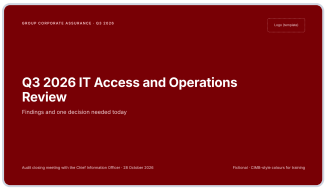
STEP-BY-STEP GUIDE | MICROSOFT 365 COPILOT | SIMPLIFIED TECHNICAL ENGLISH (ASD-STE100)

From Raw Notes to a Boardroom Deck

Use case: Q3 2026 IT Access and Operations Review
Build a complete story and a premium 8-slide deck in the CIMB brand with Copilot

1 Collect | 2 Shape | 3 Structure | 4 Design | 5 Build | 6 Polish

What you will build



1 Title



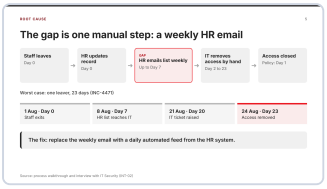
2 Key message and ask



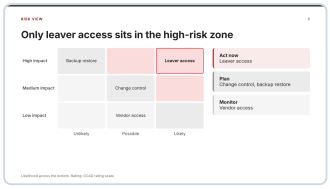
3 Summary of findings



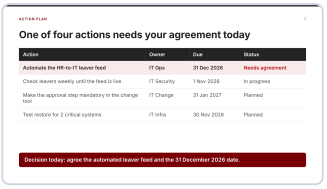
4 Top finding (5C)



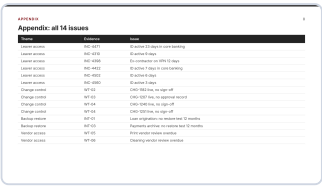
5 Root cause



6 Risk heat map



7 Action plan



8 Appendix: issue log

The target pictures use CIMB-style colours for training. Your CIMB template decides the exact colours, fonts and logo.

Use this guide again

The same steps work for any presentation built from facts: incident reports, gap assessments, audit findings, status updates. Part 9 shows how to reuse each prompt.

All names, systems and events are fictional and are for training only.

PART 1

Before you start

The files, the time plan, the licenses and the rules.

1.1 Files

File	Content	Where
Q3 IT Review Use Case.pdf	The situation, the audience and your task	From the trainer
Q3 IT Review Raw Notes.xlsx	14 raw notes, the policy rules and the owners	From the trainer
CIMB PowerPoint template	The official brand colours, fonts, logo and layouts	PowerPoint **File > New** (organization templates), the intranet, or Corporate Communications
This guide	Steps, prompts, checks and model answers	From the trainer

1.2 Time plan (100 minutes)

Part	You do	Time
2 Set up	Start the Copilot chat with 3 prompts	5 min
3 Collect	Turn the notes into a 5C issue table	15 min
4 Shape	Group, count, rank. Write the Big Idea	15 min
5 Structure	Write the storyline and the full text for each slide	15 min
6 Design	Open the CIMB template. Copilot writes the design brief	10 min
7 Build	Make the 8 slides with Copilot	25 min
8 Polish	Check, refine, add speaker notes, rehearse	15 min

1.3 Which Copilot, which license

Copilot	Use it for	License
Microsoft 365 Copilot Chat (**m365.cloud.microsoft** > **Chat**)	All thinking and writing: Parts 2 to 6 and 8	Basic and Premium
Copilot in PowerPoint (**Home > Copilot**)	Make and edit the slides: Part 7	Premium

NOTE Basic license: Copilot Chat writes all the content and the design brief. You build the slides in the CIMB template with the layout recipes in Part 7 (path B). The result is the same deck.

1.4 Rules

No.	Rule
1	Use one Copilot Chat for Parts 2 to 6 and 8. Copilot keeps the context.
2	Stop at each gate. Read, check, decide. You own the message.
3	Check every fact against the raw notes. Copilot must not invent facts.
4	Paste approved text into PowerPoint. Do not ask Copilot to write new text there.
5	Always build inside the CIMB template. Never change the brand colours, fonts or logo.
6	In a real project, do not paste names or ID numbers. Mask them first.

How to read this guide

Box	Meaning
PROMPT	Copy and paste. Text in `[brackets]` is for you to change.
WHAT COPILOT GIVES YOU	The points a good answer has. The words change each time. The facts must be the same.
GATE: YOU DECIDE	Stop and decide before you go on.
CHECK	What you must see.

PART 2

Set up the Copilot chat

3 prompts. 5 minutes.

1. Open Microsoft 365 Copilot Chat with your work account.
2. Click **New chat**.
3. Attach `Q3 IT Review Use Case.pdf` and `Q3 IT Review Raw Notes.xlsx`. Click **+** > **Upload**.
4. Send Prompts 0.1, 0.2 and 0.3, one at a time.

PROMPT 0.1 — Copilot Chat

In this chat, use these storytelling principles:
1. The audience comes first. Every choice must help the audience understand and decide.
2. One main message (the Big Idea) and one clear ask with a date.
3. Answer first: the key message and the ask come before the detail.
4. Every slide title is a takeaway sentence, not a topic.
5. One issue per slide. Detail goes to the appendix.
6. Grey for context, one highlight colour for the point.
7. Facts only from the attached files. Never invent a fact, a number or a name.

PROMPT 0.2 — Copilot Chat, same chat

I am an internal auditor in GCAD. I will turn raw audit notes into a stakeholder presentation in 6 parts: Collect, Shape, Structure, Design, Build and Polish.
Act as my thought partner and my editor.
1. Ask me questions when something is not clear.
2. Show me your plan before you change my content, and wait for my OK.
3. Label each point as Known (in the notes), Inferred, or Suggested.
4. When I ask for feedback, tell me what to cut before what to add.
5. Keep answers short. Use tables.
Reply "Ready" if you understand.

PROMPT 0.3 — Copilot Chat, same chat

For tables, findings and procedures in this chat, use ASD-STE100 Simplified Technical English: simple words, active voice, maximum 20 words for each sentence, one idea in each sentence. Do not use it for slide titles and the Big Idea. They must sound natural and persuasive. Do not use em dashes.

WHAT COPILOT GIVES YOU Ready. Copilot keeps these rules for the full chat.

PART 3

Collect: from raw notes to a 5C issue table

Every issue in the same 5 fields: Condition, Criteria, Cause, Consequence, Corrective action.

3.1 Read the context

PROMPT 1.1 Copilot Chat

Read the attached use case. State in a table: the business question, the audience (who decides), the decision, the meeting format, and the period of the review. Do not read the raw notes yet.

WHAT COPILOT GIVES YOU Business question: what do the Q3 incidents and gaps tell us, and what must management fix first? Audience: the Chief Information Officer, who owns the IT controls and agrees the management action plan, with the Head of HR and the Head of IT Security. Decision: agree the action and the date for the top issue. Meeting: audit closing meeting, 15 minutes, 28 October 2026. Period: July to September 2026.

3.2 Turn the notes into a 5C table

PROMPT 1.2 Copilot Chat

Read the sheet Raw_Notes in the attached workbook. Turn the notes into a table of issues with these columns:
No., Note_ID, Evidence_Ref, Condition, Criteria, Cause, Consequence, Corrective action.
Rules:
1. One row for each issue. One note can hold more than one issue. A note that only explains a cause is not an issue: use it in the Cause column of the related issues.
2. Take Criteria from the sheet Policy.
3. Write "Not known" where the notes do not say. Do not guess.
4. Keep each cell under 20 words.
Then tell me: how many notes, how many issues, and which notes you split or merged.

WHAT COPILOT GIVES YOU 14 notes and 14 issues. Note N10 holds 2 changes (CHG-1240 and CHG-1251), so it becomes 2 rows. Note N09 is an interview that explains the cause of the leaver issues: it goes into the Cause column, not a row. Corrective action is often "Not known", because the notes do not give actions.

GATE 1: YOU DECIDE Check 3 rows against the notes yourself: N01, N05 and N10. Check the days, the dates and the evidence numbers. If Copilot changed a fact, type: `Row [n] does not match note [N]. Use only the note text.`

PROMPT 1.3 Copilot Chat

Look at the 5C table. List what is still unclear or missing, and write the questions I must ask the auditee to close each gap. Maximum 5 questions.

WHAT COPILOT GIVES YOU Questions such as: Are contractor exits on the HR leaver list (N05)? Who approved the emergency change CHG-1207? Which owner will take vendor access after the reorganization? What management actions and dates do the owners agree?

NOTE In a real audit, you ask these questions and agree the actions with the auditee before the closing meeting. In this class, the trainer gives the answers: contractor exits are not on the list, and the owners are in the sheet Owners.

PART 4

Shape: from 14 issues to one message

Group, count, rank. Then the Big Idea.

4.1 Group, count and rank

PROMPT 2.1 Copilot Chat

Group the issues into themes by root cause, not by date or by source. For each theme, give: the number of issues, the main cause, the worst case with its fact, and a rating (High, Medium or Low) based on likelihood and impact. Rank the themes from High to Low. Show it as a table. Label each rating Inferred, because I must confirm it.

WHAT COPILOT GIVES YOU

Theme	Issues	Rating	Worst case
Leaver access	6	High	ID active 23 days in core banking (INC-4471)
Change control	4	Medium	Core banking change with no approval record (CHG-1207)
Backup restore	2	Medium	No restore test in 12 months for 2 critical systems
Vendor access	2	Low	Annual reviews overdue since 30 June

GATE 2: YOU DECIDE Confirm the ratings with the GCAD rating scale. Then confirm the count: 6 + 4 + 2 + 2 = 14. If Copilot shows a different total, type: `The total must be 14. Show me which issue is missing or counted twice.`

4.2 Write the Big Idea by hand, then test it

Big Idea worksheet	Model answer
Main audience	Chief Information Officer (owns IT controls, agrees the action plan)
Also in the room	Head of HR, Head of IT Security
What they care about	Stable systems, cost, no regulatory finding, clear ownership
Action	Agree to automate the HR-to-IT leaver feed by 31 December 2026
Benefit if they act	Access closes on Day 1, as the policy says. One cause fixed, 6 issues closed.
Risk if they do not	Ex-staff keep access to core systems. A repeat finding and a regulatory finding are likely.
Draft Big Idea (weak)	The Q3 review found several access and operations issues that need attention.

PROMPT 2.2 Copilot Chat

Here is my draft Big Idea: **[paste your draft]**.
Test it. Does it state my point of view, show what is at stake, and contain one clear ask with a date? Ask me 2 questions first. Then give me 3 sharper versions, each maximum 2 sentences.

GATE 3: YOU DECIDE Choose one version or write your own. Model: **Leaver access stays open for up to 23 days because the HR-to-IT handover is manual. Please agree to automate the HR-to-IT leaver feed by 31 December 2026.**

NOTE Internal audit does not approve budgets or own the fix. The ask is that management agrees the action, the owner and the date.

4.3 Know the room, then open with SCQA

PROMPT 2.3 Copilot Chat

For each person in the meeting (Chief Information Officer, Head of HR, Head of IT Security), give in a table: what they care about, their likely objection, and the fact from my notes that answers it.

WHAT COPILOT GIVES YOU CIO: "Is this a real risk or only admin delay?" Answer: 2 IDs stayed active in core banking, one for 23 days. Head of HR: "We send the list every week." Answer: weekly is the cause; the policy needs Day 1. Head of IT Security: "Our monthly check finds these." Answer: the monthly check found INC-4471 only on Day 23. No misuse was found, but the exposure is real.

PROMPT 2.4 Copilot Chat

Write the opening of my talk in SCQA form: Situation, Complication, Question, Answer. Maximum 2 sentences for each. The Answer is my Big Idea: **[paste Big Idea]**.

PART 5

Structure: storyline and slide text

Answer first. One issue per slide. Every title is a takeaway.

5.1 The 8-slide storyline

PROMPT 3.1 Copilot Chat

Write an 8-slide storyline for a 15-minute audit closing meeting. Use this order:
1 Title, 2 Key message and ask, 3 Summary of findings, 4 Top finding in 5C format, 5 Root cause, 6 Risk view, 7 Action plan, 8 Appendix: full issue log.
For each slide give: the takeaway title (maximum 15 words, a full sentence), the one point the audience must remember, and the best visual (big numbers, table, 5C rows, process flow with timeline, heat map, or status table).

WHAT COPILOT GIVES YOU

No.	Takeaway title (model)	Visual
2	Leaver access stays open for up to 23 days because the HR-to-IT handover is manual.	Ask box and 3 big numbers
3	1 of 4 themes is rated High: leaver access	Table with rating words
4	Leaver access is removed late	5C rows and a rating label
5	The gap is one manual step: a weekly HR email	Process flow and timeline
6	Only leaver access sits in the high-risk zone	3 × 3 heat map
7	One of four actions needs your agreement today	Status table and decision bar
8	Appendix: all 14 issues	Full log table

GATE 4: YOU DECIDE Read only the 8 titles, from top to bottom. They must tell the full story without the slides. If a title is a topic (for example "Root cause"), rewrite it as a sentence.

5.2 The full text for each slide (the storyboard)

PROMPT 3.2 Copilot Chat

Write the full storyboard: the exact text for each of the 8 slides. For each slide give:
- Section label (2 to 4 words, capitals)
- Title (the approved takeaway title)
- Body content, in the structure of its visual (for example: the 3 big numbers with a short label each; the table rows; the 5 rows of the 5C; the 5 process steps; the 4 timeline points; the heat map positions; the action rows with owner, due date and status)
- Source line
- Speaker notes: 3 to 4 sentences, what I say

Rules: maximum 40 words of body text on each content slide. Use only facts from the 5C table and the theme table. No new facts.

WHAT COPILOT GIVES YOU A slide-by-slide text plan. Compare it with the model storyboard in Appendix B. The facts must be the same.

GATE 5: YOU DECIDE Read the storyboard against your 5C table. Correct any changed fact. This text is now the only source for the slides.

1. Open Word. Create a new blank document.
2. Copy the full storyboard from Copilot Chat. Paste it into Word.
3. Save it to OneDrive as `Q3 IT Review Storyboard.docx`. You add the design brief to it in Part 6.

PART 6

Design: the CIMB brand, applied like a designer

The template gives the brand. Copilot writes the design brief. You check it.

6.1 What makes a slide look premium

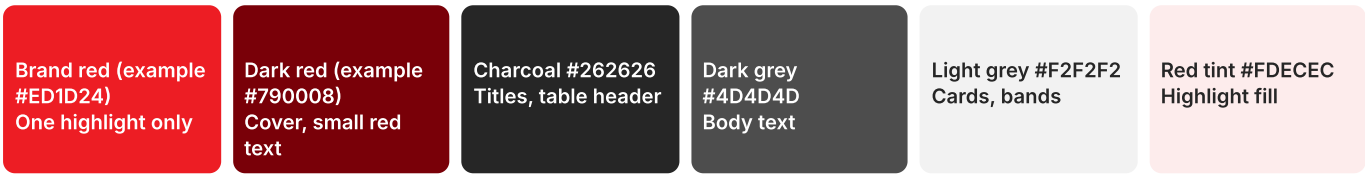
A brand template gives the colours, fonts and logo. It does not make a slide clear. These 10 rules come from professional UI and UX design. The design brief and every build prompt use them.

Rule	On a slide
Hierarchy	Importance by size, weight and position first. Colour last.
Spacing rhythm	Equal gaps for equal items, in steps of 0.1 inch. Wide margins.
Contrast	Text at least 4.5 to 1 against its background. No grey on grey.
One primary action	One red item for each slide. Everything else is dark grey or light grey.
Colour with words	Ratings and status are words, not red labels.
Type scale	4 or 5 sizes only, used the same way on every slide.
Consistency	Title, label, number and source in the same place on every slide.
Components	One card style, one table style, one icon family.
Density	Maximum 40 words. Detail goes to the notes or the appendix.
Motion with meaning	One Morph transition between related slides. No spinning or flying text.

6.2 Open the CIMB template

1. Open PowerPoint. Click **File > New**.
2. Select the organization tab (for example **CIMB** or **Shared**) and open the official CIMB template. If you cannot find it, open the template file from the intranet.
3. Save to OneDrive as `Q3 IT Review Deck.pptx`. Make sure AutoSave is on.
4. Click **Design > Variants** (the arrow) > **Colors > Customize Colors**. Read the hex codes of Dark 1, Light 1, Dark 2, Light 2, Accent 1 and Accent 2. Write them down. Click **Cancel**. Do not change them.
5. Click **Design > Variants > Fonts > Customize Fonts**. Write down the heading font and the body font. Click **Cancel**.
6. Click **Home > Layout**. Note the layout names, for example Title Slide, Title Only, Blank.
7. Take a screenshot of the title slide and one content layout. Push **Windows + Shift + S**.

> **CAUTION** Do not change the theme colours, fonts or logo of the CIMB template. If a colour you need is not in the theme, use a lighter or darker shade of a theme colour.



These are the CIMB-style colours used in the target pictures. They are not official. Use the hex codes from your template.

6.3 Copilot writes the design brief

PROMPT 4.1 — Copilot Chat

Act as a senior presentation designer for executive audiences in banking.
Here is my CIMB brand template: **[paste the 2 screenshots]**
Theme colours: **[Dark 1, Light 1, Dark 2, Light 2, Accent 1, Accent 2 with hex codes]**
Theme fonts: heading **[font]**, body **[font]**. Layouts: **[layout names]**.
My deck: 8 slides for an audit closing meeting with the Chief Information Officer, about audit findings and one decision. Mood: calm, confident, premium. It is shown on screen and printed in black and white.
Write a design brief that stays fully inside the brand:
1. A role for each theme colour: titles, body, cards and bands, labels, and ONE highlight
2. Use the brand red only for the single most important item on each slide. Give a darker red for small red text.
3. Ratings and status as bold words, not red labels, so red keeps one meaning
4. Type scale in points for title, key number, body, label, source
5. Margins, grid, spacing steps, card style, table style
6. Which template layout to use for each slide type
7. What must never appear
Check that every text and background pair has a contrast of at least 4.5 to 1. Maximum 250 words.

WHAT COPILOT GIVES YOU A numbered brand design brief: colour roles from your theme, red for one item only, a darker red for small text, ratings as words, a type scale in the theme fonts, spacing rules, a layout for each slide type, and a never-use list. It is close to the model brief in Prompt 5.1.

GATE 6: YOU DECIDE Check the brief: only theme colours and fonts, red for one item only, ratings as words, the logo not touched. Then paste the brief at the top of `Q3 IT Review Storyboard.docx`, under the heading **Design brief**. Save the file.

PROMPT 4.2 — Copilot Chat

Using my design brief and my storyboard, describe the layout of each of my 8 slides in 2 or 3 sentences: which template layout to use, where the title, the content blocks and the source go, which single element gets the brand red, and where the white space is.

NOTE No CIMB template available? Make a blank presentation and set the theme: **Design > Variants > Colors > Customize Colors** and **Fonts > Customize Fonts**, with the colours and fonts from your brand guideline. Then follow the same steps.

PART 7

Build the 8 slides in the CIMB template

Path A: Premium, Copilot in PowerPoint. Path B: Basic, layout recipes.

7.1 Path A (Premium): Copilot makes the first draft

1. Open `Q3 IT Review Deck.pptx` (your copy of the CIMB template). Click **Home > Copilot**.
2. Copy Prompt 5.1. In the prompt, type `/` and select `Q3 IT Review Storyboard.docx`.
3. Push **Enter**. Wait for the draft deck.

PROMPT 5.1 — Copilot in PowerPoint

Create a presentation from **[/Q3 IT Review Storyboard.docx]** in this CIMB template. Make exactly 8 slides, in the order of the storyboard. Use the exact titles, text, sources and speaker notes from the file. Do not change, add or remove any fact or word. Follow the design brief at the top of the file.
Visual design for every slide. Style: premium executive briefing in the CIMB brand. Calm, clean, confident.
1. Brand: use ONLY the theme colours, theme fonts and slide layouts of this CIMB template. Do not add any new colour or font. Do not move, resize or recolour the logo.
2. Colour roles: the darkest theme colour for titles; dark grey for body text; light grey for cards and table bands; the CIMB red ONLY for the one thing that matters on the slide (the ask, the top theme, the gap, the decision). Small red text must use the dark red, so it stays readable.
3. Ratings and status are words in bold dark grey (High, Medium, Low; Needs agreement). Do not colour ratings red: red is for the one highlight only.
4. Grid: 16:9. Margins 0.6 inch. One left edge for all content. Spacing in steps of 0.1 inch; equal gaps between equal items.
5. Type: theme heading font for titles, theme body font for text. Title 32 to 36 pt bold; key numbers 48 to 60 pt bold; body 16 to 20 pt; section label 11 pt bold capitals; source 10 pt grey. Line spacing 1.2 for titles, 1.4 for body. Maximum about 70 characters in a line.
6. Hierarchy: size, weight and position first, colour last. The eye must go: title, then the one red item, then the detail.
7. Components: one card style (small corner radius, same padding, no shadow or one very soft shadow); tables with no vertical lines, thin grey row lines and a dark header. The same on every slide.
8. Every content slide: small section label above the title, slide number top right, source line bottom left. The title is a full-sentence takeaway, maximum 15 words. Maximum 40 words of body text. No bullet walls.
9. Contrast: all text at least 4.5 to 1 against its background.
10. Never: clip art, stock photos, emoji, 3D, gradients, WordArt, shadows on text, a second highlight colour, decorative shapes.
White space is part of the design. Keep it.

CAUTION Copilot can change words, add stock images or use the wrong layout. Delete every image it adds. Compare each title with your storyboard. If a slide has the wrong layout, click **Home > Layout** and select the template layout from your design brief.

NOTE If Copilot in PowerPoint cannot read the file, open the storyboard in Word and use **Copilot > Transform to PowerPoint** if your Word has it, then apply the CIMB template with **Design > Themes > Browse for Themes**. Otherwise use Path B for the slides it cannot make.

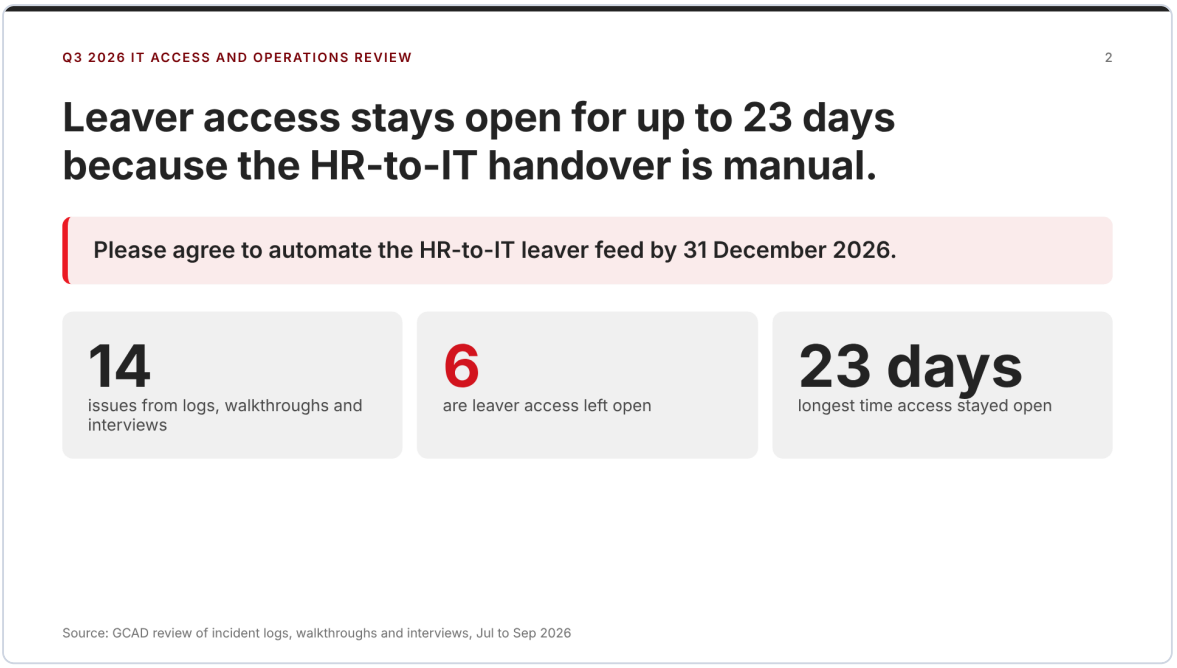
7.2 Bring each slide to the target

Go to each slide. Run its prompt in the Copilot pane. Compare with the target picture. Fix the rest by hand. Each prompt names colour roles, not hex codes, so it works with any brand template.

Slide 2: Key message and ask

PROMPT 5.2 — Copilot in PowerPoint

On this slide, keep the CIMB template layout and theme. Put the title at the top left, 36 pt bold in the darkest theme colour, maximum 2 lines. Under it, put the ask in a box with a light tint of the brand red and a thick brand red left border, 22 pt bold dark text. Under the box, put 3 equal light grey cards in one row. Each card has one big number, 54 pt bold, and a 16 pt dark grey label under it: "14" issues from logs, walkthroughs and interviews; "6" are leaver access left open (make only this number brand red); "23 days" longest time access stayed open. Source line at the bottom left, 10 pt grey. Nothing else.



Target: Slide 2: Key message and ask

Slide 3: Summary of findings

PROMPT 5.3 — Copilot in PowerPoint

Keep the CIMB template layout. Turn the content into a table with 4 columns: Theme, Issues, Rating, What we found. Rows: Leaver access, 6, High, Access stays open for up to 23 days; Change control, 4, Medium, 4 changes went live with no sign-off; Backup restore, 2, Medium, No restore test for 2 key systems in 12 months; Vendor access, 2, Low, Annual review overdue since 30 June; Total, 14. Header row in the darkest theme colour with white text. Shade only the Leaver access row with a light tint of the brand red. Ratings are bold dark grey words, not red. No vertical lines. Body 18 pt. Under the table, one line with a thin brand red bar on its left: "Today we focus on leaver access. The other 3 themes have agreed fixes with dates (slide 7)."

SUMMARY OF FINDINGS 3

1 of 4 themes is rated High: leaver access

Theme	Issues	Rating	What we found
Leaver access	**6**	**High**	**Access stays open for up to 23 days**
Change control	4	**Medium**	4 changes went live with no sign-off
Backup restore	2	**Medium**	No restore test for 2 key systems in 12 months
Vendor access	2	**Low**	Annual review overdue since 30 June
Total	**14**		

> Today we focus on leaver access. The other 3 themes have agreed fixes with dates (slide 7).

Rating: impact and likelihood, GCAD rating scale. Full issue log in the appendix.

Target: Slide 3: Summary of findings

Slide 4: Top finding in 5C format

PROMPT 5.4 **Copilot in PowerPoint**

Keep the CIMB template layout. Lay out this slide as 5 rows, one for each C: Condition, Criteria, Cause, Consequence, Corrective action. The label is on the left in bold, darkest theme colour, 18 pt; the text is on the right, 18 pt dark grey. A thin grey line between rows and a dark line above the first row. Make the Cause text bold. Put a small dark grey label with white text "Rating: High" at the right end of the title line. Use my exact text. Do not use red on this slide.

FINDING 1 OF 4 4

Leaver access is removed late

Rating: High

Condition	6 leavers kept system access after exit. 5 waited more than 5 days; the longest waited 23 days.
Criteria	Access Management Policy 4.2: remove all access within 1 working day of exit.
Cause	**HR emails the leaver list to IT once a week. IT removes access by hand. Contractor exits may not be on the list.**
Consequence	Ex-staff could log in to core systems. 2 IDs stayed active in core banking. No misuse was found.
Corrective action	Automate the HR-to-IT feed (IT Ops, 31 Dec 2026). Check leavers weekly until it is live (IT Security, from 1 Nov 2026).

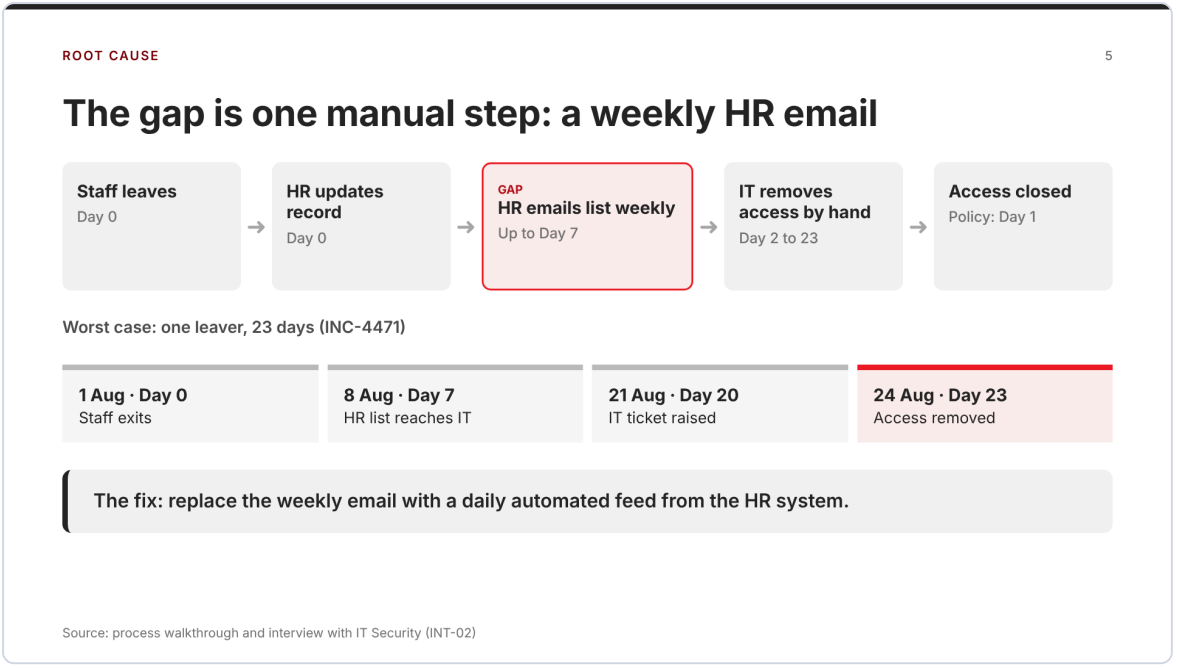
Evidence: INC-4310, 4398, 4422, 4471, 4502, 4560; interview INT-02

Target: Slide 4: Top finding in 5C format

Slide 5: Root cause

PROMPT 5.5 — Copilot in PowerPoint

Keep the CIMB template layout. Make a process flow of 5 rounded boxes in one row, joined by small grey arrows: Staff leaves (Day 0); HR updates record (Day 0); HR emails list weekly (up to Day 7); IT removes access by hand (Day 2 to 23); Access closed (Policy: Day 1). All boxes light grey, except box 3: light tint of the brand red, brand red border, and the small dark red label "GAP". Under the flow, a timeline of 4 points for the worst case: 1 Aug Day 0 Staff exits; 8 Aug Day 7 HR list reaches IT; 21 Aug Day 20 IT ticket raised; 24 Aug Day 23 Access removed. Only the last point has a brand red top line. At the bottom, a light grey box with a dark left bar: "The fix: replace the weekly email with a daily automated feed from the HR system."

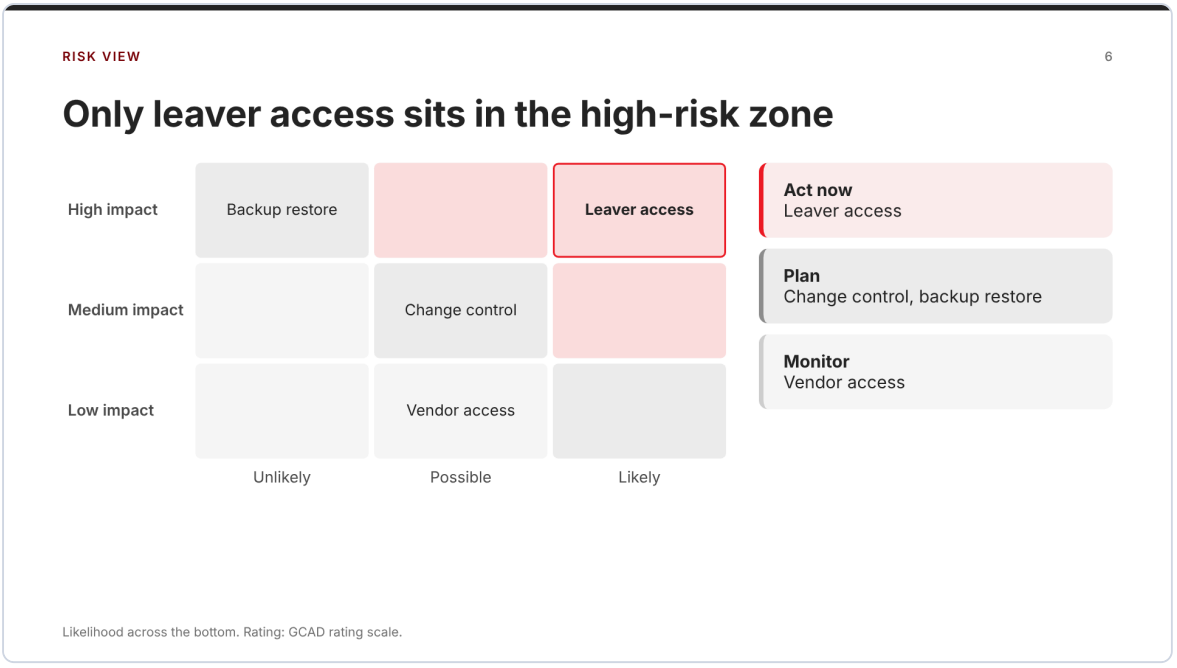


Target: Slide 5: Root cause

Slide 6: Risk view

PROMPT 5.6 — Copilot in PowerPoint

Keep the CIMB template layout. Make a 3 by 3 risk heat map. Rows from top: High impact, Medium impact, Low impact. Columns: Unlikely, Possible, Likely. Shade the 3 high-risk cells (High-Likely, High-Possible, Medium-Likely) with a light tint of the brand red; other cells light grey. Place: Leaver access in High-Likely with a brand red border and bold text; Backup restore in High-Unlikely; Change control in Medium-Possible; Vendor access in Low-Possible. On the right, 3 stacked cards: Act now (leaver access), Plan (change control, backup restore), Monitor (vendor access). Only the Act now card has a brand red left border.

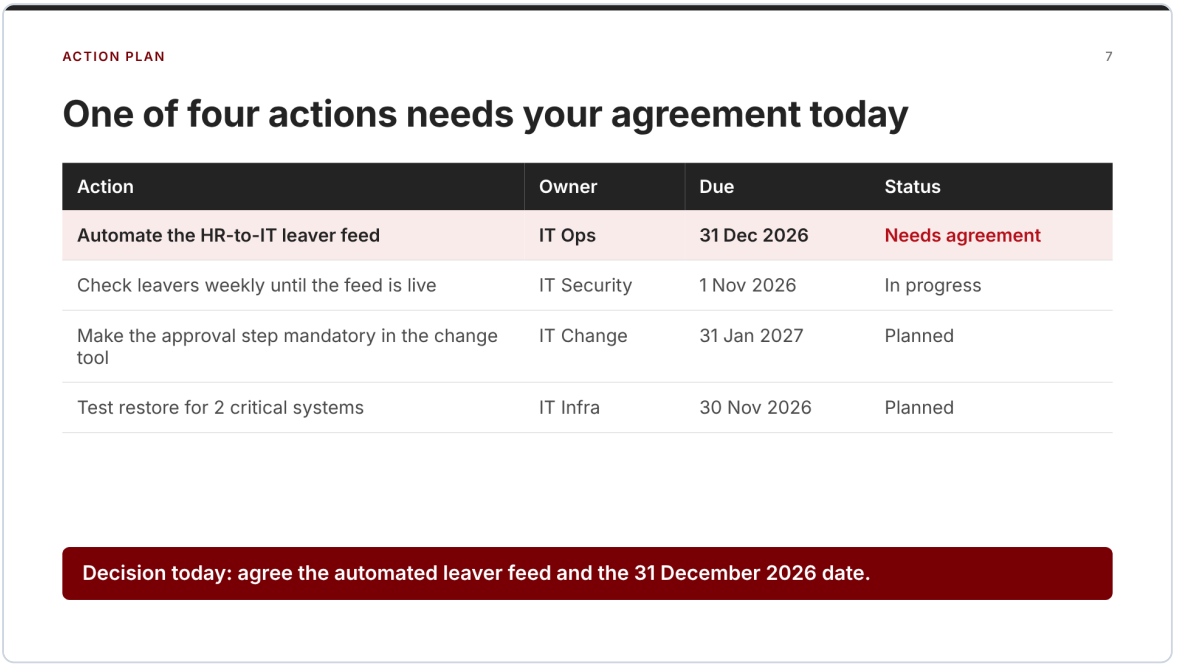


Target: Slide 6: Risk view

Slide 7: Action plan

PROMPT 5.7 — **Copilot in PowerPoint**

Keep the CIMB template layout. Make a table with 4 columns: Action, Owner, Due, Status. Rows: Automate the HR-to-IT leaver feed, IT Ops, 31 Dec 2026, Needs agreement; Check leavers weekly until the feed is live, IT Security, 1 Nov 2026, In progress; Make the approval step mandatory in the change tool, IT Change, 31 Jan 2027, Planned; Test restore for 2 critical systems, IT Infra, 30 Nov 2026, Planned. Dark header. Shade only the first row with a light tint of the brand red and make "Needs agreement" bold dark red. At the bottom, a full-width bar in the dark red theme colour with white bold text: "Decision today: agree the automated leaver feed and the 31 December 2026 date."



Target: Slide 7: Action plan

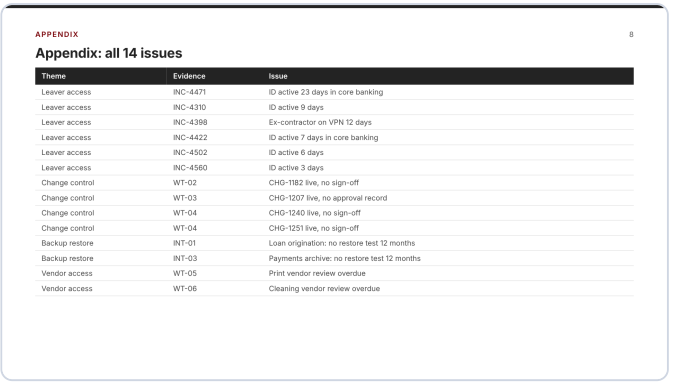
Slide 1 and slide 8

PROMPT 5.8 — Copilot in PowerPoint

Slide 1: use the CIMB Title Slide layout. Title: "Q3 2026 IT Access and Operations Review". Subtitle: "Findings and one decision needed today". Small line: "Audit closing meeting with the Chief Information Officer · 28 October 2026". Small label above the title: "GROUP CORPORATE ASSURANCE · Q3 2026". Keep the template background and logo. No images.
Slide 8: use the Title Only layout. A compact table of all 14 issues with the columns Theme, Evidence, Issue. Body 11 pt. Title: "Appendix: all 14 issues".



Target: slide 1 (the template gives the real background and logo)



Target: slide 8

7.3 Path B (Basic): build with layout recipes

Copilot Chat already wrote all the text (Part 5) and the design brief (Part 6). Build each slide in your copy of the CIMB template. Keep the storyboard open beside PowerPoint.

Slide	Recipe in PowerPoint
All	Click **Home > New Slide** and select the template layout from your design brief (usually **Title Only**). Type the title. Use only theme colours: click a shape > **Shape Fill** > the top rows of **Theme Colors**.
1 Title	Layout **Title Slide**. Type the title, subtitle and meeting line. Keep the template background and logo.
2 Key message	Rectangle with a light red tint for the ask, brand red left border. 3 rounded rectangles (light grey) for the numbers. Big number 54 pt, label 16 pt.
3 Summary	Click **Insert > Table** (4 × 6). **Table Design** > a clean style. Header in the darkest theme colour. Shade row 2 with a light red tint.
4 Top finding	Insert a table (2 × 5). No fill. Bold labels in column 1. Bottom border only.
5 Root cause	5 rounded rectangles + arrows (**Insert > Shapes**). Box 3 red border and light red tint. 4 small rectangles for the timeline.
6 Risk view	Insert a table (4 × 4) for the heat map. Shade cells. 3 rectangles on the right for the legend.
7 Action plan	Insert a table (4 × 5). Dark red bar at the bottom: a rectangle with white text.
8 Appendix	Insert a table (3 × 15). Body 11 pt. Paste the rows from Copilot Chat.

NOTE Use **Home > Arrange > Align** to line up boxes, and **Format Painter** to copy a style. After each slide, click **Home > Designer** and look for an idea that keeps the template. Accept only clean ideas with no images.

7.4 Basic option: ask Copilot Chat for a PowerPoint file

PROMPT 5.9 Copilot Chat

Create a PowerPoint file from the storyboard and the design brief in this chat. Make exactly 8 slides. Use the exact text and speaker notes. Do not change any fact.
Visual design for every slide. Style: premium executive briefing in the CIMB brand. Calm, clean, confident.
1. Brand: use ONLY the theme colours, theme fonts and slide layouts of this CIMB template. Do not add any new colour or font. Do not move, resize or recolour the logo.
2. Colour roles: the darkest theme colour for titles; dark grey for body text; light grey for cards and table bands; the CIMB red ONLY for the one thing that matters on the slide (the ask, the top theme, the gap, the decision). Small red text must use the dark red, so it stays readable.
3. Ratings and status are words in bold dark grey (High, Medium, Low; Needs agreement). Do not colour ratings red: red is for the one highlight only.
4. Grid: 16:9. Margins 0.6 inch. One left edge for all content. Spacing in steps of 0.1 inch; equal gaps between equal items.
5. Type: theme heading font for titles, theme body font for text. Title 32 to 36 pt bold; key numbers 48 to 60 pt bold; body 16 to 20 pt; section label 11 pt bold capitals; source 10 pt grey. Line spacing 1.2 for titles, 1.4 for body. Maximum about 70 characters in a line.
6. Hierarchy: size, weight and position first, colour last. The eye must go: title, then the one red item, then the detail.
7. Components: one card style (small corner radius, same padding, no shadow or one very soft shadow); tables with no vertical lines, thin grey row lines and a dark header. The same on every slide.
8. Every content slide: small section label above the title, slide number top right, source line bottom left. The title is a full-sentence takeaway, maximum 15 words. Maximum 40 words of body text. No bullet walls.
9. Contrast: all text at least 4.5 to 1 against its background.
10. Never: clip art, stock photos, emoji, 3D, gradients, WordArt, shadows on text, a second highlight colour, decorative shapes.
White space is part of the design. Keep it.

NOTE Copilot Chat cannot use your template file directly. If it gives you a file, open it, then apply the CIMB template: **Design > Themes > Browse for Themes** and select the template. Then fix the slides with the recipes in 7.3. If it gives no file, use 7.3.

PART 8

Polish: from good to premium

Small fixes make the biggest difference.

8.1 The polish checklist

Check	How	Yes / No
Titles sit in the same place on every slide	Click each title. **Shape Format > Size**: same top and left value.	
One left edge	Select the boxes. **Home > Arrange > Align > Align Left**.	
Equal gaps	Select the cards. **Align > Distribute Horizontally**.	
Only the template fonts	Click **Home > Replace > Replace Fonts** if you see another font.	
Only theme colours	Click a shape. **Shape Fill**: the colour must be in **Theme Colors**.	
One red item for each slide	Look at each slide for 3 seconds.	
Logo untouched	Same place and size as in the template.	
No more than 40 words of body text	Count. Move detail to speaker notes or the appendix.	
No images, icons or effects that Copilot added	Delete them.	
Slide numbers and sources	On every content slide.	

8.2 Test with Copilot

1. Take a screenshot of each slide. Push **Windows + Shift + S**.
2. Paste it into Copilot Chat.

PROMPT 6.1 — Copilot Chat

Here is slide **[n]** of my deck. **[paste screenshot]**
Act as a senior presentation designer. First read it as the Chief Information Officer in 10 seconds: what do you see first, what is the message, what must you decide?
Then review it against my design brief and these rules: only CIMB theme colours and fonts, red for one item only, hierarchy by size and weight, contrast at least 4.5 to 1, equal spacing and one left edge, maximum 40 words, the same title position as other slides, colour never alone.
Give me a table: Rule, Pass or Fix, the exact change in PowerPoint terms. Then the 3 changes that make it look most premium. Prioritize removing over adding.

PROMPT 6.2 — Copilot Chat

Write speaker notes for each of my 8 slides: 3 to 4 short sentences that I say, not what is on the slide. Slide 2 must take less than 60 seconds. End slide 7 with the ask.

NOTE Premium touch: select slides 5 and 6, then click **Transitions > Morph**. Use Morph only between related slides. Keep all other slides with no transition or **Fade**.

PROMPT 6.3 Copilot Chat

Act as the Chief Information Officer. You think this is admin delay, not a real risk. Ask me one hard question at a time. Wait for my answer. Then tell me how convincing it was and how to make it stronger, using only facts from my notes.

1. Paste the speaker notes into PowerPoint: **View > Notes**.
2. Click **Slide Show > Rehearse with Coach**. Present once. Read the report: pace, filler words, reading from the slide.

8.3 Final sign-off

Check	Yes / No
Every fact on the slides is in the raw notes or the policy sheet.	
The total is 14 issues on every slide where it appears.	
Slide 2 alone gives the message and the ask.	
The 8 titles, read alone, tell the full story.	
The deck uses only the CIMB template colours, fonts, layouts and logo.	
The deck ends with the ask (slide 7).	
A colleague read slide 2 and repeated the message in 10 seconds.	

PART 9

Use this guide for your own story

The same 6 parts work for any presentation built from facts.

9.1 What to change

Part	Keep	Change
2 Set up	Prompts 0.1 to 0.3	Your role in Prompt 0.2
3 Collect	The 5C table and Gate 1	Your source files and the name of the sheet or document. For a status update, use: Item, Status, Issue, Impact, Next step.
4 Shape	Group, count, rank, Big Idea, SCQA	Your audience, their decision, their likely objections
5 Structure	Answer first, takeaway titles, the storyboard	The number of slides and the visual for each
6 Design	The 10 premium rules, Prompt 4.1, Gate 6	Your template (CIMB or a unit template)
7 Build	Prompt 5.1 and the design brief	The slide prompts: describe your own layout with colour roles
8 Polish	Checklist, Prompts 6.1 to 6.3, Rehearse with Coach	Your audience in the test prompts

9.2 Which storyline fits

Kind of story	Slides (answer first)	Best visuals
Audit findings	Key message and ask, summary, top finding (5C), root cause, risk view, action plan	Rating table, 5C rows, process flow, heat map, status table
Incident report	Key message and ask, what happened, impact, root cause, actions, lessons	Timeline, impact cards, process flow, status table
Gap assessment	Key message and ask, overall result, top gaps, cause, plan	Gap table (required, actual, gap), heat map, roadmap
Status update	Key message and ask, overall status, what changed, risks and issues, next steps	Status tracker, milestone timeline, risk table
Data story	Key message and ask, the trend or comparison, why it matters, action	One chart with a hybrid title (see the data storytelling guides)

9.3 Generic versions of the key prompts

PROMPT G1 Collect — Copilot Chat

Read **[file or sheet name]**. Turn it into a table with these columns: **[No., Source, Condition, Criteria, Cause, Consequence, Corrective action]**. One row for each issue. Write "Not known" where the source does not say. Do not guess. Then tell me how many items and issues you found.

PROMPT G2 Shape — Copilot Chat

Group the issues into themes by root cause. For each theme, give the number of issues, the main cause, the worst case, and a rating. Rank them. Then test my Big Idea: **[draft]**. Give 3 sharper versions with one ask and a date.

PROMPT G3 Structure — Copilot Chat

Write a **[n]**-slide storyline for **[audience]** in **[time]** minutes, answer first: **[list the slide types]**. Give each slide a takeaway title (maximum 15 words) and the best visual. Then write the full storyboard: label, title, body text (maximum 40 words), source and speaker notes.

PROMPT G4 Design — Copilot Chat

Act as a senior presentation designer. Here is my brand template: **[screenshots, theme colours, fonts, layouts]**. Write a design brief that stays inside the brand: colour roles, ONE highlight colour for one item on each slide, ratings as words, type scale, spacing, card and table style, a layout for each slide type, and a never-use list. Check contrast of at least 4.5 to 1.

PROMPT G5 Build — Copilot in PowerPoint

Create a presentation from **[/storyboard file]** in this template. Make exactly **[n]** slides. Use the exact text and speaker notes. Do not change any fact. Follow the design brief at the top of the file. Use only the theme colours, fonts and layouts. Do not touch the logo. No images.

APPENDIX A

Model answers

Use these to check your own work. Your words can be different. The facts must be the same.

A.1 The 5C table for the top theme

C	Leaver access (6 issues)
Condition	6 leavers kept system access after exit. 5 waited more than 5 days; the longest waited 23 days (INC-4471).
Criteria	Access Management Policy 4.2: remove all access within 1 working day of exit.
Cause	HR emails the leaver list to IT once a week. IT removes access by hand (INT-02). Contractor exits are not on the list (N05).
Consequence	Ex-staff could log in to core systems. 2 IDs stayed active in core banking. No misuse was found (N14).
Corrective action	Automate the HR-to-IT feed (IT Ops, 31 Dec 2026). Check leavers weekly until it is live (IT Security, from 1 Nov 2026).

A.2 Issue count by theme

Theme	Notes	Issues
Leaver access	N01, N03, N05, N08, N11, N14 (cause from N09)	6
Change control	N02, N07, N10 (2 changes)	4
Backup restore	N04, N12	2
Vendor access	N06, N13	2
Total	14 notes	14

A.3 Big Idea and SCQA

Part	Model
Big Idea	Leaver access stays open for up to 23 days because the HR-to-IT handover is manual. Please agree to automate the HR-to-IT leaver feed by 31 December 2026.
Situation	Policy says leaver access must close within 1 working day. We reviewed 14 issues from Q3.
Complication	6 of the 14 are leaver access left open, for up to 23 days. 2 IDs stayed active in core banking.
Question	Are we exposed, and what fixes it?
Answer	Yes. The cause is one manual step, a weekly HR email. Please agree to automate the HR-to-IT leaver feed by 31 December 2026.

Appendix B: model storyboard (slide text)

Slide	Label and title	Body	Speaker notes
1	GROUP CORPORATE ASSURANCE · Q3 2026 **Q3 2026 IT Access and Operations Review**	Findings and one decision needed today. Audit closing meeting with the CIO, 28 October 2026.	Thank you for the time. I have one main finding and one decision for you today.
2	Q3 2026 IT ACCESS REVIEW **Leaver access stays open for up to 23 days because the HR-to-IT handover is manual.**	Ask: Please agree to automate the HR-to-IT leaver feed by 31 December 2026. Numbers: 14 issues; 6 leaver access; 23 days longest.	We reviewed 14 issues. Six are the same problem: leavers keep access. The cause is one manual step. We need your agreement on the fix and the date.
3	SUMMARY OF FINDINGS **1 of 4 themes is rated High: leaver access**	Table: 4 themes, issues, rating, what we found. Total 14.	Four themes. Only one is High. The other three have agreed fixes.
4	FINDING 1 OF 4 **Leaver access is removed late**	5C rows (Appendix A.1). Rating: High.	Policy says Day 1. We saw up to Day 23. No misuse was found, but the door stayed open.
5	ROOT CAUSE **The gap is one manual step: a weekly HR email**	5-step flow, gap at step 3. Timeline: 1, 8, 21, 24 Aug. Fix box.	Here is where it breaks. The weekly email adds up to 7 days before IT even starts.
6	RISK VIEW **Only leaver access sits in the high-risk zone**	Heat map with 4 themes. Act now, Plan, Monitor.	This is why we focus on leaver access first.
7	ACTION PLAN **One of four actions needs your agreement today**	4 actions with owner, due date, status. Decision bar.	Three actions are already moving. One needs your agreement today: the automated feed by 31 December.
8	APPENDIX **Appendix: all 14 issues**	Full log: theme, evidence, issue.	For reference only.

Appendix C: prompt card

Part	Prompt	Short version
Set up	0.1 to 0.3	Principles. Thought partner. STE for findings.
Collect	1.1 to 1.3	Context. Notes to 5C table (one row for each issue). Open questions.
Shape	2.1 to 2.4	Themes, count, rating. Test the Big Idea. Objections. SCQA.
Structure	3.1 to 3.2	8-slide storyline with takeaway titles. Full storyboard text.
Design	4.1 to 4.2	Brand design brief from the CIMB template. Layout for each slide.
Build	5.1 to 5.9	Create in the template from the storyboard. One prompt for each slide type.
Polish	6.1 to 6.3	Designer review against the brief. Speaker notes. Tough questions.
Reuse	G1 to G5	Generic prompts for any fact-based story.