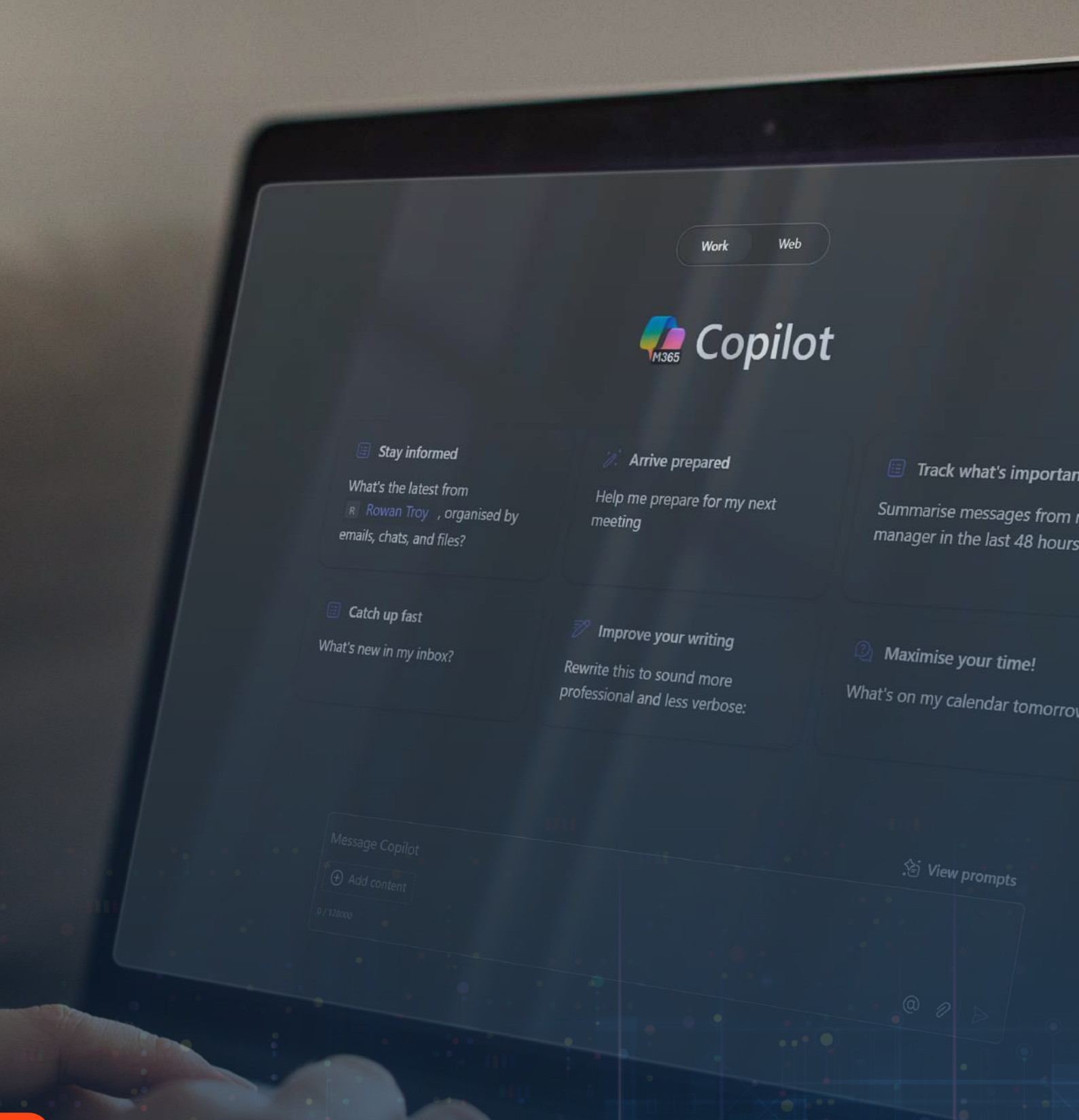

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PROMPT ENGINEERING CHEAT SHEET

AI Prompt Engineering in Microsoft 365

By now, it's very likely that you've begun to adopt AI tools across your organisation. Whether it's using Copilot in M365 to efficiently manage your workloads, leveraging ChatGPT for content creation, or deploying AI-driven cyber security to detect threats in real time, all sorts of businesses are harnessing AI to work smarter and more efficiently.

Of course, successful implementation of AI – just as with any new tool – hinges on user adoption; and this begins when employees see real value in their interactions with it. Throughout this guide, we'll explore how to maximise the value of AI, with a particular focus on learning how to craft effective prompts to make the most of Microsoft Copilot (and other types of AI) in your daily workflows.

Prompt Engineering - M365 Copilot

Prompt Engineering in Microsoft 365 Copilot refers to the skill of crafting clear, specific, and effective prompts to get the best results from apps like Word, Excel, Outlook, and Teams. Since Copilot generates responses based on company data and user input, well-structured prompts can significantly improve accuracy, efficiency, and productivity.

Remember, although Copilot and other AI tools are trained on human language, they are still not human, and they require us to communicate in a specific format. Therefore, it might help to think of prompt engineering as 'learning to speak the language of AI'.

Microsoft's guidance

You'll be glad to know that Microsoft haven't left us high and dry when it comes to prompt engineering and the use of Copilot for M365. Here, you can access some helpful guidance on how to devise effective prompts from Microsoft itself.

In short, however, Microsoft recommends including four elements: **goal, context, source, and expectation.**

1- Goal
Define what you want from Copilot, your objective.

2- Context
Explain why you need this information, who is involved, or how you'll use it.

I want to know what our best-selling product is this month, so I can offer a promotion on this item to individuals on our mailing list. Use information from my Sales folder and our inventory data to find this information, also include the top 4 next best-selling products

3- Source
Identify data sources or plugins Copilot should use.

4- Expectations
Define how Copilot should respond; the tone, audience, length of information, Etc.

We can see that, in Microsoft's framework, including detailed information across four steps means that Copilot will usually retrieve a comprehensive and precise answer. Of course, adding or modifying parameters, clarifying ambiguous instructions, or providing more examples can help guide the AI toward a better understanding of what is required if you don't receive exactly what you need in the first attempt.

What other prompt engineering frameworks are there?

There are multiple AI prompt frameworks to make use of because different use-cases require different approaches. AI models, including Microsoft Copilot and other LLMs like ChatGPT, generate responses based on how the prompt is framed. By using specific frameworks, users can structure and optimise AI interactions for their specific business use, gaining accuracy, clarity, and efficiency.

Some prompts, for example, ask for step-by-step instructions, while others need problem-solving guidance or side-by-side comparisons. AI can also provide different answers based on role, instruction, or situation (as seen in the RISEN framework below). Having access to multiple frameworks allows users to tailor their prompts based on their goals, ensuring that AI delivers the most useful output for different business scenarios.

Here are a few commonly used prompt frameworks:

5W1H Framework

The 5W1H framework is a simple yet powerful method for structuring AI prompts. It helps ensure clarity, completeness, and relevance by focusing on six fundamental questions: Who, What, When, Where, Why, and How.

This framework is particularly useful for information gathering, troubleshooting, and strategic decision-making in business and IT contexts

The Instructional Framework

The iInstructional Fframework is a prompt engineering method that focuses on giving AI clear, actionable, and structured instructions to generate precise and useful responses. This framework is ideal for when you need step-by-step guidance, explanations, or well-defined outputs.

The Problem Solution Framework

The Problem-Solution Framework is a structured method for generating AI responses that focus on identifying an issue (the problem) and providing a clear, actionable resolution (the solution). This framework is particularly useful in business contexts where troubleshooting, decision-making, and optimisation are required.

The Contextual Framework

This framework includes specific context or background information to help the AI give more tailored and relevant responses. It's an approach that improves AI-generated responses by incorporating detailed background information to ensure that answers are accurate, relevant, and tailored to specific situations.

The Comparison Framework

This framework asks the AI to compare different options or solutions to help make informed decisions. It's a method used to generate structured comparisons between multiple options and helps in decision-making by providing a clear, side-by-side evaluation of features, benefits, limitations, and use cases.

The Action-Oriented Framework

This framework focuses on generating clear, actionable steps for solving problems, implementing strategies, or making improvements. This framework is particularly useful for business leaders and project managers who need AI-generated instructions that are immediately applicable.

The RISEN Framework

The RISEN Framework is a prompt engineering methodology designed to generate more effective AI responses by following a structured approach. It ensures AI outputs are **R**elevant, **I**nformed, **S**pecific, **E**xecutable, and **N**uanced, making it especially useful in business strategy and problem-solving contexts.

Prompt engineering frameworks cheat-sheet

Whatever your industry or chosen framework, here's your quick guide to crafting effective AI prompts.

5W1H framework

Helps break down complex issues by asking one of six questions.

WHO

Identifies people/roles

"Who should be responsible for overseeing data privacy in a public sector organisation?"

WHAT

Defines objects, concepts, or issues

"What are the most common security vulnerabilities in cloud environments?"

WHEN

Helps understand timing and scheduling

"When is the best time to roll out a new sensitivity training initiative?"

WHERE

Locates issues, data, or resources

"Where can I find the latest sales report?"

WHY

Justifies actions or decisions

"Why should a manufacturing organisation invest in automation for its production lines?"

HOW

Explains processes, steps, or solutions.

"How can a financial services organisation enhance customer experience?"

The Instructional Framework

Focuses on giving clear, actionable, step-by-step instructions.

Example 1

"Provide a step-by-step guide for implementing an electronic health record (EHR) system in a healthcare facility."

Example 2

"Provide a step-by-step guide for implementing GDPR compliance in a public sector organisation."

Example 3

"What steps should a financial services organisation take to set up an AI-driven customer support chatbot?"

The Problem-Solution Framework

Identifies a specific problem and proposes an actionable solution.

Example 1

Problem
Hospitals struggle with patient wait times due to inefficiencies in appointment scheduling and resource management.

Prompt
"What solutions can hospitals implement to reduce patient wait times by optimising appointment scheduling and resource allocation?"

Example 2

Problem
Charities struggle with donor engagement and maintaining relationships with supporters over time.

Prompt
"What AI solutions can charities use to improve donor engagement and retention?"

Example 3

Problem
A financial institution is experiencing challenges with high employee turnover in its customer service department, leading to decreased service quality.

Prompt
"What actions can a financial institution take to reduce employee turnover in its customer service department and improve service quality for customers?"

The contextual framework

Provides AI with specific background details to generate more accurate and relevant responses.

Example 1

Context
A national grocery chain is looking to optimise pricing strategies using AI. They want to balance competitive pricing with profitability while considering factors like seasonality and regional demand.

Prompt
"For a national grocery chain aiming to optimise pricing strategies, how can AI-driven dynamic pricing models improve profitability while maintaining customer loyalty?"

Example 2

Context
An automotive organisation is dealing with supply chain disruptions that are causing delays in vehicle production and affecting delivery times to customers.

Prompt
Given the ongoing supply chain disruptions and delays in vehicle production, what steps can an automotive organisation take to mitigate these issues and ensure timely delivery to customers?

The Comparison Framework

Prompts AI to evaluate, contrast, or differentiate between two or more elements.

Example 1

Context
A housing association is considering two different strategies to improve tenant satisfaction: implementing a new tenant engagement program or improving the maintenance process.

Prompt
"Compare the effectiveness of a new tenant engagement program versus improving the maintenance process in terms of tenant satisfaction and retention for a housing association."

Example 2

Context
A utilities company is debating whether to invest in an on-premises data centre or switch to cloud services for data management.

Prompt
"Compare the benefits and drawbacks of maintaining an on-premises data centre versus moving to cloud services for data storage and management in an IT utilities company."

The Action-Oriented Framework

Focuses on generating prompts that ask for specific actions or steps to take in response to a given situation

Example 1

"What steps can a hospital take to streamline patient discharge processes and ensure a smooth transition of care that reduces readmission rates?"

Example 2

"What actions can a financial services company take to speed up the loan application process without compromising accuracy or security?"

Example 3

"What steps should a retail organisation take to create personalised shopping experiences that increase foot traffic and customer satisfaction?"

Example 4

"What actions can a pharmaceutical company take to improve production line efficiency while ensuring consistent product quality?"

The RISEN Framework

Designed to help you give AI clear directions for clear, precise, and actionable AI responses. Involves 5 elements:

1 Role

"As a network security expert …,"

2 Instruction

"What steps should I take to secure our company's Wi-Fi network?"

3 Situation

"We have 100+ employees, with both in-office and remote workers."

4 Execution

"Provide specific methods for encrypting the network and setting up secure guest access."

5 Narrowing

"Please focus on cost-effective solutions that can be implemented quickly."

Getting Started with Copilot for Microsoft 365

If you'd like to discuss how AI and machine learning could transform efficiency for your organisation, or learn more about implementing Microsoft 365 Copilot or Copilot for Security, please get in touch for a no-pressure conversation.

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To find out more about how Littlefish can help transform your business contact us on the below:

info@littlefish.co.uk

0344 848 4440

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