

Purpose of this guide

This guide helps University of North Carolina System Office employees write clear, effective prompts for Microsoft 365 Copilot Chat.

System Office access note: Most employees should expect to use Copilot Chat through the standalone Microsoft 365 chat experience, Outlook, and Teams. Full native Copilot features inside every Microsoft 365 app may not be available to every account. Some approved accounts may see additional capabilities based on role, license assignment, app availability, Microsoft rollout timing, and System Office configuration.

A prompt is the instruction, question, or request you give to Copilot Chat.

Good prompts do not need to be complicated. They should be clear, specific, and appropriate for the task. This guide focuses on practical prompting, not technical prompt engineering.

What makes a good prompt?

A good prompt usually includes some combination of the following elements:

- Task — what you want Copilot Chat to help you do
- Context — background information Copilot Chat needs, if appropriate to share
- Audience — who the response is for
- Tone — how the response should sound
- Format — how the response should be organized

You do not need to include all five parts every time. Generally, great prompts get more useful answers.

Basic prompt formula

Use this structure when you are not sure where to start:

Basic prompt formula

Help me [task].

The context is [brief context].

The audience is [audience].

Use a [tone] tone.

Provide the response as [format].

Example

Help me draft a short internal email.

The context is that our team is reminding employees about an upcoming training session.

*The audience is System Office employees.
Use a professional, helpful tone.
Provide the response in three short paragraphs.*

The five parts of a prompt

1 Prompt part 1: Task

The task tells Copilot Chat what to do.

Instead of

Help with this.

Try

Rewrite this message to make it clearer and shorter.

Useful task words include:

- Draft
- Rewrite
- Summarize
- Compare
- Explain
- Organize
- Brainstorm
- Create
- Review
- Turn this into

2 Prompt part 2: Context

Context gives Copilot Chat helpful background. Only include context appropriate to use with AI tools, and use the least amount of information needed for the task.

Examples of appropriate context:

- The intended audience
- The purpose of the message
- Desired length
- Non-sensitive project background

- Approved text to summarize or revise
- Public information
- General constraints

Data safety reminder

Do not include Tier 3 data or information that should not be exposed in AI tools.

3 Prompt part 3: Audience

Tell Copilot Chat who the response is for.

Examples:

- System Office employees
- A project team
- A supervisor
- A non-technical audience
- A new employee
- Meeting participants
- A general internal audience

Audience affects word choice, tone, structure, and level of detail.

4 Prompt part 4: Tone

Tone tells Copilot Chat how the response should sound.

Useful tone words include:

- Professional
- Clear
- Helpful
- Concise
- Plain-language
- Friendly but professional
- Formal
- Calm
- Neutral
- Instructional

Example

Use a professional, clear, and helpful tone. Avoid marketing language.

5 Prompt part 5: Format

Format tells Copilot Chat what the answer should look like.

Useful formats include:

- Three short paragraphs
- Bullet points
- A checklist
- A table
- An outline
- A short email
- A meeting agenda
- A briefing note
- Step-by-step instructions
- A list of questions

Example

Provide the response as a checklist with no more than eight items.

Copy-and-adapt prompt examples

Writing and editing

Prompt

*Rewrite the following message for [audience].
Keep the tone professional, clear, and helpful.
Make it shorter without changing the meaning.
Do not add new facts.*

Follow-up

Give me three alternate subject lines and explain which one is clearest.

Summarizing

Prompt

*Summarize the following approved text for [audience].
Provide five key points, action items, open questions, and assumptions.
Do not add information that is not in the text.*

Follow-up

Turn the summary into a short briefing note with headings.

Planning a task

Create CSV-style rows with columns for task, owner, due date, and status. I will review the result before pasting it into Excel or another approved app.

App handoff example

Prompt

*Help me plan [project or task].
Create a practical checklist organized into before, during, and after steps.
Include risks, assumptions, and questions I should confirm.*

Follow-up

Convert this checklist into immediate next steps and items that need approval.

Meeting preparation

Prompt

*Help me prepare for a meeting about [topic].
The purpose is [purpose].
Create a short agenda, five questions to ask, risks to clarify, and a follow-up email template.*

Follow-up

Make the agenda shorter and organize the questions by priority.

Brainstorming

Prompt

Help me brainstorm practical options for [task or project].

Give me ten ideas.

For each idea, include a short description, one benefit, and one limitation.

Follow-up

Group these into quick wins, medium-effort options, and ideas needing review.

Explaining a concept

Prompt

Explain [concept] for an employee who is new to the topic.

Use plain language.

Include a short definition, why it matters, and one practical example.

Follow-up

Rewrite the explanation so it is shorter and appropriate for an internal resource page.

How to improve a response

If Copilot Chat gives an answer that is not quite right, do not start over immediately.

Ask for a revision.

Useful follow-up prompts include:

- Make this shorter.
- Make this more specific.
- Use a more professional tone.
- Rewrite this for a non-technical audience.
- Turn this into a checklist.
- Add assumptions and open questions.
- Remove anything that is not supported by the source text.
- Give me three alternate versions.

Prompting habits to avoid

Avoid prompts that are:

- Vague
- Overloaded with too many requests
- Missing the audience

- Missing the desired format
- Based on sensitive or restricted information
- Asking Copilot Chat to make final decisions
- Asking Copilot Chat to invent facts or sources

Instead of asking for a final answer, ask Copilot Chat to help you draft, organize, compare, or clarify.

Practical workflow: If you do not have native Copilot access inside a specific Microsoft 365 app, use Copilot Chat to draft, summarize, outline, create CSV-style content, or generate text. Review the output carefully, then move the final content manually into Word, Excel, PowerPoint, Outlook, Teams, or another approved app.

Data safety reminder

Important

Do not enter, paste, upload, or expose Tier 3 data in AI tools.

Before prompting, ask:

- Is this information appropriate for Copilot Chat?
- Could the prompt be written with less detail?
- Can I use placeholders instead of names or sensitive information?
- Do I need approval before using this content?

When unsure, pause and ask.

Quick prompt checklist

Before sending a prompt, check

- Did I clearly state the task?
- Did I include only appropriate context?
- Did I identify the audience?
- Did I specify the tone?
- Did I ask for a useful format?
- Did I avoid Tier 3 data?
- Will I review the output before using it?

Final reminder

Direction in, judgment out

A good prompt gives Copilot Chat direction.

A good employee still reviews the response.

Use Copilot Chat to support your work — not to replace your judgment.