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Mastering the Art of Prompt Engineering for Microsoft Co-pilot

Presented by Endsight

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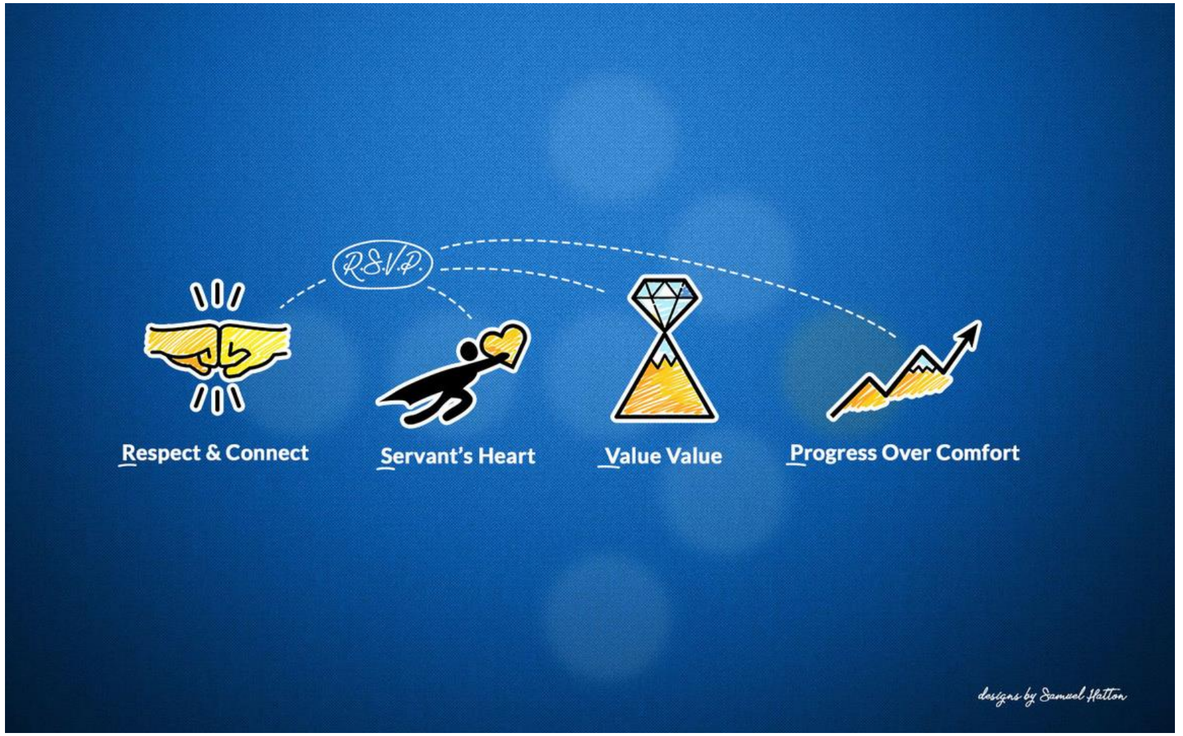
San Diego Business Journal
2024 TOP
TECHNOLOGY SOLUTION PROVIDERS

San Francisco Business Times
2024 BEST PLACES TO WORK IN THE BAY AREA
2024 BEST PLACES TO WORK
BPTW
Endsight
RANKED #24

MSP 501
Channel Futures 2024

The Channel Co.
CRN
SOLUTION PROVIDER 500
2024



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Michelle Brezenski
Manager, Development

- +20 Years of IT experience
- 16 years at Endsight
- Lead development efforts at Endsight for a decade
- Microsoft Office, Power Platform, Database Management, CoPilot

Agenda

- Why CoPilot?
- What’s a prompt and why do I care if it’s “good”?
- General Guidelines for writing effective prompts
- Examples/Demos:
  - Word
  - Excel
  - Microsoft 365
  - Teams
  - Outlook
- Q&A
- Homework (yes, there’s homework ☺)

Copilot for Microsoft 365

Embedded across Microsoft 365 apps

What’s a prompt and why do I care if it’s “Good”?

Prompts

Prompts are how you ask Microsoft 365 Copilot to do something for you.

Think about prompting like having a conversation.

What's a prompt and why do I care if it's "Good"?

The way you interact with AI will impact your results.

You can ask AI similar questions and get different answers.

It's important to guide AI

AI is a powerful tool, however

Common Prompts

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

Delve

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

Edit text

"Check this product launch rationale for inconsistencies and suggest alternative wording."

Summarize

“Write a summary of this [presentation].”

Transform

“Transform this document into a 10-slide presentation.”

Create

“Create a value proposition for [Product X].”

Catch-up

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

1

Goal: *What* do you want from Copilot?

2

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

3

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

4

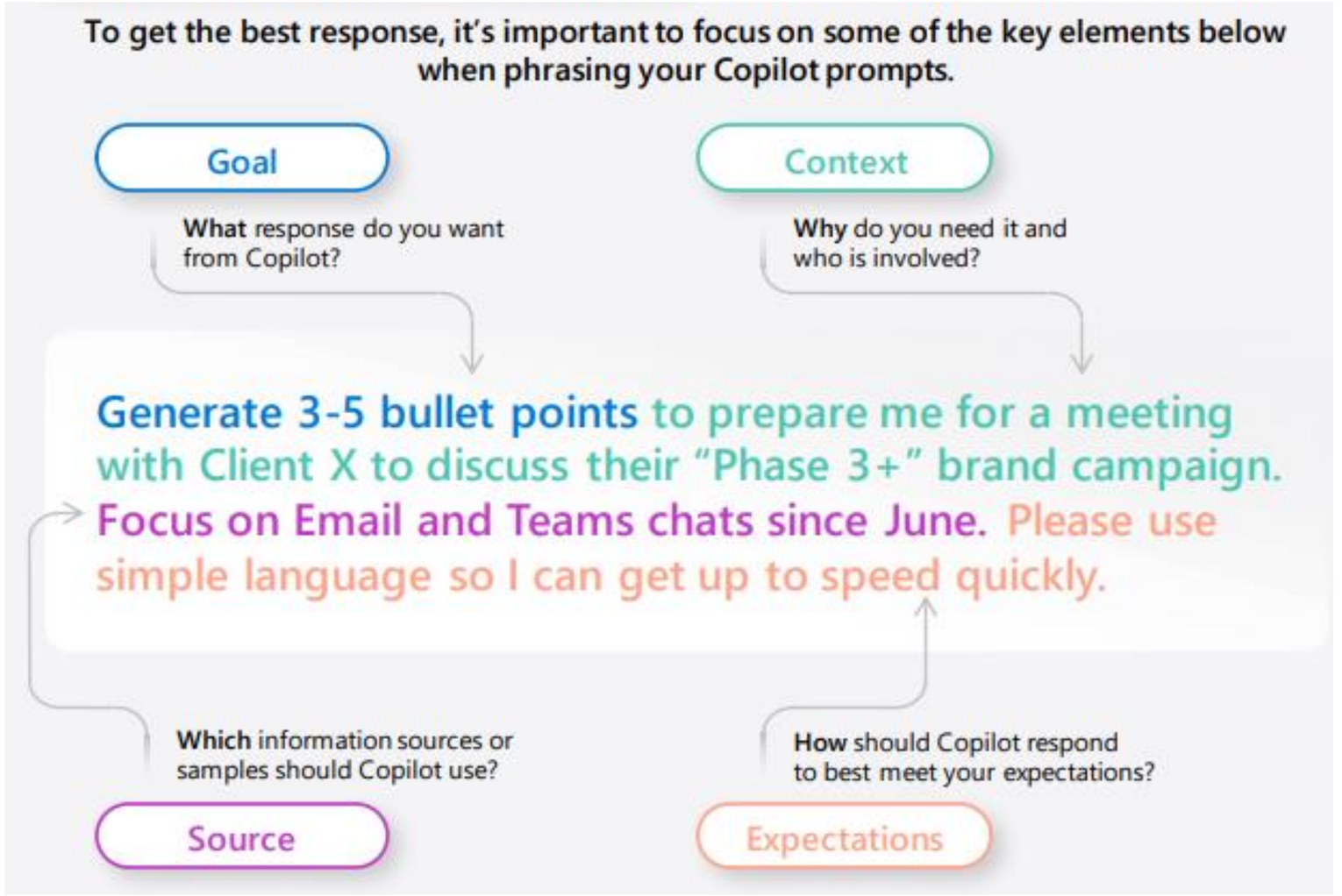
Expectations: *How* should Copilot respond to best meet your expectations?

Prompt “ingredients”

Before

Summarize the Phase 3+ campaign

After



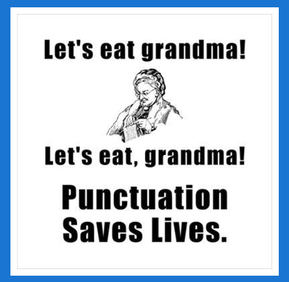
DO'S

- Be clear and specific.
  - Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.

- Keep it conversational.
  - Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.

- Give examples.
  - Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.

- Ask for feedback.
  - Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.



- Write legibly.
  - Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses

- Check for accuracy.
  - Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.

- Provide details.
  - Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

- Be Polite
  - Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

DON'TS

- Be vague.
  - When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses

- Request inappropriate or unethical content.
  - Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.

- Use slang, jargon, or informal language.
  - This may cause Copilot to give low-quality, inappropriate or unprofessional responses.

- Give conflicting instructions.
  - Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.

- Interrupt or change topics abruptly.
  - This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

Iteration – Review and Revise

ITERATION IS EVERYTHING!!

One of the most common mistakes people make with AI is giving up after a single try that yielded less-than-ideal results.

Working with AI is a dynamic and interactive process, and it may take multiple iterations and recrafting of your query to get it “right”. Remember, CoPilot (and users!) are learning a new way to co-create.

As you provide more detail and context, the conversation helps CoPilot better understand what you want, producing more relevant output.

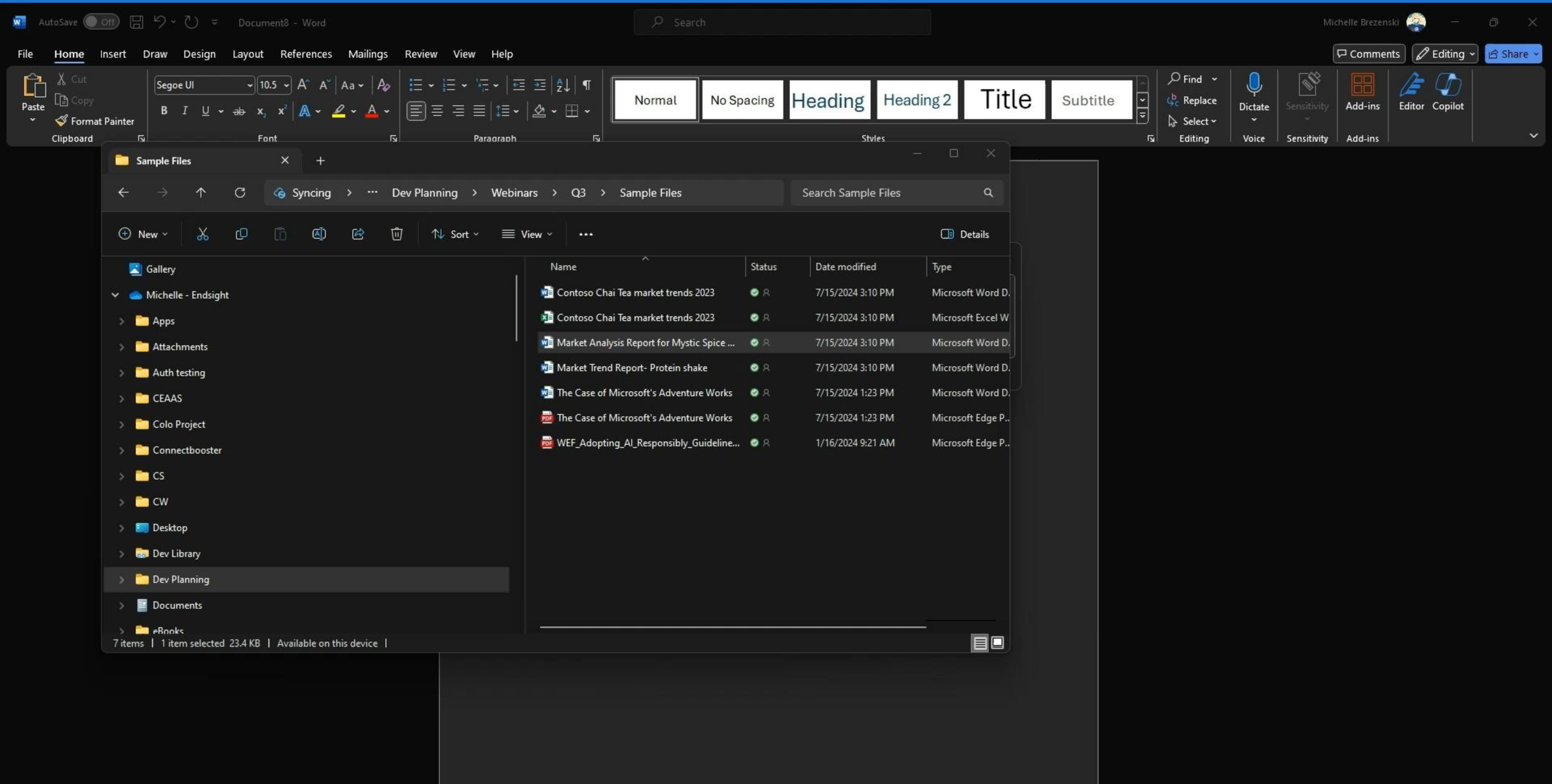
Giving feedback helps CoPilot learn and improve its performance. Following up on returned information provides deeper insights into points you want to drill into.

Experimentation, and iteration, is the key. And remember, generative AI is trained on human conversations – much the way your interactions with human people can inform their future responses to you, AI learns to collaborate with you on your terms.

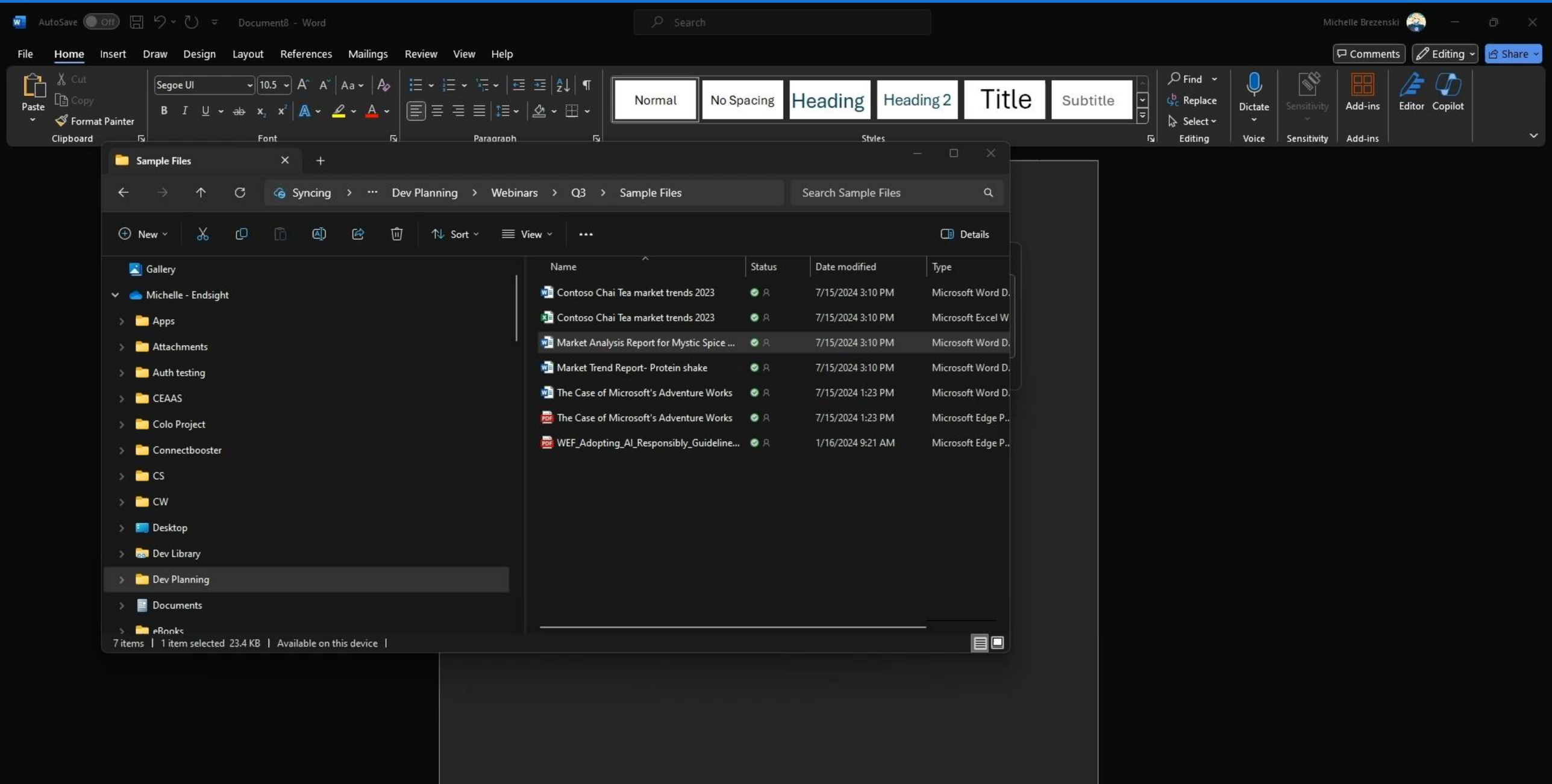
Look for these tips throughout the presentation to avoid mishaps!

GOTCHA’S!

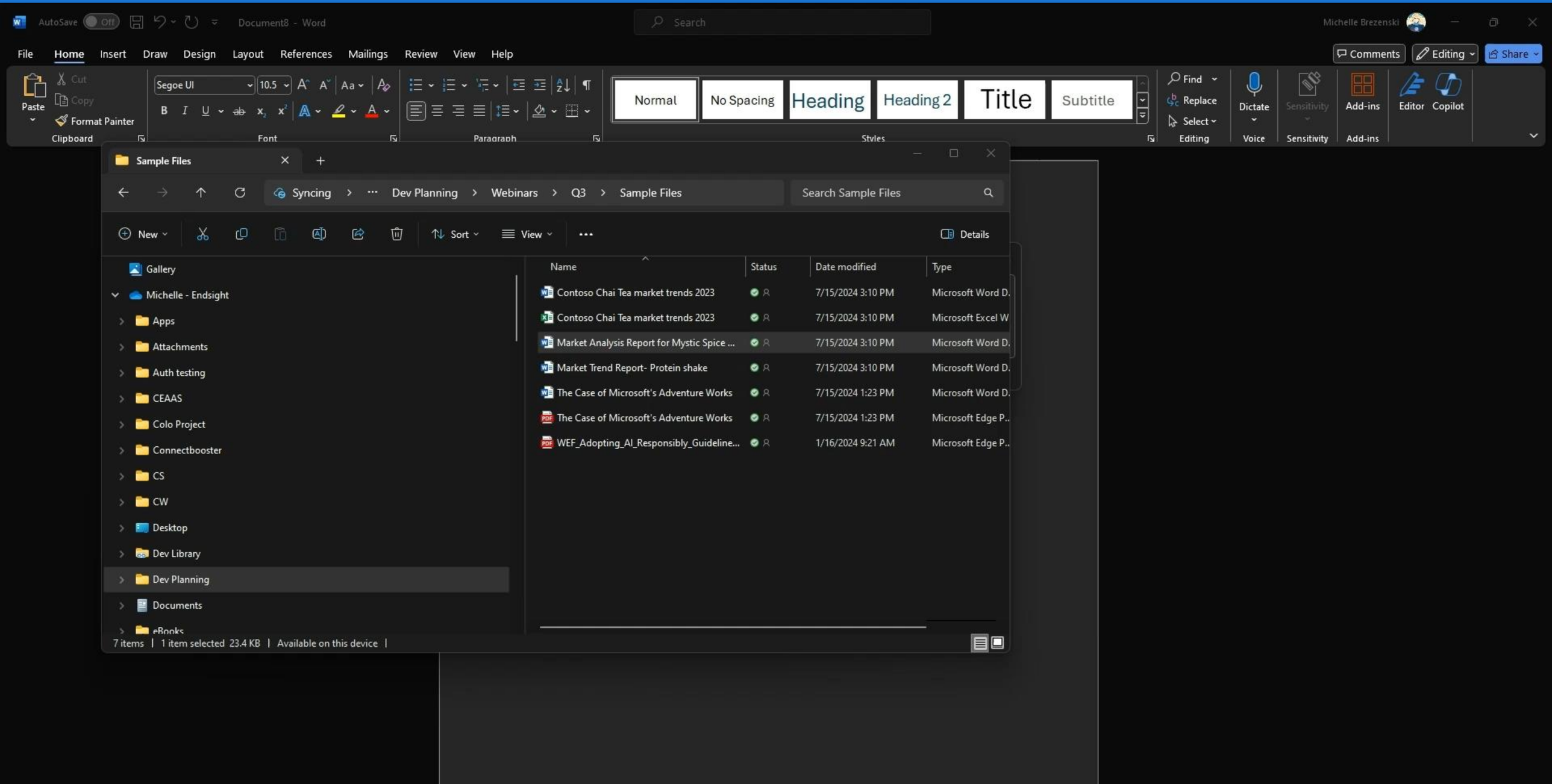
CoPilot in Microsoft Word Part I



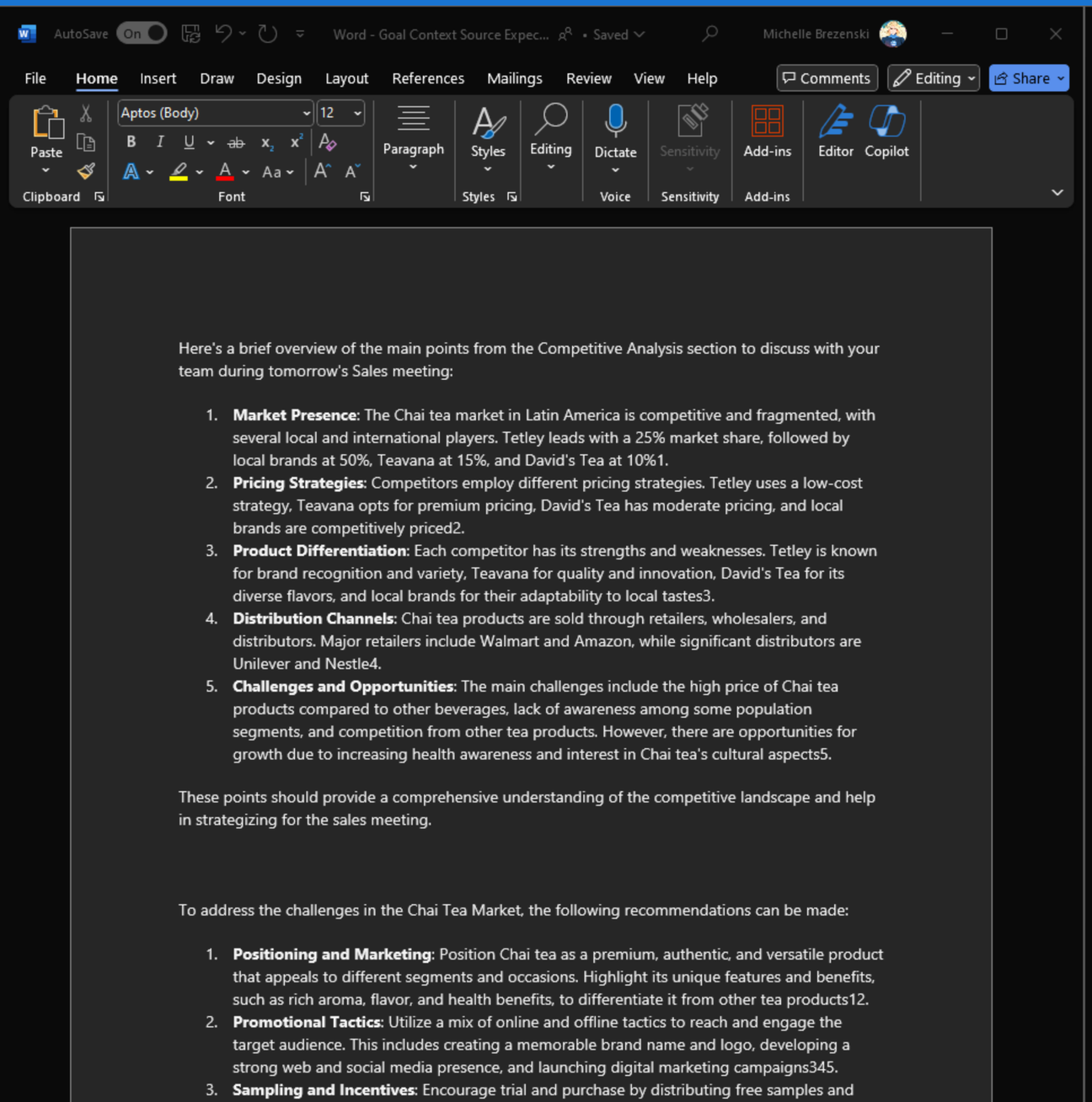
CoPilot in Microsoft Word Part II



CoPilot in Microsoft Word Part III



CoPilot in Microsoft Word Part IV



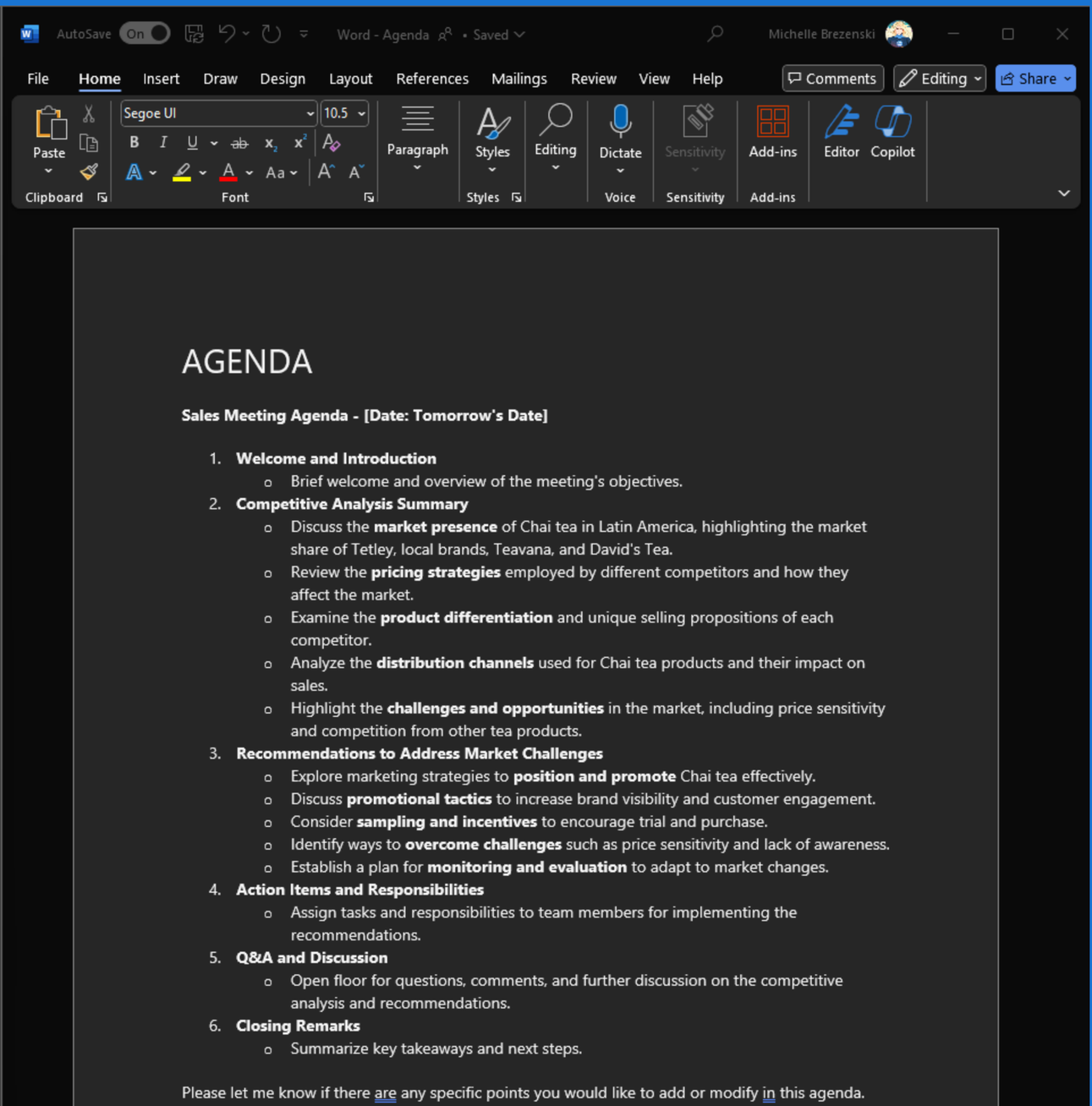
Here's a brief overview of the main points from the Competitive Analysis section to discuss with your team during tomorrow's Sales meeting:

1. **Market Presence**: The Chai tea market in Latin America is competitive and fragmented, with several local and international players. Tetley leads with a 25% market share, followed by local brands at 50%, Teavana at 15%, and David's Tea at 10%1.
2. **Pricing Strategies**: Competitors employ different pricing strategies. Tetley uses a low-cost strategy, Teavana opts for premium pricing, David's Tea has moderate pricing, and local brands are competitively priced2.
3. **Product Differentiation**: Each competitor has its strengths and weaknesses. Tetley is known for brand recognition and variety, Teavana for quality and innovation, David's Tea for its diverse flavors, and local brands for their adaptability to local tastes3.
4. **Distribution Channels**: Chai tea products are sold through retailers, wholesalers, and distributors. Major retailers include Walmart and Amazon, while significant distributors are Unilever and Nestle4.
5. **Challenges and Opportunities**: The main challenges include the high price of Chai tea products compared to other beverages, lack of awareness among some population segments, and competition from other tea products. However, there are opportunities for growth due to increasing health awareness and interest in Chai tea's cultural aspects5.

These points should provide a comprehensive understanding of the competitive landscape and help in strategizing for the sales meeting.

To address the challenges in the Chai Tea Market, the following recommendations can be made:

1. **Positioning and Marketing**: Position Chai tea as a premium, authentic, and versatile product that appeals to different segments and occasions. Highlight its unique features and benefits, such as rich aroma, flavor, and health benefits, to differentiate it from other tea products12.
2. **Promotional Tactics**: Utilize a mix of online and offline tactics to reach and engage the target audience. This includes creating a memorable brand name and logo, developing a strong web and social media presence, and launching digital marketing campaigns345.
3. **Sampling and Incentives**: Encourage trial and purchase by distributing free samples and



AGENDA

Sales Meeting Agenda - [Date: Tomorrow's Date]

1. **Welcome and Introduction**
   - Brief welcome and overview of the meeting's objectives.
2. **Competitive Analysis Summary**
   - Discuss the **market presence** of Chai tea in Latin America, highlighting the market share of Tetley, local brands, Teavana, and David's Tea.
   - Review the **pricing strategies** employed by different competitors and how they affect the market.
   - Examine the **product differentiation** and unique selling propositions of each competitor.
   - Analyze the **distribution channels** used for Chai tea products and their impact on sales.
   - Highlight the **challenges and opportunities** in the market, including price sensitivity and competition from other tea products.
3. **Recommendations to Address Market Challenges**
   - Explore marketing strategies to **position and promote** Chai tea effectively.
   - Discuss **promotional tactics** to increase brand visibility and customer engagement.
   - Consider **sampling and incentives** to encourage trial and purchase.
   - Identify ways to **overcome challenges** such as price sensitivity and lack of awareness.
   - Establish a plan for **monitoring and evaluation** to adapt to market changes.
4. **Action Items and Responsibilities**
   - Assign tasks and responsibilities to team members for implementing the recommendations.
5. **Q&A and Discussion**
   - Open floor for questions, comments, and further discussion on the competitive analysis and recommendations.
6. **Closing Remarks**
   - Summarize key takeaways and next steps.

Please let me know if there are any specific points you would like to add or modify in this agenda.

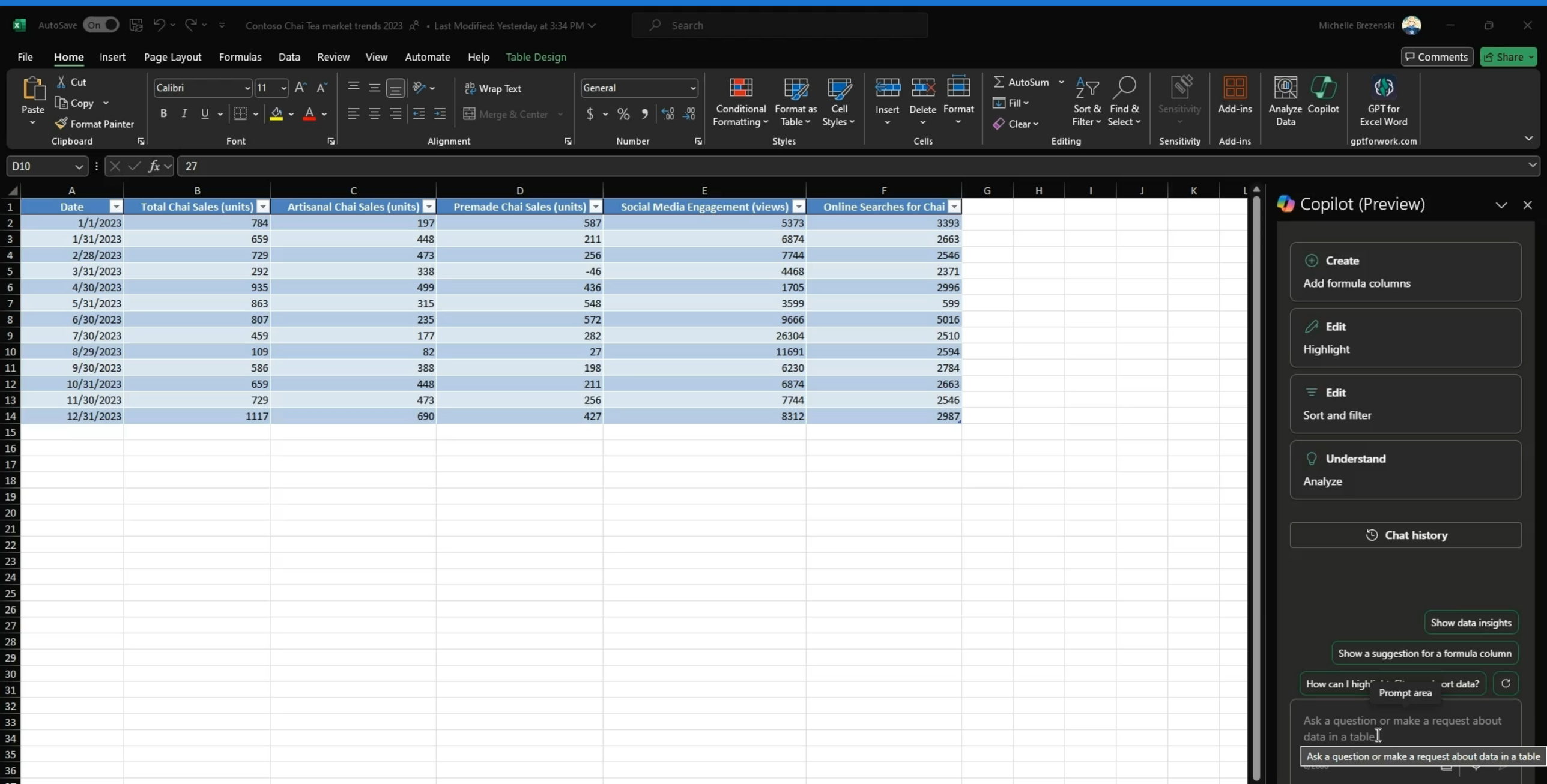
WARNING!!

CoPilot in Excel can only reference Excel data that has been formatted into a table.

- Select the cell or the range in the data.
- Select Home > Format as Table.
- If you want the first row of the range to be the header row, In the ”Format as Table” dialog box, select the checkbox next to My table has headers.
- Select OK.
- Select any cell within the table to make the table active before prompting CoPilot.

GOTCHA’S!

CoPilot in Microsoft Excel



	A	B	C	D	E	F
1	Date	Total Chai Sales (units)	Artisanal Chai Sales (units)	Premade Chai Sales (units)	Social Media Engagement (views)	Online Searches for Chai
2	1/1/2023	784	197	587	5373	3393
3	1/31/2023	659	448	211	6874	2663
4	2/28/2023	729	473	256	7744	2546
5	3/31/2023	292	338	-46	4468	2371
6	4/30/2023	935	499	436	1705	2996
7	5/31/2023	863	315	548	3599	599
8	6/30/2023	807	235	572	9666	5016
9	7/30/2023	459	177	282	26304	2510
10	8/29/2023	109	82	27	11691	2594
11	9/30/2023	586	388	198	6230	2784
12	10/31/2023	659	448	211	6874	2663
13	11/30/2023	729	473	256	7744	2546
14	12/31/2023	1117	690	427	8312	2987

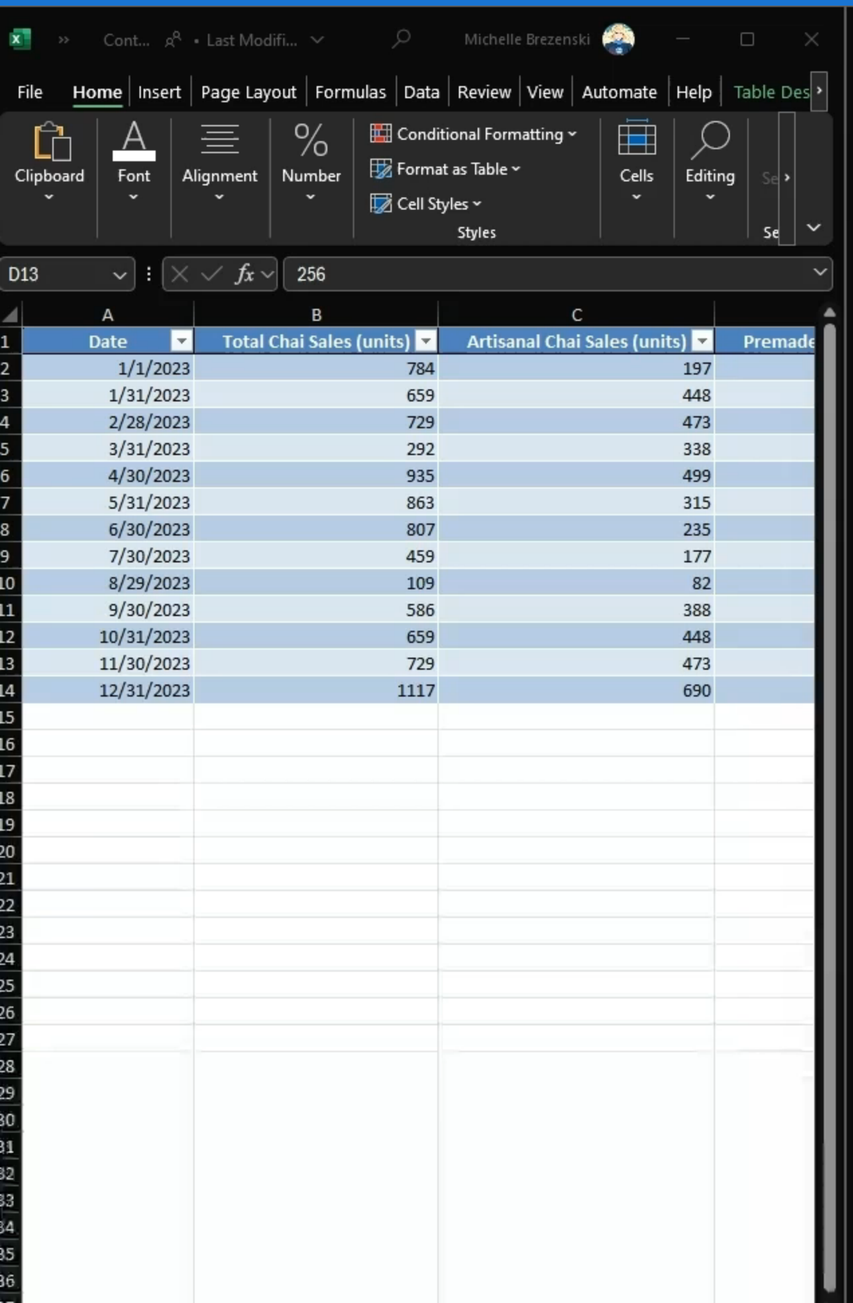
WARNING!!

Using the Slash commands (/) to reference a file only shows the Most Recently Used (MRU) list.

You can still indicate other files to be referenced by typing in the full file name or in some cases by browsing to the file, however Microsoft Copilot will only work with files saved to OneDrive. If files are stored locally on your PC, you will need to move them to OneDrive to activate Copilot.

GOTCHA'S!

CoPilot across Microsoft 365



Date	Total Chai Sales (units)	Artisanal Chai Sales (units)	Premade
1/1/2023	784	197	
1/31/2023	659	448	
2/28/2023	729	473	
3/31/2023	292	338	
4/30/2023	935	499	
5/31/2023	863	315	
6/30/2023	807	235	
7/30/2023	459	177	
8/29/2023	109	82	
9/30/2023	586	388	
10/31/2023	659	448	
11/30/2023	729	473	
12/31/2023	1117	690	

Date	Total Chai Sales (units)	Artisanal Chai Sales (units)	Premade Chai Sales (units)	Social Media Engagement (views)
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5/31/2023	863	315	548	3599
6/30/2023	807	235	572	9666
7/30/2023	459	177	282	26304
8/29/2023	109	82	27	11691
9/30/2023	586	388	198	6230
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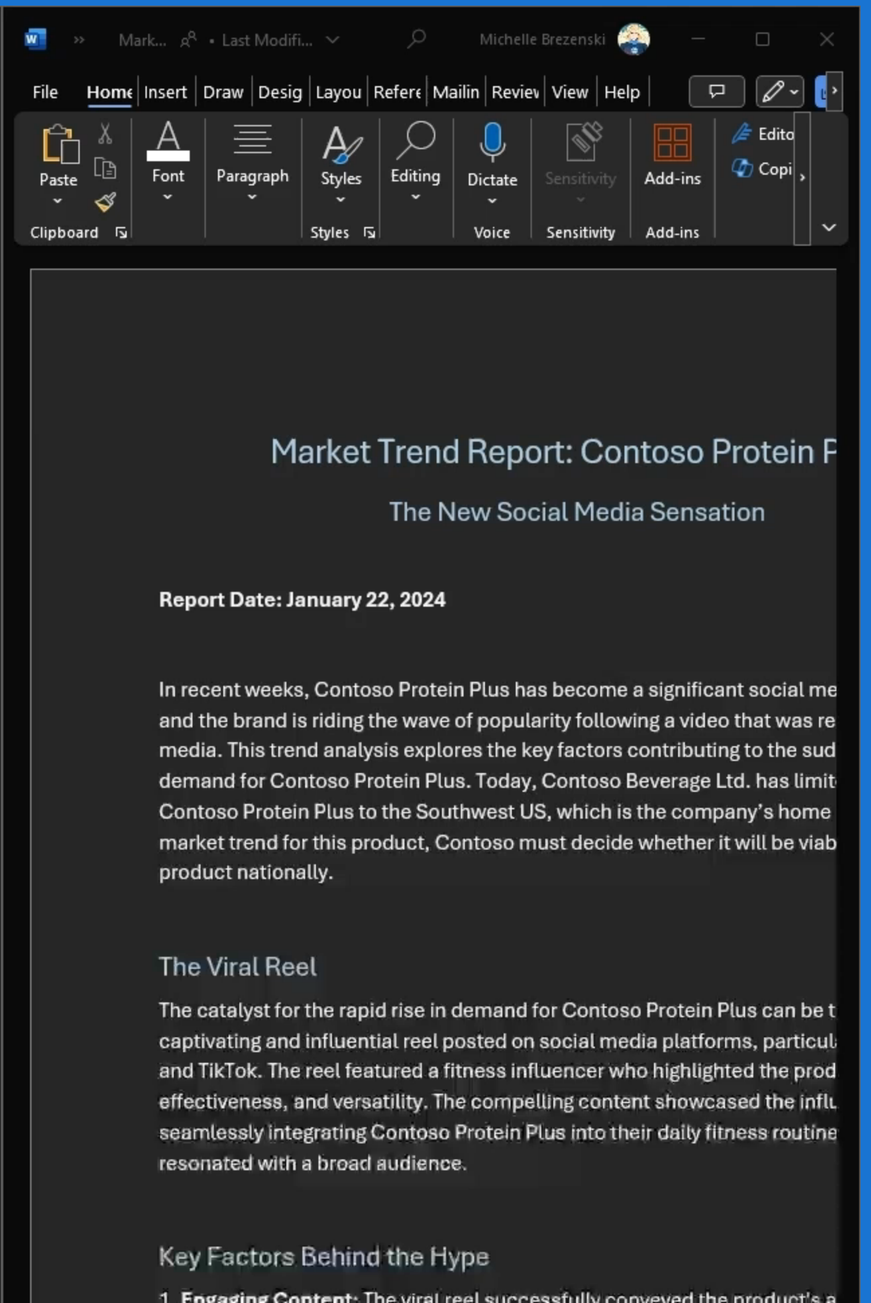
11/30/2023	729	473	256	7744
12/31/2023	1117	690	427	8312



Market Trend Report: Contoso Protein P

The New Social Media Sensation

Report Date: January 22, 2024

In recent weeks, Contoso Protein Plus has become a significant social me and the brand is riding the wave of popularity following a video that was re media. This trend analysis explores the key factors contributing to the sud demand for Contoso Protein Plus. Today, Contoso Beverage Ltd. has limit Contoso Protein Plus to the Southwest US, which is the company's home market trend for this product, Contoso must decide whether it will be viab product nationally.

The Viral Reel

The catalyst for the rapid rise in demand for Contoso Protein Plus can be t captivating and influential reel posted on social media platforms, particul and TikTok. The reel featured a fitness influencer who highlighted the prod effectiveness, and versatility. The compelling content showcased the influ seamlessly integrating Contoso Protein Plus into their daily fitness routine resonated with a broad audience.

Key Factors Behind the Hype

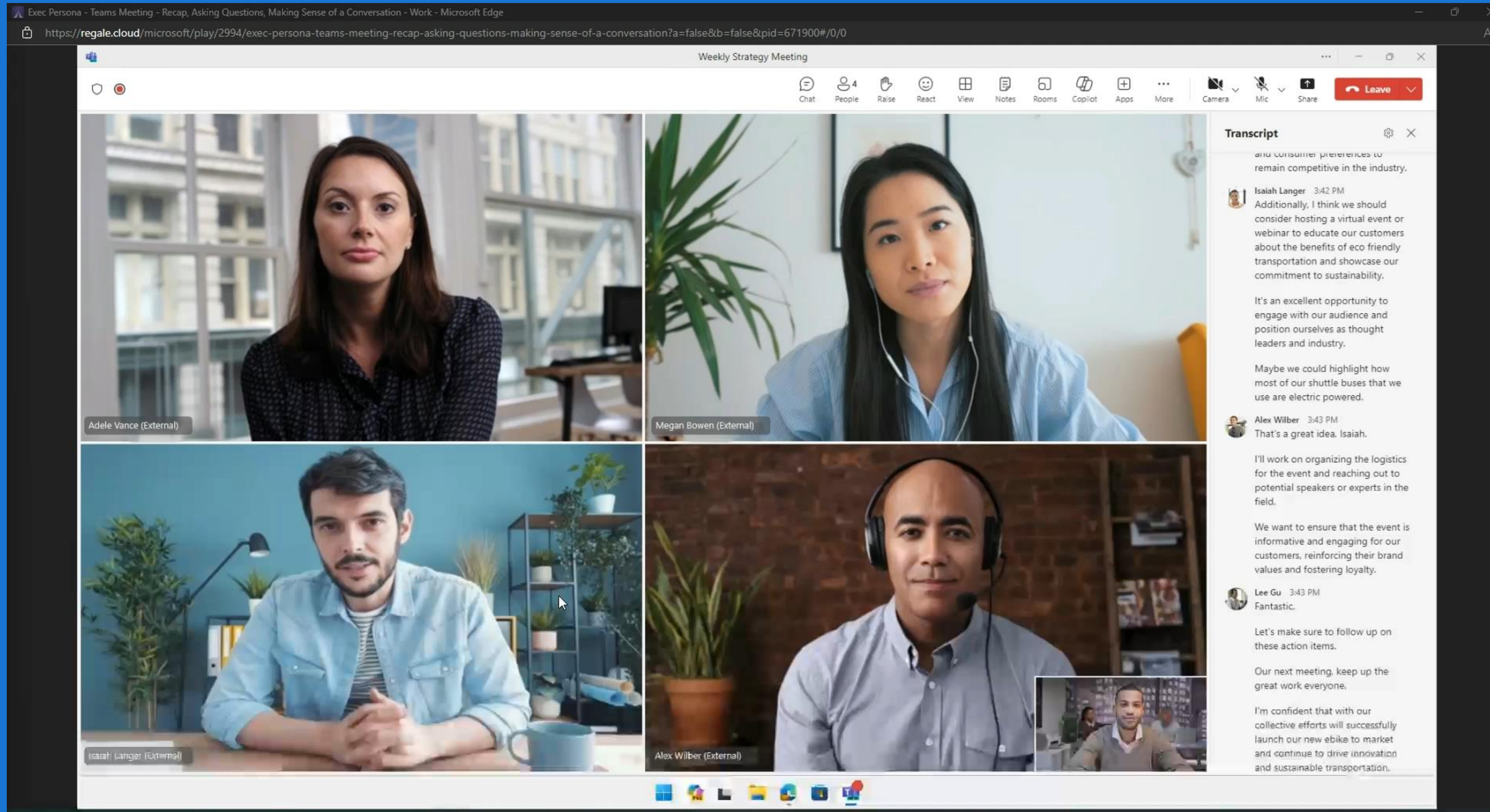
1. **Engaging Content**: The viral reel successfully conveyed the product's a

WARNING!!

CoPilot in Teams Meetings requires that either Transcription or Recording is turned on (or both), and the meeting must be long enough for CoPilot to analyze.

GOTCHA’S!

CoPilot in Microsoft Teams

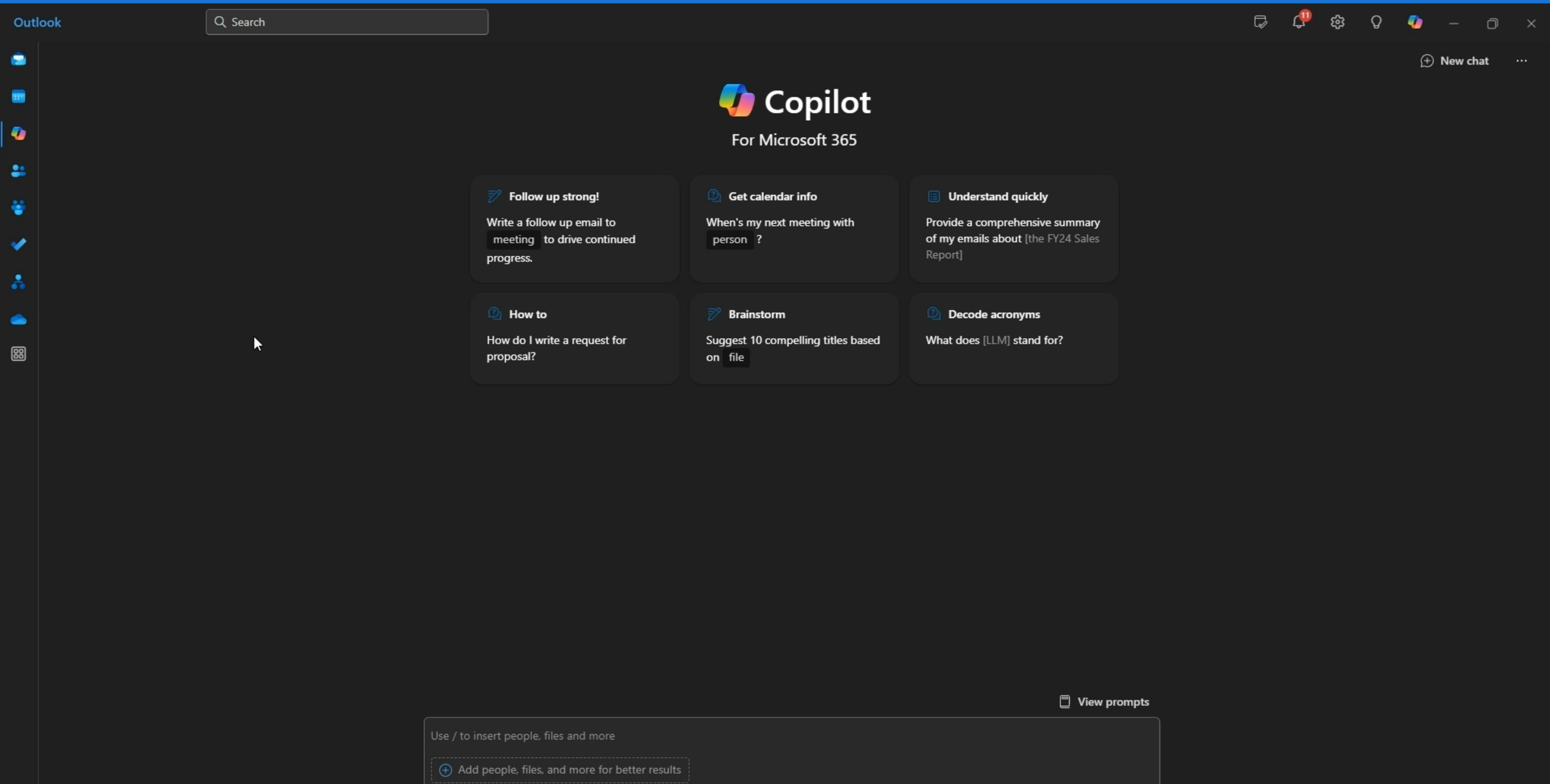


WARNING!!

Copilot in Outlook only supports work or school accounts, and Microsoft accounts using outlook.com, hotmail.com, live.com, and msn.com email addresses at this time. Any Microsoft account using an account from a third-party email provider, such as a Gmail, Yahoo, or iCloud, can still use Outlook, but won’t have access to the Copilot features in Outlook.

GOTCHA’S!

CoPilot in Microsoft Outlook



Helpful hints

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.

Q&A

Homework (I did warn you...)

Group A: You have Copilot

- Go use it!
- If you have any questions or an issue arises, feel free to reach out.
  - You can reach out to your Technical Account Manager
  - Later today you'll receive a recording of the webinar. On the recording page there is a form where you can submit questions.

Group B: You don't have Copilot

- Go use Copilot for Microsoft 365!
  - Free version for those without Copilot
  - After using it, if you can benefit from Copilot, get connected with your Technical Account Manager.
- If you have any questions or an issue arises, feel free to reach out!
  - Contacting your Technical Account Manager is a good place to start!
  - Later today you'll receive a recording of the webinar. On the recording page there is a form where you can submit questions.

Applications, Analytics & A.I. Services

Are you looking for answers in any of the following areas?

- **AI Integration**
  - Strategy and Development
  - Dashboarding
  - Custom reports
- **Personalized Workflows**
- **Integrations**
  - Custom solutions and strategy development
- **Custom Applications**
- **SharePoint Customization**

The Development Team can help!

If you want to implement Copilot or need support in any of these areas, let us know!

- Answer "Yes," in survey, and we'll connect you with your TAM to get you more information or learn how we can support your needs
- You can also reply to the follow up email that will be sent after the webinar

Upcoming Session: Development Webinar

October 17th (Wineries)

- All will be recorded, so if you can’t make it, you'll receive a recording!
- You can pre-register for our remaining 2024 webinars! Just select yes in the upcoming poll.
    - You can also send an email to akreps@endsight.net or reply to our follow up email.

Upcoming Sessions: Office Hours

- August 22nd!
- Topic: Protecting from Phishing Attacks

- Great for business leaders and tech professionals, also for anyone looking to stay up to date on recent cybersecurity trends.
- Extensive Q&A - if you have a question, we'll get it answered! We can also take sensitive questions offline.
- This will be recorded, so if you can’t make it, you'll receive a recording!
- If you hadn't registered for this event yet and want to, please answer YES in the upcoming poll.
- You can also email Aaron Kreps, akreps@endsight.net to pre-register

Thank you!

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