PROMPT LIKE A PRO: MASTERING THE ART OF ASKING COPILOT

A GUIDE FOR THE KM TEAM

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WHAT I'LL COVER

- Why does it matter?
- What's a Prompt Anyways?
- 7 Principles for High-Impact Prompts
- Combine & Conquer: The Recommended Order
- Stuck? Prompt the prompter
- Ready to Level Up?



Why does it matter?

I asked for coffee. I got a triple-shot espresso… at 9 p.m.
Coffee arrived. So did the consequences.
Wide awake. Zero sleep. Many regrets.

Copilot works the same way.
It takes your words literally; & delivers exactly what you ask for.
If the instructions are unclear, the outcome can be… memorable.

That's why how you ask matters.

What's a Prompt Anyways?

A prompt is simply how you talk to Copilot.

It can be a question, a request, or a set of instructions.

It's the input that shapes:

- What Copilot understands
- What it prioritizes
- What it delivers

Change the prompt, and everything downstream changes too.

7 Principles for High-impact Prompts

Great prompts aren’t magic - they’re structured.

The following seven principles show you exactly what to include so Copilot understands your intent and delivers usable results the first time.

DIRECTION: SET PERSPECTIVE AND INTENT

1. ROLE

How to think

Sets expertise, perspective, and decision quality.

- ✗ "Write a knowledge article."
- ✓ "Act as a Knowledge Management specialist creating articles for frontline agents."

2. CONTEXT

Who, what, when, where, how

Provide background so Copilot understands your goal.

- ✗ "This is for agents."
- ✓ "This will be used by frontline agents during live customer calls and must reduce handle time."

3. TASK

What it needs to do

This Avoids vague outcomes.

- ✗ "Fix this process."
- ✓ "Rewrite this process into a step-by-step knowledge article."

CONTROLS: REFINE THE RESPONSE

4. FORMAT

What it should look like

Specify how you want the output (bullet points, email, PDF etc.). Saves rework and aligns expectations.

- ✗ "Make it easy to read."
- ✓ "Use Information Mapping with headings, steps, and decision points."

5. TONE

How it should sound

Aligns with brand and audience.

- ✗ "Make it nice."
- ✓ "Clear, direct, and supportive for frontline agents."

6. CONSTRAINTS

What to avoid or limit

Provides success criteria that sharpens quality and focus.

- ✗ "Keep it short."
- ✓ "Under 200 words. Plain language. No policy citations."

CALIBRATION:
ALIGN ON QUALITY

7. EXAMPLE

What 'good' looks like

Reduces interpretation risk.

- ✕ "Use our usual style."
- ✓ "Follow the tone and structure of 'Password Reset' SOP documentation."

In Summary

Prompt = Direction + Controls + Calibration

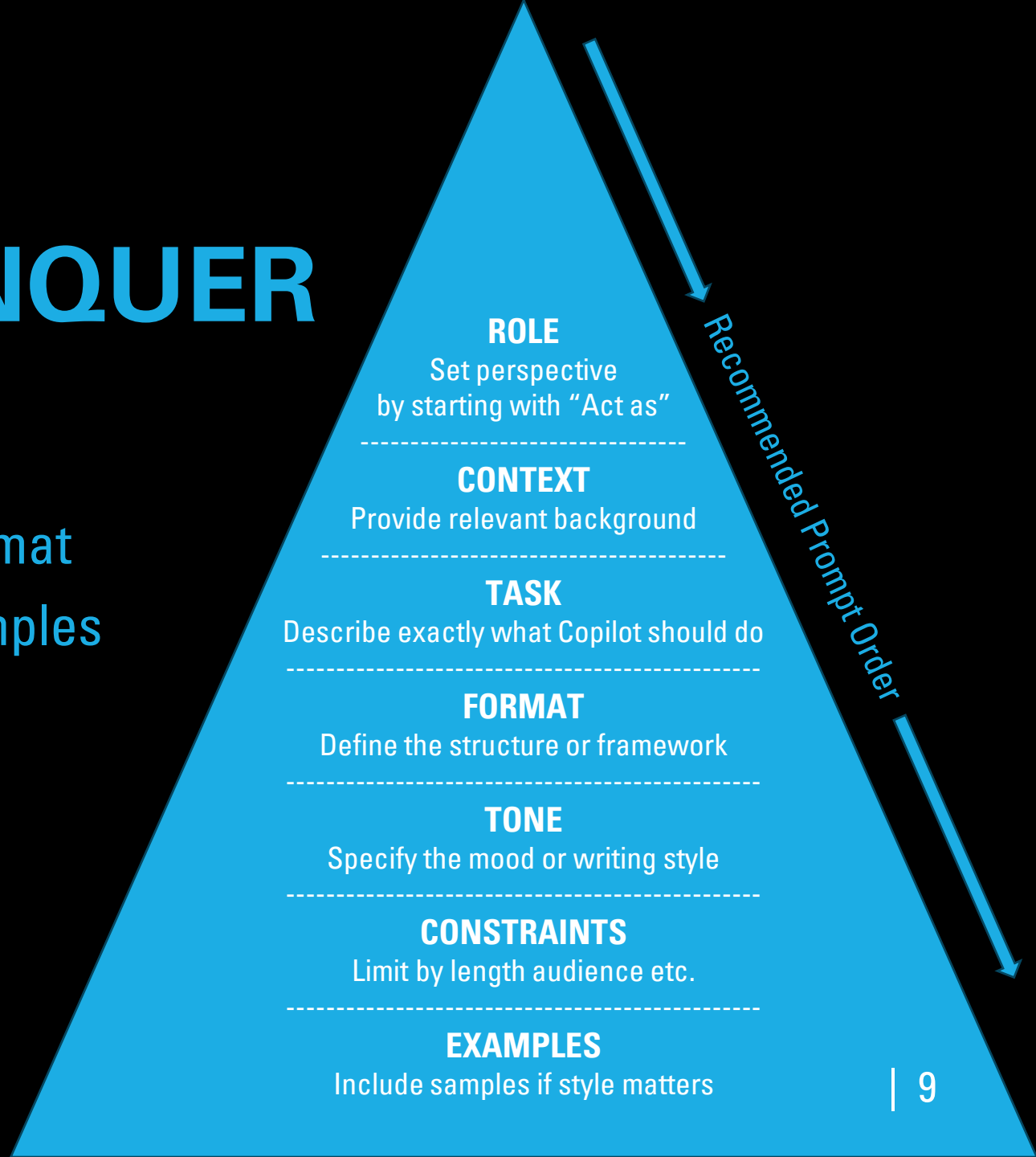
COMBINE & CONQUER

Start with Role + Context

Them move to action with Task + Format

Finish with Tone, Constraints, & Examples to fine-tune the result.

Although Copilot is flexible, using the right sequence ensures that your most important details don't get lost and that your output stays sharp and on target.



Example of a well-structured prompt using all 7 principles

Role: Act as a Knowledge Management lead supporting Customer Care.

Context: This content will be used by frontline agents during live calls to resolve customer issues quickly.

Task: Rewrite the attached process into a knowledge article.

Format: Information Mapping with clear headings, numbered steps, and decision points.

Tone: Clear, direct, and supportive.

Constraints: One page max. Plain language. No policy references.

Example: Match the structure and style of the approved “Password Reset” article.

Stuck? Prompt the prompter

Did everything right and it still didn’t land?
No shame - let Copilot take the lead and be your prompt coach.

How to do it

- Give the context
- Tell Copilot: "Ask me any questions you need, then create a strong prompt for [this task]."

Result: Copilot will ask you clarifying questions and return a ready-to-use, well-structured prompt.

Ready to Level Up?

Great prompts aren't just instructions; they're the secret sauce that unlocks Copilot's full potential.

By applying clarity, context, and structure, you'll transform Copilot from a simple helper into a true productivity partner.

Next Steps:

- Start small. Rewrite one vague prompt today using 7 principles.
- Bookmark the Prompt Structure Pyramid for quick reference.
- Experiment! The more you practice, the better your results.

Remember
Copilot is Powerful,
But you are the Pilot.
The smoother you steer,
the smoother the ride

THANK YOU

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