STEP-BY-STEP GUIDE | MICROSOFT 365 COPILOT | SIMPLIFIED TECHNICAL ENGLISH (ASD-STE100)

Data Storytelling with Microsoft 365 Copilot: Any Project

From a business question and raw data to a data story that gets a decision. Copilot does the work. You approve at each gate.

1 Discover | 2 Develop | 3 Design | 4 Drive

Use this guide when

- You have data and a business question, and you must give a clear message to decision makers.
- You want Copilot to do the heavy work: clean the data, build PivotTables, test the story, draft the chart and the slide.
- You want to stay in control of the numbers, the message and the decision.

What is in this guide

Part	Content
Part 1	Before you start: the journey, the rules, licenses, data safety, prompts, the 8 gates
Part 2	Set up the Copilot chat (3 prompts)
Part 3	Discover: from data to insight (5-step insight process)
Part 4	Develop: from insight to story (Story Space, Big Idea, 3C, S.T.O.R.Y, Core)
Part 5	Design: from story to visual (6 story types, chart options, hybrid title)
Part 6	Drive: from visual to decision (declutter, focus, slide, presentation)
Part 7	Fix common problems and keep the conversation going
Part 8	Project canvas and one-page prompt card

What you need

- Microsoft 365 Copilot Chat with your work account (Basic or Premium license).
- Your data in Excel, and a short note about the business situation.
- Paper and sticky notes for Gate 5 and Gate 6.

Text in [brackets] in a prompt is for you to change. All prompts work in Microsoft 365 Copilot Chat. Some steps use Copilot in Excel or PowerPoint if you have a Premium license.

PART 1

Before you start

The journey, the rules and the gates. Read this once.

1.1 The journey: Data, Story, Visual

1 Discover	2 Develop	3 Design	4 Drive
Data to insight	Insight to story	Story to visual	Visual to decision

Phase	Question you answer	Output
Discover	What does the data tell me?	1 to 3 insights: WHAT happened + WHY it matters + WHAT to do
Develop	What story does my audience need?	Big Idea, story outline (S.T.O.R.Y), core message
Design	How do I show it?	The right chart and a hybrid title
Drive	How do I make them act?	A clean slide, ready to present, and answers to hard questions

1.2 Who does the work?

You do all the work	AI expands your thinking	AI speeds up your work	AI does all the work
Classic data storytelling. Slow, full control.	Copilot asks questions, finds gaps and risks.	Copilot cleans, calculates, drafts, prototypes.	Not recommended. You lose control of the message.

NOTE Work in the two middle boxes. Know the process first, then use Copilot. If you do not know the process, you cannot write good prompts and you cannot see when the answer is wrong.

1.3 Six rules

No.	Rule	Why
1	Think first. Write your context, Big Idea and storyboard by hand before you ask Copilot.	If you start with AI, your thinking anchors on its framing.
2	Ask Copilot to ask you questions first.	Your answers make your thinking clear. Copilot then gives better feedback.
3	Give context: audience, what they care about, the decision, the data.	Feedback quality depends on the context you give.
4	Ask Copilot to cut, not to add.	AI tends to add content. A good story has less.
5	Check every number against the source.	AI can calculate wrong, invent data, or agree with you too easily.
6	Stay in one chat for one project.	Copilot keeps the context, so you do not repeat it.

1.4 Which Copilot, which license

Copilot	Open it	Use it for	License
Microsoft 365 Copilot Chat	**m365.cloud.microsoft** > **Chat**, work account	Thinking, analysis of attached files, chart prototypes, critique	Basic and Premium
Copilot in Excel, Agent mode	**Home > Copilot**, then turn on **Agent mode** (Edit with Copilot) in the Copilot pane. File on OneDrive or SharePoint, AutoSave on.	Clean-up, PivotTables, formulas, charts inside your workbook	Premium
Copilot in PowerPoint	**Home > Copilot**	Slide text and layout	Premium

NOTE Prompts in this guide work for both licenses. Where a prompt says **[Excel: ...] [Chat: ...]**, keep the part for your license and delete the other part. Premium: Copilot in Excel and Copilot Chat are separate chats. They do not share what you typed. Copy results from one to the other when the guide tells you.

CAUTION Features change often and can be different in your organization. Before a real project, test each prompt once on fictional data.

1.5 Data safety

CAUTION Follow your organization policy for AI tools. Use only the approved Microsoft 365 Copilot with your work account. Do not put customer names, account numbers, staff names, ID numbers or other confidential data into a prompt or an attached file. Mask or aggregate the data first (Prompt 0.4).

1.6 How to write a good prompt

Goal What do you want?	**Context** Why? Who is the audience?	**Source** Which file, table or text?	**Expectations** Format, length, rules

Weak prompt	Strong prompt
Analyze my data.	Find the 3 patterns that matter most (Goal) to the Head of Operations, who must decide on a staffing change (Context). Use the attached table Sales_Flat (Source). Give each pattern with numbers, label it Known or Inferred, and keep it to 5 lines (Expectations).

1.7 The 8 gates: Copilot works, you approve

At each gate, stop. Read what Copilot made. Decide. Do not go on until you agree. You own the result.

Gate	Where	You must
1	3.1 Sub-questions	Approve the sub-questions. They drive all the analysis.
2	3.3 Clean-up plan	Approve the plan before Copilot changes any data.
3	3.4 Results	Check the control total and one PivotTable number yourself.
4	3.5 Validate	Confirm the business reason for each pattern with the business owner.
5	4.2 Big Idea	Fill in the Big Idea worksheet by hand. Choose the action and the stakes.
6	4.4 Story	Write the storyboard by hand. Choose the climax. Cut what does not help the audience.
7	5.2 to 5.4 Visual and title	Choose the chart. Check every claim and number in the title.
8	6.3 to 6.5 Slide and talk	Check the slide word by word against the data. You present it.

How to read this guide

Box	Meaning
PROMPT	Copy and paste. Change the text in `[brackets]`. The label on the right tells you where to run it.
A GOOD ANSWER HAS	Use this to judge the Copilot answer. If it is missing, ask again.
GATE: YOU DECIDE	Stop and decide. Copilot does not decide for you.
CHECK	What you must see before you go on.
EXAMPLE	A short example from an audit case: trade exceptions on a dealing desk after a work-from-home pilot.

PART 2

Set up the Copilot chat

Do this once at the start of each project. It takes 3 minutes.

1. Open Microsoft 365 Copilot Chat. Make sure the work account is on.
2. Click **New chat**. Use this chat for the full project.
3. Copy Prompts 0.1, 0.2 and 0.3, one at a time. Push **Enter** after each.

PROMPT 0.1 — Copilot Chat

In this chat, use these data storytelling principles when we explore data, build a story, and create graphs, slides and presentations:
1. The audience comes first. Every choice must help the audience understand and act.
2. One clear main message (the Big Idea) for each story.
3. Use familiar charts: bar, line, slopegraph, dot plot. Avoid pie, 3D and unusual charts.
4. Remove clutter: gridlines, borders, legends, extra colours and decimals that do not help.
5. Show people where to look: grey for context, one highlight colour for the point.
6. Tell people what to see: use a title that states the takeaway, not a topic.
7. Every story has tension and ends with a clear action.
Prioritize simplicity, clarity and audience focus in all your recommendations.

NOTE If your organization gives you a data storytelling principles guide (a PDF), attach it with Prompt 0.1 and add: `Also use the attached guide.`

PROMPT 0.2 — Copilot Chat, same chat

I am a **[role]** in **[department]**. I will work through a data storytelling project in 4 phases: Discover, Develop, Design and Drive.
Act as my thought partner, not as my writer.
Rules for this chat:
1. Before you give feedback, ask me the questions that help you give better input.
2. Do not rewrite my work unless I ask. Show blind spots, risks and other angles.
3. Do not invent data. Label each point as Known (from my data), Inferred, or Suggested.
4. When I ask for feedback, tell me what to cut before what to add.
5. When I ask you to change data, show me your plan first and wait for my OK.
6. Keep answers short. Use bullets and tables.
Reply "Ready" if you understand.

PROMPT 0.3 — Copilot Chat, same chat

For all procedures, findings and insights in this chat, write in ASD-STE100 Simplified Technical English:
1. Use simple, common words. Use one word for one meaning.
2. Use names from my data exactly as they are (sheet, column and menu names).
3. Procedures: maximum 20 words for each sentence. Descriptions: maximum 25 words.
4. One instruction in each sentence. One action in each numbered step.
5. Use the active voice and the imperative ("Click", "Select", "Type").
6. Put conditions first: "If the total is not correct, stop."
7. Start warnings with "CAUTION:", tips with "NOTE:" and expected results with "CHECK:".
8. Use "Push" for keyboard keys. Do not use em dashes.

Do not use STE for story text, slide titles and the Big Idea. They must sound natural and persuasive.
Check each answer against these rules before you send it.

A GOOD ANSWER HAS A short confirmation, such as "Ready". If Copilot starts to write long answers later, type: `Remember the rules from the start of this chat.`

2.1 Make the data safe to share

Do this before you attach any real data. Share only the column names, not the data.

PROMPT 0.4 — Copilot Chat

I want to analyze a dataset with these columns (no data, names only):
[paste the column names]
The purpose is: **[business question]**.
Which columns are confidential or personal? For each one, tell me: delete it, mask it (replace with a code), or aggregate it (for example, by month or by team). Which columns do I need to answer my question?

A GOOD ANSWER HAS A table: column, sensitive yes or no, action (keep, delete, mask, aggregate), and a reason.

1. Do the masking in Excel yourself. Replace names with codes, for example Dealer_01.
2. Delete the columns that you do not need.
3. Save the file with a new name, for example `[Project] masked.xlsx`. Use only this file with Copilot.

CHECK Open the masked file. Search for one real name. You must find no result.

PART 3

Discover: from data to insight

The 5-step insight process: Context, Audit, Foundation, Baseline and SCAN, Validate.

3.1 Step 1: Context

Write these 5 lines by hand first. They take 5 minutes and drive the full analysis.

Item	Your answer
Business question	
Audience (who decides)	
Decision they must make	
Period	
Scope (units, products, desks)	

1. Attach the masked data file and any background note to the chat. Click `+` > **Upload**.
2. Copy Prompt 1.1. Paste your 5 lines.

PROMPT 1.1 — Copilot Chat

```
Here is my context:
Business question: [ ]
Audience: [ ]
Decision: [ ]
Period: [ ]
Scope: [ ]
Read the attached background note. Do not analyze the data yet.
1. Tell me if my business question is clear and can be answered with data.
2. Break it into 5 to 7 sub-questions that the data must answer.
3. For each sub-question, state the data I need and the data transformation I need.
Then wait for my OK.
```

A GOOD ANSWER HAS Sub-questions that cover: change over time, a before and after of a key event, comparison between groups, the size of the base (volume) to rule out simple growth, the detail (who, where, how), and the data quality question "are the numbers correct?".

EXAMPLE Business question: did the work-from-home pilot change trade exception risk? Sub-questions: Did exceptions change over time? Did they change after the pilot date? Only the pilot desk or all desks? Is it only more trades? Who made them, and how? Are the numbers correct?

GATE 1: YOU DECIDE Add, remove or change the sub-questions. Then type: `OK. Use these sub-questions for the full analysis.` Write the final list on your project canvas (Part 8).

3.2 Step 2: Audit

PROMPT 1.2 — Copilot Chat

Look at the attached data. Do not analyze the results yet.
For each sheet or table, tell me: what one row means, the columns and data types, and every data quality issue (title rows, blank cells, merged cells, duplicates, subtotal or total rows, total columns, dates or months stored as columns, text that looks like numbers, outliers).
Then tell me the control total (for example, the grand total) and where it is.

A GOOD ANSWER HAS One short block for each sheet, a numbered list of issues, and a control total with its cell address.

CHECK Open the file. Go to the cell that Copilot gave. The control total is the same. Write it on your project canvas. You use it in Step 3.

3.3 Step 3: Foundation (Copilot plans, then cleans)

First Copilot shows a plan. You approve it. Then Copilot does the work. Review before you execute.

PROMPT 1.3 — Excel Agent mode or Copilot Chat

[Excel: Here are my sub-questions: paste the approved list.]
Plan the data clean-up that I need to answer my sub-questions. Do not change anything yet.
For each problem from the audit, tell me the fix and the sub-question it supports.
The result must be one flat table named **[Table_Name]** with one row for each **[unit, for example: desk, type and month]** and these columns: **[column list]**.
Tell me which helper columns I need (for example: a before or after label for a key date, or a group label such as "Target" against "Others") and why.
Then wait for my OK.

A GOOD ANSWER HAS An ordered plan, for example: remove title rows, set the header row, fill blank cells, remove subtotal and total rows and columns, turn month columns into rows (unpivot), set data types, add helper columns. Each step links to a sub-question.

GATE 2: YOU DECIDE Read the plan. If a step is missing, type: `Add this step: [step]`. The most common miss: subtotal rows or a total column left in the data, which counts the numbers twice. Do not say OK until the plan is complete.

PROMPT 1.4 — Excel Agent mode or Copilot Chat

OK. Do the clean-up now.
[Excel: put [Table_Name] on a new sheet and format it as a table.] **[Chat: use Python and give me [Table_Name]** as an Excel file to download.]
[For a report that you refresh each month, add: use Power Query, so I can refresh it.]
Then do a control check: give me the row count, the sum of **[value column]**, and the control total from the source. Tell me if they match.

CHECK The sum is the same as the control total from Step 2. Open the table and check one row against the source yourself.

3.4 Step 4: Baseline and SCAN

PROMPT 1.5 — Excel Agent mode or Copilot Chat

Answer my sub-questions from the data. Build one view for each:
[P1: value by time and group]
[P2: average a month by group, before against after the key date]
[P3: the base (volume) and a rate, for example per 1,000 transactions]
[P4: the detail of the main group: who, where, how]
[Excel: make each one a PivotTable on its own sheet, named P1 to P4.] **[Chat: show each one as a small table.]**
Then read the results. Give me a table with: No., Sub-question, Answer (one sentence with numbers), Source (P1 to P4). Label each answer Known or Inferred.

A GOOD ANSWER HAS One answer for each sub-question, with numbers and a source. No answer without a number.

GATE 3: YOU DECIDE Pick one number in the answer table. Find it in the PivotTable (or the Chat table) and in the source data. If it is different, type: `Show me the filter and the calculation for this number.`

1. Premium only: copy the answer table from the Excel Copilot pane. Paste it into your Copilot Chat. Type: `These are my verified results.`

PROMPT 1.6 — Copilot Chat

Apply SCAN to these results:
S Spikes: sudden rises or falls.
C Comparisons: one group against another, or against a target.
A Anomalies: values or behaviour that are not normal.
N No-change: things that should change but did not.
For each, give the pattern with numbers and the period, label it Known or Inferred, and rank by importance to **[audience]**.

A GOOD ANSWER HAS 2 to 6 patterns, each with a number and a period. The "No-change" type is often the most valuable for audit: an action that was closed but the problem stays.

3.5 Step 5: Validate

PROMPT 1.7 — Copilot Chat

Challenge each pattern. For each one:
1. List other explanations: more volume, season, system change, data error, change of definition, one-off event.
2. Tell me which evidence in the data confirms or rejects each explanation.
3. Tell me what I must ask the business owner to confirm it.

GATE 4: YOU DECIDE Copilot cannot talk to the business. Ask the business owner to confirm the reason for each pattern. Mark each one: Finding (no valid reason), Good news (valid reason, improvement), or Explained (valid reason, no action).

PROMPT 1.8 Copilot Chat

Write each confirmed finding as an insight: WHAT happened (with numbers) + WHY it matters to [audience] + WHAT to do. Then give each insight in one sentence. Maximum 3 insights.

WHAT happened + WHY it matters + WHAT to do

EXAMPLE Trade exceptions on the pilot desk rose five times after the work-from-home pilot, mostly on unrecorded lines, so pause the rollout until recorded-line controls work.

CHECK Each insight has a number, a reason the audience cares, and one action. Compare the wording with your own. Keep your words if they are more precise.

PART 4

Develop: from insight to story

Not every insight needs a story. Choose one, then build the story around your audience.

4.1 Story Space: which insight needs a story?

	Low value	Mid value	High value
Easy to explain	Skip or one line	Report it (one line or table)	Report it, then act
Hard to explain	Skip	**Story Space**	**Story Space**

PROMPT 2.1 Copilot Chat

Rate each insight on two scales: complexity (easy or hard to explain) and value to **[audience]** (low, mid, high). Put them in a table. Which one goes into the Story Space and needs a full data story? How do I report the others?

A GOOD ANSWER HAS One insight in the Story Space (hard to explain, mid or high value). The others are reported as findings or used as support evidence.

NOTE You know the audience better than Copilot. Change a rating if it is wrong.

4.2 The Big Idea (fill in by hand first)

Fill in this worksheet on paper for the Story Space insight. Do not ask Copilot to fill it in.

Worksheet box	Your answer
(1) Primary audience: groups or people	
(2) If only one person: who?	
(3) What does the audience care about?	
(4) What action must the audience take?	
Benefits if they act	
Risks if they do not act	
Draft Big Idea: one sentence, your point of view, what is at stake	

PROMPT 2.2 Copilot Chat

Here is my Big Idea worksheet, audience section:
[paste boxes 1 to 4]
Ask me questions first. Then tell me: Is the single person the right choice? What does each person in the room care about? What is their likely objection? Is the action specific enough? What am I missing?

PROMPT 2.3 Copilot Chat

Here are the benefits and risks from my worksheet:
[paste benefits and risks]
Which of these matter most to this audience? Which 1 or 2 must be in the Big Idea? Is any risk too weak or too general?

PROMPT 2.4 Copilot Chat

Here is my draft Big Idea: [paste draft]
Does it state my point of view, show what is at stake, and is it one complete sentence? Ask me questions first. Then give me 2 to 3 sharper versions.

A GOOD ANSWER HAS Questions before advice. Clear points about each person in the audience and the likely objection. Sharper versions with one action and one stake.

GATE 5: YOU DECIDE Answer the questions from Copilot. They make your thinking clear. Then write the final Big Idea in your own words. Copilot often suggests a softer action (a pilot, a review). Use it only if it does not weaken your message. Do not put names of people in the Big Idea.

EXAMPLE Pause the 1 January work-from-home rollout until every home trade is on a recorded line, because exceptions rose five times under the pilot and USD 260 million of trades have no recorded conversation.

4.3 Crowd: know your audience

PROMPT 2.5 Copilot Chat

For each person in my audience [list], tell me in a table: what they already know, what they care about, their likely objection, what will make them say yes or at least not block, and how they like to get information.

CHECK You can answer the main objection with a number from your data. If not, go back to Discover and find it.

4.4 Storyboard (by hand), then pressure-test

1. Write one idea on each sticky note. Write as many as you can in 10 minutes. Do not filter.
2. Remove the notes about your process: how you cleaned the data, methods, checks.
3. Make each note a point, not a label. Not "Trade volume" but "Trade volume did not change".
4. Put the notes in order. Keep 8 to 12 notes.

PROMPT 2.6 Copilot Chat

Here is my storyboard, one idea for each line, in order:
[paste the sticky notes]
Act as a thought partner to pressure-test the narrative arc. Do not rewrite it and do not add content.
Before you give feedback, ask me questions that help you give better input.
Then review: Is there clear tension? Where does the story lose momentum? Which notes do not earn their place? Are there logical gaps? Where is the climax?

A GOOD ANSWER HAS Questions about the audience first. Then notes to combine or cut, gaps, where tension starts, and a suggested climax.

GATE 6: YOU DECIDE AI often agrees too easily. If Copilot only praises, type: `Be more critical. Give me the 3 biggest weaknesses.` Choose the climax yourself. A good climax answers the main objection of your audience before they say it.

4.5 Content: S.T.O.R.Y

Letter	Meaning	Question to answer
S	Situation	What is the normal state? What does the audience already know?
T	Take Off	What changed? What is the surprise in the data?
O	Opportunity	Why is now the right time to act?
R	Resolution	What must we do?
Y	Yield	What do we get if we act? What happens if we do not?

PROMPT 2.7 Copilot Chat

Map my storyboard to S.T.O.R.Y: Situation, Take Off, Opportunity, Resolution, Yield. Use only my notes. Show which note goes where, and tell me which letter is weak or empty and what question I must answer to fix it.

4.6 Core message

Problem + Stakes + Steps + Call to Action

PROMPT 2.8 Copilot Chat

Write the Core of my story in 4 short sentences: Problem, Stakes (with a number), Steps (2 or 3), Call to Action (one thing to decide today).

CHECK The Core and your Big Idea ask for the same action. Every number is the same as in your Step 4 answer table.

4.7 Takeaway titles (for a longer deck)

PROMPT 2.9 Copilot Chat

Turn each point in my storyboard into a draft takeaway title for a slide: a short point of view, not a label. Give me just the titles as a simple numbered list.

NOTE Skip 4.7 if your story is one slide. Edit each title. Keep it short. Check each number.

PART 5

Design: from story to visual

Lead with the message, not the data. Choose a familiar chart.

5.1 Choose the data story type

Story type	The message is about	Good charts
Ranking	Which is biggest or smallest	Horizontal bar, sorted
Distribution	How values spread	Histogram, dot plot
Proportion	Parts of a whole	Stacked bar, 100% bar
Correlation	How two measures move together	Scatter plot
Comparison	Group A against group B	Bar, dot plot, slopegraph
Change over time	How it moved, before and after an event	Line, column, slopegraph

PROMPT 3.1 Copilot Chat

Which of these 6 data story types fits my Big Idea: Ranking, Distribution, Proportion, Correlation, Comparison, Change over time? Give the main type, a second type if needed, one reason, and 2 familiar charts for it.

5.2 See 2 to 3 chart options

PROMPT 3.2 Copilot Chat

Act as a thought partner to help me choose a visual.
Audience: **[who, and their view of the topic]**
What I want to show: **[Big Idea or takeaway in one sentence]**
How it will be used: **[live slide / report / email]**. Goal: **[inform / persuade / get a decision]**.
Data: **[describe the data from this chat, for example: monthly totals for the target group and for all others combined]**. First show me this data as a small table.
Ask me clarifying questions first. Then show me 2 to 3 visual approaches. For each one, explain what it makes easy to see and what it hides. Use Python to draw each option as a chart image. Prefer familiar charts.

A GOOD ANSWER HAS A data table first, then 2 to 3 chart images with a short "easy to see" and "hides" note for each, and a recommendation.

CAUTION Copilot sometimes gives only text or code, not an image. Type: `Run the Python code and show me the charts as images.` If it still fails, ask for the data table as a file and build the options in Excel.

GATE 7: YOU DECIDE Check the data table against your PivotTables. Then choose the chart that shows your Big Idea fastest to this audience. Reject unusual charts that the audience cannot read in 5 seconds. The Copilot image is a prototype. You build the final chart.

5.3 Build the chart

PROMPT 3.3 — Excel Agent mode or Copilot Chat

[Excel: From [Table_Name], make a new sheet Chart_Data with the columns [columns]. Then create a [chart type] from Chart_Data. Put [field] on the horizontal axis and show [series] as the series.]
[Chat: Give me the chart data table as an Excel file named Chart Data to download.]

1. Basic only: open Chart Data.xlsx. Select the table.
2. Click **Insert > Recommended Charts**. Select your chart type. Click **OK**.

CHECK Check 2 points on the chart against Chart_Data: the first and the last value. This is your draft chart. Do not present it yet.

5.4 Write the hybrid title

Insight + Call to Action + Legends

Part	What it does	Rule
Insight (headline)	States the finding	One sentence with a number word. Not a topic like "Sales trend".
Call to action (subtitle)	Tells the audience what to do	Starts with a verb: Please approve, Please pause.
Legends	Replace the legend box	Colour the series names in the headline with the same colour as their lines or bars.

PROMPT 3.4 — Copilot Chat

Write 3 options for a hybrid title for my chart:
1. Headline: the insight in one sentence, with a number word. Not a topic.
2. Subtitle: a call to action that starts with a verb.
3. Legends: the series names inside the headline, so the headline replaces the legend box. Tell me which word gets which colour.
Use my Big Idea: [paste Big Idea]

GATE 7: YOU DECIDE Choose one title or combine two. Check each claim in it against the data: each number, each "rose", "fell", "exceeds", "times". Write the approved headline and call to action on your project canvas.

PART 6

Drive: from visual to decision

Declutter, focus attention, tell people what to see, and prepare for questions.

6.1 Declutter and focus

1. Take a screenshot of your draft chart. Push **Windows + Shift + S**.
2. Paste it into Copilot Chat. Push **Ctrl + V**.

PROMPT 4.1 — Copilot Chat

Here is a graph I am working on. **[paste screenshot]**
Help me refine it through the lens of clear, simple data communication. What can I remove or simplify? Is attention on what matters most? Where can the words, hierarchy or design be clearer? Prioritize removing or simplifying over adding more. Give me a numbered list of changes in Excel terms.

PROMPT 4.2 — Copilot Chat

Check this chart against these rules and list each rule as Pass or Fix:
1. No chart junk: no gridlines, border, 3D, shadow or legend box.
2. One sans-serif font.
3. Grey for context and one highlight colour for the point (a complementary colour, for example orange with grey and blue).
4. Data labels only where they help, directly on the line or bar.
5. A takeaway title and a source line.
6. A note on the key event or the key point.
Where does the eye go first, second and third? Is that the right order for my message: **[Big Idea]**?

6.2 Apply the changes

PROMPT 4.3 — Excel Agent mode

Change this chart: delete the chart title, the gridlines and the legend. Make **[context series]** grey and **[main series]** **[highlight colour]** and thicker. Add a data label with the series name and value at the last point of each series. Add a note at **[key point]**: "**[short note]**". Use short axis labels.

Basic, or the changes that Agent mode does not do:

Change	How to do it in Excel
Delete gridlines, legend, title	Click the item. Push **Delete**.
Colour a line or bar	Right-click the series > **Format Data Series** > **Fill & Line** > colour.
Make a line thicker	Same panel > **Width**: 3 pt.
Label the last point	Click the last point twice. Right-click > **Add Data Label**. Then **Format Data Label** > select **Series Name** and **Value**.
Add a note	Click **Insert > Text Box**. Type a short note. Put it near the point.

CHECK Run Prompt 4.2 again with a new screenshot. All rules are Pass.

6.3 Put it on a slide

1. Save the chart as a picture. Right-click the chart > **Save as Picture** > PNG.
2. Premium: open a new PowerPoint file. Paste the chart. Click **Home > Copilot**.
3. Basic: stay in the same Copilot Chat. Attach the chart picture.

PROMPT 4.4 — Copilot in PowerPoint or Copilot Chat

Create one 16:9 slide for my data story. Use the exact text below. Do not change any word or number.
1. Headline at the top, 24 pt bold, dark grey: **[paste your approved headline]**
Make the words "**[series 1]**" **[colour 1]** and "**[series 2]**" **[colour 2]**.
2. Call to action under the headline, 16 pt: **[paste your approved call to action]**
3. Chart in the middle: **[PowerPoint: use the chart on this slide.]** **[Chat: use the attached chart picture.]**
4. Source at the bottom left, 10 pt grey: Source: **[source and period]**.
Use one sans-serif font and a white background. Do not add images, icons, bullets or other text.
[Chat: give me the slide as a PowerPoint file to download.]

NOTE Paste the approved text. Do not type "use the recommended headline": Copilot then writes a new one. If Copilot Chat gives no PowerPoint file, type the 3 text lines on the slide by hand.

GATE 8: YOU DECIDE Read the slide word by word. The headline, the call to action and every number must be the same as your approved title and your data.

PROMPT 4.5 — Copilot Chat

Here is my final slide. **[paste screenshot]**
Read it as **[audience]** in 10 seconds. What do you see first? What is the message? What must you do? If any answer is not clear, tell me the smallest change that fixes it.

6.4 Prepare to present

PROMPT 4.6 — Copilot Chat

Here are my audience, key message and the points I plan to cover: **[use the context in this chat]**
Help me prepare to present this. Where can my message be unclear or fail to resonate? What are the 5 toughest questions this audience is likely to ask? For each, give a short answer that uses only my data.

GATE 8: YOU DECIDE Remove any answer that uses data that is not in your files. If a question has no answer in the data, write: "I will check and come back to you."

PROMPT 4.7 — Copilot Chat

Act as **[audience role]**, who **[attitude, for example: supports the current plan and is sceptical of audit]**.
Ask me one hard question at a time. Wait for my answer. Then tell me how convincing my answer was and how to make it stronger.

> **NOTE** Do 3 rounds before the real meeting.

6.5 Final sign-off

Check	Yes / No
Every number on the slide is the same as the source data or your PivotTables.	
The control total matches the source.	
No confidential or personal data went into a prompt or file.	
The business owner confirmed the business reasons.	
The Big Idea, the action and the climax are your decisions.	
A second person read the slide and got the message in 10 seconds.	

PART 7

Fix common problems

A good result comes from a conversation, not from one prompt.

7.1 Follow-up prompts

When	Type
The answer is too long	`Give me just the list.`
Copilot only praises	`Be more critical. What are the 3 biggest weaknesses?`
You do not trust a number	`Show me the calculation and the filter.`
You want choices	`Give me 2 alternatives and the trade-off of each.`
You do not understand why	`Why do you suggest this? What principle is it based on?`
Copilot adds too much	`What can I cut and still keep the message?`
You changed something	`Here is the new version. Is it better? What is still weak?`
Copilot forgets the rules	`Remember the rules from the start of this chat.`
Copilot stops using STE	`Rewrite your last answer in ASD-STE100.`

7.2 Problems and fixes

Problem	Fix
Copilot gives a number that is not in the data	Type: `Do not invent data. Use only the attached file. Show the source of each number.`
The totals are too high (about two times)	Subtotal or total rows are still in the data. Type: `Remove all subtotal and total rows and columns, then check again.`
The before and after split is wrong	Give the exact date: `Before means before [date]. After means from [date].`
Copilot cannot read the file	Save it as .xlsx. Remove passwords. Keep it small: only the sheets you need.
Copilot gives code, not a chart image	Type: `Run the code and show me the chart as an image.` Or build it in Excel.
Copilot in Excel is not there	You have a Basic license, or the file is not on OneDrive. Use the Copilot Chat path.
The answer changes each time	This is normal. Use the "A good answer has" box, and check the numbers.

PART 8

Project canvas and prompt card

Print the canvas. Fill it in as you go. It is your record of the decisions.

8.1 Project canvas

Discover

Item	Your record
Business question, audience, decision	
Approved sub-questions (Gate 1)	
Control total and where it is (Step 2)	
Clean table: rows and total (Gate 2, Step 3)	
Number you checked yourself (Gate 3)	
Business owner confirmation (Gate 4)	
Insights (WHAT + WHY + WHAT TO DO)	

Develop

Item	Your record
Story Space insight	
Big Idea (Gate 5)	
Main objection and the number that answers it	
Climax (Gate 6)	
Core: Problem, Stakes, Steps, Call to Action	

Design and Drive

Item	Your record
Story type and chart (Gate 7)	
Approved headline and call to action (Gate 7)	
Highlight colour and legend words	
Slide checked word by word (Gate 8)	
Top 3 hard questions and your answers	

8.2 One-page prompt card

One chat for one project. Think first, then prompt. Check every number. You decide at each gate.

Phase	Step	Short prompt
Start	0.1 Principles	Use these data storytelling principles: audience first, one Big Idea, familiar charts, declutter, one highlight colour, takeaway titles, clear action.
	0.2 Partner	Act as my thought partner. Ask questions first. Do not invent data. Label Known, Inferred, Suggested. Show plans before you change data.
	0.3 Style	Write procedures, findings and insights in ASD-STE100. Not the story text.
	0.4 Safety	Here are my column names only. Which are confidential? Delete, mask or aggregate?
Discover	1.1 Context	Here is my context. Break the question into 5 to 7 sub-questions, with data and transformation. Wait for my OK. (Gate 1)
	1.2 Audit	Describe each sheet and list every data quality issue. Give the control total.
	1.3 to 1.4 Foundation	Plan the clean-up from my sub-questions. Wait for my OK (Gate 2). Do it and check the control total.
	1.5 Baseline	Build a PivotTable for each sub-question. Answer each sub-question with numbers. (Gate 3)
	1.6 SCAN	Find Spikes, Comparisons, Anomalies, No-change, with numbers.
	1.7 to 1.8 Validate	Challenge each pattern (Gate 4). Write WHAT + WHY + WHAT TO DO. Maximum 3.
Develop	2.1 Story Space	Rate each insight on complexity and value. Which one needs a story?
	2.2 to 2.4 Big Idea	Here is my worksheet. Ask questions. Pressure-test audience, stakes, Big Idea. (Gate 5)
	2.5 Crowd	For each person: knows, cares, objection, what makes them say yes.
	2.6 Story	Here is my storyboard. Find gaps, detours, weak tension. What can I cut? (Gate 6)
	2.7 to 2.9	Map to S.T.O.R.Y. Write the Core. Turn points into takeaway titles.
Design	3.1 to 3.2 Visual	Which story type? Show 2 to 3 chart options: what each shows and hides. (Gate 7)
	3.3 Build	Make Chart_Data and the chart. Or give me Chart_Data as a file.
	3.4 Title	Give 3 hybrid titles: insight, call to action, legend words in colour. (Gate 7)
Drive	4.1 to 4.3	What can I remove? Pass or Fix against the design rules. Apply the changes.
	4.4 to 4.5 Slide	Create the slide with my exact approved text. Read it in 10 seconds. (Gate 8)
	4.6 to 4.7 Present	Toughest questions with answers from my data. Act as my audience and test me.