

Copilot Skills Workshop: Writing Better Prompts

June 24, 2026

Agenda

- Introduction and AI Maturity
 - Engaging with AI
 - Levels of AI Maturity
 - AI Categories and Considerations
- Winning with Conversational Chat
 - Leveraging AI Today
 - Using Conversational Chat (Generative AI) Successfully
 - Steps to Prompt Excellence
 - Anatomy of a Great Prompt
 - “Power” Techniques
 - Giving it a Try
- Resources

| Introduction and AI Maturity

Engaging with AI

AI is not one thing.

It is a series of capabilities within different layers.

You need the right tool for the right kind of work.

(you don't use a screwdriver to hammer in a nail!)

You don't want "AI." You want faster work, better decisions, and higher value/time

AI maturity is not about building the most advanced thing. It's about applying the simplest capability that *solves the problem*.

AI is a partner, not a decision-maker. The accountability stays with the user.

Levels of AI Maturity



AI Categories and Considerations

Category	Definition	Best-Fit For	Considerations
Conversational (Generative)	AI that understands and responds to natural language and generates new content	• Drafting (email, docs, summaries) • Q&A and knowledge • Brainstorming/ideation • Rewriting, revisions, tone	• Requires good prompting skills (high dependency on user quality) • Outputs need human validation • Does not take action on its own
Workflow Productivity (Assist and Integrate)	AI embedded in tools and workflows to assist or automate steps in a process	• Meeting summaries to tasks • Email triage and response suggestions • CRM updates, internal processes, documentation, • Cross-tool workflows • Data Analysis	• Value comes from integration, not just intelligence • Often requires: ▪ Clean data ▪ Defined processes ▪ Change management
Predictive/ Analytical AI (Data to Insights)	AI that analyzes historical data to predict future outcomes	• Forecasting (revenue, demand) • Churn prediction • Risk scoring, fraud detection • Recommendations (“next best action”)	• Requires: Structured data • Data quality & governance ▪ Stops at insight—does NOT execute actions
Agentic AI (Goal-Driven, Action-Oriented)	AI systems that plan, decide, and execute tasks autonomously toward a goal	• Multi-step processes (onboarding, research, coordination) • Complex workflows across systems • Autonomous task execution	• Requires: Strong foundation in workflows and prompting • Clear governance and guardrails • System integrations and permissions • Higher risk: Errors scale faster • Harder to audit decisions

| Winning with Conversational Chat

Leveraging AI Today

Today, all eMoney employees have access to **Copilot Chat** for secure, current, chat capabilities.

How do we get the most out of this powerful tool? What can it do for me?

Copilot Chat Core Capabilities:

- Summarize reports or meeting notes
- Draft emails for updates, replies, or stakeholder communications
- Brainstorm realistic AI use cases for specific business situations
- Generate prompt examples for use with specific document types (Excel, Word, etc.)
- Create draft responses targeting various audiences and incorporating key information
- Rephrase or simplify complex topics/language for broader audiences

Did you know?
You can personalize
your chat to you.
What to know how?
Ask it!

Key Differences:

- Copilot Chat (Free): Web-based assistant, can summarize and brainstorm using visible content but lacks application-specific automation
- 365 Copilot (Licensed): Embedded in MS Office Applications (Excel example: generates formulas, summaries, charts, and automates tasks using organizational data) and grounded in MS Graph (underlying data)

Targeting a broader rollout later this year. Hold tight – more to come!

Using Conversational (Generative) AI Successfully

Good Fit

- Drafting
- Summarizing
- Transforming Content – Reformatting
- Brainstorming

Weak For

- Accuracy in the absence of context
- Specialized expertise
- One-shot perfection
- High-risk decisions

AI is a *draft* generator



AI is *not* a final-answer machine

Detailed inputs result in more usable outputs



Vague inputs result in AI “guessing”

Prompting is a skill that takes learning and practice



Prompting is not magic!

The first response is a starting point – refinement is expected



The first response is *not* a final, polished answer

When it's good – SAVE IT and build a personal library

Steps to Prompt Excellence

Prompting is not keyword searching – it's a new paradigm

After years of perfecting key word searching, we need to retrain ourselves on using natural language and a conversational approach to getting the most out of “AI Chat”

Approaches that lead to success:

- ✓ It's like having a personal assistant, an over-qualified intern, or an expert consultant: how would you talk to them?
- ✓ Apply the Prompting Framework – Goal, Context, Structure, Expectations
- ✓ “Garbage in, garbage out”
- ✓ Practice, practice, practice! (don't be afraid to try and try and try again)
- ✓ Human in the loop – check every response/outcome
- ✓ Copilot Cognitive Load: Prompt is too vague = generic outputs (unhelpful), too complex = inconsistent results (unreliable). Break tasks into smaller prompts (called chaining)
- ✓ Control vs. Creativity: more constraints = more consistency, fewer constraints = more creativity

Iteration is key! Industry research notes almost 40% of prompts benefit from iteration. Prompting is a conversation.

Anatomy of a Great Prompt

Start with a standard approach/thought process:

1. What do I want?
2. Who is it for?
3. What should it look like?

Apply a Prompt Framework: GCSE

Goal

- What are you trying to achieve?
- Clearly define the outcome you want AI to produce
- Example: "Summarize this meeting and highlight next steps for follow up"

Structure

- How should the output be formatted?
- Specify how you want the response organized or delivered
- Example: "Provide output as: key themes, risks, and recommended next actions in bulleted list"

Context

- What information does AI need?
- Provide relevant background, data, or constraints to ground the output
- Example: "This is a Contract Renewal meeting with a key client. Focus on pain points and buying signals"

Expectation

- What does "good" look like?
- Set quality, tone, depth, or success criteria for the response
- Example: "Keep it concise and executive-ready with clear, actionable recommendations"

“Power” Techniques

Question Refinement

- Improving the *question itself* before asking for an answer
- Example: “From now on, whenever I ask a question, suggest a better version of the question to use instead”
- Value: helps users who don’t know what to ask

Flipped Interaction

- Instead of asking AI to answer, ask it to ask YOU questions first
- Example: “Ask me three clarifying questions before drafting a response”
- Value: prevents bad outputs early; turns AI into a collaborator not just a generator

Audience Persona

- Explicitly telling AI who the output is for
- Example: “Explain this concept for a non-technical executive audience”
- Value: dramatically improves relevance and tone

Example-Based Prompting

- Showing the AI an example of what “good” looks like
- Example: “Here is an example of the format I want [example]. Now create a similar output for this scenario”
- Value: reliable way to improve output quality early

Blind-Spot Prompting

- Ask AI to identify what you may be overlooking; surface gaps, risks, assumptions, and alternative perspective
- Example: “Review this plan and identify 3 risks, 2 blind spots, and 1 alternative approach I should consider?”
- Value: expands thinking, helps catch issues early, aids decision-making and strategy, AI as critic

Giving it a Try

Exercise 1

- Situation: there is a long email string that you have (frankly) been watching but kind of ignoring. Now, you need to step in and help the group decide on the best next step.
 - What do you do?
 - What could you do differently to get a stronger result?

Exercise 2

- Situation: You have improved the way you do a core/consistent part of your job. Your manager thinks this improvement would be valuable for the rest of the team.
 - What do you do?
 - What could you do differently to get a stronger result?

Exercise 3

- Situation: You receive a document from a business partner who needs you to provide an analysis of risks and considerations.
 - What do you do?
 - What could you do differently to get a stronger result?

Wrap Up and Resources

- Did you learn anything today?
- Are you more comfortable trying something new with Copilot Chat?
- Do you need some help in navigating or getting to know the features available in Copilot Chat?
- How have you started to use Copilot Chat (or AI in general) to work smarter and get more out of your day?

Resource	Location	Link
Using AI at eMoney	Life@eMoney Intranet	Using AI at eMoney
Microsoft Copilot Chat Learning Series	Life@eMoney Intranet	Microsoft Copilot Chat Learning Series
Rules for the Responsible Use of AI	Life@eMoney Intranet	Rules for the Responsible Use of AI
Accessing Copilot	Okta	Okta
Contacting the AI Committee	• Teams Channel • Request Form	Teams channel AI-Related Requests: Tools, Initiatives Product Features – Fill out form

One Prompt to Rule them All

I'd like you to act as my Prompt engineer. Your goal is to help me craft the best possible prompt for my needs. The purpose of the prompt is that I will use it with you, Copilot.

You must follow the following process during this chat session:

1. Your first response will be to ask me what the prompt should be about. I will provide my answer, but we will need to improve it through continual iterations by going through steps two and three.
2. Based on my input, you will generate two sections.
 - Revised prompt (Always provide your revised prompt. It should be clear, concise, and easily understood by you)
 - Questions (ask any relevant questions pertaining to what additional information is needed from me for you to improve the prompt).
3. We will continue this iterative process with me providing additional information to you, and you continuously updating the prompt in the Revised prompt section so I can use it.