COPILOT FOR EXCEL – PROMPT DIAGNOSTIC FRAMEWORK

Copilot is powerful, but only when it's anchored to real Excel structures and clear intent.

This framework helps you produce outputs that are **specific, explainable, and defensible** — the kind you can confidently use in analysis, reporting, or review.

Use it whenever Copilot's responses feel vague, generic, or untrustworthy.

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1) GOAL — **What do you want Copilot to *do* in Excel?**

Be explicit about the task, not the topic.
Copilot performs actions — it does not interpret intent.

Strong examples:

- "Check this table for inconsistent formulas."

- "Summarize key trends in the Price and P/E columns."

- "Write a documentation note explaining how Profit is calculated."

- "Find duplicates in Table SalesData and recommend cleanup steps."

Weak examples:

- "Analyze this."

- "Clean this up."

- "Give me insights."

Ask yourself:
Could someone else read this prompt and know *exactly* what action Copilot should take?

2) CONTEXT — What data, structure, or logic does this refer to?

Copilot only understands what Excel understands.
If Excel can't clearly identify it, neither can Copilot.

Anchor your request to concrete workbook objects:

- Table names (SalesData, EquitySnapshot)

- Columns (Price, Sector, EPS)

- Sheets ("Q2", "Analysis")

- Formulas (cell references, named ranges, structured references)

- Data types (dates, currencies, percentages)

Strong examples:

- "Use Table SalesData on the Q2 sheet."

- "Column Profit uses the formula =Revenue–Cost."

- "Use only numeric columns in EquityData."

Ask yourself:
Have I told Copilot *where* the relevant data lives?

3) EXPECTATIONS — What should the output look like?

Copilot defaults to verbosity unless you tell it otherwise.
Define what "good" looks like *before* you hit Enter.

Specify:

- **Format:** bullets, table, steps, summary, explanation, formula

- **Tone:** analyst-style, plain language, manager-ready

- **Length:** word, paragraph, or bullet limits

- **Focus:** KPIs, outliers, comparisons, errors, trends

Strong examples:

- "Give me 5 bullet points, each under 20 words."

- "Explain this formula in plain language for a beginner."

- "Summarize trends sector-by-sector."

- "Provide a 1-sentence takeaway suitable for leadership."

Ask yourself:
Would a reviewer immediately recognize whether this output is "right" or "wrong"?

4) SOURCE — What should Copilot use (and ignore)?

This step prevents hallucinations, generic advice, and misinterpretation.

Examples:

- "Use only Table SalesData. Ignore the Summary sheet."

- "Base all numbers on columns Price, P/E, and EPS."

- "Do not infer or estimate values that aren't in the data."

- "If you are unsure, ask me to clarify."

Ask yourself:
Have I constrained Copilot tightly enough that I could defend the result?

The Copilot-in-Excel 10-Second Check

Before hitting Enter, scan your prompt:

☐ Is the task explicit?
☐ Are real Excel objects named?
☐ Is the output format and audience defined?
☐ Is the data source constrained?

If any box is unchecked → rewrite.

Common Failure Modes (and how to fix them)

1. Vague output
→ Add metrics, limits, and required comparisons.
"Give me 3 insights backed by numbers from the table."

2. Wrong or made-up numbers
→ Add grounding.
"Use only values present in Table EquityData."

3. Overly long responses
→ Add constraints.
"4 bullets, max 15 words each."

4. Formula explanations that are too technical
→ Add audience.
"Explain in beginner-friendly language."

5. Misunderstanding a table
→ Explicitly name the columns.
"In Table SalesData, treat Price as currency and Date as a true date field."

A Standard Template

Use this structure whenever accuracy matters:

Goal: What you want Copilot to do
Context: Tables, sheets, columns, formulas involved
Expectations: Format, tone, length, audience
Source: Exact data to use or ignore

Example:

Goal: Summarize valuation trends.
Context: Use Table EquityData (columns: Sector, Price, P/E, EPS).
Expectations: 5 bullets, analyst tone, highlight outliers with numbers.
Source: Use only data from EquityData; do not infer missing values.

Final reminder

Copilot in Excel succeeds when prompts reference **real workbook structures**.

If you wouldn't point to it in Excel, don't expect Copilot to find it.