



# PROMPT ENGINEERING

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# Prompt Engineering

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# 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.

# Getting Microsoft 365 Copilot



## Access Official Copilot Pages

Begin by navigating to the official Copilot website to explore options for personal or business use.

## Select the Right Copilot Plan

Choose a suitable Copilot plan, such as Pro for individuals or a business version, depending on your needs.

# Getting Microsoft 365 Copilot



## Complete Purchase and Setup

Follow the purchasing steps, sign in with your account, and ensure you meet any system or subscription prerequisites.

<https://www.microsoft.com/en-in/store/b/copilotpro>

# 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**

# **5. Advanced Prompting, Limitations & Governance**

Prompt chaining (multi-step outputs)

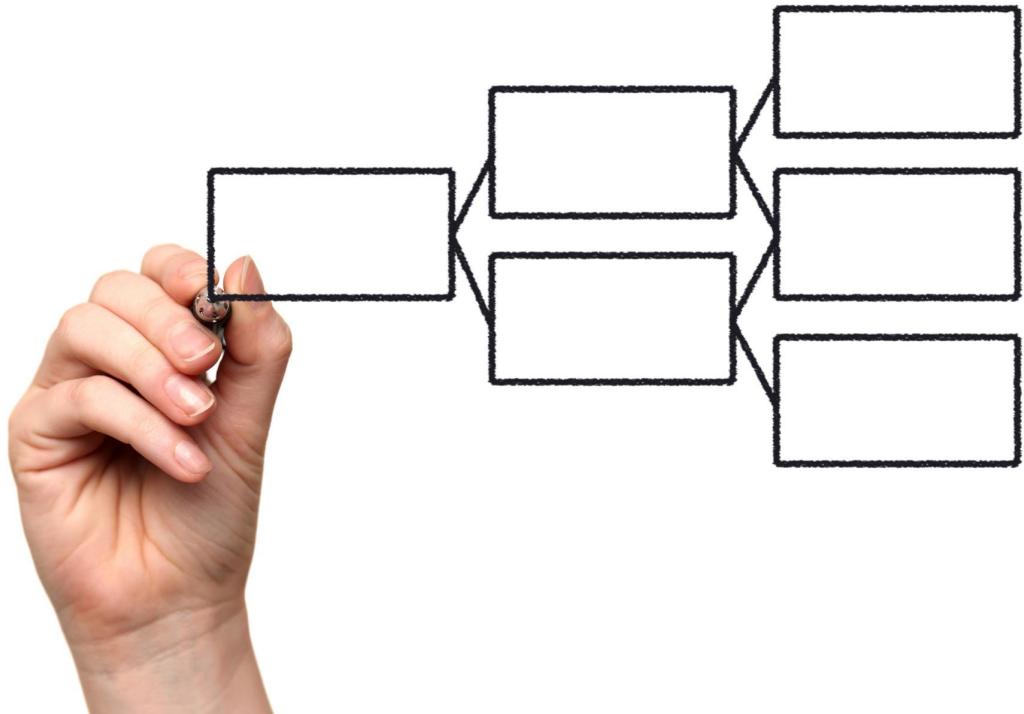
Prompt reusability & templates

Copilot limitations and best practices

Governance: data sensitivity, compliance, and prompt hygiene

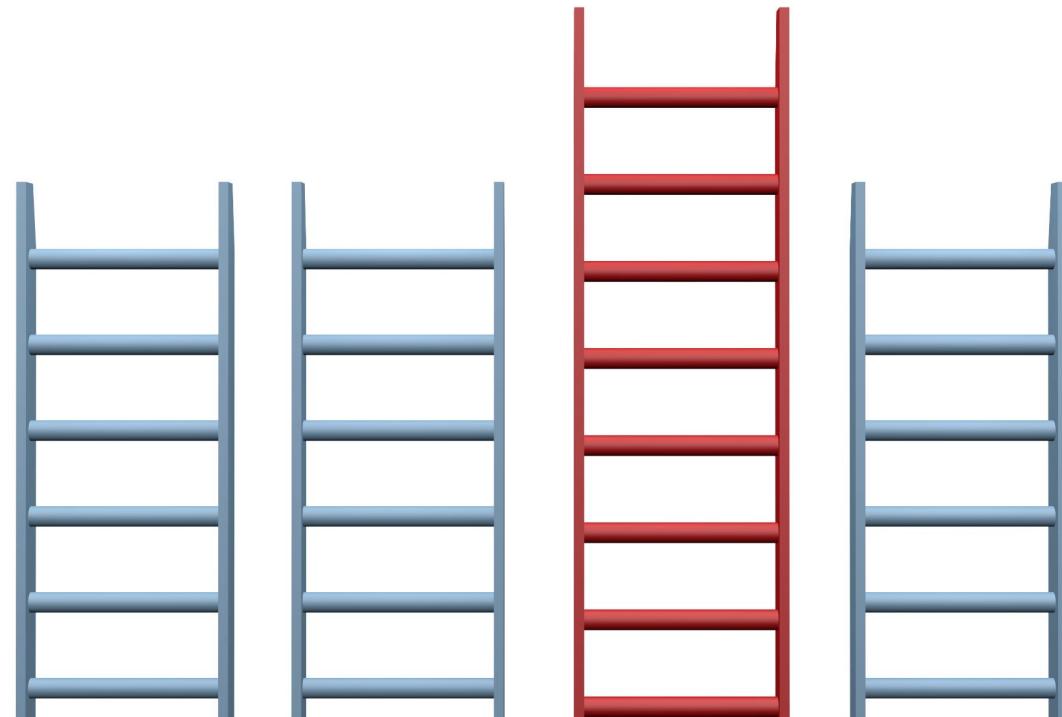
# What is Advanced Prompting?

- Advanced prompting involves crafting complex instructions for AI systems.
- It enhances the quality and relevance of AI-generated responses.
- Techniques include layering prompts and contextualising tasks effectively.



# Understanding Prompt Chaining

- Prompt chaining breaks down complex tasks into smaller, manageable steps.
- Each prompt builds on the previous output to maintain task coherence.
- This method ensures clarity, accuracy, and structured results.



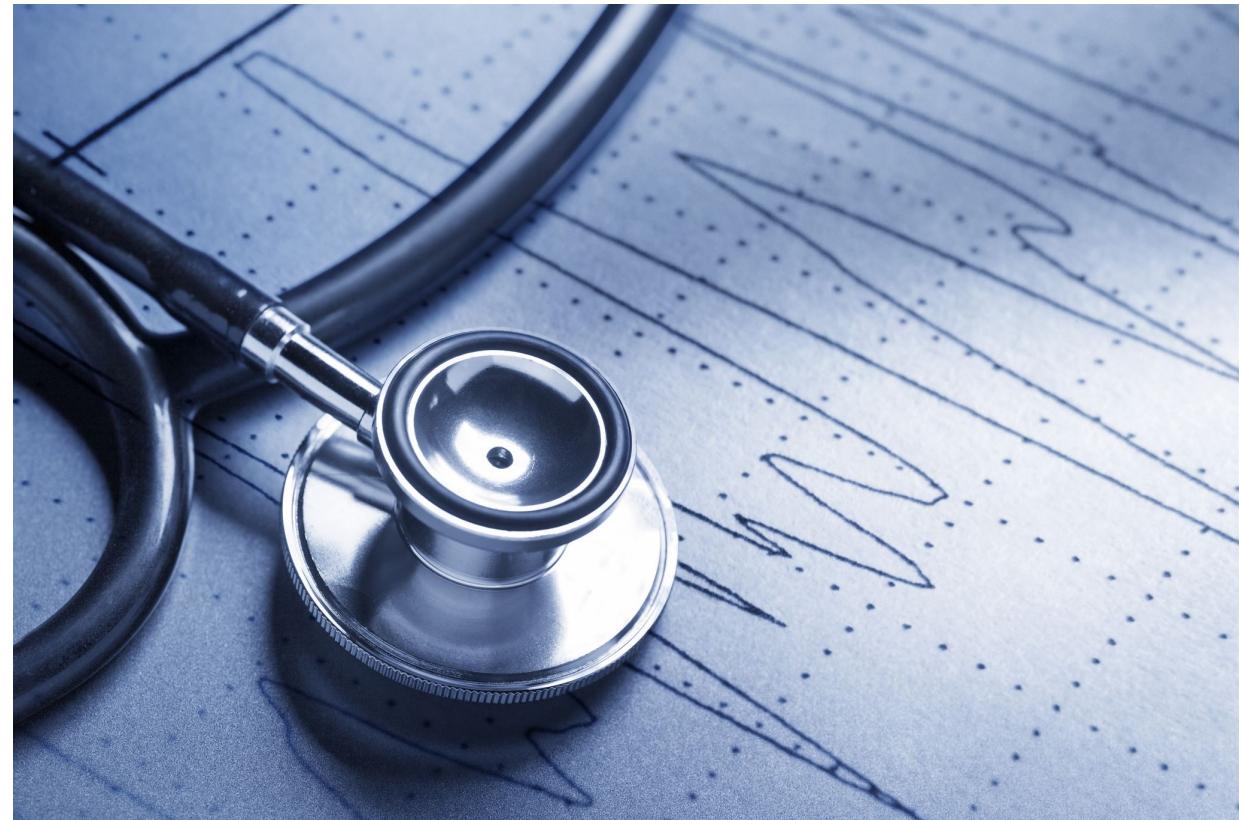
# Healthcare Use Case: Patient Education

- Transforms complex medical files into easy-to-understand handouts.
- Uses steps like extracting key information, rephrasing, and formatting.
- Produces clear, structured leaflets for patient guidance.



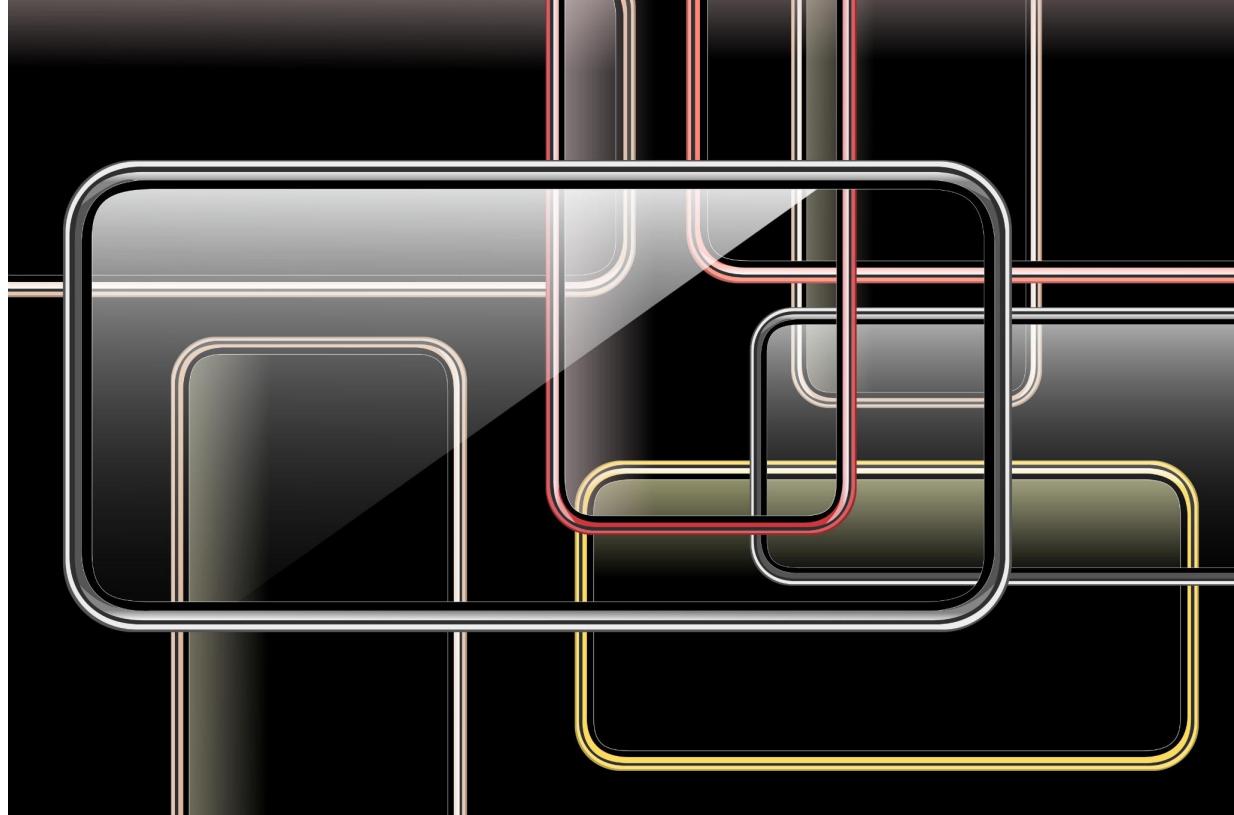
## **Example: Simplifying Healthcare Communication**

- Extract diagnosis, medications, and lifestyle advice from records.
- Rephrase content using simple, everyday language for patients.
- Format handouts with clear sections on problems, actions, and follow-ups.



# Prompt Reusability and Templates

- Design reusable prompt templates for consistent results.
- Saves time by avoiding repeated effort in prompt crafting.
- Facilitates easier training and onboarding of teams.



# Retail Use Case: Product Marketing

- Use template prompts to draft promotional emails effectively.
- Target specific customer segments with tailored messages.
- Structure emails with subject, hook, bullet points, offers, and CTAs.



# Example: Retail Marketing Email

- Promote the SmartBlend Mixer 5000 to young professionals and families.
- Adopt a friendly, lifestyle-oriented tone in the message.
- Include a special 20% discount offer and free delivery.
- Call to action: Encourage immediate purchase with 'Shop Now'.



# Understanding Copilot Limitations

- Dependence on accurate data grounding for reliable output.
- Risk of hallucinations where AI makes up information.
- Challenges with maintaining consistent formatting and tone.
- Security and compliance considerations in business use.



# Best Practices for Effective Prompting

- Be specific about role, task, audience, and constraints in prompts.
- Ground outputs by instructing AI to use trusted data only.
- Structure results clearly using tables, lists, or slides.
- Iterate prompts by refining, correcting, and expanding as needed.
- Set appropriate tone and audience for each task.



# Copilot Limitations & Best Practices

- Understand key limitations of Microsoft 365 Copilot for better use.
- Adopt best practices to maximise effectiveness and reliability.
- Learn sample prompts to handle common Copilot challenges.



# Data Dependency Challenges

- Copilot relies heavily on the input data provided.
- Incomplete or unclear data leads to inaccurate outputs.
- Best practice: clearly specify data scope in prompts.



# Avoiding Hallucinations in AI Outputs

- Copilot may generate information not grounded in source data.
- Strictly instruct Copilot to use only verified content.
- Use clear constraints to minimise misinformation.



# Ensuring Consistent Formatting

- Copilot can miss formatting instructions without clear guidance.
- Specify output structure explicitly in prompts.
- Use sections, bullet points, or tables for clarity.



# Managing Tone Appropriately

- Copilot might default to inappropriate tones.
- Specify tone requirements (formal, friendly, etc.) in prompts.
- Adjust tone for different audiences and contexts.



# **Security and Compliance Considerations**

- Copilot may inadvertently expose sensitive data.
- Use prompts to filter or summarise confidential information safely.
- Be mindful of organisational compliance requirements.



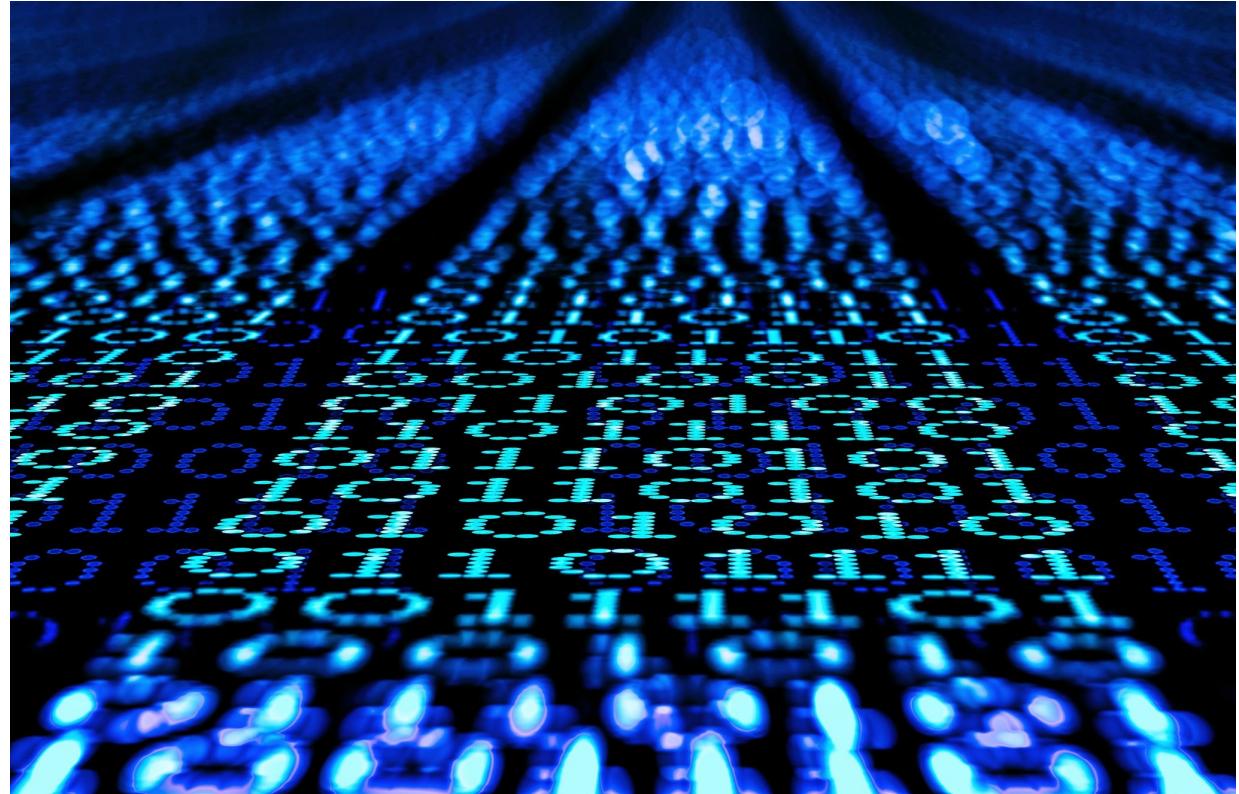
# **Best Practice: Be Specific**

- Define roles, tasks, audiences, and constraints precisely.
- Specific prompts yield more accurate and relevant results.
- Example: summarising financial risks within word limits.



# Best Practice: Ground Outputs in Data

- Instruct Copilot to reference only provided data sources.
- Prevents addition of unsupported or fabricated content.
- Useful for critical tasks like risk reporting.



# **Best Practice: Structure Outputs Clearly**

- Specify formats like tables, lists or slides for clarity.
- Organised outputs improve comprehension and usability.
- Example: splitting meeting summaries into decisions and next steps.



# Summary and Takeaways

- Awareness of Copilot's limitations is essential for success.
- Clear, specific, and structured prompts maximise effectiveness.
- Adopting best practices leads to reliable and secure AI outputs.



# Governance: Data Sensitivity, Compliance, and Prompt Hygiene

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# **Governance: Data Sensitivity, Compliance, and Prompt Hygiene**

- Understand the importance of governance in AI use
- Focus on data sensitivity, regulatory compliance, and prompt hygiene
- Ensure responsible and secure AI interactions



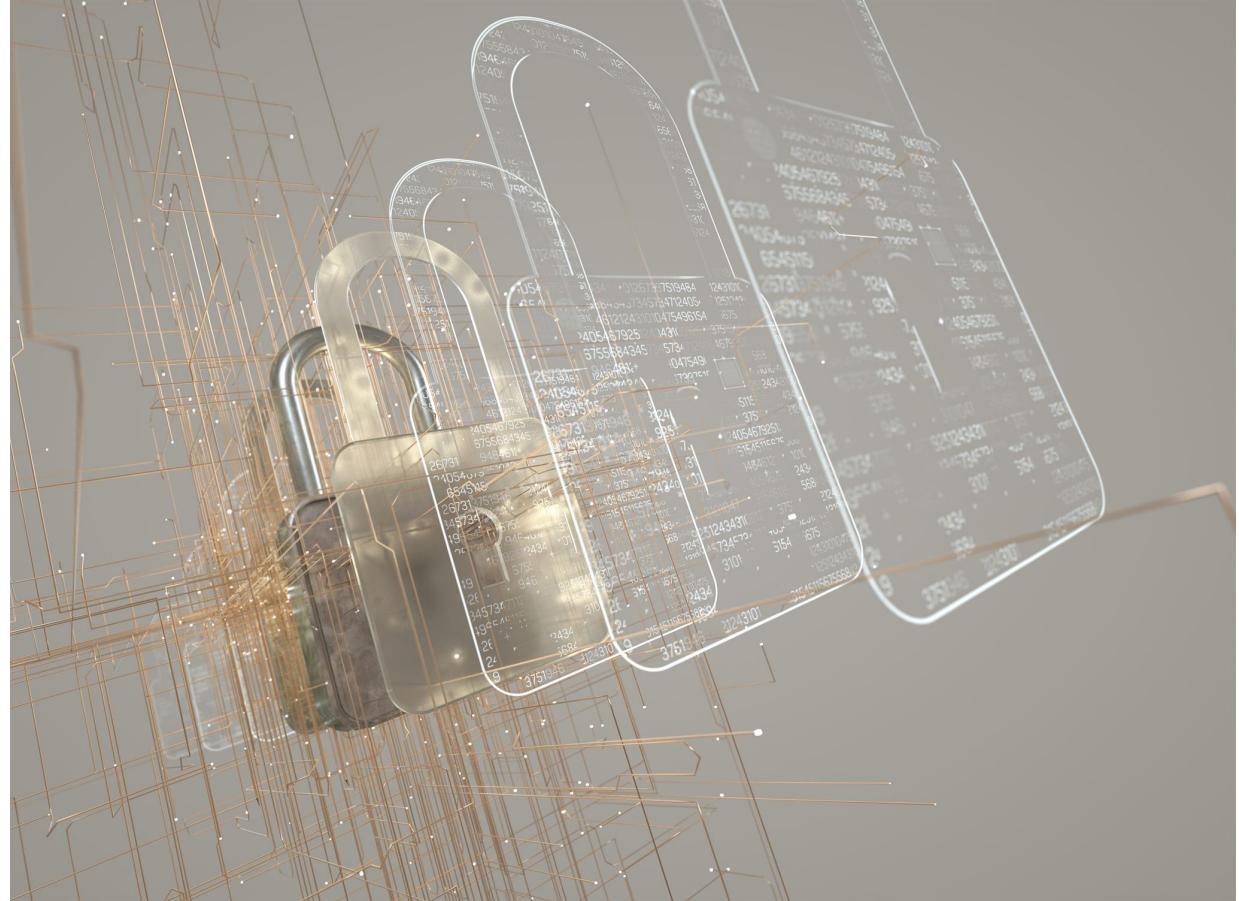
# Overview of Governance in AI

- Governance is essential for ethical AI deployment
- Main areas include data sensitivity, compliance, and prompt hygiene
- Presentation structured to address these core topics



# Understanding Data Sensitivity

- AI processes the data it is given, including sensitive information
- Risk of accidental exposure of confidential or personal data
- Implement best practices to protect data privacy and security



# Best Practices for Data Sensitivity

- Avoid sharing confidential or personally identifiable information
- Anonymize or mask data before use with AI tools
- Example: Summarize patient cases without personal identifiers



# Ensuring Compliance in AI Usage

- Align AI use with industry and legal regulations
- Avoid violations that could lead to penalties
- Maintain logs of prompt usage for auditing purposes



# Use Case: Compliance in Finance

- Summarize financial data while protecting raw transactional details
- Focus on key metrics like revenue, profit, and risks
- Use summary formats to share insights securely



# Importance of Prompt Hygiene

- Write clear, compliant, and reusable AI prompts
- Ensure specificity and structured inputs
- Avoid dumping raw documents to prevent errors



# Best Practices for Prompt Hygiene

- Be explicit with roles, context, and output formats
- Create reusable prompts for consistency
- Example: Outline for workplace flexibility policy



# Summary of Governance Best Practices

- Protect sensitive data by avoiding exposure of confidential information
- Ensure AI use complies with regulations and maintains audit trails
- Write clear, structured prompts to guide AI safely and effectively



# Questions & Answers

- Open discussion on governance in AI
- Address queries on data sensitivity and compliance
- Explore prompt hygiene best practices with examples



# 5. Advanced Prompting, Limitations & Governance



**Exercise:**



Design a 3-step prompt flow (e.g., extract > rephrase > format)

# Objective



Use Microsoft 365 Copilot



to convert disorganized meeting notes



into a refined executive summary.

# **Meeting Notes - Financial Data Review**

**Date:** 14th September 2025

**Attendees:** John, Sarah, Michael, Emily

**Agenda:**

Review of Q2 Financial Performance

Budget Allocation for Q3

Discussion on Cost-Cutting Measures

# Notes:

John started the meeting by presenting the Q2 financial performance. He mentioned that the revenue was up by 15% compared to Q1, but the expenses also increased by 10%. The net profit margin was slightly better than expected.

Sarah pointed out that the marketing expenses were higher than budgeted. She suggested reallocating some funds from the marketing budget to the R&D department.

Michael raised a concern about the rising operational costs. He proposed a detailed review of the current suppliers and potential negotiations for better rates.

Emily highlighted the need for cost-cutting measures. She suggested reducing travel expenses and implementing a more stringent approval process for discretionary spending.

# Action Items:

John to provide a detailed breakdown of the Q2 financial performance by the next meeting.

Sarah to prepare a revised budget proposal for Q3 with reallocated funds.

Michael to conduct a supplier review and present findings.

Emily to draft a cost-cutting plan and share it with the team.

# **Step 1: Extract**

Extract the key points from the messy meeting notes.

# Key Points from Financial Data Review Meeting

- Q2 revenue increased by 15% compared to Q1; expenses rose by 10%.
- Net profit margin exceeded expectations.
- Marketing expenses surpassed budget; suggestion to shift funds to R&D.
- Operational costs are climbing; proposal to review suppliers for better rates.
- Emphasis on cost-cutting: reduce travel expenses and tighten spending approvals.
- Action items include: breakdown of Q2 performance, revised budget for Q3, supplier review, and cost-cutting plan.

# Financial Consultant Prompt Flow: Extract



- Identify key financial data from complex reports.
- Focus on extracting relevant metrics and figures.
- Use AI to summarise large datasets efficiently.

## **Step 2: Rephrase**

- Rephrase the extracted key points for clarity and conciseness.

# Key Points from Financial Data Review Meeting

- Q2 revenue increased by 15% over Q1, while expenses rose by 10%.
- Net profit margin slightly exceeded expectations.
- Marketing expenses were higher than budgeted; recommendation to reallocate some funds to R&D.
- Operational costs are increasing; a supplier review is proposed to secure better rates.
- To manage costs, reducing travel and tightening discretionary spending approvals were suggested.

# Action Items:

- John: Provide a detailed Q2 financial breakdown for the next meeting.
- Sarah: Prepare a revised Q3 budget with updated fund allocations.
- Michael: Review current suppliers and present findings.
- Emily: Draft and share a cost-cutting plan with the team.

# Financial Consultant Prompt Flow: Rephrase

- Translate technical financial terms into clear language.
- Tailor communication to client understanding levels.
- Ensure accuracy while simplifying complex data.



## **Step 3: Format**

Format the rephrased key points into a structured summary.

# Structured Summary: Financial Data Review Meeting

## Key Financial Highlights

- Q2 Revenue: Increased by 15% compared to Q1
- Expenses: Rose by 10% over Q1
- Net Profit Margin: Slightly exceeded expectations
- Marketing Expenses: Surpassed budget; recommendation to redirect some funds to R&D
- Operational Costs: On the rise; supplier review proposed to secure better rates
- Cost Management: Suggestions include reducing travel and tightening discretionary spending approvals

# Action Items

- John: Provide a detailed Q2 financial breakdown for the next meeting
- Sarah: Prepare a revised Q3 budget with updated fund allocations
- Michael: Review current suppliers and present findings
- Emily: Draft and circulate a cost-cutting plan to the team

# Financial Consultant Prompt Flow: Format

- Organise information into structured reports or presentations.
- Use tables, charts, and bullet points for clarity.
- Highlight key findings and actionable recommendations.



# Let's Connect



## Professional Email Contact

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## LinkedIn Networking

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Happy Learning!!  
Thanks for Your  
Patience 😊

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