



# PROMPT ENGINEERING

---





# Prompt Engineering

**Surendra Panpaliya**

Founder and CEO, GKTC 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**



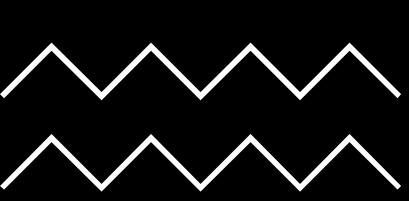
**Module 3: Prompt Engineering Techniques & Patterns**



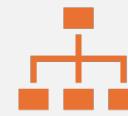
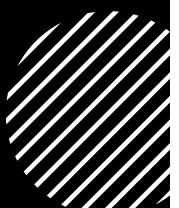
**Module 4: Use Case Simulation by Industry**



**Module 5: Advanced Prompting, Limitations & Governance**



### 3. Prompt Engineering Techniques & Patterns



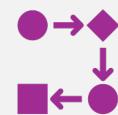
Role-based prompting (“Act as a Project Manager...”)



Tone and style control



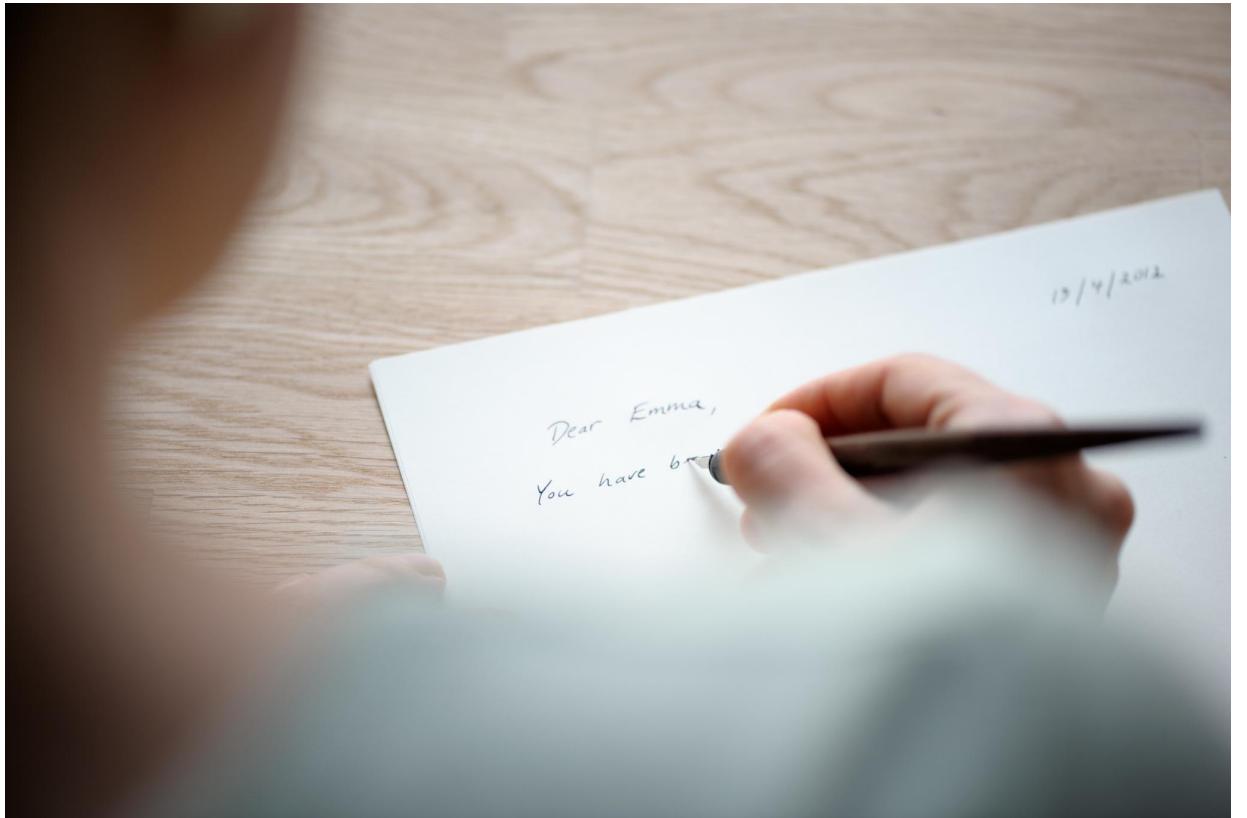
Output formatting (tables, lists, emails, slides)



Iterative prompting (Refine > Correct > Expand)

# Prompt Engineering with ACTOR Framework

- ACTOR stands for Actor, Context, Task, Objective, and Role.
- Defines clear roles to guide AI responses effectively.
- Enhances prompt specificity and output relevance.
- Example: 'Act as a Project Manager to summarise project risks.'
- Learners practice crafting prompts using ACTOR.



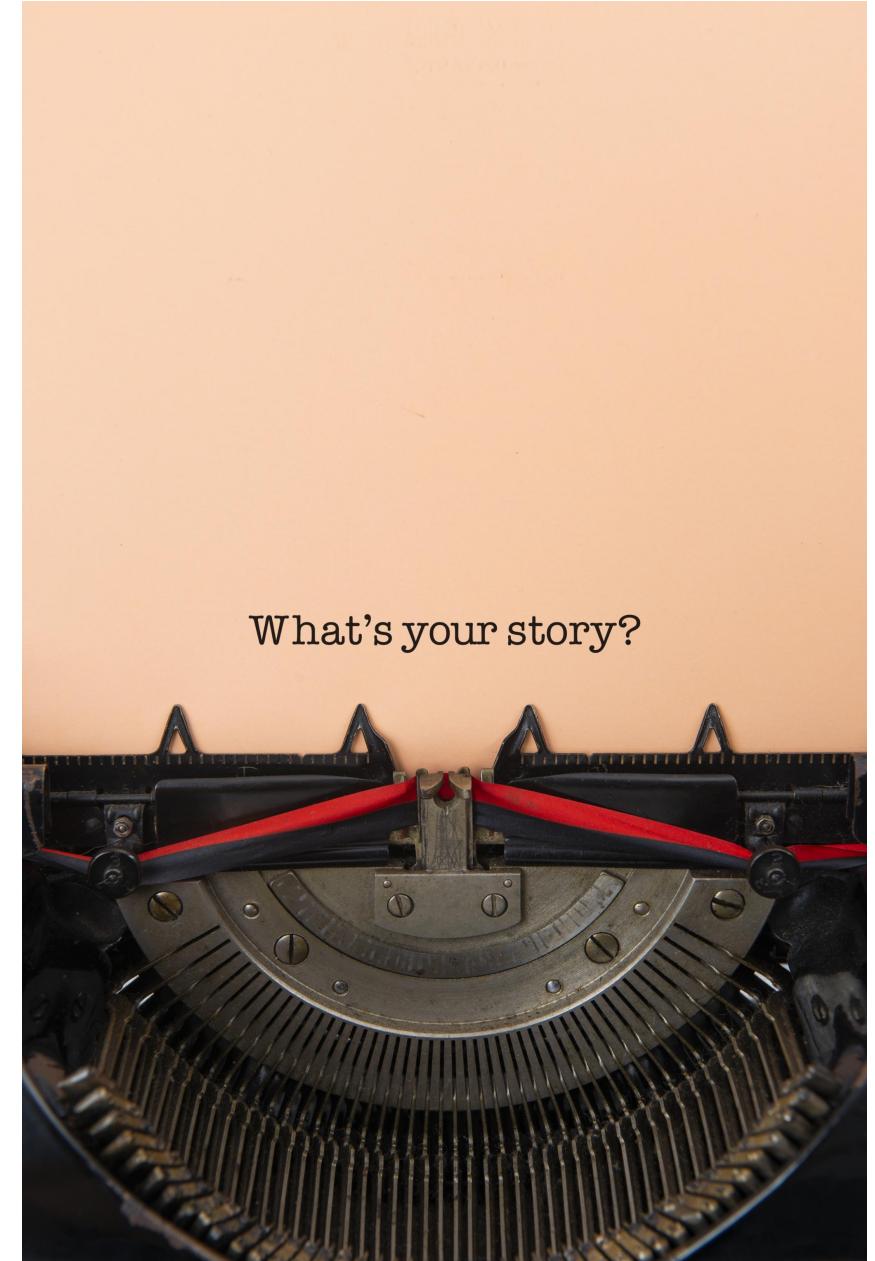
# Use Case Scenario: Financial Consultant Challenge

- Financial consultant faces complex quarterly sales data analysis.
- Current reports lack clarity and uniform formatting.
- Objective: deliver clear, actionable insights to management.
- Data volume and complexity hinder effective communication.



# Crafting Prompts Using ACTOR Framework

- Define Actor: specify AI as financial consultant.
- Set Context: quarterly sales data and market conditions.
- Clarify Task: summarise key sales trends and risks.
- State Objective: provide concise report for executives.
- Assign Role: trusted advisor delivering insights.



# **Example Prompt Using ACTOR Framework**

- ‘Act as a Financial Consultant analysing Q2 sales data.’
- ‘Summarise key trends, highlight risks.’
- ‘Provide a concise report for senior management.’
- ‘Focus on actionable insights to guide decisions.’



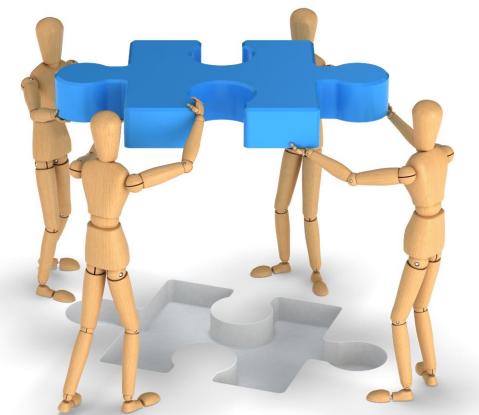
# Expected Output with ACTOR Framework



- Clear summary of sales performance and trends.
- Identification of potential risks and opportunities.
- Concise report tailored for management review.
- Relevant recommendations based on data analysis.

# **Benefits of ACTOR Framework for Financial Consulting**

- Enhances prompt clarity and precision.
- Improves relevance and usefulness of AI responses.
- Supports role-specific and context-aware outputs.
- Facilitates better communication and decision-making.



# **Enhancing Role-Based Prompting with ACTOR Framework**

- Define the role clearly to guide AI responses effectively.
- Use ACTOR to specify Actor, Context, Task, Objective, and Role.
- Example: 'Act as a Project Manager to summarise project risks.'
- Role-based prompts improve relevance and accuracy of outputs.



# Controlling Tone and Style Using FOCUS Framework

- FOCUS stands for Format, Objective, Context, User, and Style.
- Set tone to be formal, casual, persuasive, or technical as needed.
- Adjust style to match audience and communication purpose.
- Example: 'Write a formal email summarising quarterly results.'



# **FOCUS: Format Explained**

- Format defines the structure of the output, such as email, report, or table.
- Choosing the right format ensures clear and effective communication.
- Formats should match the intended audience and purpose.
- Examples include memos, presentations, and spreadsheets relevant to finance.
- Proper format enhances readability and professionalism.



# **FOCUS: Objective Clarified**

- Objective defines the goal or purpose of the communication or task.
- Clear objectives guide the AI to produce focused and relevant outputs.
- Examples include summarising financial risks or preparing investment recommendations.
- Objectives help avoid ambiguous or irrelevant information.
- Aligning objectives with client needs improves decision-making.



# FOCUS: Context Importance



- Context provides background information to inform the AI's response.
- Including market conditions, company data, or reporting periods helps accuracy.
- Context ensures outputs are tailored to the specific financial scenario.
- It prevents generic or misaligned responses.
- Examples include current economic trends or quarterly financials.

# FOCUS: User Considerations



- The user specifies the audience, like executives or analysts.
- Adapting language and detail improves clarity.
- Financial consultants should modify their communication style.
- Use technical terms for analysts and summaries for clients.
- Focusing on the user boosts engagement and decisions.

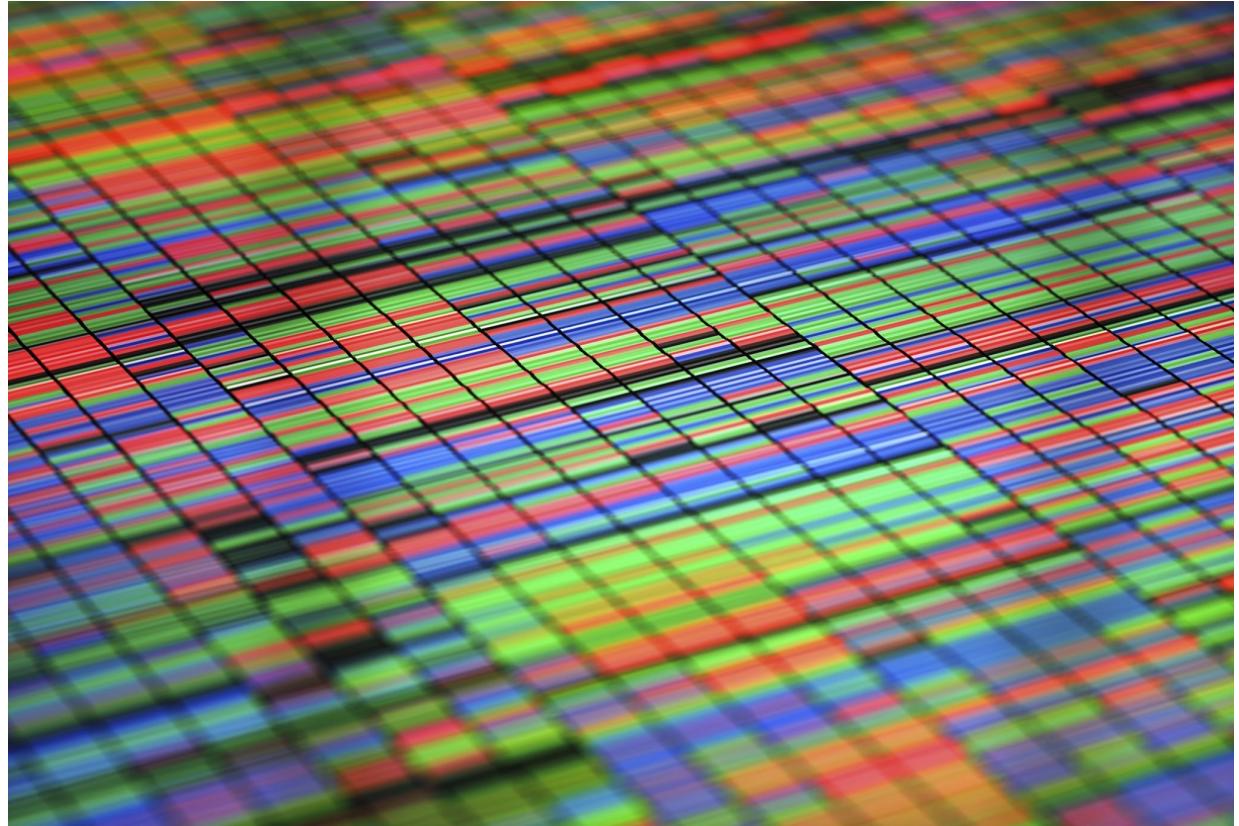
# **FOCUS: Style Adaptation**

- Style determines the tone and formality of the communication.
- It ranges from formal and professional to casual and conversational.
- Choosing the right style reflects the company culture and audience expectations.
- Examples include persuasive, informative, or empathetic tones.
- Consistent style strengthens brand and client relationships.



# **Output Formatting Best Practices with DRAFT**

- DRAFT stands for Data, Representation, Action, Format, and Tone.
- Specify desired output format: tables, lists, emails, or slides.
- Guide AI to organise content clearly for easy understanding.
- Example: 'Generate a table summarising sales data by region.'



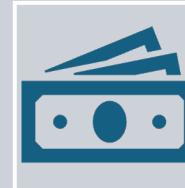
# DRAFT: Data Explained



Data refers to the raw financial information used in analysis.



Accurate data is crucial for reliable financial insights.



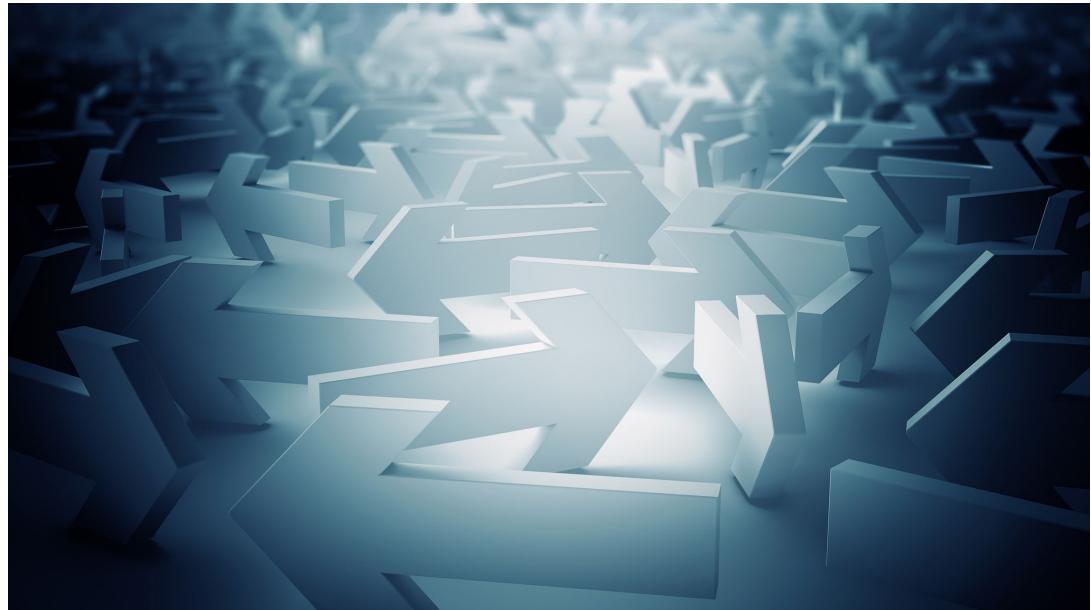
Financial consultants must verify data sources carefully.

# DRAFT: Representation in Finance



- Representation means how financial data is shown, visually or in writing.
- Clear charts and tables improve client understanding.
- Choose the representation based on the audience's needs and preferences.

# DRAFT: Action – Driving Financial Decisions



- Action defines what the consultant wants the AI to perform with data.
- Examples include summarising reports or forecasting trends.
- Clear action instructions ensure precise and useful outputs.

# DRAFT: Format for Financial Communication



- Format specifies the structure of the output, like reports or emails.
- Choosing the right format improves clarity and professionalism.
- Formats should match the financial context and stakeholder expectations.



# DRAFT: Tone in Finance

- Tone sets the style, such as formal or persuasive, of financial content.
- Appropriate tone builds trust and conveys expertise.
- Adjust tone depending on whether addressing clients or colleagues.

# Iterative Prompting for Continuous Improvement



- Use iterative prompting to refine, correct, and expand responses.
- Start with a simple prompt and improve based on AI output.
- Hands-on approach: review and adjust prompts for better results.
- Encourages collaboration between user and AI for optimal output.

# Use Case Scenario: Financial Consultant Challenge

- Financial consultant needs to summarise quarterly sales data.
- Current reports are unclear and inconsistent in format.
- Objective is to deliver clear insights to senior management.
- Data complexity and volume hinder effective communication.





## Prompt Using DRAFT Framework

- Data: Quarterly sales figures by region and product line.
- Representation: Summarised in tables and bullet points.
- Action: Highlight key trends and anomalies.
- Format: Formal report with clear headings.
- Tone: Professional and concise.

# **Output Example Using DRAFT Framework**

- Clear tables showing sales performance per region.
- Bullet points summarising key growth areas and risks.
- Well-structured report with meaningful headings.
- Professional tone ensures credibility and engagement.



# **Benefits of Using DRAFT for Financial Consultants**

- Improves clarity and focus in reporting.
- Ensures outputs meet specific communication needs.
- Facilitates consistent and professional documentation.
- Enhances ability to convey complex data effectively.



# **Next Steps: Applying DRAFT in Your Work**

- Practice crafting prompts using the DRAFT elements.
- Tailor your prompts to specific data and audience needs.
- Incorporate feedback to refine output quality.
- Leverage AI tools to streamline reporting tasks.



# Hands-on Exercise: Refining Role-Based Prompts

- Exercise with weak prompts for various roles.
- Apply ACTOR framework to enhance prompt clarity.
- Compare AI responses before and after refinement.
- Discussion on improvements and best practices.



# **Hands-on Exercise: Tone and Style Adjustment**

- Practice setting tone and style using FOCUS framework.
- Create prompts for different audiences and purposes.
- Review AI outputs to assess tone accuracy.
- Learn to adapt communication for senior IT and non-IT professionals.



# Hands-on Exercise: Output Formatting Techniques

- Experiment with generating tables, lists, emails, and slides.
- Utilise the DRAFT framework to specify output format.
- Evaluate clarity and usefulness of AI-generated formats.
- Enhance presentation and documentation skills.



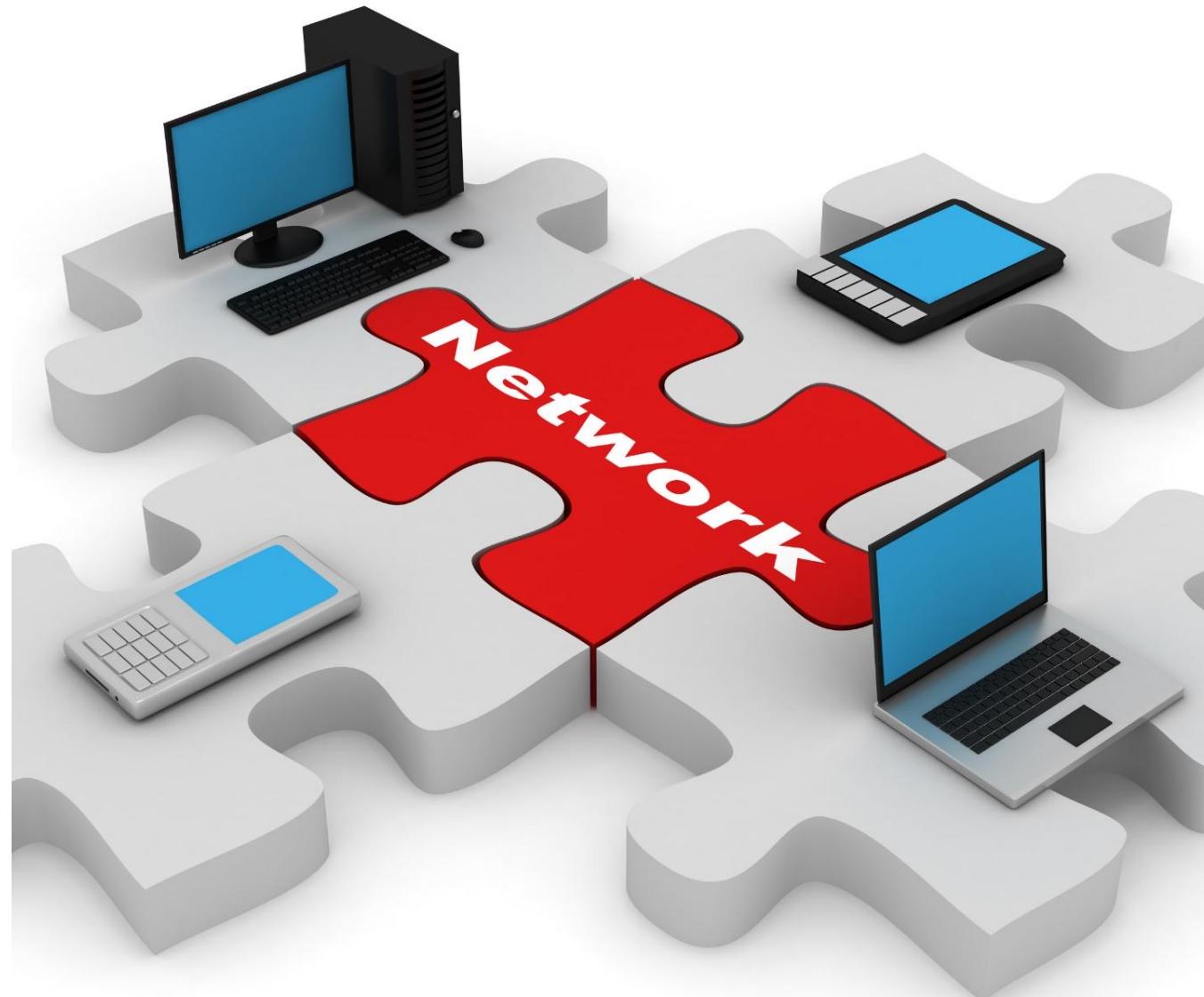
# Best Practices for Iterative Prompting

- Start with a baseline prompt and analyse AI response.
- Use feedback loops to refine and correct output.
- Expand prompt details gradually for richer content.
- Document iterations to track improvements.



# Integrating Prompt Engineering Frameworks

- Combine ACTOR, FOCUS, and DRAFT for comprehensive prompts.
- Tailor prompts to role, tone, and output format simultaneously.
- Enhances AI response quality and relevance.
- Supports diverse business scenarios and communication needs.



# Summary and Next Steps

- Review key concepts: role-based prompting, tone control, formatting, and iteration.
- Encourage continuous practice of prompt engineering frameworks.
- Leverage AI tools to boost productivity and communication.
- Plan follow-up sessions and advanced training modules.



# 3. Prompt Engineering Techniques & Patterns

## Examples:

“You are a Finance Controller. Summarize the key risks in this P&L.”

“Turn these 5 bullet points into a persuasive email to leadership.”

## Hands-on Lab:

Exercise sheet with weak prompts; refine using best practices

# Example 1: Finance Controller Role

- Act as a Finance Controller to analyse P&L risks.
- Summarise key financial risks clearly and concisely.
- Use ACTOR framework to define role, context, and task.
- Learners to craft prompts using ACTOR for financial analysis.



## Example 2: Persuasive Email Creation

- Transform bullet points into a persuasive email for leadership.
- Control tone and style using the FOCUS framework.
- Specify format and audience to tailor the message.
- Learners to create prompts adjusting tone for senior leaders.



# Example 3: Project Manager Report

- Act as a Project Manager summarising project risks and status.
- Use ACTOR to define role, context, and objectives clearly.
- Format output as bullet points or concise report.
- Learners to create role-based prompts for project updates.



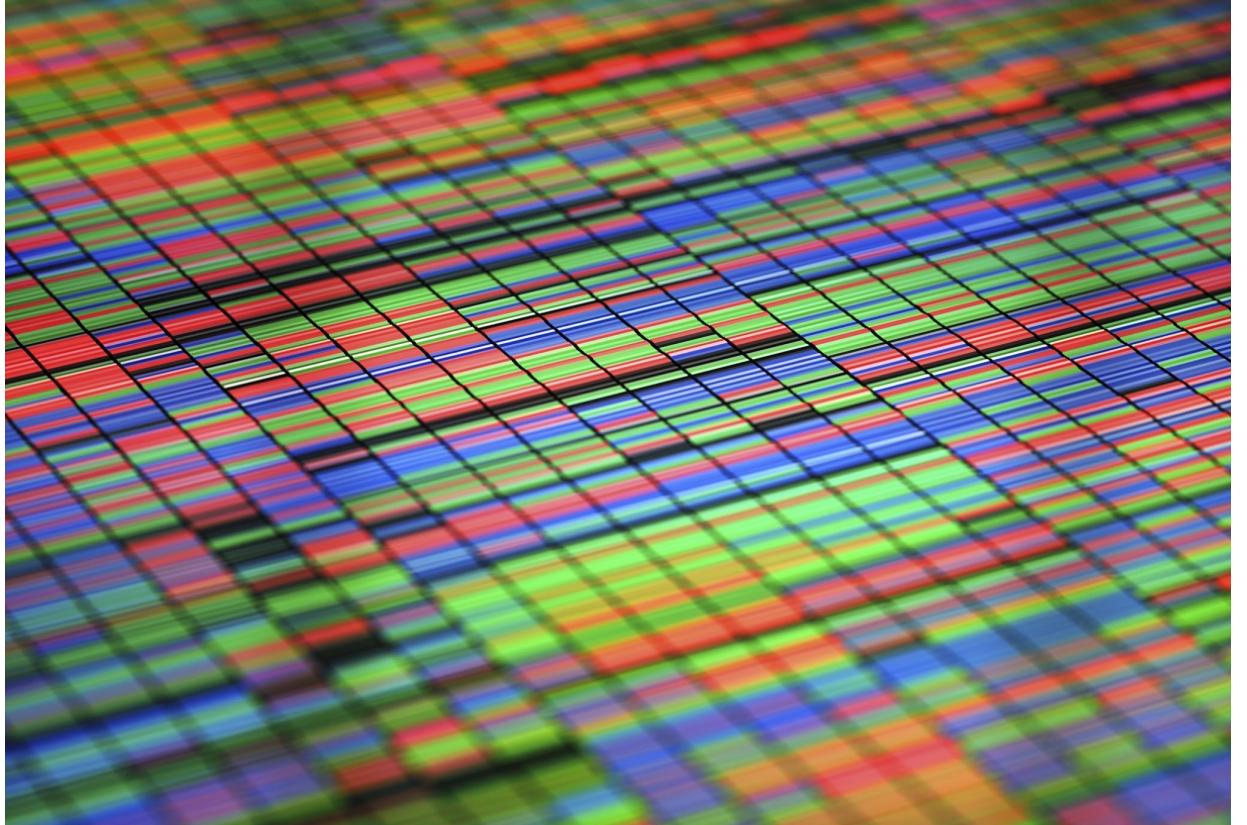
## **Example 4: Customer Support Email**

- Create a polite and empathetic customer support email.
- Use FOCUS to set tone as empathetic and professional.
- Format output as an email with greeting and closing.
- Learners to experiment with tone adjustments for customer care.



## Example 5: Sales Data Table

- Generate a table summarising sales data by region and quarter.
- Apply DRAFT framework to specify data and output format.
- Ensure clear representation for easy analysis.
- Learners to practice formatting outputs as tables.



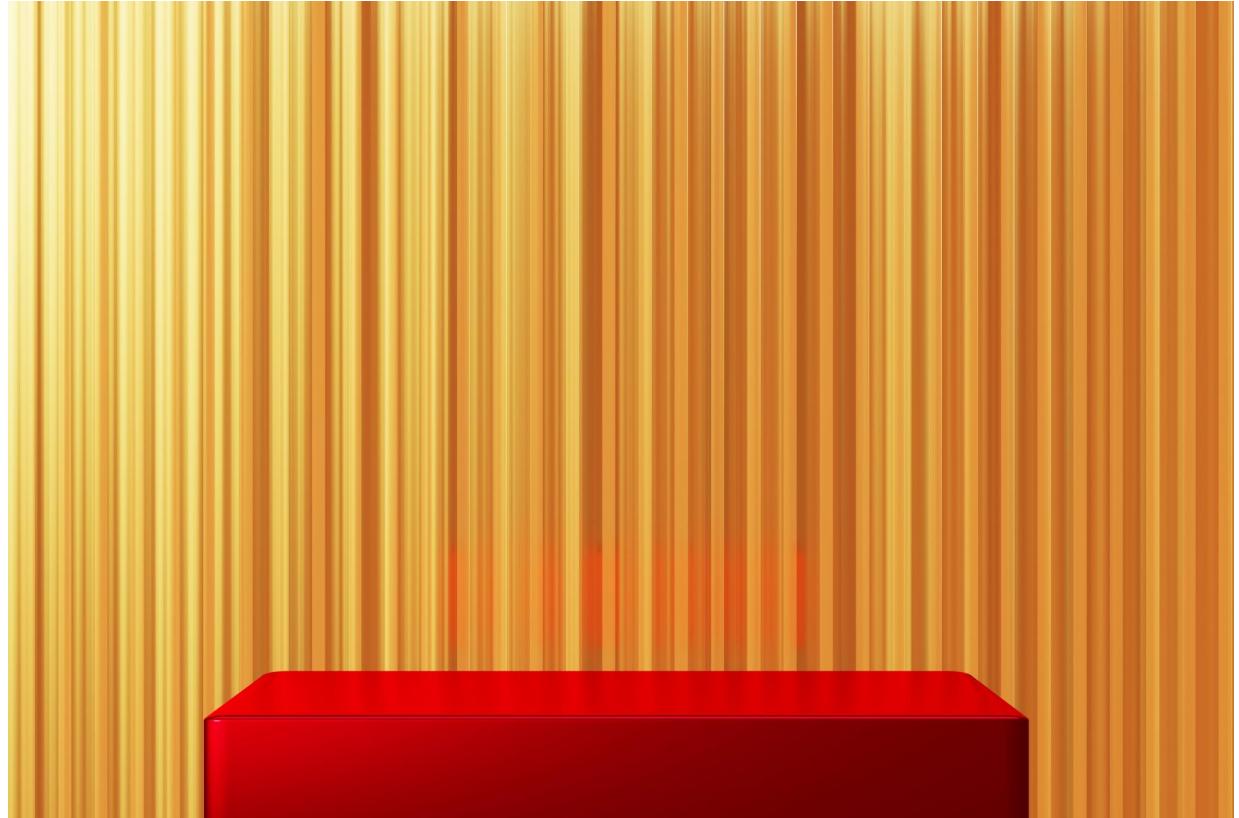
# Example 6: Technical Presentation Slides

- Create concise presentation slides on AI trends.
- Use DRAFT to define format (slides) and tone (technical).
- Include bullet points and headings for clarity.
- Learners to try formatting content as slide decks.



## **Example 7: Marketing Campaign Email**

- Compose a catchy and persuasive email for a marketing campaign.
- Set tone as casual and persuasive using FOCUS.
- Format message with call-to-action and benefits.
- Learners to adjust prompts for marketing communication.



# Example 8: Executive Summary Report

- Summarise project outcomes in a formal executive report.
- Use ACTOR to specify role and objectives clearly.
- Format output as a structured report with headings.
- Learners to refine role-based prompts for formal reports.

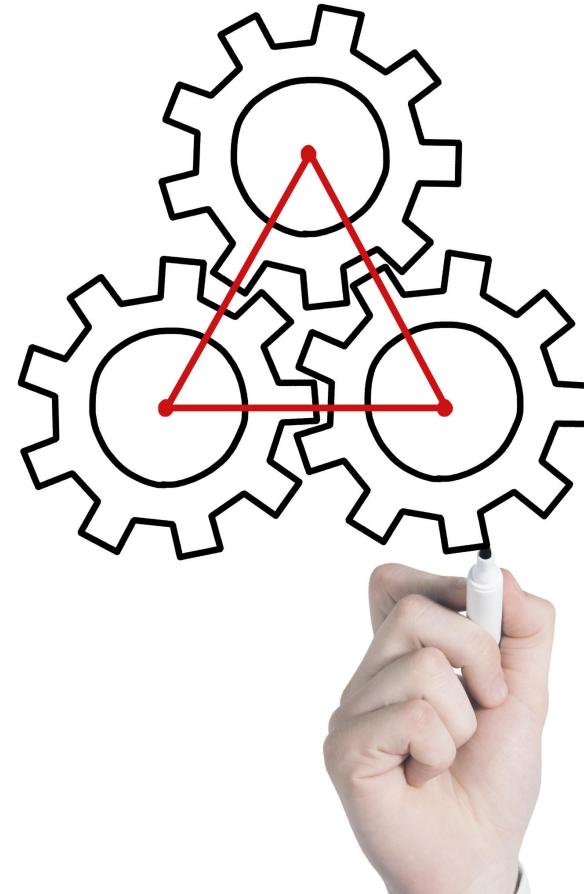


# Example 9: Code Review Feedback

- Provide constructive feedback on a code snippet.
  - Control tone to be helpful and professional with FOCUS.
  - Format output as a list of suggestions and improvements.
  - Learners to practice prompting for technical code reviews.

## Example 10: Iterative Prompt Refinement

- Start with a basic prompt and gradually refine responses.
- Use iterative prompting to correct and expand AI outputs.
- Document changes to track prompt improvements.
- Learners to engage in hands-on iterative prompt exercises.



# Sample Prompt

You are Finance AI Consultant. Create 3 Power Points slides for following content. 1. Specify Problem Statement 2. Write Prompt 3. Explain Output by Creating Table. Include slides in existing Presentation.

# Problem Statement: Financial Report Clarity

- Current financial reports are unclear and inconsistent.
- Complex data volume delays decision-making.
- Management needs concise, actionable financial insights.
- Inconsistent formatting hinders effective communication.



# Writing the Prompt Using DRAFT Framework

- Specify Data: Quarterly sales by region and product.
- Representation: Summarise in tables and bullet points.
- Action: Highlight key trends and anomalies.
- Format: Formal report with clear headings.
- Tone: Professional and concise.



# Output Explanation

- Table summarises sales performance by region and product.
- Bullet points highlight key growth areas and risks.
- Report structured with meaningful headings.
- Tone ensures credibility and clear communication.



# Problem Statement: Financial Report Clarity

- Current financial reports are inconsistent and difficult to interpret.
- Data volume and complexity cause delays in decision-making.
- Management requires concise and actionable insights.



# Writing the Prompt Using ACTOR Framework

- Act as a Financial Analyst reviewing quarterly sales data.
- Summarise key trends, highlight risks and opportunities.
- Provide a concise report tailored for senior management.





## Explaining the Output

- Summary of sales performance by region and product line.
- Identification of risks and opportunities.
- Actionable recommendations for management decisions.

# Introduction to Hands-on Lab Exercise

- Explore common weak prompts and their limitations.
- Understand the importance of refining prompts.
- Learn frameworks to improve prompt effectiveness.
- Prepare for practical exercises to enhance skills.



# Identifying Weak Prompts

- Prompts lacking clarity or specific roles.
- Ambiguous or incomplete instructions.
- Missing tone or output format details.
- Common examples of ineffective prompts.



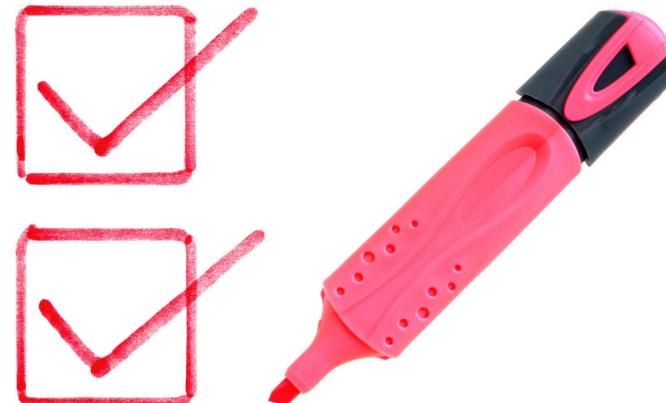
# Refining Prompts with ACTOR Framework

- Define Actor clearly to specify AI role.
- Set Context to provide background information.
- Clarify Task and Objective for focused output.
- Example: ‘Act as a Project Manager summarising risks.’



# Practical Example: ACTOR Refinement

- Weak prompt: ‘Summarise project risks.’
- Refined prompt using ACTOR: ‘Act as a Project Manager to summarise key project risks in bullet points.’
- Notice improved specificity and clarity.
- Learners practice by revising weak prompts.



# Enhancing Tone and Style with FOCUS

- Define Format and Objective clearly.
- Set appropriate Context and User understanding.
- Select Style to match audience and purpose.
- Example: ‘Write a formal email summarising results.’



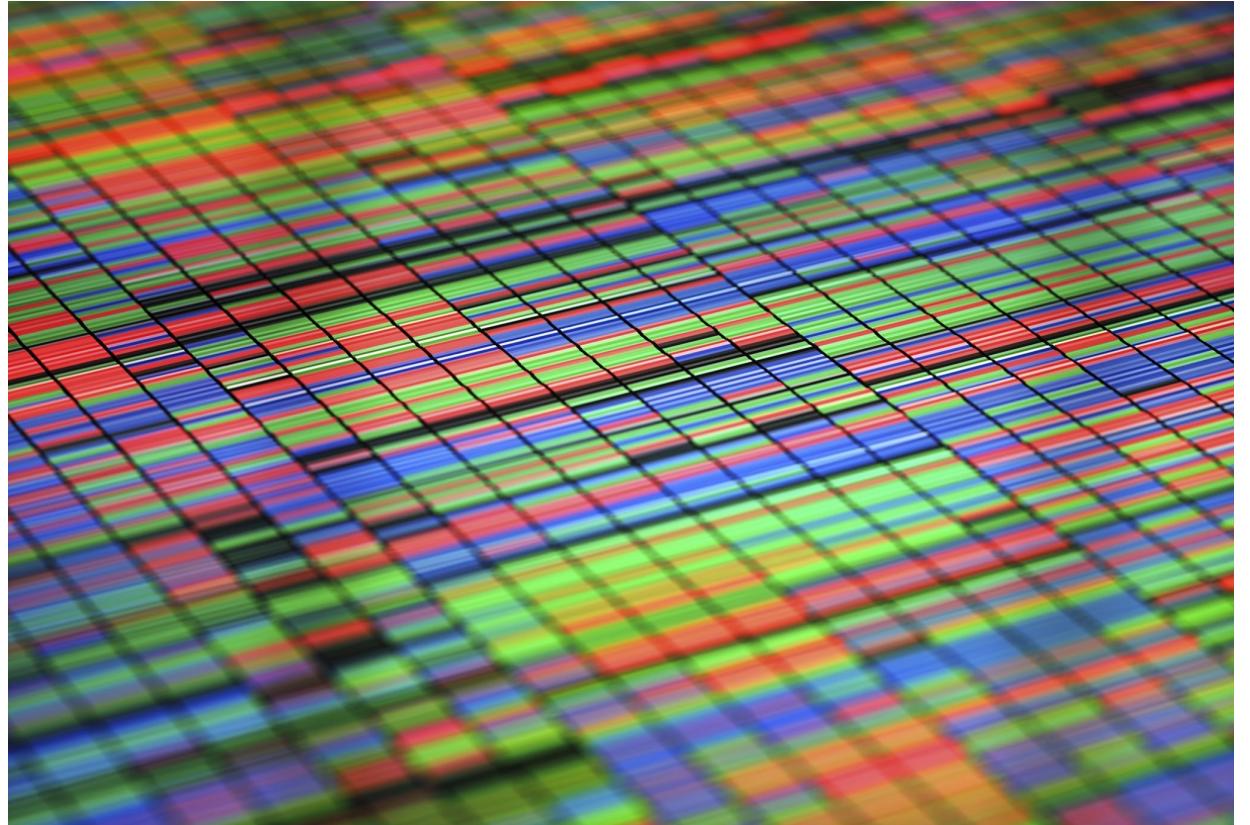
# Practical Example: FOCUS Application

- Weak prompt: ‘Write email about sales.’
- Refined prompt: ‘Write a persuasive email to senior leadership summarising quarterly sales results formally.’
- Improves tone, clarity, and target audience relevance.
- Hands-on practice refining prompts with FOCUS.



# Specifying Output with DRAFT Framework

- Define Data and Representation clearly.
- Specify Action and desired Format.
- Set Tone for consistency and clarity.
- Example: ‘Generate a table summarising sales data.’



# Practical Example: DRAFT in Action

- Weak prompt: ‘Show sales data.’
- Refined prompt: ‘Create a table summarising quarterly sales data by region with totals.’
- Focuses output on clear data representation.
- Learners try formatting outputs with DRAFT.



# Iterative Prompt Refinement

- Start with a simple prompt and review output.
- Refine, correct, and expand based on results.
- Document changes for tracking improvements.
- Promotes collaboration between user and AI.



# **Summary and Hands-on Practice**

- Recognise and refine weak prompts using ACTOR, FOCUS, and DRAFT.
- Apply tone, style, and output format best practices.
- Engage in iterative improvement for optimal results.
- Hands-on exercises reinforce learning and skills.



# Let's Connect



## Professional Email Contact

[surendra@gktcs.com](mailto: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