



# 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.

# 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**

## 2. Prompting Basics Across Microsoft 365 Apps

App	Prompt Style	Examples
Word	Rewriting, summarizing, transforming	“Rewrite this as a formal letter”
Excel	Data analysis, trends, forecasting	“Explain quarterly trends in this table”
Outlook	Drafting, summarizing, tone adjustment	“Summarize this thread in bullet points”
PowerPoint	Slide creation, enhancement	“Create 3 slides from this document”
Teams	Summarize meetings, extract actions	“Summarize this meeting with next steps”

## 2. Prompting Basics Across Microsoft 365 Apps



### Hands-on Lab:



Try 2 prompts per app using sample datasets or emails

# Prompting Basics in Word



## **Guide Copilot with Clear Prompts**

Giving Copilot specific instructions on tone, audience, and format improves the quality of rewritten and summarised text.

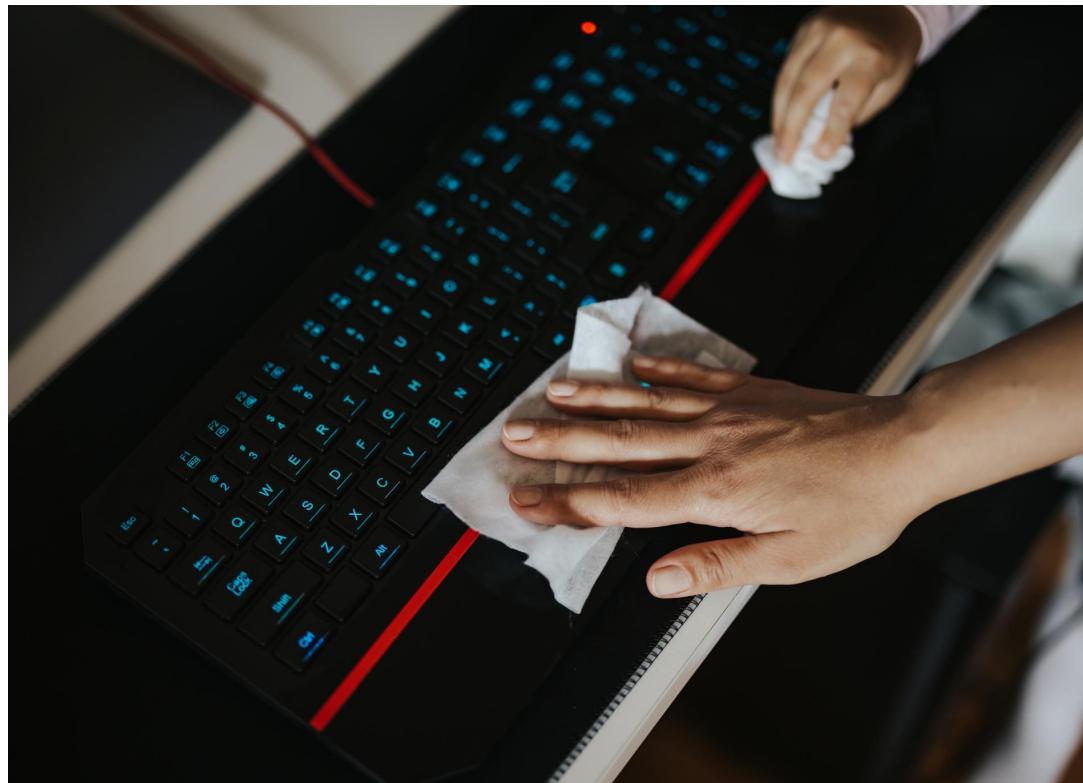
## **Transform and Enhance Text**

Copilot can rewrite, summarise, and transform existing content to make your documents more engaging and professional.

## **Achieve Tailored Outputs**

Effective prompting results in tailored outputs that align your documents with your professional goals and audience needs.

# Effective Prompting Strategies



## Clarity and Specificity

Providing clear and specific prompts about style, audience, and format leads to better outcomes in Word.

## Use Rewriting Techniques

Rewriting helps adjust the tone and length of text to meet different needs and preferences.

## Summarising and Transforming

Summarising condenses information, while transforming presents ideas in new and varied formats.

# Weak Prompt

Rewrite this.

- ✖ Copilot may just reword a few phrases but still keep it casual.
- 👉 **Learning point:** Too vague, no audience, no tone.

# **Refined Prompt**

Rewrite this as a formal business letter for senior leadership.

Tone: professional and solution-oriented.

Keep it within 120 words.

# Rewriting: Transforming Text



## Adapting Tone and Style

Rewriting changes a text's tone and style to fit new contexts, such as switching from casual to formal language.

## Tailoring for Different Audiences

Altering content ensures the message suits diverse readerships, making the text relevant and impactful for each audience.

## Adjusting Length and Clarity

Rewriting can condense or expand passages, improving clarity and engagement to meet specific communication needs.

# **Example Scenario: Rewriting**

## **Source Text (paste into Word):**

Hi Team,

We didn't do so well last quarter. Revenue was lower than expected, and there were supply issues. Let's try harder this quarter.

Regards,

Surendra

# Effective Summarising Techniques



## Identify Main Ideas

Focus on recognising the most important concepts in the text, filtering out unnecessary information to capture the core message.

## Remove Unnecessary Details

Omit less important facts and examples to make the summary clearer and more concise for the reader.

## Rephrase Clearly

Rewrite the main points in your own words, ensuring the summary is easy to understand and retains the essential message.

# **Example Scenario: Summarizing**

## **Prompt**

Summarize this letter in two sentences for an internal team update.

## **Output:**

“The last quarter underperformed due to supply chain challenges. Corrective measures are underway, and the focus is now on efficiency and recovery.”

# Transforming Information Effectively



## Summarising with Bullet Points

Turning information into bullet points helps clarify main ideas and makes content easier to read and understand.

## Creating Checklists

A checklist allows you to track tasks efficiently and ensures nothing important is missed.

## Organising with Tables

Arranging details in a table format makes comparison simple and information quickly accessible.

# **Example Scenario: Transforming**

## **Prompt**

Turn this letter into a bulleted action plan for the operations team.

## **Output:**

Strengthen supplier partnerships

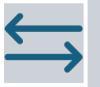
Improve operational efficiency

Regain revenue momentum in the new quarter

# Takeaway



**Rewriting** = Change **tone, audience, style**



(casual → formal, long → short).



**Summarizing** = Reduce length while keeping **core meaning**.

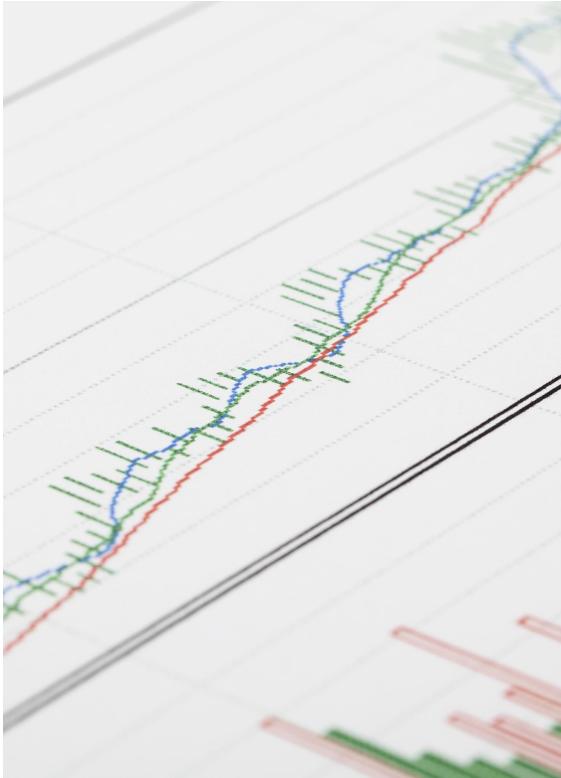


**Transforming** = Convert into a **new shape**



(bullets, checklist, email, table).

# Prompting Basics in Excel



## **Analysing Data Effectively**

Excel Copilot helps identify trends and make forecasts by thoroughly analysing your data sets.

## **Crafting Clear Prompts**

Define patterns, timeframes, and formats in your prompts to obtain accurate and relevant results.

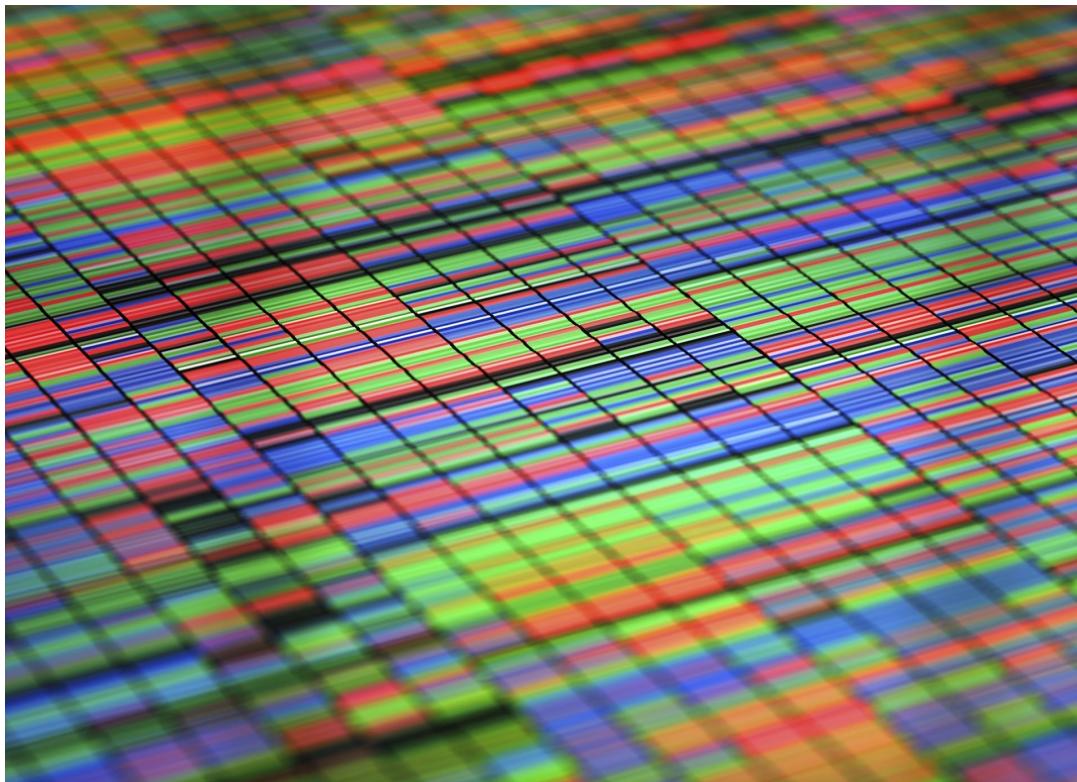
## **Achieving Actionable Insights**

Precise instructions enable Copilot to deliver tailored insights, making data exploration more efficient and actionable.

# Example Scenario: Data Analysis

Quarter	Revenue (₹ Cr)	Expenses (₹ Cr)	Profit (₹ Cr)
Q1	50	30	20
Q2	52	32	20
Q3	48	34	14
Q4	55	33	22

# Data Analysis in Excel



## **Importing and Organising Data**

Begin by importing sample data into Excel to ensure it can be easily organised and manipulated for analysis.

## **Summarising with PivotTables and Charts**

Use PivotTables and charts to effectively summarise data trends and patterns for clearer insights.

## **Highlighting Insights with Formatting**

Apply filters and conditional formatting to emphasise key insights and make your findings stand out.

# Weak Prompt

Explain quarterly trends in this table.

✖ Copilot may just say “Revenue goes up and down, expenses increase, profit fluctuates.”

👉 **Learning point:** Too generic, lacks business insight and structure.

# Avoiding Weak Prompts



## Problems with Weak Prompts

Weak prompts provide vague summaries and do not uncover important business insights or underlying reasons for changes.

# Avoiding Weak Prompts



## Need for Analytical Depth

Strong prompts seek detailed analysis, highlighting specific drivers, impacts, and actionable recommendations for improvement.

# Avoiding Weak Prompts



## **Request Structured Explanations**

Prompts should ask for structured explanations that clarify trends, causes, and impacts across each quarter.

# Refined Prompt

Explain quarterly trends in this table as a business analyst.

Include:

- 1) Revenue trend and drivers
- 2) Expense changes
- 3) Profit movement and risks
- 4) Use percentages where relevant

Limit to 120 words, formal business tone.

# Quarterly Financial Trends Analysis



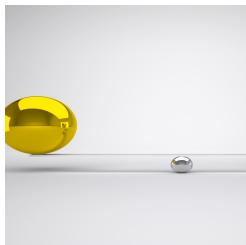
## Revenue Growth

Revenue climbed by 8% this quarter, fuelled by greater sales in new markets and an improved product mix.



## Expense Increase

Expenses increased by 5%, mainly due to higher marketing costs and increased staff salaries.



## Profit and Risks

Profit rose by 12%, but future risks include rising operational costs and market volatility. Focus on cost control and diversification is vital.

# Example Scenario: Forecasting

## Prompt

Forecast revenue and profit for next 2 quarters based on past trends.

Provide results in a table with Q5 and Q6 values, plus short explanation.

# Output:

Quarter	Revenue (₹ Cr)	Profit (₹ Cr)
Q5	57	23
Q6	59	24

# Effective Prompting Matters



## Consequences of Weak Prompting

Weak prompts generate vague answers and unclear trends, making it difficult to reach actionable conclusions or reliable results.

# Effective Prompting Matters



## Benefits of Refined Prompts

Well-structured prompts deliver clear, structured business insights, such as specific percentages and risk assessments.

# Effective Prompting Matters



## Prompting Best Practices

Specify your role, scope, analysis structure, and constraints to ensure concise and actionable outputs.

# Takeaway for Participants

- **Weak prompts** → vague trends.
- **Refined prompts** → structured insights, percentages, risks, and clear business tone.
- **Best practice:** Always specify **role, scope, structure, and constraints** (e.g., “as a business analyst... ≤120 words... include risks and drivers”).

# Clarity Through Specification



## Define Your Role

Clearly stating your role sets expectations for your audience and makes your communication more effective.

# Clarity Through Specification



## Outline Scope and Structure

Outlining the scope and structure keeps responses focused and ensures all relevant information is organised logically.

# Clarity Through Specification



## Specify Constraints

Stating constraints like word limits or required elements ensures precision, relevance, and tailored deliverables.

# Mastering Outlook Summaries



## Efficient Email Management

Outlook streamlines drafting, editing, and sending emails, helping users communicate quickly and efficiently.

## Summarising Email Threads

Condensing conversations into bullet points makes information easy to review and reference for all recipients.

## Adapting Message Tone

Selecting the right tone and language ensures clarity and professionalism in every Outlook communication.

# Prompting Basics in Outlook



## Drafting and Summarising Emails

Outlook Copilot helps you draft and summarise emails, making communication quicker and more efficient.

## Specifying Tone and Audience

Clearly stating the desired tone and audience in your prompts leads to tailored and effective emails.

## Improving Clarity and Efficiency

Explicit prompts ensure your messages are clear, saving time and enhancing professional communication.

# Example Scenario

Summarizing an Email Thread

# **Source Email Thread (paste into Outlook / Copilot):**

[10:05 AM] Rahul: Team, UAT for Auto-Recon v2 is slipping due to the Tally integration issue. We may need to extend by 3–4 days.

[10:12 AM] Meera: The GST rounding bug fix will be completed by 24 Aug. Regression tests will follow.

[10:18 AM] Priya: Performance tuning is in progress. We're targeting p95 ≤1.5s by 27 Aug.

[10:22 AM] Rahul: Please prepare an update for Arjun (Client CFO office) if timelines move further.

# Weak Prompt

Summarize this thread in bullet points.

✖ Copilot may output:

UAT may slip.

Bug fix in progress.

Perf tuning ongoing.

Update client if delays.

👉 **Problem:** Too generic, missing owners, dates, business tone.

# Refined Prompt

- Summarize this thread in 4–5 bullet points for an internal project update.
- Include: owner names, due dates, and task status.
- Tone: concise and professional.

# Expected Output (Copilot-style)

- **Rahul:** UAT for Auto-Recon v2 may slip by 3–4 days due to Tally integration.
- **Meera:** GST rounding bug fix due **24-Aug**, regression testing to follow.
- **Priya:** Performance tuning underway; target **p95 ≤1.5s by 27-Aug**.
- **Rahul:** Prepare client update for Arjun (CFO office) if further delays occur.

# Example Scenario: Tone Adjustment

## Prompt

Rewrite this email for the client in a formal, reassuring tone.

Keep it under 150 words. Highlight corrective actions and next steps.

# Expected Output (Copilot-style)

**Subject:** Update on Auto-Recon v2 UAT

Dear Arjun,

We would like to share a brief update on the UAT progress for Auto-Recon v2.

Due to a Tally integration issue, UAT may extend by 3–4 days. Corrective work is in progress, and we are confident that the revised plan will ensure a smooth outcome.

Key actions:

GST rounding fix to be completed by 24-Aug, followed by regression testing.

Performance tuning scheduled for completion by 27-Aug to meet the p95 ≤1.5s target.

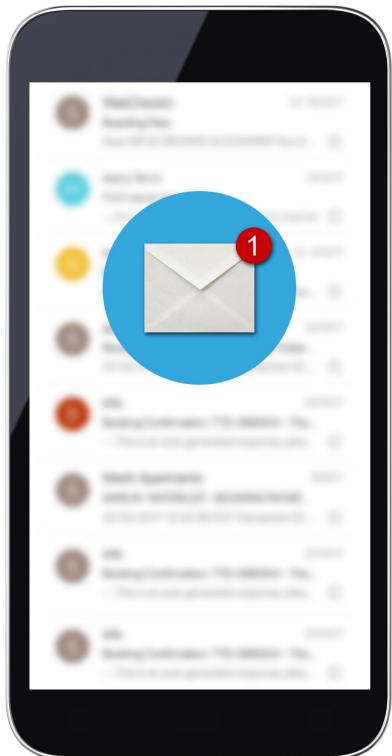
# Outlook Copilot Best Practices



## Specify Communication Audience

Always clarify if your message is for internal colleagues or external clients to ensure relevance and professionalism.

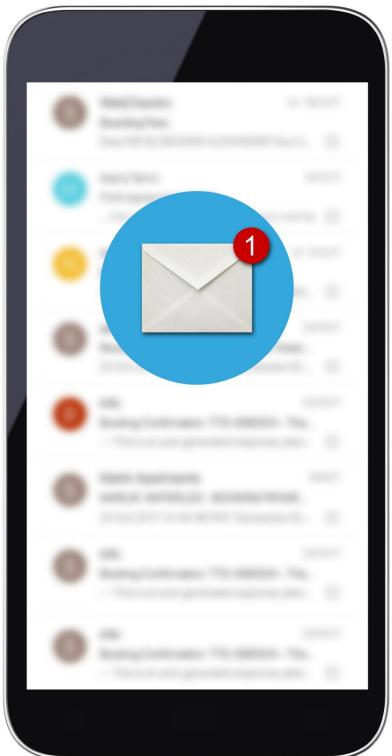
# Outlook Copilot Best Practices



## Define Message Tone

State whether you want a formal or friendly tone to match the context and recipient of your email.

# Outlook Copilot Best Practices



## Set Word Limit and Structure

Indicate a word limit and preferred format, like bullet points or paragraphs, for clear and effective communication.

# Key Takeaways for Participants



## **Clear Main Point Summaries**

Summarise the main points in a way that your audience can easily understand and remember.

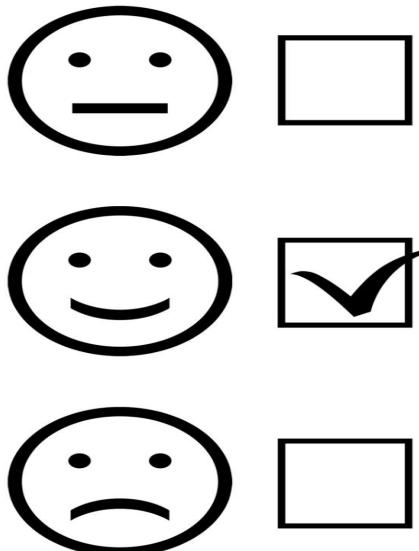
# Key Takeaways for Participants



## **Define Audience and Message**

Specify for whom the summary is intended, what needs to be communicated, and the timing of delivery.

# Key Takeaways for Participants



## Use Concise Formats

Adopt concise formats like bullet points and actionable language to maximise clarity and relevance.



# Prompting Basics in PowerPoint

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# Prompting Basics Explained



## Use Clear Instructions

Start with clear, concise instructions to ensure the content generated meets your intended purpose and audience needs.

## Define Topic and Structure

Specify the topic, style, and desired structure to help generate relevant and accurate PowerPoint slides.

## Provide Context and Examples

Include contextual information or examples to guide content creators and match your presentation's unique needs.

# Example Scenario: Slide Creation

## Source Document (e.g., pasted from Word):

RevX Q3 Review – 20 Aug 2025

Revenue down 7% vs Q2; APAC supplier delays.

Auto-Recon v2 ~80%. SIT: 25 Aug. UAT: 28 Aug–05 Sep. Go-Live: 10 Sep (tentative).

Perf: p95 = 1.8s (SLO 1.5s) at 1.2k rps.

Quality: 17 open defects; GST rounding bug (#1432) affects invoices > ₹10L.

Budget: +₹12,00,000 approved; FY25 cap enforced.

Risks: Tally auth refresh may slip UAT 3–4 days (Vivek). Perf gap at peak (Priya). GST rounding accuracy (Meera).

Actions: Vivek token refresh by 23 Aug; Meera hotfix by 24 Aug; Priya perf tuning by 27 Aug; Anjali UAT scenarios by 25 Aug; Rahul client comms by 26 Aug.

# Weak Prompt

Create 3 slides from this document.

✖ Output: Copilot may just copy-paste text into 3 slides.

👉 **Problem:** No structure, no audience focus, cluttered.

# Weak PowerPoint Prompts



## Unstructured Text Blocks

Weak prompts produce slides filled with unorganised, lengthy text, making information difficult to digest and understand.

## Lack of Audience Focus

Slides that ignore the audience's needs tend to be cluttered and unfocused, reducing engagement and effectiveness.

## Importance of Clear Prompts

Effective prompts encourage concise structure, clear organisation, and information tailored for audience engagement.

# Refined Prompt

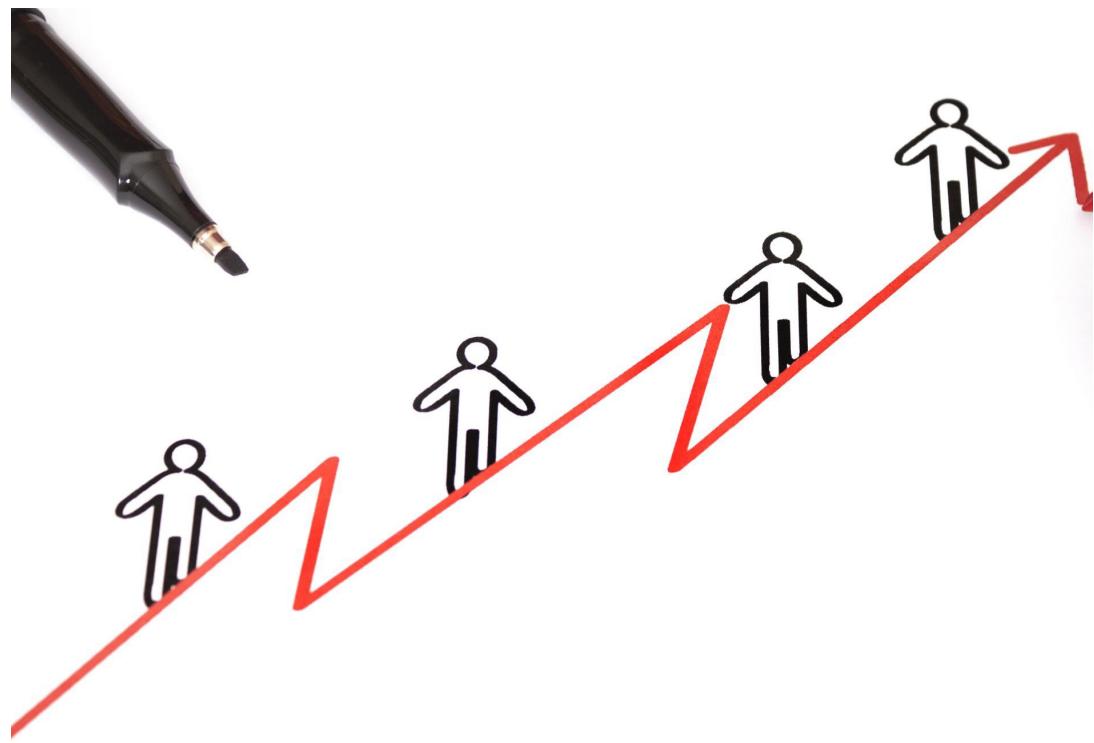
Create 3 slides from this document for an executive audience.

Structure:

- Slide 1: “Executive Summary” → 3 bullets on revenue, quality, performance
- Slide 2: “Key Risks & Mitigations” → table [Risk | Impact | Owner | Mitigation]
- Slide 3: “Next 7 Days Plan” → checklist with owners and due dates in DD-MMM-YYYY

Constraints: Use professional tone, ≤6 bullets per slide, no filler text, only data from this document.

# Executive Summary Highlights



## Significant Revenue Growth

Revenue increased by 12% compared to the previous quarter, reflecting robust sales in key markets.

## Enhanced Product Quality

Product quality improved as defect rates dropped to 1.5% after targeted process enhancements.

## Exceeded Performance Targets

Performance objectives were surpassed, with 98% of service level targets met across business units.

# **Expected Output (Copilot-style)**

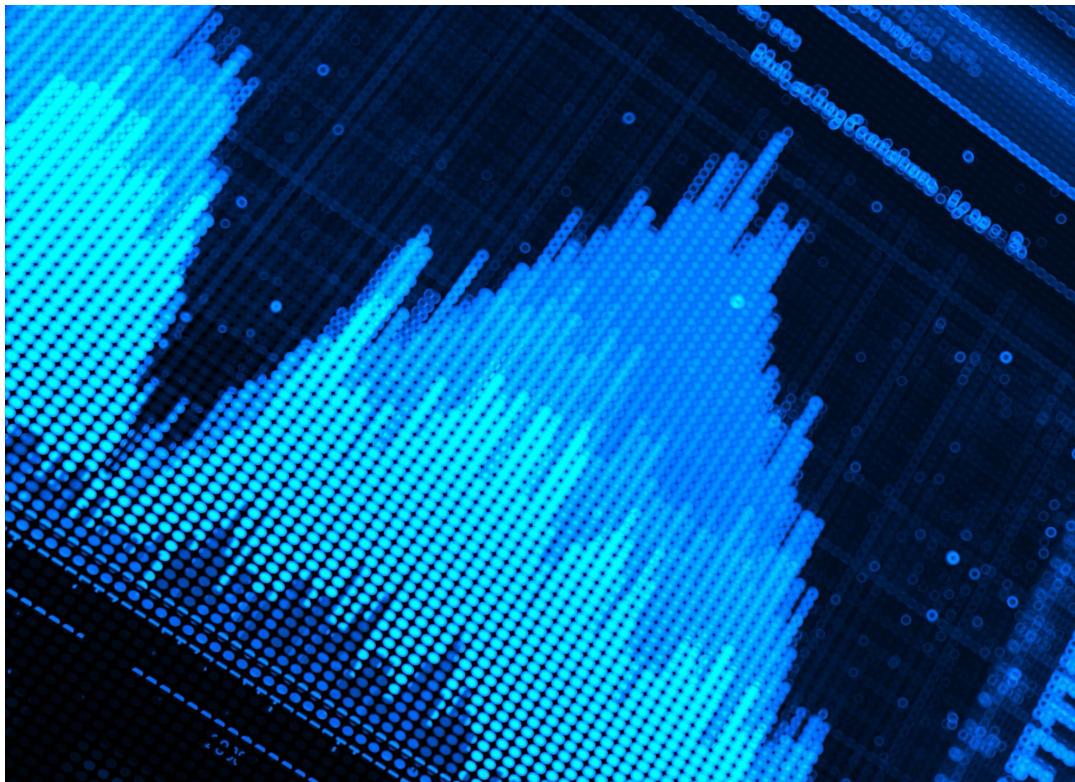
## **Slide 1 – Executive Summary**

Revenue down 7% vs Q2 due to APAC supply delays

17 open defects; GST rounding bug impacts invoices > ₹10L

Performance: p95 at 1.8s vs 1.5s SLO

# Q2 Executive Summary



## Revenue Decrease in Q2

Revenue dropped by 7% this quarter, mainly due to supply chain delays affecting the APAC region.

## Outstanding Defects

Seventeen software defects remain unresolved, including a GST rounding error impacting high-value invoices.

## Performance Metrics Lagging

The p95 response time reached 1.8 seconds, exceeding the 1.5 second service level objective.

# Slide 2 – Key Risks & Mitigations

Risk	Impact	Owner	Mitigation
Tally integration	UAT slip by 3–4 days	Vivek	Token refresh fix by 23-Aug
Performance gap	Break SLO at peak loads	Priya	Perf tuning by 27-Aug
GST rounding bug	Finance reporting errors	Meera	Hotfix by 24-Aug

# Key Risks & Mitigations



## Schedule Delays

Delays in project schedules can impact overall delivery. Regular progress reviews help identify and address issues early.

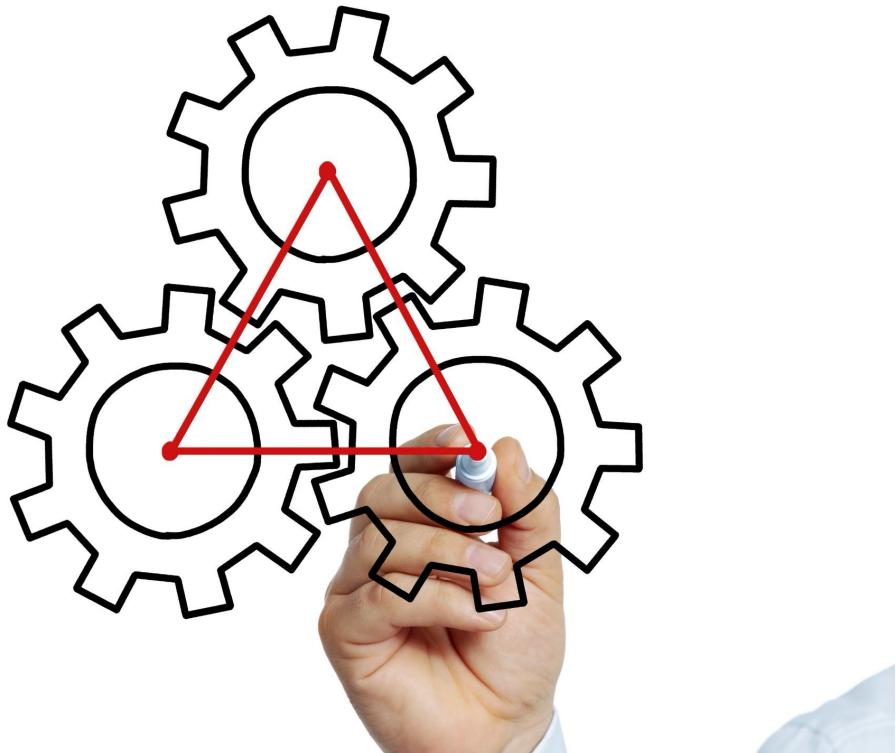
## Budget Overruns

Budget overruns threaten financial stability. Strict budget monitoring ensures spending stays on track and reduces financial risks.

## Resource Shortages

Lack of resources may hinder project execution. Proactive recruitment and planning help ensure teams have what they need.

# Key Risks & Mitigations



## Tally Integration Delay

The Tally integration could delay UAT by a few days, but a token refresh fix is scheduled to mitigate this risk.

## Performance SLO Risks

Performance issues during peak loads could affect service level objectives. Performance tuning is planned to resolve this.

## GST Rounding Bug

A GST rounding bug risks causing financial errors, but a hotfix is being implemented to resolve the issue promptly.

# **Slide 3 – Next 7 Days Plan**

Vivek → Token refresh fix (23-Aug-2025)

Meera → GST hotfix (#1432) (24-Aug-2025)

Priya → Perf tuning (27-Aug-2025)

Anjali → UAT scenarios (25-Aug-2025)

Rahul → Client comms if UAT slips (26-Aug-2025)

# Takeaway for Participants

- **Weak prompt** = generic, cluttered slides.
- **Refined prompt** = executive-ready, clear structure, owners/dates preserved.

# Takeaway for Participants

**Best practice in PowerPoint Copilot:**

Always specify **slide count + titles + structure**.

Limit bullets ( $\leq 6$  per slide).

Use **tables or checklists** where clarity matters.

Add **audience (executive, team, client)** to guide tone and content.

# PowerPoint Copilot Best Practices



## Define Structure and Titles

Clearly state the number of slides, their titles, and your desired structure to ensure your presentation aligns with your objectives.

## Limit Bullet Points

Keep bullet points to six or fewer per slide to enhance clarity and audience engagement.

## Use Tables and Checklists

Select tables or checklists when you need to convey complex information clearly and efficiently.

## Tailor to Your Audience

Specify your audience, such as executives or teams, to adapt content and tone for maximum relevance and impact.

# Weak vs Refined Prompts



## Clarity and Focus

Weak prompts produce slides with vague or unclear messages. Refined prompts deliver slides with clear, concise information and strong focus.

## Organisation and Structure

Slides from refined prompts are well-organised, making content easy to follow, unlike slides from weak prompts which lack structure.

## Ownership and Accountability

Refined prompts ensure slide owners and dates are clearly noted, fostering accountability. Weak prompts often miss these important details.

# Microsoft 365: Key Features



## **Efficient Text Management**

Word enables users to rewrite, summarise, and transform text with speed and accuracy, increasing productivity.

## **Advanced Data Analysis**

Excel empowers users to analyse data, identify trends, and make forecasts, supporting informed decisions.

## **Streamlined Email Communication**

Outlook assists with drafting, summarising, and adjusting email tone for clear, effective communication.

## **Enhanced Presentation Creation**

PowerPoint simplifies slide building and improvement, enhancing presentations with visual and organisational features.

# 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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