Scan me! 📱



Follow David Fortin, CPA on LinkedIn



MICROSOFT COPILOT CHEAT SHEET

By David Fortin

HOW TO PROMPT

Prompt such as : " What to do in Paris" is too generic and lack details

The prompt structure and hierarchy is the following :

- **GOAL** : What response do you want from Copilot?
 - Example : Give me 5 bullet points on Team Building activities to do in Paris
- **CONTEXT** : Why do you need it and who is involved?
 - Example : I am going to Paris for a business meetings with 5 of my colleagues and we are staying 4 days.
- **SOURCE** : Which information sources should Copilot use?
 - Example : Base your research on the best reviews of the last year from TripAdvisor
- **EXPECTATION** : How should Copilot respond?
 - Example : Respond in a professional tone as I want to share to my colleagues.

Perfect Prompt Formula :

Give me 5 bullet points on Team Building activities to do in Paris. I am going to Paris for a business meetings with 5 of my colleagues and we are staying 4 days. Base your research on the best reviews of the last year from TripAdvisor. Respond in a professional tone as I want to share to my colleagues.

DOS & DON'TS

Do

- RIGHT PROMPT INGREDIENTS : GOAL, CONTEXT, SOURCE, EXPECTATIONS
- BE CLEAR AND SPECIFIC
- TREAT IT LIKE A CONVERSATION
- GIVE EXAMPLES
- USE PUNCTUATION, DECENT GRAMMAR
- CHECK FOR ACCURACY, ITS A NEW TOOL
- IN OTHER WORDS : TALK TO COPILOT LIKE IT WAS YOUR MOM (BE POLITE!)

Don't

- TYPE RANDOMLY LIKE YOU'D TALK TO YOUR BEST FRIEND FOREVER
- BE SUPER VAGUE
- TREAT IT LIKE ITS A DICTIONARY
- CONTRADICT YOURSELF
- USE SLANG AND INFORMAL LANGUAGE
- RANDOMLY TRUST THE RESULTS (USE YOUR CRITICAL JUDGMENT)
- CHANGE TOPICS IN THE SAME CONVERSATION : START A NEW ONE

MS 365 APPS

- Analyze and visualize your data. For example, you can ask, "What are the sales trends for the last quarter?"
- Generate formula column suggestions for complex calculations. For example, you can ask, "What formula can I use to calculate the total sales?" or "How do I do a VLOOKUP if I want the unique id of my product?"
- Highlight, filter, and sort your data. For example, you can ask, "Filter the data to show only sales above \$5000."
- Summarize your notes. For example, you can ask, "Can you summarize my meeting notes from last week?"
- Create to-do lists. For example, you can ask, "Create a to-do list for my project tasks."
- Generate ideas and content. For example, you can ask, "Give me some ideas for my next blog post."
- Generate outlines and design slides. For example, you can ask, "Create an outline for a presentation on climate change." Using the perfect prompt formula you can ask Copilot to make it funny and colorful.
- Organize content for an upcoming meeting or presentation. For example, you can ask, "How should I organize my slides for a product launch presentation?"
- Transform a Word file into a presentation. For example, you can ask, "Turn my project report into a PowerPoint presentation."
- Draft content. For example, you can ask, "Write an essay about baseball" or "Create a paragraph about time management."
- Bring in specific information from other documents into your content. For example, you can ask, "Include the key points from my project report in this document."
- Generate summaries. For example, you can ask, "Can you summarize this research paper?"
- Ask questions about your document. For example, you can ask, "What are the main arguments in this essay?"
- Get ideas about specific topics. For example, you can ask, "Give me some ideas for a blog post about sustainable living."
- Transform text into tables. For example, you can ask, "Can you convert this list into a table?"
- Provide suggestions for ways to rewrite your content. For example, you can ask, "How can I make this paragraph more concise?"
- Summarize long email threads. For example, you can ask, "Can you summarize the main points from the project update email thread?"
- Offer suggested replies. For example, you can ask, "What's a polite way to decline a meeting request?"
- Help draft emails with the right tone. For example, you can ask, "How can I write a professional email to my manager about a delay in the project?"

Visit Piggy Bank Accountant YouTube for a full video on Copilot Pro Features.

USE CASES

For Excel, Email or Content Creation

01 Generate random excel data	02 Write code or Excel function	03 Prepare for a presentation on a specific topic (Step by Step to Financial ratios)
04 Draft emails (put bullet points)	05 Correct grammar issues	06 Translate Text
07 Generate LinkedIn content ideas	08 Generate video ideas	09 Build strong hooks & titles and use as a "Google Search"

Prompt Example :

- Give me 25 lines of Excel Data. I am an accountant making a presentation to showcase copilot to accountants and data analysts. I want a dataset based on the "Piggy Bank Candies". It is a company that sells candies. Let your imagination run the data and make it fun. I want to be able to build analysis , charts and other insights based on this data.

More on the topic



Microsoft Copilot Free vs ChatGPT - Which one is the BEST?



Microsoft Copilot Free vs Pro - Which is Right for You?



@piggybankaccountant



Follow David Fortin, CPA on LinkedIn



Microsoft Copilot Agents Cheatsheet

Simple



Retrieval Agent

Retrieval Agents possess knowledge about specific processes, topics, and more.

✦✦ Example Scenario

A common situation in where you can encounter a retrieval agent is in HR, where the agent is well-known with all the information typically found in a staff manual.



Task Agent

Task agents possess all the capabilities of retrieval agents, but they also perform actions on behalf of the user.

✦✦ Example Scenario

A typical scenario where you find these agents are IT. The agent can work as helpdesk and also register a ticket when the helpdesk information doesn't resolve the issues the user is facing.



Advanced

Autonomous Agent

Autonomous agents possess all the capabilities of retrieval agents. They can initiate actions automatically and carry out processes autonomously.

✦✦ Example Scenario

A typical scenario where a autonomous agent can be used is a return process for a webshop. The customer has contact with the agent, which gives all instructions on the return and register the return in a ERP system.

Key Components

📄 Instructions

With instructions you tell the agent where it can find it's knowledge and when it needs to execute a certain action



💡 Knowledge

Knowledge is extra information that you feed into your agent. This can be files, SharePoint libraries, external websites, etc.



🚀 Actions

Actions are activities that the agent can execute. There is a wide library available of more than 1000+ actions

🗣️ Topics

Topics define how a conversation plays out. They are a core building block of an Agents



📋 Instructions

A good set of instructions contains at least: The purpose of the agent, Guidelines, step-by-step instructions, the tone of voice and skills.



🔔 Triggers

A trigger defines when a autonomous agent starts. There is a library with triggers available for you to use



🔒 Action Authentication

Actions often require authentication, two options are available:

- **Credentials of the end-user are used.** The agent uses the credentials of the end-users for a connector. This is helpful when auditing is important.
- **Credentials are part of the agent.** Credentials will be stored with the agent. This can be a service account



Orchestration configures how the agent responds:

- **Generative AI** lets the agent determine what actions and knowledge is needed.
- **Classic orchestration** lets the agent use topics to navigate a conversation.



📋 Licensing

You can build agents using the following licenses:

- **Microsoft 365 Copilot** gives access to Copilot Studio and the Copilot Studio Agent builder, but only the **Teams** and **Telephony** channels are available.
- **Microsoft Copilot Studio License (per tenant)** gives access to Copilot studio for the whole tenant.
- **Microsoft Copilot Studio License (per message)** gives access to Copilot Studio for the whole tenant. In this case you pay per message instead of a fixed fee.



📺 Channels

You can configure multiple channels for your agent. Channels are platforms where your agent is active, like Microsoft Teams, Telephone, Slack, Facebook etc.



👤 Escalate/handoff to a live person

- In order to escalate to a **live person**, a customer **engagement hub** needs to be configured. You can find them at the channels tab of your agent.
- If you don't have any engagement hubs configured, the **Escalate topic** can be modified to start a flow, or message the user to submit a ticket to your ticket system