

How to Write Powerful Copilot Prompts using CREATE

Across M365 Apps & Power Platform

Secure. Smart. Cross-Platform.

Share one time AI surprised you. What did you use it for? Did it make you laugh, give you something unexpected? It doesn't have to be work related.

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Where are you already using Copilot?

In the chat, type the number(s) that match where you've tried Copilot, or share another use.

1

Outlook

Drafting, checking meaning or summarizing emails

2

Teams

Meeting recaps or chat summaries

3

Word / PowerPoint

Creating or editing documents

4

Power BI

Asking questions about data or spotting patterns and trends

5

Power Automate

Building or describing workflows

6

Haven't started yet

That's okay — you're in the right place!

Why Copilot? It's built for your environment.



Enterprise Security

Copilot works inside your organization's M365 tenant. Your data never leaves your company's secure environment, unlike public AI tools.



Respects Permissions

Copilot only surfaces data you already have access to. It won't show a colleague's private files or restricted reports.



Connects to Your Data

Copilot can read your SharePoint files, Power BI reports, and Teams conversations, giving you answers grounded in real company information.

You are still the expert.

Copilot is your assistant, not your replacement.

Think of it this way:

- Copilot = the engine
- You = the driver
- Your prompt = the steering wheel
- Your expertise = the GPS

What this means for you:

- Always review Copilot's output
- Add your context and judgment
- Share useful prompts with your team
- The better your prompt, the better the result

What's missing from this prompt?

Look at this Copilot prompt. In the chat, tell us: what information is missing?

 **Weak Prompt**

"Summarize last month's report."

Ask yourself:

? Which report? Where is it stored?

? How long should it be?

? What should the summary include?

? What format do you want the output in?

? Who is the audience for this summary?

Meet a prompting framework: C.R.E.A.T.E.

Six simple questions. One Copilot prompt that provides powerful context and information.

C

Character

What role should Copilot play?

A

Additions

What extra context should it know?

R

Request

What exactly do you need it to do?

T

Type of Output

What should the result look like?

E

Examples

Can you show it a style or example?

E

Extras

What clarifying questions might fill gaps?

C.R.E.A.T.E. in Action: A Real Copilot Prompt

Scenario: A manager needs to summarize Q1 regional sales data for their leadership team.

C

Character

Act as a senior business analyst who communicates clearly to non-technical executives.

A

Additions

Our goal was 10% growth. Highlight where we exceeded or missed that target.

R

Request

Summarize our Q1 regional sales performance from the report in SharePoint.

T

Type of Output

3–5 bullet points, written for a leadership briefing. Plain language, no jargon.

E

Examples

Use the same format as last quarter's summary I will paste below.

E

Extras

If any regional data looks incomplete, flag it and ask me before summarizing.

Let's see what this looks like put together

All six elements combined into one clean, powerful prompt:

Act as a senior business analyst who communicates clearly to non-technical executives.

Summarize our Q1 regional sales performance using the report X.

Use the same format as last quarter's summary I'll paste below.

Our goal was 10% growth. Highlight which regions exceeded or missed that target.

Output: 3–5 bullet points, written for a leadership briefing. Plain language, no jargon.

If any regional data looks incomplete, flag it and ask me a clarifying question before you summarize.

This works in: Copilot in Word • Copilot Chat (Teams) • Copilot in Outlook

The prompt isn't the end of the story

Provide relevant information, data, as well as the context for these pieces.

Some additional questions to consider before submitting the prompt:

What specific SharePoint files, Teams chats, spreadsheets, docs, or outlook threads can I attach to ground the output?



What context can I give for these files if needed?



Remember, you may have to provide some of this information later in the conversation with Copilot.

Practice: Make the Prompt Better

Scenario: You need Copilot in Outlook to help respond to a vendor complaint. Which prompt is better — and why?

Prompt Before

"Write a reply to this vendor email."

What's missing?

- No tone or relationship context
- No guidance on the outcome you want
- No mention of what happened or why
- Copilot will guess — and may guess wrong

Let's Improve it



Practice: Make the Prompt Better

Scenario: You need Copilot in Outlook to help respond to a vendor complaint. Which prompt is better — and why?

Original Prompt

"Write a reply to this vendor email."

What's missing?

- No tone or relationship context
- No guidance on the outcome you want
- No mention of what happened or why
- Copilot will guess — and may guess wrong

New Prompt

"Act as a professional account manager. Draft a calm, solution-focused reply to this vendor complaint about a late shipment. Acknowledge the delay, explain we are investigating, and offer a follow-up call. Keep it under 150 words."

Why it works:

Uses C (role), R (task), A (context), T (length)

More Practice: Power Platform Prompts

Which prompt would give you better results from Copilot in Power BI or Power Automate?

Power BI — Asking Copilot about your data:

 *"Show me the sales data."*

Too vague. Copilot doesn't know which time period, region, or metric.

✓ *"Compare Q1 vs Q2 revenue by region. Highlight any region where growth dropped more than 5%. Show as a bar chart."*

Power Automate — Describing a workflow to Copilot:

 *"Automate my approval process."*

Copilot needs to know what triggers it, who approves, and what happens next.

✓ *"When a new purchase request is submitted in SharePoint, send an approval email to the department manager. If approved, notify the requester and log it in the tracking sheet. If rejected, email the reason back."*

Making It Stick: 3 Next Steps



1. Build a Shared Prompt Library

Save your best Copilot prompts in a shared Teams channel or SharePoint page. Tag them by app (Outlook, Power BI, etc.). A shared library means your whole team benefits from each person's wins, and you can see examples other use.



2. Share a Win at Your Next Team Meeting

Spend 5 minutes at your next staff meeting showing one Copilot prompt that saved you time. Seeing real results from a real colleague is the fastest way to build adoption.



3. Iterate Your Prompts

If Copilot's output isn't quite right, don't start over. Refine the prompt. Add more context, clarify the output format, or ask Copilot what information it needs. Treat it like a conversation.

Remember:



1. You Are the Pilot or Navigator

You set the direction and make the decisions. Copilot is the vehicle that gets you there. Stay in control: choose the destination, judge whether the route is right, and let Copilot do the heavy lifting while you keep your hands on the wheel.



2. Practice Human in the Loop

Always keep a human in the loop and review Copilot's output before you rely on it. Leverage your own knowledge and expertise, or that of your colleagues and your professional network to verify, refine, and improve every result.

CREATE is not the only prompt structure. It's important to note patterns of success and share them with others.

My design process

How this session was built — and what that means for your team.

Phase 1: Spot the Problem

Started with the real performance gap: most employees use Copilot, but few use structured prompts, leading to wasted time and inconsistent results.

Phase 3: Bring it to Life

Used realistic M365 scenarios (Outlook, Power BI, Power Automate) your team will recognize. Added practice with real prompt comparisons, not abstract exercises.

Phase 2: Build the Blueprint

Anchored the session in learning science (Gagné, Bloom). Mapped delivery to Zoom/Teams for live virtual engagement with chat polling built in.

Phase 4: Make it Stick

Closed with three concrete next steps and a job aid. The goal is behavior change, not just awareness.

You're Ready to Prompt.

Use C.R.E.A.T.E. and let Copilot do more of the heavy lifting.

Questions & Discussion

Job Aid: How to Write Powerful Copilot Prompts | Share in Teams after this session

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