



PROMPT ENGINEERING





Prompt Engineering

Surendra Panpaliya

Founder and CEO, GKTCS Innovations

<https://www.linkedin.com/in/surendrarp>



Surendra Panpaliya: AI Visionary

Extensive Digital Transformation Experience

With over 25 years in IT, his expertise drives digital transformation and technological innovation for global organisations.

Empowering IT Professionals

He has mentored and trained more than 25,000 IT professionals, equipping them with advanced technology skills and knowledge.

Advancing AI Adoption

Through collaborations with numerous multinational firms, he has promoted the adoption of AI-driven strategies across diverse industries.

Agenda



Module 1: Introduction to Prompt Engineering



Module 2: Prompting Basics Across Microsoft 365 Apps



Module 3: Prompt Engineering Techniques & Patterns



Module 4: Use Case Simulation by Industry



Module 5: Advanced Prompting, Limitations & Governance

4: Use Case Simulation by Industry

Industry	Sample Prompt
Healthcare	“Summarize this case file into layman's terms” (Word)
Retail	“Draft a promotional email using this product data” (Outlook)
IT/Services	“Create a client status update slide from this email chain” (PowerPoint)

4: Use Case Simulation by Industry

Industry	Sample Prompt
HR	“Write a policy document outline from these notes” (Word)
Manufacturing	“Summarize this inspection report into key observations” (Excel + Word)
Finance	“Create a concise report focusing on revenue and expenses.”

Healthcare Use Case Simulation Overview

- Use prompt engineering for healthcare document summarisation.
- Focus on simplifying complex medical language.
- Leverage Microsoft Word for summarising case files.
- Apply ACTOR, FOCUS, DRAFT framework to prompts.
- Encourage learners to practice with real healthcare data.



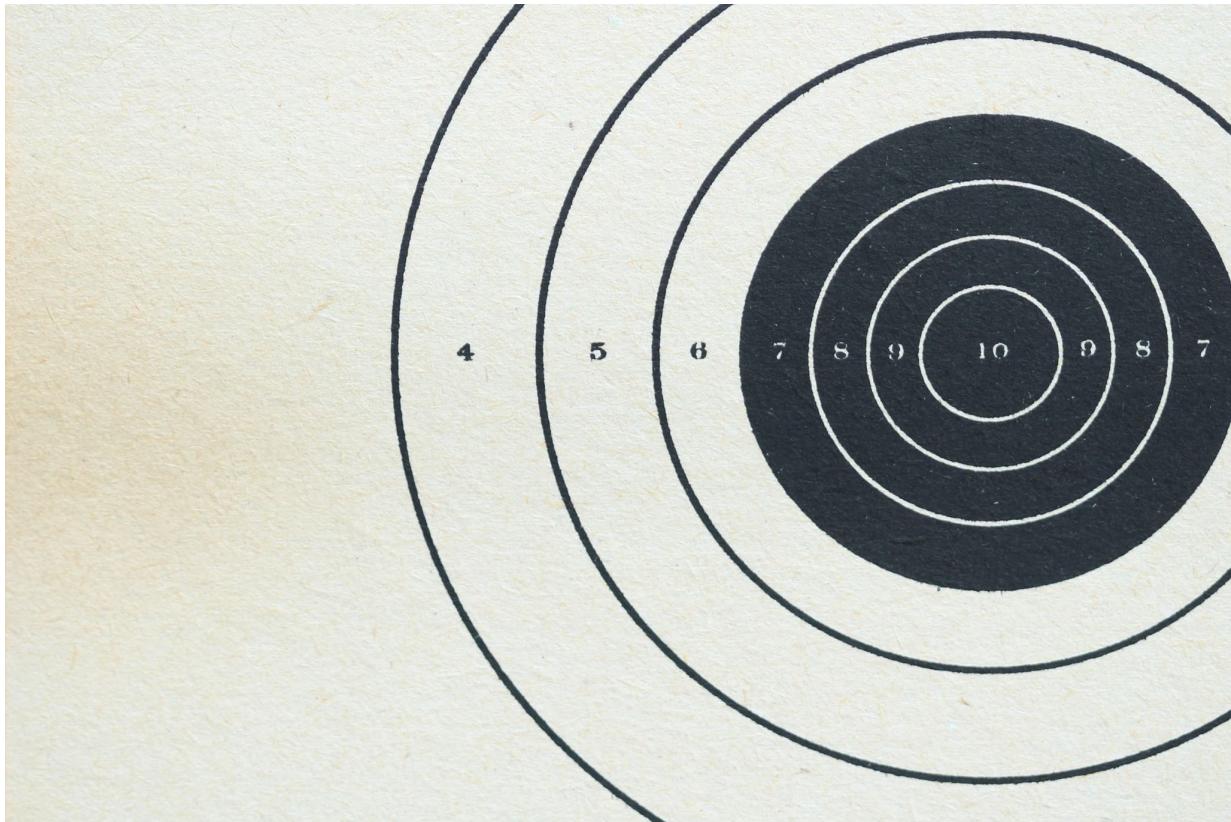
Understanding the ACTOR Framework

- ACTOR identifies the prompt's role or perspective.
- In healthcare, ACTOR could be a doctor or patient.
- Setting ACTOR guides the tone and detail level.
- Clear ACTOR definitions improve AI response quality.
- Practice assigning ACTOR in healthcare prompt examples.



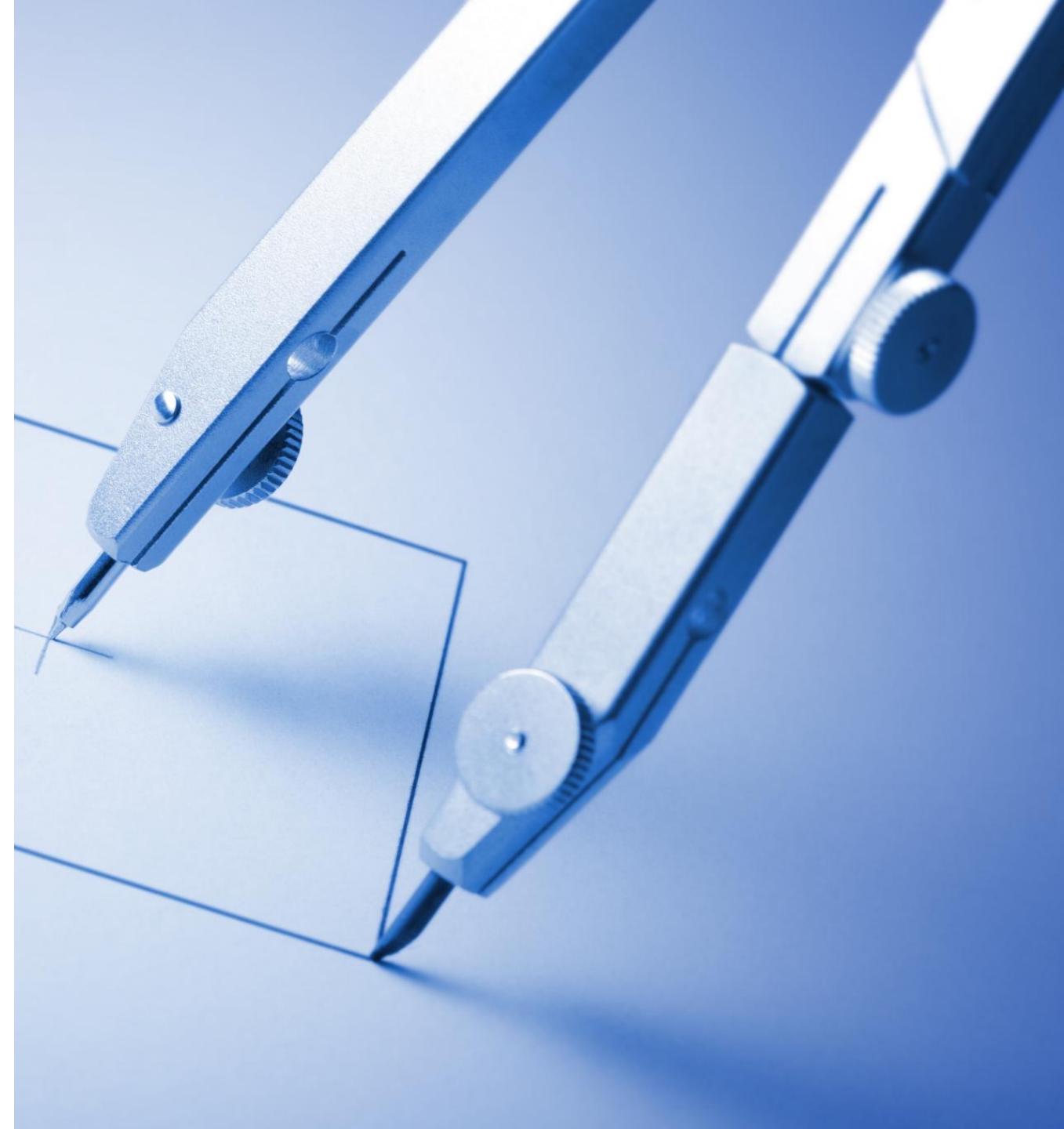
Applying FOCUS in Healthcare Prompts

- FOCUS directs what information to prioritise.
- Example: Focus on symptoms, diagnosis, or treatment.
- Narrowing FOCUS enhances summary relevance and clarity.
- Use precise FOCUS terms for better AI summarisation.
- Hands-on: Define FOCUS for a sample case file prompt.



Drafting Effective Healthcare Prompts

- DRAFT is the prompt's output style or format.
- Could be a layman summary, bullet points, or report.
- Choose DRAFT to suit audience and purpose.
- Combining ACTOR and FOCUS with DRAFT yields precise prompts.
- Exercise: Draft a prompt summarising a case file in layman's terms.



Learner Exercise: Craft & Test Healthcare Prompts

- Use ACTOR, FOCUS, DRAFT framework to create prompts.
- Example: Summarise case file for patient understanding.
- Utilise sample healthcare data provided.
- Run prompts in Word using Microsoft Copilot.
- Share and discuss results for feedback.



Retail Industry Use Case Overview

- Draft promotional emails using product data in Outlook.
- Utilise prompt engineering to create effective marketing content.
- Apply ACTOR, FOCUS, DRAFT framework for targeted messaging.
- Enhance customer engagement through personalised emails.
- Encourage hands-on exercises with sample retail data.



Sample Retail Product Data

- Product Name: Wireless Earbuds
- Features: Noise cancellation, long battery life, Bluetooth 5.0
- Price: \$79.99
- Promotional Offer: 20% off for first 100 customers
- Target Audience: Tech-savvy young adults



Applying ACTOR Framework in Retail Email

- ACTOR: Marketing Manager or Brand Ambassador.
- Defines the email's tone and perspective.
- Helps tailor the message to the target audience.
- Ensures voice aligns with brand identity.
- Example: 'As your trusted brand ambassador...'



Using FOCUS to Target Key Information

- FOCUS prioritises product features or promotional offers.
- Example: Highlight noise cancellation and discount offer.
- Narrow focus improves email relevance and engagement.
- Guides AI to emphasise selling points.
- Encourages clear, concise messaging.



Drafting the Email: Format and Style

- DRAFT defines output style: formal, friendly, concise.
- Choose format: bullet points, paragraphs, or call to action.
- Combining ACTOR and FOCUS with DRAFT creates precise prompts.
- Example prompt: 'Draft a friendly promotional email highlighting...'
- Learners to practice drafting with sample data.



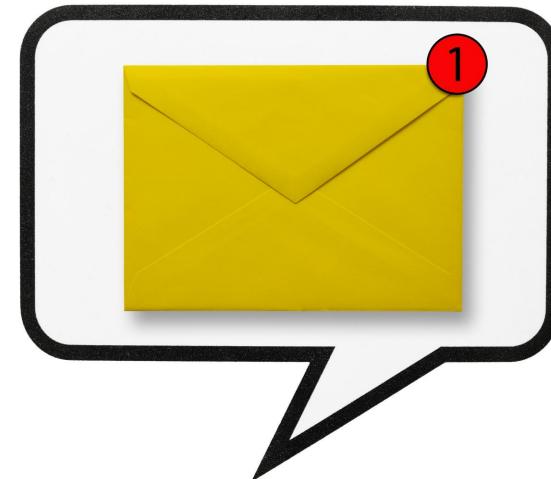
IT/Services Industry Use Case Overview

- Create client status update slides using email chains in PowerPoint.
- Utilise prompt engineering to organise and summarise information effectively.
- Apply ACTOR, FOCUS, DRAFT framework for clear and targeted updates.
- Enhance communication between IT teams and clients with concise slides.
- Encourage hands-on practice with real email data for skill building.



Sample Email Chain Data for Status Update

- Email chain includes project milestones, issues, and next steps.
- Details on task completions, pending actions, and deadlines.
- Key stakeholders and team members involved in communications.
- Essential information summarised for slide content.
- Learners to extract relevant data points for slide creation.



Applying ACTOR Framework in IT Status Updates

- ACTOR defines the perspective: project manager, client, or team lead.
- Sets the tone and level of detail appropriate to the audience.
- Aligns message style with stakeholder expectations.
- Example: 'As the project manager, I report...' introduces clarity.
- Helps tailor updates for better client understanding.



Using FOCUS to Highlight Key Status Elements

- FOCUS identifies critical information like milestones or risks.
- Directs AI to emphasise priority topics in the update slide.
- Example: Focus on task completions and upcoming deadlines.
- Narrowing focus improves update relevance and impact.
- Learners to define FOCUS for their sample email data.



Drafting Effective Status Update Slides

- DRAFT determines slide format: bullet points, summary, or timeline.
- Choose style based on client preferences and meeting context.
- Combine ACTOR and FOCUS with DRAFT for clear prompts.
- Example prompt: 'Create a bullet-point slide summarising tasks...'
- Practice drafting slides with provided email data.



HR Industry Use Case Overview

- Create a policy document outline from notes using Microsoft Word.
- Apply prompt engineering to structure HR policy documents effectively.
- Use ACTOR, FOCUS, DRAFT framework for clear and targeted prompts.
- Enhance accuracy and compliance in HR documentation.
- Encourage hands-on practice with real HR notes for skill building.



Sample HR Notes for Policy Document

- Notes include workplace conduct, leave policies, and grievance procedures.
- Highlight key points for inclusion in the policy document.
- Organise notes into logical sections for clarity.
- Identify compliance requirements relevant to the policy.
- Use these notes as the basis for prompt creation.



Applying ACTOR Framework in HR Prompts

- ACTOR defines the role, e.g., HR manager or legal advisor.
- Sets the tone and perspective of the policy document.
- Helps tailor language for target audience clarity.
- Ensures policy aligns with organisational voice.
- Example: 'As an HR manager, draft a policy outline...'



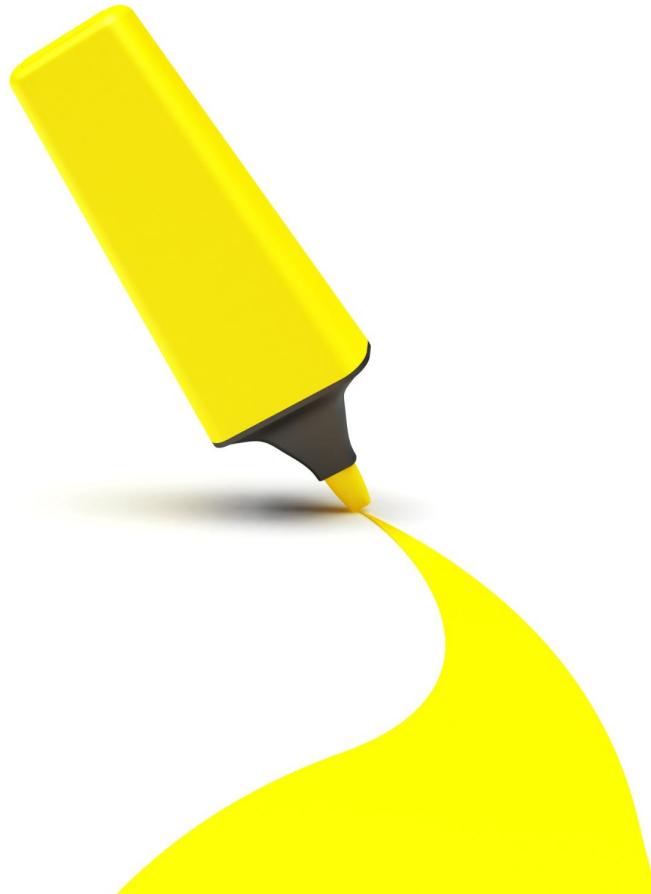
Focusing Your HR Policy Prompts

- FOCUS directs attention to specific policy topics.
- Example: highlight leave entitlements or grievance handling.
- Narrow focus enhances relevance and precision.
- Use clear, specific terms for better AI output.
- Hands-on: Define FOCUS for your sample HR notes.



Drafting HR Policy Documents with DRAFT

- DRAFT specifies the format and style of the output.
- Choose formats like bullet points, summaries, or formal text.
- Combine ACTOR and FOCUS with DRAFT for clear prompts.
- Example prompt: 'Draft a formal policy outline on leave entitlements.'
- Learners practice drafting using provided HR notes.



Prompt Example for Leave Policy Outline

- ACTOR: HR manager drafting organisational policies.
- FOCUS: Leave entitlements and approval procedures.
- DRAFT: Formal bullet-point outline.
- Prompt example: 'Create a formal outline for leave policies.'
- Illustrates combining framework components for clarity.



Learner Exercise: Craft Your HR Policy Prompt

- Use the ACTOR, FOCUS, DRAFT framework to create prompts.
- Select a policy topic from provided sample notes.
- Draft prompts suited for Microsoft Word processing.
- Test and refine prompts to improve AI outputs.
- Share and discuss results for collaborative learning.



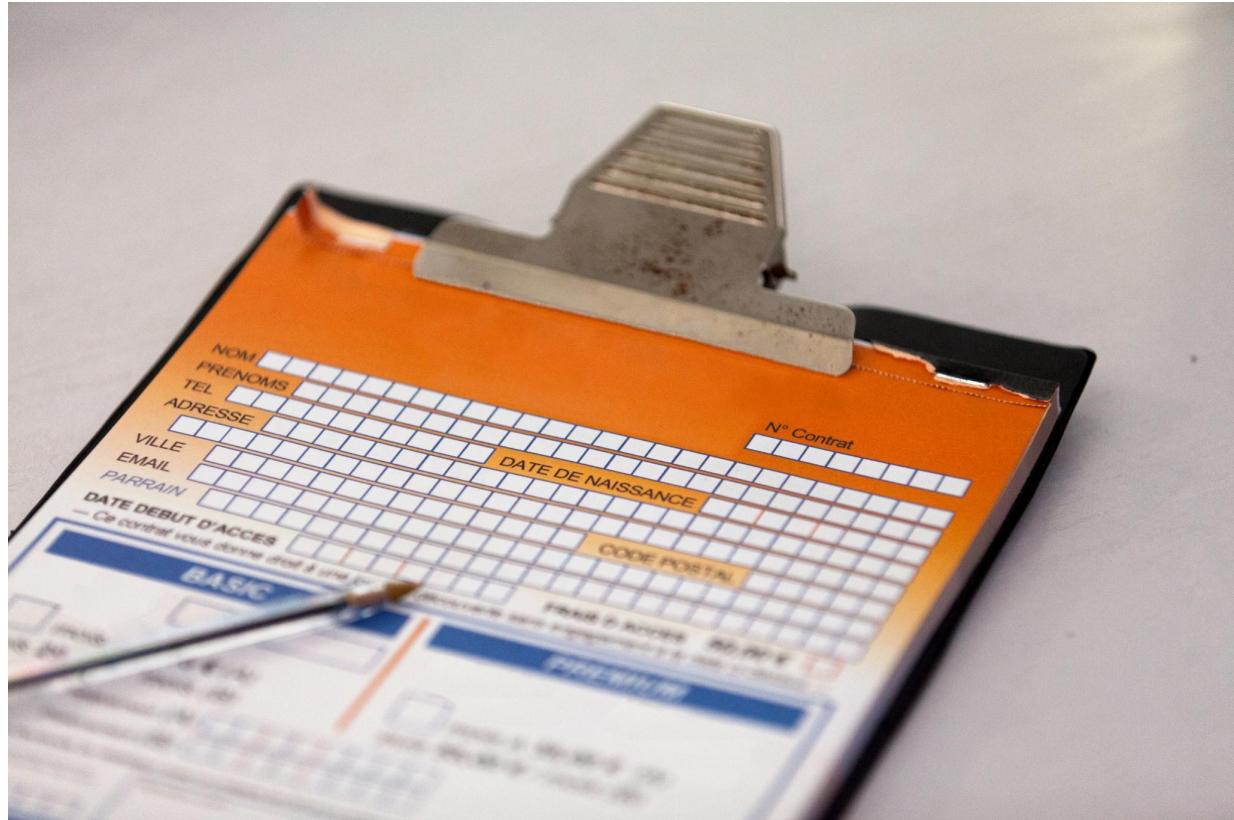
Manufacturing Use Case Overview

- Summarise inspection reports into key observations using Excel and Word.
- Apply prompt engineering to extract critical insights from data.
- Use ACTOR, FOCUS, DRAFT framework for clear and concise prompts.
- Improve decision-making with structured report summarisation.
- Encourage hands-on practice with real manufacturing data.



Sample Manufacturing Inspection Report Data

- Report includes equipment conditions, safety checks, and defect logs.
- Key findings like equipment wear and maintenance needs highlighted.
- Data organised in tables for easy identification of issues.
- Learners to focus on extracting critical inspection insights.
- Sets foundation for prompt creation and summarisation.



Applying ACTOR Framework in Manufacturing Prompts

- ACTOR defines the prompt perspective, e.g., quality inspector or manager.
- Sets tone and level of detail suitable for manufacturing context.
- Improves clarity and relevance of AI-generated summaries.
- Example: 'As a quality inspector, summarise key defects noted...'
- Tailors output to stakeholder needs.



Using FOCUS to Highlight Key Observations

- Focus targets critical data points like safety issues or equipment faults.
- Narrowing focus enhances the accuracy of summaries.
- Example: emphasise maintenance priorities or production impacts.
- Clear focus guides AI to relevant report sections.
- Learners define focus areas for their inspection data.



Drafting Clear Summary Prompts with DRAFT

- DRAFT specifies output style like bullet points or detailed paragraphs.
- Choose formats that suit report context and audience.
- Combine ACTOR, FOCUS, and DRAFT for precise prompt crafting.
- Example: 'Draft bullet points summarising equipment defects...'
- Practice makes better prompt construction.



Prompt Example 1: Equipment Defect Summary

- ACTOR: Quality inspector writing report summary.
- FOCUS: Key equipment defects and their impact on production.
- DRAFT: Bullet-point list for quick reference.
- Prompt: 'As a quality inspector, create bullet points summarising main equipment defects affecting production.'
- Illustrates practical use of the framework.



Prompt Example 2: Safety Issue Overview

- ACTOR: Plant safety officer reporting findings.
- FOCUS: Safety hazards and recommended corrective actions.
- DRAFT: Formal paragraph format suitable for compliance documentation.
- Prompt: 'As a safety officer, draft a paragraph summarising identified hazards and corrective steps.'
- Encourages practice with specific formatting.



Use Cases for Finance using ACTORS

Surendra Panpaliya

Founder and CEO, GKTCS Innovations

<https://www.linkedin.com/in/surendrarp>

Use Case 1: Financial Reporting Automation

- Scenario: Automating generation of monthly financial reports.
- Prompt using ACTORS Framework: 'As a finance analyst, generate a concise monthly report focused on revenue and expenses.'
- Benefits: Enhances clarity and relevance of reports.
- Enables automation with precise role definition.
- Improves communication across finance teams.





Use Case 2: Budget Proposal Drafting

- Scenario: Preparing detailed budget proposals for new projects.
- Prompt using ACTORS Framework: 'As a project manager, draft a detailed budget proposal outlining cost estimates and resource allocation.'
- Benefits: Improves proposal detail and accuracy.
- Clarifies responsibilities with defined ACTOR role.
- Supports streamlined project planning and approval.

Use Case 3: Financial Risk Analysis

- Scenario: Assessing risks in investment portfolios.
- Prompt using ACTORS Framework: 'As a financial analyst, prepare a risk assessment focusing on market volatility and credit risks.'
- Benefits: Provides targeted and actionable risk insights.
- Enables focused analysis with defined ACTOR perspective.
- Supports proactive risk management.



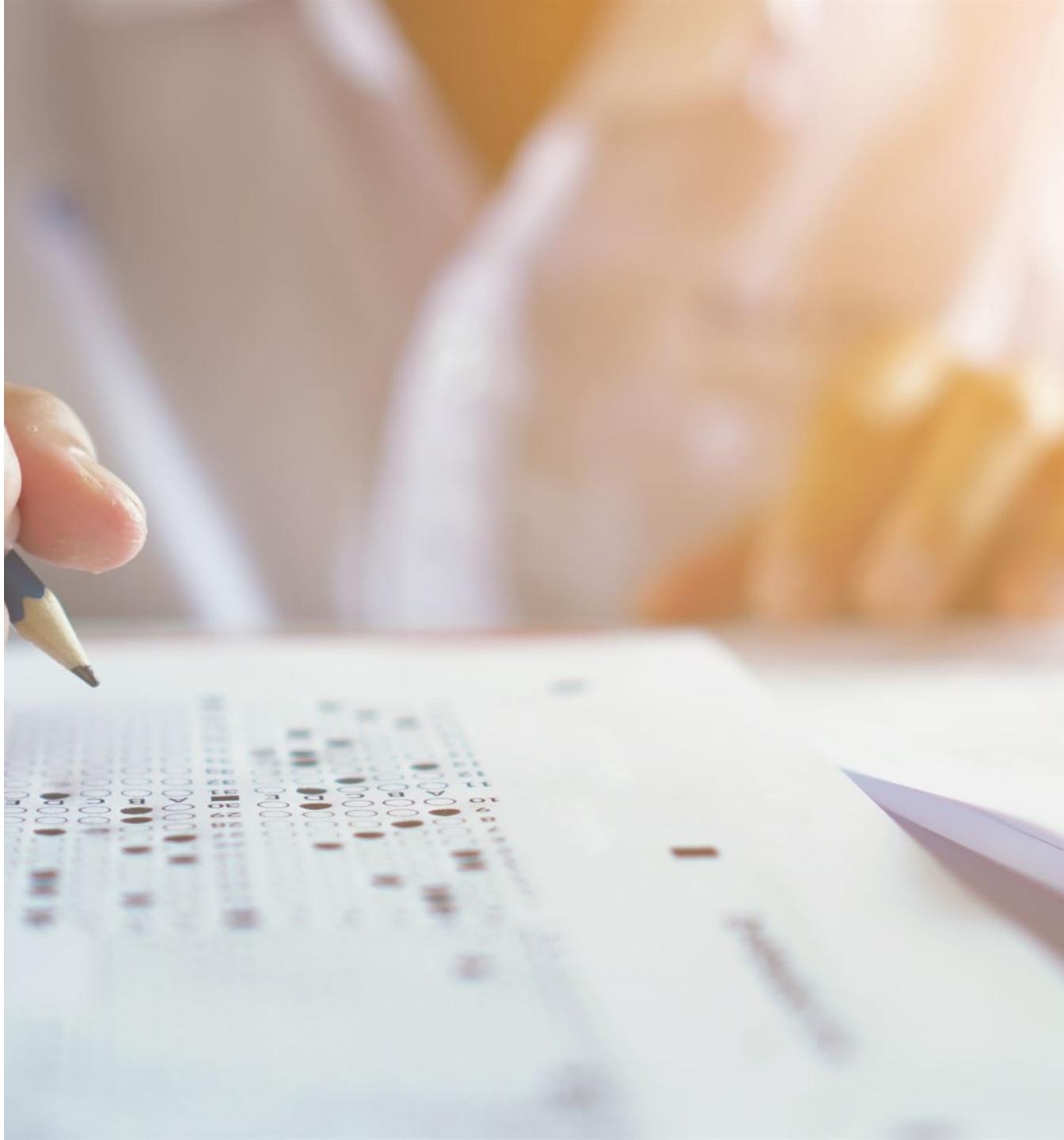


Use Case 4: Expense Report Summarisation

- Scenario: Summarising employee expense reports for management review.
- Prompt using ACTORS Framework: 'As a finance officer, produce a concise summary highlighting high-value transactions and anomalies.'
- Benefits: Streamlines expense review and fraud detection.
- Clarifies summary focus with defined ACTOR role.
- Improves financial oversight and control.

Use Case 5: Tax Compliance Documentation

- Scenario: Drafting tax compliance documents for audits.
- Prompt using ACTORS Framework: 'As a tax consultant, draft formal compliance documents focusing on regulatory adherence and deadlines.'
- Benefits: Increases compliance accuracy and audit readiness.
- Guides formal documentation with clear ACTOR definition.
- Supports timely and precise tax reporting.



Use Cases for Finance using DRAFT

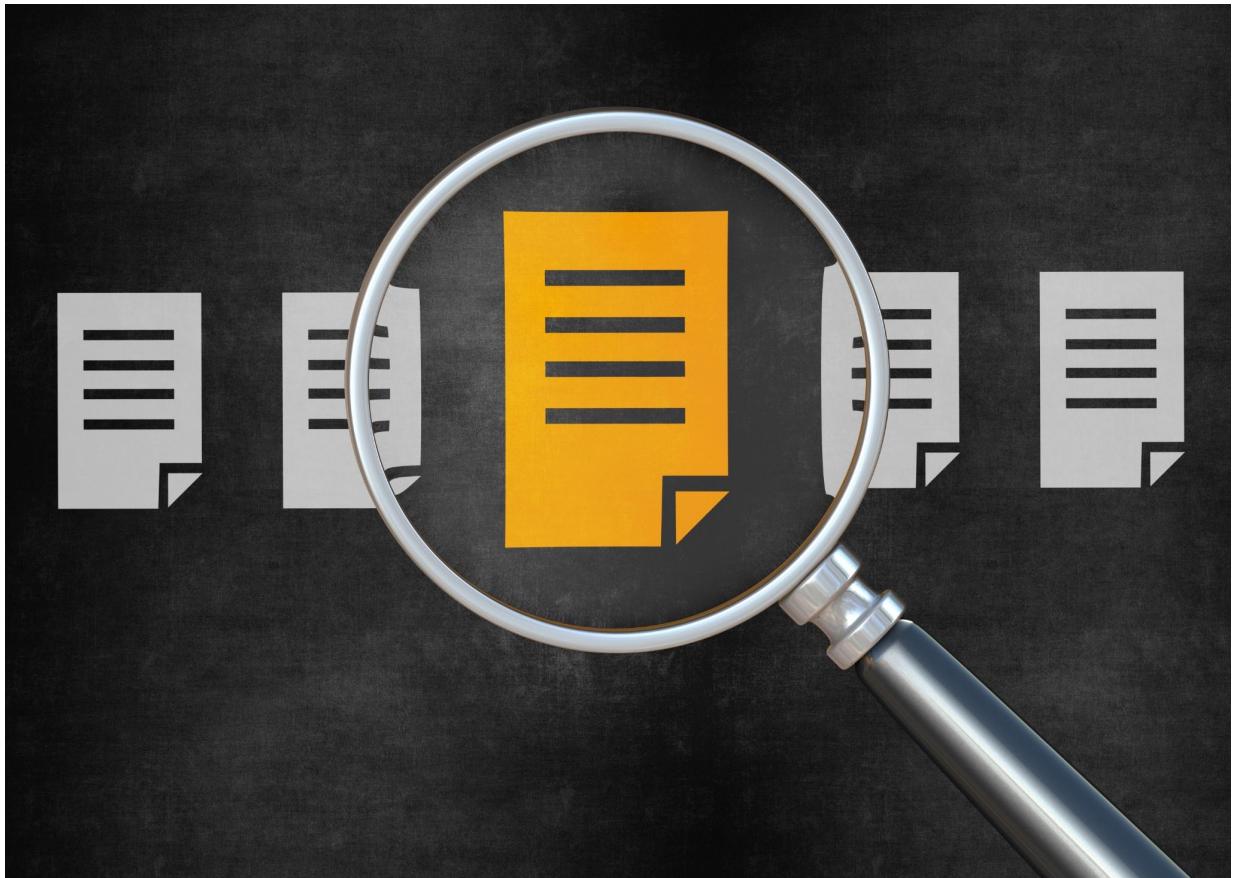
Surendra Panpaliya

Founder and CEO, GKTCS Innovations

<https://www.linkedin.com/in/surendrarp>

Use Case 1: Financial Report Formatting

- Scenario: Automate formatting of monthly financial reports for clarity.
- Prompt: 'Draft a concise, bullet-point summary highlighting key financial metrics.'
- Benefits: Enhances report readability and standardises presentation style.





Use Case 2: Budget Proposal Presentation

- Scenario: Creating detailed budget proposals with structured format.
- Prompt: 'Draft a formal proposal with clearly separated sections and tables.'
- Benefits: Improves proposal clarity and facilitates easier review and approval.

Use Case 3: Risk Analysis Summary



- Scenario: Summarising financial risk reports in an executive-friendly format.
- Prompt: 'Draft a concise paragraph highlighting key risk factors and mitigations.'
- Benefits: Enables quick comprehension and informed decision-making.

Use Case 4: Expense Report Overview

- Scenario: Summarising expense reports into bullet points for management review.
- Prompt: 'Draft bullet points highlighting significant transactions and trends.'
- Benefits: Streamlines review process and highlights key financial data.



Use Case 5: Tax Compliance Document Drafting

- Scenario: Preparing formal tax documents for audit compliance.
- Prompt: 'Draft a formal report detailing regulatory adherence and deadlines.'
- Benefits: Enhances compliance accuracy and audit readiness.



Use Cases for Finance using FOCUS

Surendra Panpaliya

Founder and CEO, GKTCS Innovations

<https://www.linkedin.com/in/surendrarp>

Use Case 1: Financial Reporting Automation

- Scenario: Automate monthly financial report generation.
- Prompt using FOCUS Framework: 'Create a concise report focusing on revenue and expenses.'
- Benefit: Enhances clarity and relevance of financial summaries.



Use Case 2: Budget Proposal Drafting

- Scenario: Prepare detailed budget proposals for new projects.
- Prompt using FOCUS Framework: 'Draft a budget proposal focusing on costs and resource allocation.'
- Benefit: Improves detail accuracy and proposal effectiveness.



Use Case 3: Financial Risk Analysis

- Scenario: Assess risks in investment portfolios.
- Prompt using FOCUS Framework: 'Prepare a risk assessment focusing on market volatility and credit risks.'
- Benefit: Provides targeted and actionable risk insights.



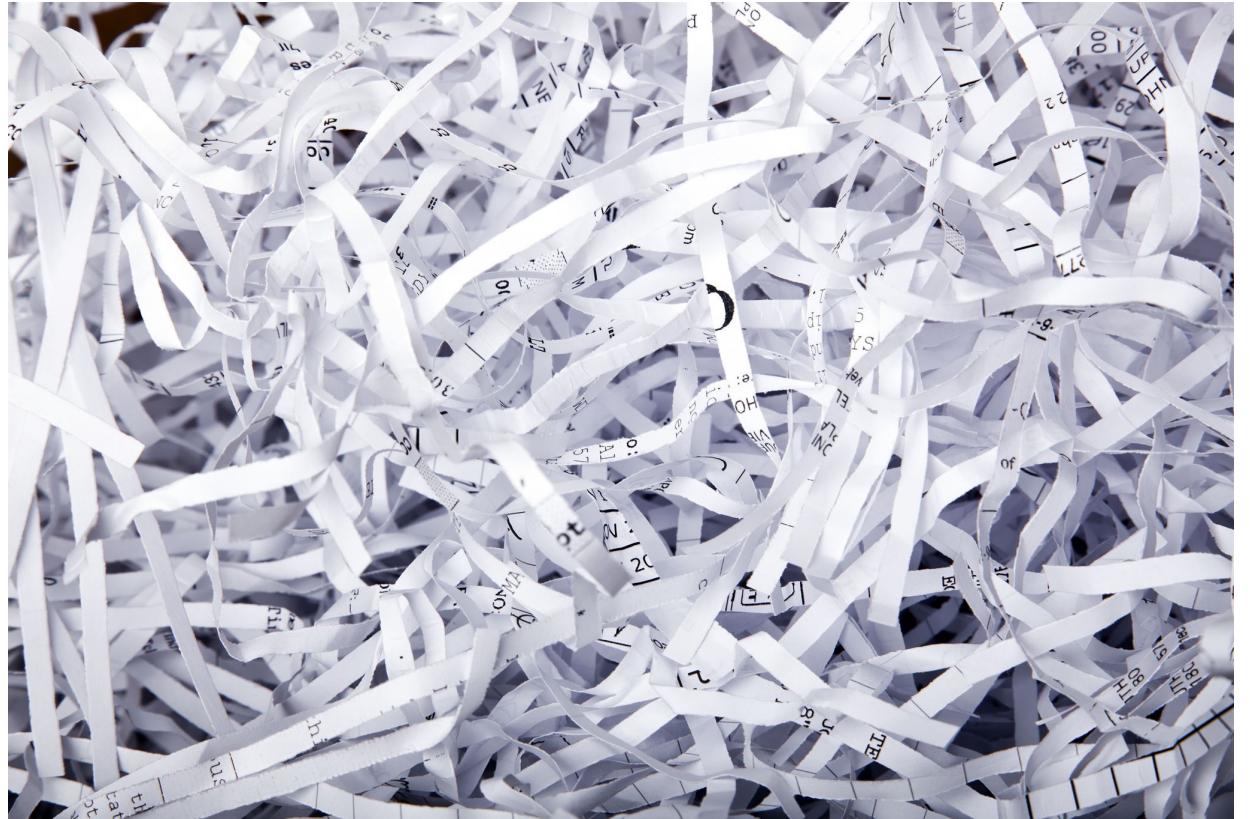
Use Case 4: Expense Report Summarisation

- Scenario: Summarise employee expense reports for management review.
- Prompt using FOCUS Framework: 'Produce a summary highlighting high-value transactions and anomalies.'
- Benefit: Streamlines expense review and fraud detection.



Use Case 5: Tax Compliance Documentation

- Scenario: Draft tax compliance documents for audits.
- Prompt using FOCUS Framework: 'Draft compliance documents focusing on regulatory adherence and deadlines.'
- Benefit: Increases compliance accuracy and audit readiness.



Use Cases for Finance (ACTOR/DRAFT/FOCUS)

Surendra Panpaliya

Founder and CEO, GKTCS Innovations

<https://www.linkedin.com/in/surendrarp>

Use Case 1: Financial Reporting Automation

- Scenario: Automating monthly financial report generation.
- Weak Prompt: 'Generate financial report for last month.'
- Prompt Using Framework: 'As a finance analyst (ACTOR), create a concise monthly report (DRAFT) focusing on revenue and expenses (FOCUS).'
- Practice: Draft reports with varying ACTOR roles and FOCUS areas.
- Benefit: Improves clarity and relevance of financial summaries.



Use Case 2: Budget Proposal Drafting

- Scenario: Preparing a budget proposal for a new project.
- Weak Prompt: 'Write a budget proposal for the project.'
- Prompt Using Framework: 'As a project manager (ACTOR), draft a detailed budget proposal (DRAFT) focusing on cost estimates and resource allocation (FOCUS).'
- Practice: Create prompts targeting different project phases.
- Benefit: Enhances detail accuracy and proposal effectiveness.



Use Case 3: Financial Risk Analysis

- Scenario: Analysing financial risks for investment portfolios.
- Weak Prompt: 'Analyse the risks in this portfolio.'
- Prompt Using Framework: 'As a financial analyst (ACTOR), prepare a risk assessment summary (DRAFT) focusing on market volatility and credit risks (FOCUS).'
- Practice: Test prompts with varied risk factors.
- Benefit: Provides targeted and actionable risk insights.



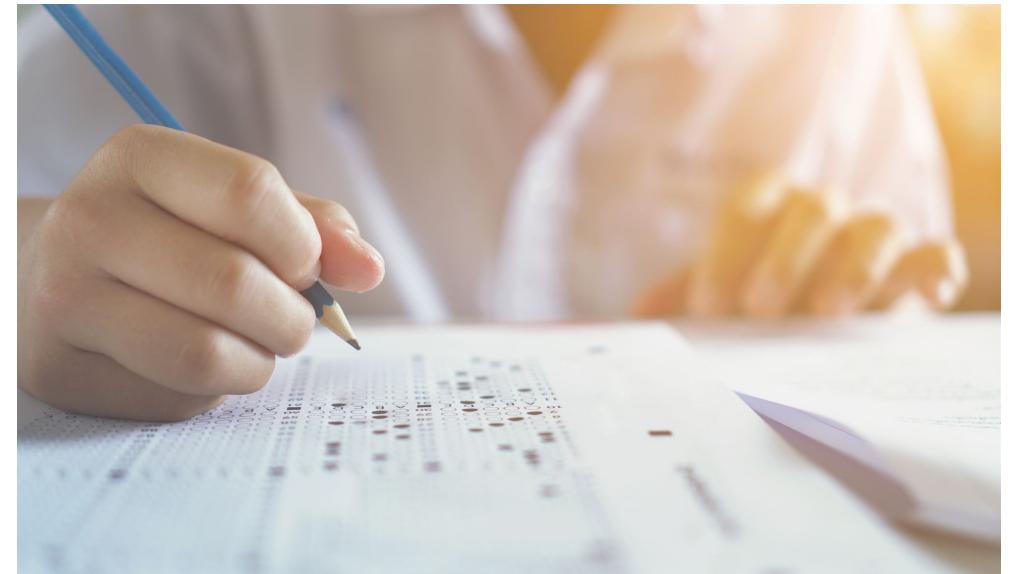
Use Case 4: Expense Report Summarisation



- Scenario: Summarising employee expense reports for management.
- Weak Prompt: 'Summarise these expenses.'
- Prompt Using Framework: 'As a finance officer (ACTOR), produce a concise summary (DRAFT) highlighting high-value transactions and anomalies (FOCUS).'
- Practice: Generate summaries with varying focus points.
- Benefit: Streamlines expense review and fraud detection.

Use Case 5: Tax Compliance Documentation

- Scenario: Preparing tax compliance documents for audits.
- Weak Prompt: 'Prepare tax documents.'
- Prompt Using Framework: 'As a tax consultant (ACTOR), draft formal compliance documents (DRAFT) focusing on regulatory adherence and deadlines (FOCUS).'
- Practice: Create prompts for different tax scenarios.
- Benefit: Increases compliance accuracy and audit readiness.



Use Case 6: Investment Presentation Creation



- Scenario: Creating presentations for investor meetings.
- Weak Prompt: 'Make an investment presentation.'
- Prompt Using Framework: 'As a financial advisor (ACTOR), design a clear presentation (DRAFT) emphasising portfolio performance and growth strategies (FOCUS).'
- Practice: Develop varied presentations for different investor types.
- Benefit: Enhances communication and investor confidence.

Use Case 7: Cost-Benefit Analysis Reports

- Scenario: Producing cost-benefit analysis for projects.
- Weak Prompt: 'Write a cost-benefit report.'
- Prompt Using Framework: 'As a business analyst (ACTOR), prepare a detailed report (DRAFT) focusing on financial impacts and resource utilisation (FOCUS).'
- Practice: Write reports with different project scopes.
- Benefit: Supports informed strategic decisions.



Use Case 8: Cash Flow Forecasting

- Scenario: Forecasting cash flow for the next quarter.
- Weak Prompt: 'Forecast cash flow for next quarter.'
- Prompt Using Framework: 'As a finance planner (ACTOR), create a forecast report (DRAFT) focusing on inflows, outflows, and risks (FOCUS).'
- Practice: Develop forecasts under different market conditions.
- Benefit: Enhances planning and financial stability.



Use Case 9: Audit Preparation Summaries

- Scenario: Summarising financial data for audit preparation.
- Weak Prompt: 'Prepare audit summary.'
- Prompt Using Framework: 'As an auditor (ACTOR), draft a summary report (DRAFT) focusing on compliance and discrepancies (FOCUS).'
- Practice: Generate summaries with different compliance focuses.
- Benefit: Streamlines audit processes and accuracy.



Use Case 10: Financial Policy Drafting

- Scenario: Drafting organisational financial policies.
- Weak Prompt: 'Write financial policies.'
- Prompt Using Framework: 'As a finance director (ACTOR), draft formal policies (DRAFT) focusing on expense management and reporting standards (FOCUS).'
- Practice: Create policies addressing diverse organisational needs.
- Benefit: Improves policy clarity and adherence.



4: Use Case Simulation by Industry



Group Exercise Overview

- Divide learners into groups by industry domain.
- Each group will focus on creating prompts specific to their assigned industry.
- Encourages collaboration and hands-on learning.
- Promotes understanding of prompt engineering in varied contexts.



Healthcare Industry Exercise

- Summarise complex case files into layman's terms using Word.
- Apply ACTOR, FOCUS, and DRAFT frameworks in prompt creation.
- Practice creating clear, accurate medical document summaries.
- Hands-on use of Microsoft Copilot to test prompts.



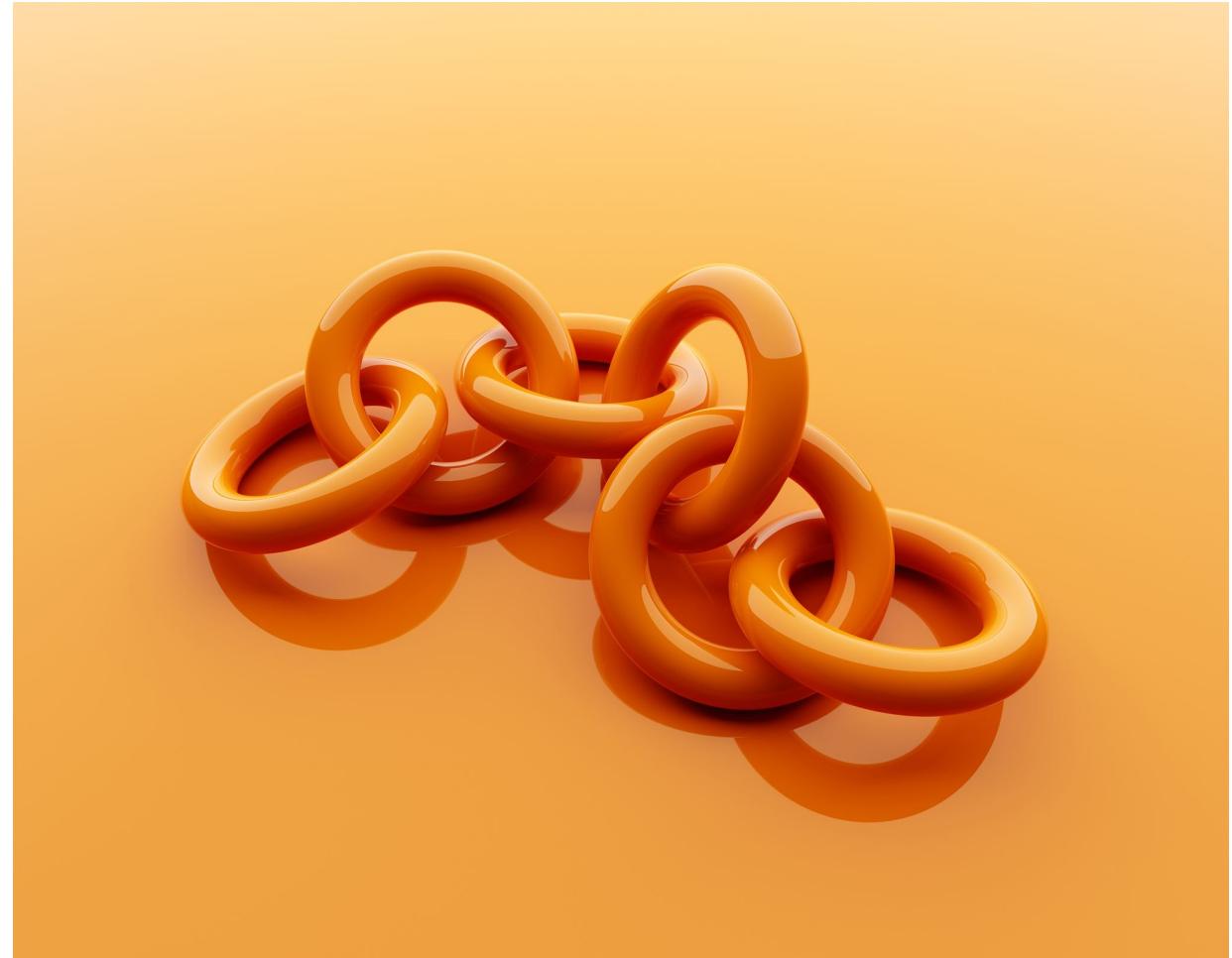
Retail Industry Exercise

- Draft promotional emails using provided product data in Outlook.
- Use prompt engineering frameworks for targeted messaging.
- Emphasise product features and promotional offers.
- Hands-on activity with sample retail datasets.



IT/Services Industry Exercise

- Create client status update slides from email chains in PowerPoint.
- Organise and summarise key project information effectively.
- Apply ACTOR, FOCUS, and DRAFT for precise prompt instructions.
- Engage in hands-on slide creation and prompt testing.



HR Industry Exercise

- Write policy document outlines from notes using Word.
- Focus prompts on specific policy areas with ACTOR, FOCUS, DRAFT.
- Enhance clarity and compliance in HR documentation.
- Practice drafting and refining policy prompts.



Manufacturing Industry Exercise

- Summarise inspection reports into key observations using Excel and Word.
- Highlight critical data points with targeted prompts.
- Utilise ACTOR, FOCUS, and DRAFT for effective summarisation.
- Hands-on practice with real manufacturing data.



Group Exercise Finance

Finance Group Exercise Overview

- Divide participants into finance-focused groups for collaborative learning.
- Each group will create and test three prompts for finance scenarios.
- Encourages hands-on practice with real-world finance data and challenges.
- Promotes understanding of prompt engineering in financial contexts.
- Fosters teamwork and knowledge sharing among finance professionals.



Exercise Task 1: Financial Reporting Automation



- Group crafts prompts to automate monthly financial report generation.
- Focus on clear ACTOR and FOCUS elements within prompts.
- Test prompts using sample financial data for accuracy.
- Discuss prompt improvements and challenges encountered.
- Share results and feedback within the group.

Exercise Task 2: Budget Proposal Drafting

- Create prompts for drafting detailed budget proposals.
- Incorporate cost estimates and resource allocation focus.
- Use prompt frameworks to enhance proposal structure.
- Perform hands-on testing with provided budget data.
- Evaluate prompt effectiveness and refine as needed.



Exercise Task 3:

Financial Risk Analysis

- Develop prompts to assess investment portfolio risks.
- Focus on market volatility and credit risk factors.
- Apply prompt engineering to generate actionable insights.
- Test prompts with diverse risk scenarios.
- Collaborate to improve prompt clarity and precision.



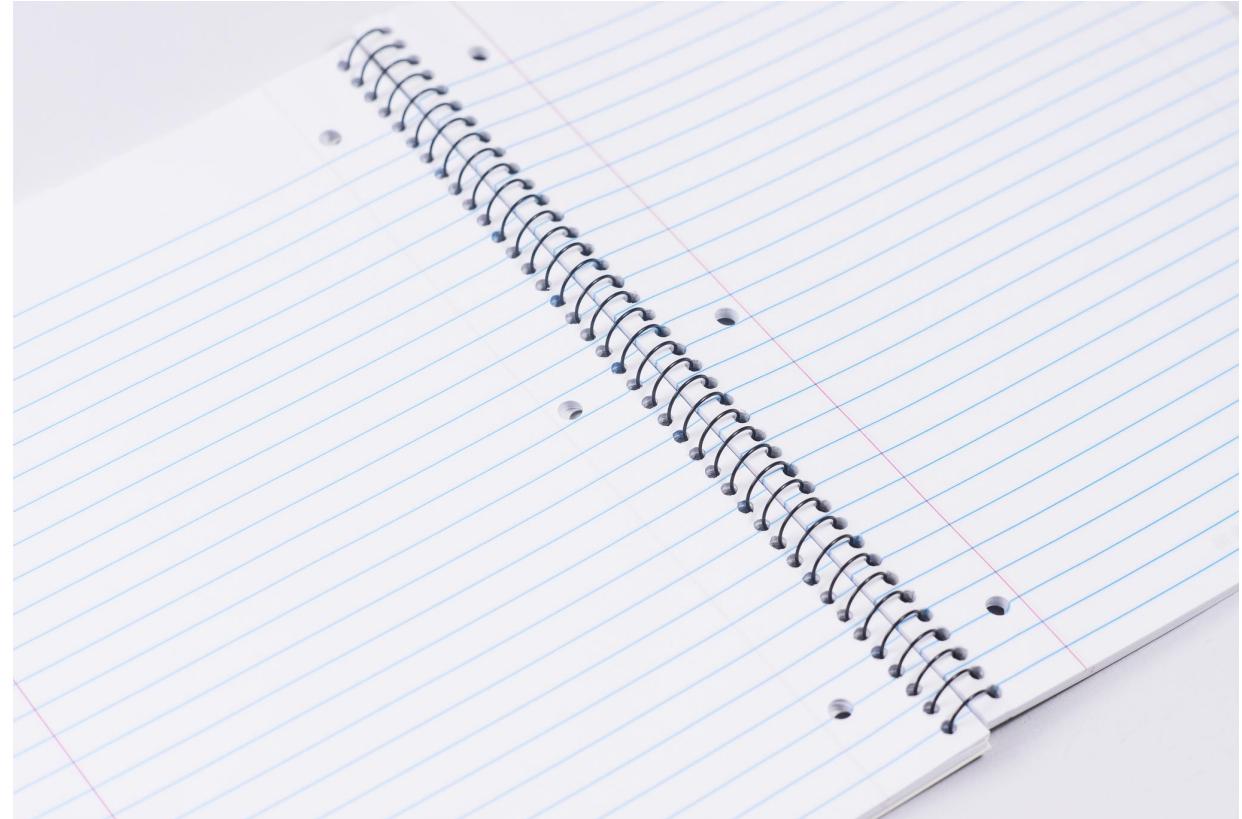


Group Collaboration and Review

- Share prompt outcomes and discuss lessons learned.
- Compare approaches and identify best prompt practices.
- Encourage peer feedback to refine prompt crafting skills.
- Document key takeaways for future prompt engineering tasks.
- Prepare for applying skills to real finance challenges.

Prompt Crafting Best Practices

- Define clear ACTOR roles for accurate context.
- Set precise FOCUS to target desired content.
- Choose appropriate DRAFT styles for output format.
- Iterate and refine prompts for improved results.



Collaborative Prompt Testing

- Share prompt outcomes within groups for feedback.
- Compare different prompt approaches and results.
- Identify improvements through peer discussions.
- Foster a learning environment through collaboration.



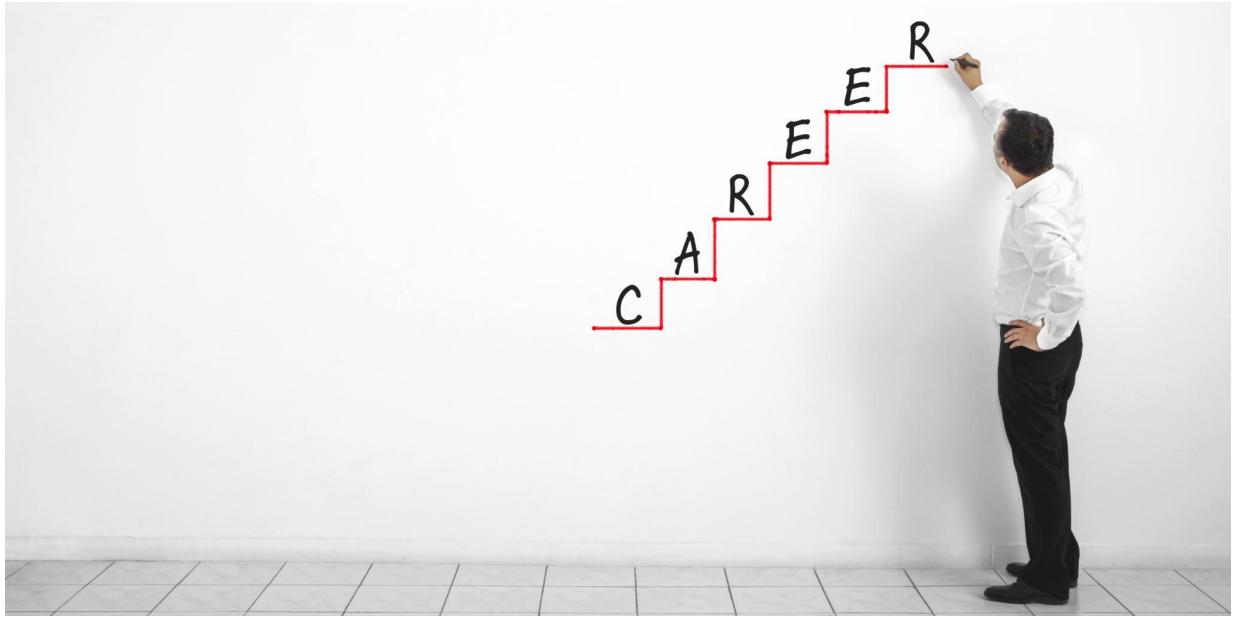
Leveraging Microsoft Copilot

- Utilise Copilot's AI capabilities for prompt execution.
- Explore application features across Word, Outlook, and PowerPoint.
- Understand Copilot's strengths and limitations.
- Maximise productivity through AI-assisted workflows.



Next Steps and Continuous Learning

- Apply learned skills to real-world industry challenges.
- Continue practising prompt engineering independently.
- Stay updated on AI advancements and tool features.
- Share knowledge within your organisation.



Let's Connect



Professional Email Contact

surendra@gktcs.com

LinkedIn Networking

<https://www.linkedin.com/in/surendrarp>

Company Website Information

<https://www.gktcs.com>

Direct Phone Assistance

+91 9975072320

Happy Learning!!
Thanks for Your
Patience 😊

Surendra Panpaliya
GKTCS Innovations

