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

WBRS with Microsoft 365 Copilot

Do the WBRS data story again with Copilot as your companion, from the business question to the final slide.

1 Discover | 2 Develop | 3 Design | 4 Drive

Why this guide

- You already did the WBRS use case by hand. You know each step and each result.
- Now you do the same journey with Copilot. You will see how much faster it is when you know the process.
- You use AI at each stage: start with context, craft a story, choose an appropriate visual, design effective graphs and slides.

What is in this guide

Part	Content	Time
Part 1	Set up: how to work with Copilot, licenses, prompt structure, data safety	10 min
Part 2	WBRS with Copilot: 30 prompts, each with the expected result, the checks and your decisions	60 to 70 min

> **NOTE** For your own projects after the class, use the second guide: **Data Storytelling with Microsoft 365 Copilot: Any Project**.

Files

File	Content
WBRS Trade Exceptions Data.xlsx	The data (fictional)
WBRS Use Case Trade Exceptions.pdf	The use case
Big Idea Worksheet.pdf	Big Idea worksheet. Fill it in by hand before Part 2.2
Storytelling with Data AI Primer.pdf	Data storytelling principles. You give this file to Copilot in Prompt 0.1

All WBRS data is fictional and is for training only. Prompts are written for Microsoft 365 Copilot and the GCAD 4D framework.

PART 1

Set up

Know the rules before you open Copilot.

1.1 Who does the work?

There are four ways to work with AI. In this class, you work in the two middle boxes.

You do all the work	AI expands your thinking	AI speeds up your work	AI does all the work
Classic data storytelling. You did this in the WBRS guide.	You consult AI. It asks questions and finds gaps.	You direct AI. It drafts, calculates, prototypes.	Not recommended. You lose control of the message.

KEY IDEA Build the foundation first: first for you, then for AI. AI is a thought partner. You own the data, the decisions and the story.

1.2 Five rules for working with Copilot

No.	Rule	Why
1	Think first. Fill in the worksheet 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 more content. A good story has less.
5	Check every number. You make the final decision.	AI can calculate wrong, invent data, or agree with you too easily.

1.3 Where to use Copilot

Copilot	Open it	Use it for	License
Microsoft 365 Copilot Chat	**m365.cloud.microsoft** > **Chat**. Make sure the work account is on.	Thinking: context, Big Idea, story, chart options, critique. File analysis.	Basic and Premium
Copilot in Excel, Agent mode	**Home > Copilot**. In the Copilot pane, turn on **Agent mode** (also called Edit with Copilot). The file must be on OneDrive or SharePoint with AutoSave on.	Clean-up, PivotTables, formulas, charts in your workbook.	Premium only
Copilot in PowerPoint	**Home > Copilot**	Slide text and layout.	Premium only

NOTE Basic users: Copilot in Excel and PowerPoint is not available in large organizations. Each step in Part 2 gives you a Copilot Chat path or a manual path.

1.4 Before the class

Check	Yes / No
You can sign in to Microsoft 365 Copilot Chat with your work account.	
You know your license: Basic or Premium. Ask the trainer if you are not sure.	
Premium: the 4 files are in a OneDrive folder and AutoSave is on.	
You have the 4 files: data, use case, Big Idea worksheet, principles guide.	
You have a printed Big Idea worksheet and sticky notes.	

NOTE Stay in one chat for one project. Copilot keeps the context, so you do not repeat it. Start a new chat for a new project.

1.5 Data safety

CAUTION Follow the bank policy for AI tools. Use only the approved Microsoft 365 Copilot with your work account. Do not paste customer names, account numbers, staff names or other confidential data into a prompt. For real work, aggregate or mask the data first. The WBRS data in this class is fictional.

1.6 How to write a good prompt

Microsoft recommends four parts. Use them in every prompt in this guide.

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

Weak prompt	Strong prompt
Make a chart of my data.	Suggest 3 chart options (Goal) for a 10-minute meeting with the Head of Treasury, who must decide on a rollout (Context). Use the table below (Source). For each option, say what it makes easy to see and what it hides. Ask me 2 questions first (Expectations).

How to read Part 2

Box	Meaning
PROMPT	Copy and paste this text. Text in [brackets] is for you to change. The label on the right tells you where to run it.
WHAT COPILOT GIVES YOU	A good answer contains these points. Copilot uses different words each time. The numbers must be the same.
YOU DECIDE	Where your judgement is better than the AI answer.
CHECK	What you must see. If your result is different, ask Copilot to show its calculation.

PART 2

WBRS with Copilot

The same use case, the same 4 phases. Copilot speeds up each step. You stay in control.

2.0 Start the session

1. Open Microsoft 365 Copilot Chat.
2. Click **New chat**.
3. Attach `Storytelling with Data AI Primer.pdf`. Click **+** (Add content) > **Upload**.
4. Copy Prompt 0.1 into the box. Push **Enter**.

PROMPT 0.1 — Copilot Chat

Review the attached data storytelling guide. Use these principles when we explore ideas or discuss, review and create graphs, slides and presentations. Prioritize simplicity, clarity and audience focus in all future recommendations.

PROMPT 0.2 — Copilot Chat, same chat

I am an internal auditor in a bank. 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. Keep answers short. Use bullets and tables.
Reply "Ready" if you understand.

WHAT COPILOT GIVES YOU A short confirmation, for example: Ready. Copilot keeps these rules for the full chat.

NOTE Prompt 0.2 is the most important prompt. It turns Copilot from a writer into a thought partner.

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 886, 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.

NOTE Keep Prompts 0.1, 0.2 and 0.3 separate. Each prompt does one job, so Copilot follows each one better. If Copilot stops using STE in a long chat, type: `Rewrite your last answer in ASD-STE100.`

Who does what: Copilot works, you approve

Copilot does the work in every step. At 8 points, you must stop and decide. Do not skip them. Copilot can be wrong, and you sign the audit result.

Gate	Step	You must
1	1.1 Sub-questions	Approve the sub-questions. Copilot uses them for all of Discover.
2	1.3 Clean-up plan	Approve the plan before Copilot changes data.
3	1.4 and 1.5 Results	Check the control total and one PivotTable number yourself.
4	1.7 Validate	Confirm the business reasons with the business owner.
5	2.2 to 2.4 Big Idea	Write the worksheet by hand first. Choose the action and the stakes.
6	2.5 Story	Choose the climax. Cut what does not help the audience.
7	3.2 and 3.4 Visual and title	Choose the chart and the title. Check every number in the title.
8	4.4 to 4.7 Slide and talk	Check the final slide against the data. You present it.

2.1 Discover: the 5-step insight process with Copilot

In class you did the clean-up and the PivotTables by hand. Here Copilot does all of it: it plans the clean-up from the sub-questions, cleans the data, builds the PivotTables, reads them and answers each sub-question. You check the result.

Your license	Where you work	What Copilot makes
Premium (Microsoft 365 Copilot license)	Excel: **Home > Copilot**, then turn on **Agent mode** (Edit with Copilot). The file must be on OneDrive with AutoSave on.	Real sheets in your workbook: a clean table and PivotTables
Basic (Copilot Chat, no license)	Microsoft 365 Copilot app or web: **Chat**. Attach the file.	A clean file to download and result tables in the chat. No PivotTables in your workbook.

NOTE The prompts are the same for both. Where the text says **[Excel: ...] / [Chat: ...]**, keep the part for your license and delete the other part.

CAUTION Premium only: Copilot in Excel and Copilot Chat are two different chats. They do not share what you typed. Do Prompts 1.1 and 1.2 in Copilot Chat. Do Prompts 1.3 to 1.5 in Excel and paste your sub-questions into Prompt 1.3. Then copy the answer table from Excel back to Copilot Chat for Prompt 1.6.

1. Attach `WBRS Use Case Trade Exceptions.pdf` and `WBRS Trade Exceptions Data.xlsx` to the same chat.

Step 1: Context

PROMPT 1.1 — Copilot Chat

```
Read the attached use case. Do not look at the data yet.
1. State the business question, the audience, the decision, the period and the scope in a table.
2. Break the business question 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.
```

WHAT COPILOT GIVES YOU Business question: did the pilot change trade exception risk, and is it safe to extend it? Audience: Head of Treasury & Markets, with the Chief Compliance Officer and the Chief Internal Auditor. Decision: go ahead with, change or pause the 1 January 2027 rollout. Sub-questions like: change over time? change after 1 May 2026? only FX Spot or all desks? is it only more trades? who and how? Transformations like unpivot the months, fill down Desk, remove totals, add a before/after label.

YOU DECIDE Gate 1. Read the sub-questions. Add, remove or change them. The list must cover time, the pilot date, desk, trade volume and the detail of FX Spot. Then type: `OK. Use these sub-questions for the full analysis.`

Step 2: Audit

PROMPT 1.2 — Copilot Chat

Now look at the attached workbook. Do not analyze the results yet.
For each sheet, tell me: what one row means, the columns, the data types, and any data quality issues (title rows, blank cells, subtotal rows, total columns, months stored as columns, text that looks like numbers).
Then tell me the grand total of exceptions and the cell where it is.

WHAT COPILOT GIVES YOU Four sheets: Read_Me, Exceptions_Report (crosstab), Trade_Volume (60 rows), FX_Exception_Detail (354 rows). Issues in Exceptions_Report: 3 title rows, Desk only on the first row of each block, Desk Total rows, Grand Total row, Total column, months in columns. Grand total **886** in cell **O25**.

CHECK Open the workbook. Go to Exceptions_Report, cell O25. The value is **886**. You use this number as the control total in Step 3.

Step 3: Foundation (Copilot plans and cleans)

First Copilot shows a plan. You approve it. Then Copilot does the work. This is the same control you use in an audit: review before you execute.

PROMPT 1.3 — Excel Agent mode or Copilot Chat

[Excel: Here are my sub-questions: paste the list from Prompt 1.1.]
Use the sub-questions from Step 1. Plan the data clean-up that I need to answer them. Do not change anything yet.
For each problem in Exceptions_Report, tell me the fix and the sub-question it supports.
The result must be one flat table named Exceptions_Flat with these columns:
Desk, Exception_Type, Month (a real date), Exceptions (a number), Period ("Before pilot" if Month is before 1 May 2026, else "After pilot"), Desk_Group ("FX Spot" or "Other 4 desks").
Tell me why I need the Period and Desk_Group columns. Then wait for my OK.

WHAT COPILOT GIVES YOU A plan such as: remove the 3 title rows, use row 4 as the header, fill the blank Desk cells, remove the Desk Total rows, the Grand Total row and the Total column, turn the 12 month columns into rows, make Month a date, add Period and Desk_Group. Why: Period answers "did it change after the pilot?" in one PivotTable. Desk_Group answers "only FX Spot or all desks?" in one chart.

YOU DECIDE Gate 2. Read the plan. If a step is missing (most often: the Desk Total rows or the Total column), type: `Add this step: [step]`. 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 Exceptions_Flat on a new sheet and format it as a table.] **[Chat: use Python and give me Exceptions_Flat as an Excel file to download.]**
Then do a control check: give me the row count, the sum of Exceptions, and the Grand Total in Exceptions_Report. Tell me if they match.

CHECK Copilot reports **180 rows** and a sum of **886**, the same as the Grand Total in cell O25. Do not trust the report only. Open the table and check one row yourself, for example FX Spot, Off-Premise, Sep 2026.

NOTE Copilot can use formulas, Python or Power Query to do the clean-up. Any method is correct if the check passes. For a report that you refresh each month, add: `Use Power Query, so I can refresh it next month.`

Step 4: Baseline (Copilot builds the PivotTables and reads them)

PROMPT 1.5 — Excel Agent mode or Copilot Chat

Answer sub-questions 1 to 6 from the data. Build one view for each:
P1: Exceptions by Month and Desk, from Exceptions_Flat.
P2: Average Exceptions a month by Desk and Exception_Type, Before pilot against After pilot.
P3: FX Spot trades a month from Trade_Volume, and FX Spot exceptions per 1,000 trades, before and after the pilot.
P4: FX Spot exceptions since 1 May 2026 from FX_Exception_Detail: count and USD notional by Recorded_Line, and count by Dealer_ID from high to low.
[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 the numbers), Source (P1 to P4). Label each answer Known or Inferred.

WHAT COPILOT GIVES YOU

No.	Sub-question	Answer	Source
1	Did exceptions change over time?	Yes. 61 in Oct 2025 to 109 in Sep 2026.	P1
2	Did they change after the pilot started?	Yes. FX Spot 11 to 55.4 a month (five times).	P2
3	Only FX Spot, or all desks?	Only FX Spot. Other 4 desks: 47 to 40.6 a month. Money Market fell after its new system (16 to 5.1 a month from Jan 2026).	P1, P2
4	Are the numbers correct?	Yes. 180 rows, total 886, same as the report.	Step 3 check
5	Is the rise only because of more trades?	No. Volume is flat (about 2,400 a month). Rate: 4.6 to 22.8 for each 1,000 trades.	P3
6	Who made the exceptions, and how?	187 of 277 not on a recorded line (USD 260 million). FX11, FX07, FX03 made 62%.	P4

CAUTION If a number is different, do not accept it. Type: `Show me the filter and the calculation for this number.` Most errors come from the wrong pilot date or from totals left in the data.

CHECK Gate 3. Click P2 (or the P2 table). FX Spot, Off-Premise: 2.6 before and 21.8 after. If your number is the same, the PivotTables are correct.

1. Premium only: select the answer table in the Excel Copilot pane. Push **Ctrl + C**.
2. Go back to Copilot Chat. Push **Ctrl + V**. Type: `These are my verified results.`

PROMPT 1.6 Copilot Chat

Apply SCAN to these results: Spikes, Comparisons, Anomalies, No-change. For each, give the pattern with numbers and label it Known or Inferred.

WHAT COPILOT GIVES YOU **S**pike: FX Spot jumps from May 2026. **C**omparison: from June 2026, FX Spot has more exceptions than the other 4 desks combined. **A**nomaly: 187 of 277 FX Spot exceptions not on a recorded line, and 3 dealers make 62%. **N**o-change: Fixed Income backdated trades stay at 14 to 17 a month after the action plan closed on 31 March 2026. Also: Money Market falls after the new system.

YOU DECIDE Remove any pattern that has no number. Patterns labelled Inferred are not findings yet. You test them in Step 5.

Step 5: Validate

PROMPT 1.7 Copilot Chat

Challenge each finding. For each one:
1. List other explanations (more trades, season, system change, data error, change of definition).
2. Tell me which evidence in the workbook confirms or rejects each explanation.
3. Tell me if there is a valid business reason for the pattern. Use the Read_Me sheet.

WHAT COPILOT GIVES YOU FX Spot rise: volume is flat, the rise starts with the pilot, most exceptions are from home and not recorded, so it is a finding. Money Market drop: valid reason, new booking system on 1 January 2026, so it is good news. Fixed Income no-change: no valid reason, the action plan was reported as complete, so it is a repeat finding.

YOU DECIDE Gate 4. Copilot cannot talk to the business. Before you call a pattern a finding, confirm the reason with the business owner. In this class, the Read_Me sheet is the confirmation.

PROMPT 1.8 Copilot Chat

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

WHAT COPILOT GIVES YOU Insight 1: FX Spot exceptions rose five times after the pilot, mostly on unrecorded lines, so pause the rollout until recorded-line controls work. Insight 2: Fixed Income backdated trades did not fall after the action plan closed, so reopen it. Insight 3: the Money Market booking system cut exceptions by two thirds, so use the same control in FX Spot.

YOU DECIDE Compare each word with your own three insights. Keep your wording if it is more precise. Copilot is a second pair of eyes, not the author.

2.2 Develop: start with context (Big Idea)

KEY IDEA Fill in the Big Idea worksheet by hand first. Then share it with Copilot one section at a time: audience, then stakes, then the Big Idea. Answer the questions Copilot asks. Your answers alone make your thinking clearer.

Story Space first

PROMPT 2.1 Copilot Chat

Rate each of the 3 insights on two scales: complexity (easy or hard to explain) and value to the audience (low, mid, high). Put them in a table. Which one needs a full data story? What do I do with the other two?

WHAT COPILOT GIVES YOU Insight 1: hard and high value, so it goes into the Story Space. Insight 2: easy, mid value. Report it as an audit finding. Insight 3: easy, mid value. Use it as support evidence inside the Insight 1 story.

YOU DECIDE You know the audience better than Copilot. Change a value rating if it is wrong for your audience.

Fill in the worksheet by hand

Fill in `Big Idea Worksheet.pdf` for Insight 1 before you go on. This is a model answer. It has one weak draft on purpose.

NOTE Gate 5. Do not ask Copilot to fill in the worksheet. If AI writes it first, your thinking anchors on its framing. Copilot tests your thinking in the next prompts.

Worksheet box	Your answer (model)
(1) Primary audience	Head of Treasury & Markets, Chief Compliance Officer, Chief Internal Auditor
(2) Single person	Head of Treasury & Markets (approves the rollout)
(3) What they care about	Dealer productivity, keeping good staff, no regulatory problems for the desk
(4) Action	Pause the 1 January 2027 rollout until recorded-line controls work
Benefits if they act	Every trade is recorded. The rollout can go ahead later on a safe basis. No regulatory finding.
Risks if they do not	Five desks can repeat the FX Spot result. More unrecorded trades. Breach of the Dealing Room Policy.
Draft Big Idea (weak)	FX Spot exceptions went up during the pilot, so we must review the pilot and the controls and maybe delay the rollout.

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? Is the action specific enough? What am I missing?

WHAT COPILOT GIVES YOU Questions such as: Who has the final say? What will the Chief Compliance Officer want? What is the likely objection? Then points such as: the Compliance Officer cares about the policy breach, not productivity. The Head of Treasury may say: dealers like the pilot, and these are only admin errors. A suggestion such as: do not stop the pilot, extend it with conditions.

YOU DECIDE Copilot often suggests a softer action, such as a pilot or a conditional extension. Do not use it as the main message. A conditional extension weakens the control message. Keep **pause**, but add a clear restart condition. This also answers the objection.

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?

WHAT COPILOT GIVES YOU Most important: unrecorded trades (USD 260 million) because they break the policy, and the scale risk (five desks). Copilot can suggest that you name the three dealers.

YOU DECIDE Do not name dealers in the Big Idea. A dealer review is a step, not the headline. Names distract the room and are sensitive.

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.

WHAT COPILOT GIVES YOU Copilot shows the problems: three actions in one sentence, and "maybe" is weak. It gives sharper versions with one action and one stake.

CHECK Model Big Idea: **Pause the 1 January 2027 work-from-home rollout until every home trade is on a recorded line, because FX Spot trade exceptions rose five times under the pilot and USD 260 million of trades have no recorded conversation.**

2.3 Develop: craft a story

KEY IDEA Storyboard on sticky notes first: one idea on each note, as many as you can in 10 minutes. Cut the notes that describe your process, not the audience need (method, history, checks). Then ask Copilot to pressure-test the order. Do not accept the climax from Copilot. Choose it yourself.

Storyboard by hand (10 minutes)

1. Write one idea on each sticky note. Do not filter.
2. Remove notes about your process: Power Query steps, how you checked the data, all 12 dealer counts.
3. Make each note a point, not a label. Example: not "Trade volume" but "Trade volume did not change".
4. Put the notes in order.

No.	Sticky note (model)
1	The FX Spot work-from-home pilot started on 1 May 2026. The plan is to roll it out to all 5 desks on 1 January 2027.
2	Before the pilot, FX Spot had about 11 exceptions a month.
3	After the pilot, FX Spot exceptions rose to 55 a month: five times more.
4	Trade volume did not change. Exceptions per 1,000 trades went from 4.6 to 22.8.
5	From June 2026, FX Spot has more exceptions than the other 4 desks combined.
6	Off-Premise and After-Hours caused most of the rise.
7	187 of 277 exceptions were not on a recorded line: USD 260 million.
8	Three dealers made 62% of the exceptions since May.
9	Money Market shows that a system control works: exceptions fell by two thirds.
10	Pause the rollout. Block booking from unrecorded devices. Review the 3 dealers. Restart when FX Spot is back to the pre-pilot level.

PROMPT 2.5 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?

WHAT COPILOT GIVES YOU Questions first: who is the main audience, who will object, what do they already know. Then: notes 3 and 4 can be one point. Note 9 can be a detour, or proof that the fix works. Tension starts late. Copilot can put the money (note 7) as the climax, or it can call the arc "strong" with few changes.

YOU DECIDE Gate 6. AI often agrees too easily. If Copilot only praises, type: `Be more critical. Give me the 3 biggest weaknesses.` Choose the climax yourself. For this audience, the climax is note 7: the exceptions are not admin errors. They are unrecorded trades. This answers the objection before it comes.

PROMPT 2.6 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 if any letter is weak or empty.

WHAT COPILOT GIVES YOU S: notes 1 and 2. T: notes 3, 4 and 5. O: notes 7 and 8 (the pilot is still small, fix it now). R: notes 9 and 10. Y: often weak or empty. Copilot asks what happens if they act and if they do not.

PROMPT 2.7 Copilot Chat

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

WHAT COPILOT GIVES YOU Problem: FX Spot exceptions rose five times after the pilot, mostly on unrecorded lines. Stakes: USD 260 million of trades have no recorded conversation, and a rollout can multiply this. Steps: block unrecorded booking, review the 3 dealers, use the Money Market control. Call to action: approve a pause of the 1 January 2027 rollout 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.

PROMPT 2.8 Copilot Chat

I am happy with the structure. Turn each point in my storyboard into a draft takeaway title for a slide. A takeaway title is a short point of view, not a label. Give me just the titles as a simple numbered list.

WHAT COPILOT GIVES YOU A numbered list such as: 1 The pilot is the model for all 5 desks from January. 2 Exceptions rose five times after the pilot. 3 Trade volume did not change. 4 FX Spot now has more exceptions than 4 desks combined. 5 Most are not on a recorded line: USD 260 million. 6 Three dealers made 62% of them. 7 A system control already works in Money Market. 8 Pause the rollout until every trade is recorded.

YOU DECIDE Edit the titles. Keep each title short. Check each number against your Step 4 answer table.

NOTE Copilot often gives more than you ask for. Then type: `Give me just the titles as a simple numbered list.` Use short follow-ups like this when Copilot gives too much.

2.4 Design: choose an appropriate visual

KEY IDEA Lead with the takeaway, not the data. AI optimizes for the data if you let it. Ask for 2 to 3 options and the trade-offs. Push back on unusual charts that the audience cannot read. Use the AI chart as a prototype only. Build the final chart yourself.

PROMPT 3.1 — Copilot Chat

Which of these 6 data story types fits Insight 1: Ranking, Distribution, Proportion, Correlation, Comparison, Change over time? Give the main type, a second type if needed, and one reason.

WHAT COPILOT GIVES YOU Main type: Change over time (before and after 1 May 2026). Second type: Comparison (FX Spot against the other 4 desks).

PROMPT 3.2 — Copilot Chat

Act as a thought partner to help me choose a visual.
Audience: Head of Treasury & Markets, with the Chief Compliance Officer. Divided views on the pilot.
What I want to show: **[paste your Big Idea or takeaway]**
How it will be used: one slide in a live 10-minute meeting. Goal: persuade them to pause the rollout.
Data: exceptions a month for FX Spot and for the other 4 desks combined, Oct 2025 to Sep 2026, from the attached workbook. First show me this 12-row 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.

CHECK Gate 7. Compare the 12-row table from Copilot with this table. If one number is different, stop. Type: `Show me the filter you used.`

Month	FX Spot	Other 4 desks
Oct 2025	3	58
Nov 2025	11	58
Dec 2025	15	48
Jan 2026	11	44
Feb 2026	10	37
Mar 2026	10	43
Apr 2026	17	41
May 2026	37	42
Jun 2026	59	49
Jul 2026	58	33
Aug 2026	52	41
Sep 2026	71	38

WHAT COPILOT GIVES YOU Questions such as: Is the audience used to slopegraphs? Must the chart show each desk? Then 3 options, as in Figure 1. A: line chart, shows when the change starts and the cross-over. B: grouped bars by desk, shows each desk, but the time pattern is hidden. C: slopegraph, shows the five-times jump in one look, but hides the month the change starts.

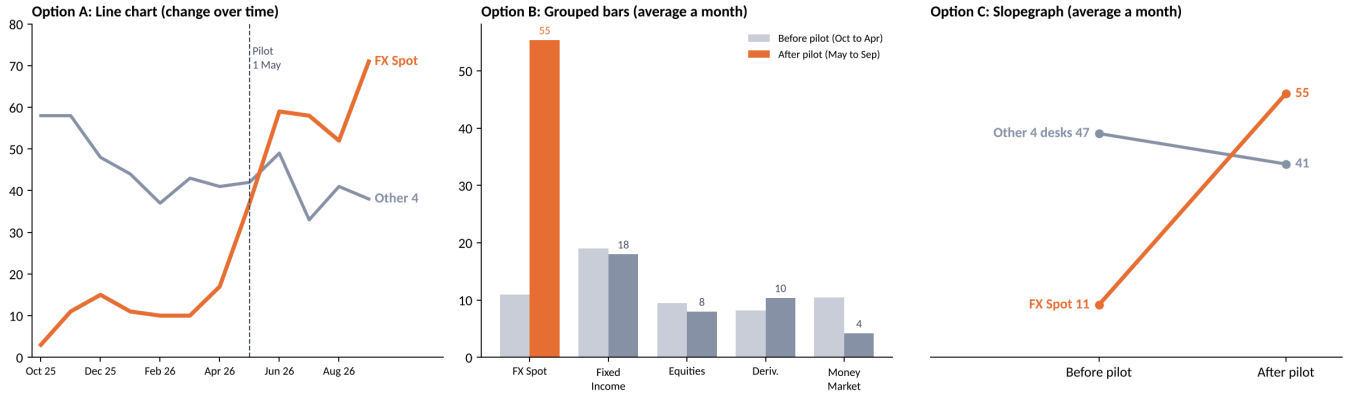

Figure 1: Three prototype options. Copilot draws its own versions. The form must be similar.

CAUTION Copilot sometimes gives only text or code, not an image. If this happens, type: `Run the Python code and show me the charts as images.` If it still fails, build the options in Excel (Prompt 3.3).

YOU DECIDE Gate 7. Choose Option A, the line chart. The meeting needs to see **when** the change started (the pilot date) and the point where FX Spot passes the other desks. Keep Option C as a backup slide for the question "how big is the change?".

Build the chart

PROMPT 3.3 — **Excel Agent mode or Copilot Chat**

[Excel: From Exceptions_Flat, make a new sheet Chart_Data with the columns Month, FX Spot, Other 4 desks (sum of the other 4 desks). Then create a line chart from Chart_Data. Put Month on the horizontal axis. Show FX Spot and Other 4 desks as two lines.]
[Chat: Give me the 12-row table as an Excel file named Chart Data to download.]

1. Basic only: open Chart Data.xlsx. Select the table.
2. Click **Insert > Charts > Line**. Select the first line chart.

CHECK You see a default line chart with two lines, a legend and gridlines, like Figure 2. The last point of FX Spot is 71 and of Other 4 desks is 38. This is your draft. Do not present it yet.

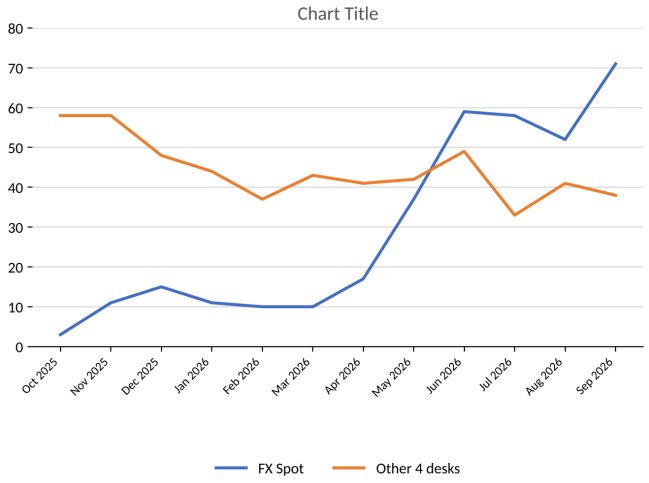

Figure 2: The default chart. Correct data, no story yet.

PROMPT 3.4 Copilot Chat

Write 3 options for a hybrid title for this chart. A hybrid title has 3 parts:
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 in the headline, so the headline replaces the legend box. Tell me which word gets which colour.
Use my Big Idea: **[paste Big Idea]**

WHAT COPILOT GIVES YOU Headline: **FX Spot** trade exceptions rose five times after the work-from-home pilot and now exceed the **other 4 desks combined**.
Call to action: Please pause the 1 January 2027 rollout to all desks until every home trade is on a recorded line.
Colours: FX Spot in orange, other 4 desks in grey.

YOU DECIDE Gate 7. Choose one title, or combine two. Check that each claim is true in the data: "five times" (11 to 55.4) and "exceed the other 4 desks" (June to September).

2.5 Drive: design effective graphs and slides

KEY IDEA Declutter, but do not stop there. Show people where to look with colour, size and position. Tell people what to see with a takeaway title. Ask AI to remove or simplify before it adds.

1. Take a screenshot of your default chart. Push **Windows + Shift + S**.
2. Paste the screenshot 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.

WHAT COPILOT GIVES YOU 1 Delete "Chart Title". 2 Remove the gridlines. 3 Remove the legend and label each line at its end. 4 Make Other 4 desks grey and FX Spot orange (one highlight colour). 5 Make the FX Spot line thicker. 6 Add a dashed line at May 2026 with the text "pilot starts". 7 Add a note at June 2026 where FX Spot passes the other desks. 8 Use short month labels. 9 Add the takeaway title and the source.

PROMPT 4.2 — Copilot Chat

Check my colours and fonts against these rules: one sans-serif font, a monochrome base (greys) and one complementary highlight colour, colour only where it carries meaning. What do I change?

PROMPT 4.3 — Excel Agent mode

Change this chart: delete the chart title, the gridlines and the legend. Make the Other 4 desks line grey and the FX Spot line orange and thicker. Add a data label with the series name and value at the last point of each line. Add a dashed vertical line at May 2026 with the text "1 May 2026: work-from-home pilot starts for FX Spot". Use short month labels, for example Oct 25.

NOTE Premium: Agent mode does most of these changes. Do the rest by hand, as in Part 4 of the WBRS guide. Basic: do all the changes by hand, from the list in Prompt 4.1.

CHECK Your chart looks like Figure 3.

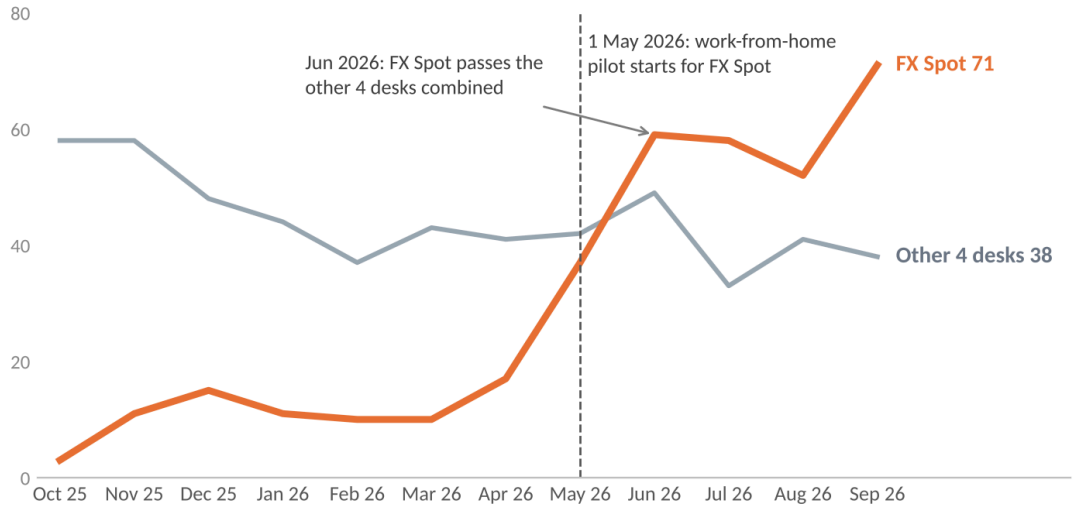

Figure 3: After declutter and focus. One highlight colour, direct labels, pilot date, one note.

Put it on a slide

1. Save the final 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.
4. Copy Prompt 4.4. Paste your approved headline and call to action from Prompt 3.4.

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 "FX Spot" orange (#E97132) and "other 4 desks combined" grey (#6B7785).
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: Trade surveillance report, Oct 2025 to Sep 2026.
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 text. Do not type "use the recommended headline". Copilot then writes a new headline and you lose the title you approved at Gate 7. Copilot in PowerPoint also cannot see what you approved in Copilot Chat. If Copilot Chat gives no PowerPoint file, type the 3 text lines on the slide by hand.

CHECK Read the slide text word by word. Copilot can change words. The headline, the call to action and all numbers must be the same as your approved title.

PROMPT 4.5 — Copilot Chat

Here is my final slide. **[paste screenshot]**
Read it as the Head of Treasury & Markets in 10 seconds. What do you see first? What is the message? What do I need to do? If any answer is not clear, tell me the smallest change that fixes it.

WHAT COPILOT GIVES YOU The eye goes to the orange line and the headline. The message is clear: five times rise, more than 4 desks combined. The action is clear: pause the rollout. Possible small fixes: shorten the headline, make the CTA darker, move a note so it does not touch the line.

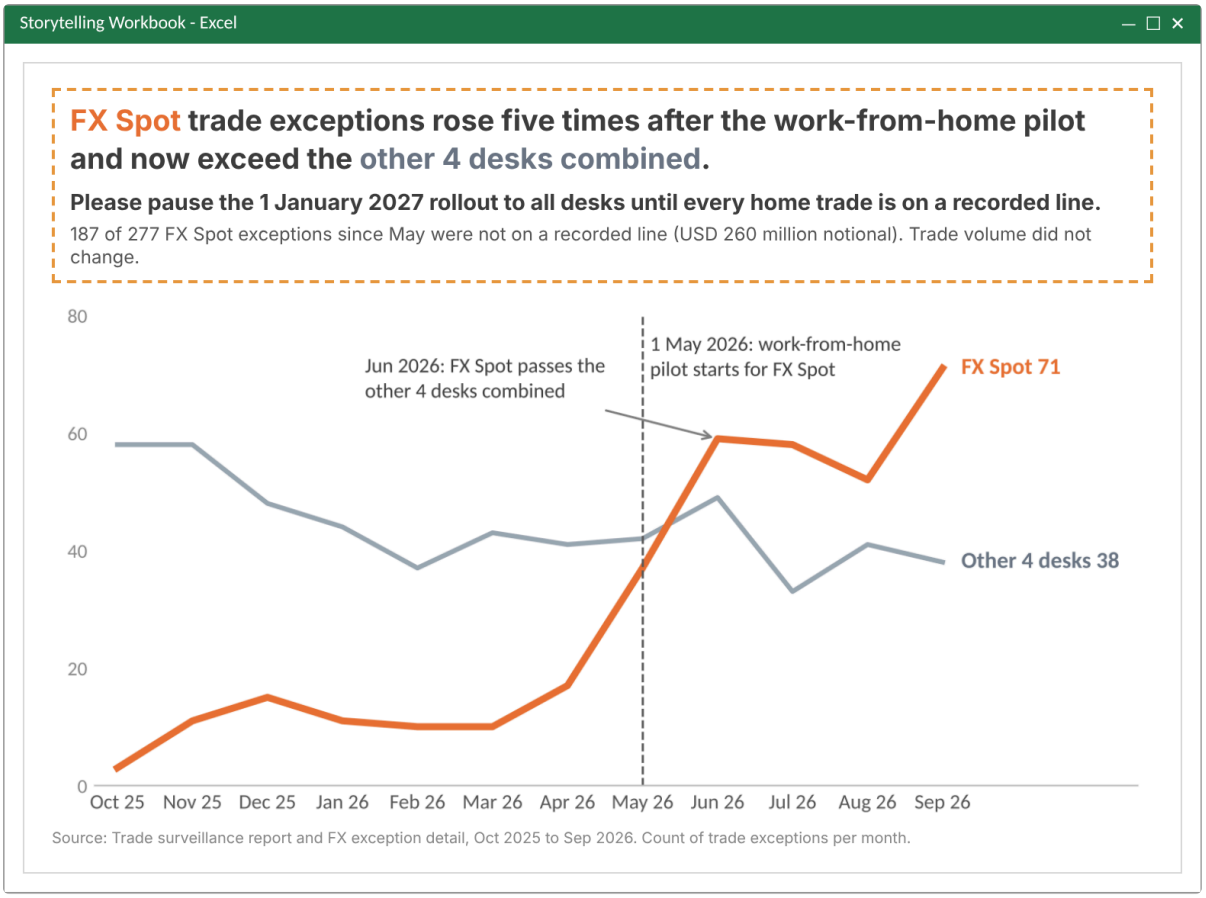

Figure 4: The final data story with the hybrid title. Your slide must give the same message in 10 seconds.

2.6 Drive: present powerfully

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.

WHAT COPILOT GIVES YOU

Likely question	Answer from the data
Dealers like the pilot. Are these only admin errors?	No. 187 of 277 were not on a recorded line. That is a policy breach, not admin.
Did FX Spot just do more trades?	No. Volume is flat at about 2,400 a month. The rate went from 4.6 to 22.8 per 1,000 trades.
Is it the whole desk or a few people?	Three dealers made 62%. But the rise is across all 3 exception types.
Five months is a short period. Is it real?	The rise starts in the pilot month and stays high every month, up to 71 in September.
Can we fix it without a pause?	Not before 1 January 2027 with proof. First put in a booking block for unrecorded devices. Money Market proves a system control works. Restart when FX Spot is back near 11 a month.

YOU DECIDE Gate 8. Remove any answer that uses data that is not in the workbook. You present the answers, so they must be yours.

PROMPT 4.7 Copilot Chat

Act as the Head of Treasury & Markets. You support the pilot and you are 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 Prompt 4.7 is a rehearsal. Do 3 rounds before the real meeting.

2.7 Keep the conversation going

A good result comes from a conversation, not from one prompt. Use these short follow-ups at any step.

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?`

2.8 What changed with Copilot?

Phase	By hand (WBRS guide)	With Copilot	What you still do
Discover	40 min	10 to 15 min	Approve the clean-up plan. Check every number. Decide what is valid.
Develop	25 min	10 to 15 min	Fill in the worksheet first. Choose the climax and the action.
Design	15 min	5 to 10 min	Choose the chart for the audience. Build the final chart.
Drive	10 min	5 to 10 min	Apply the changes. Practise the talk.

Final sign-off before you present

Check	Yes / No
Every number on the slide is the same as the source data or your PivotTables.	
The control total (886) matches the report.	
No customer names, account numbers or staff names went into a prompt.	
The business owner confirmed the business reasons.	
The Big Idea, the action and the climax are your decisions, not Copilot's.	
A second person read the slide and got the message in 10 seconds.	

NOTE Copilot is fast because you know the process. Without the process, you cannot write good prompts and you cannot see when the answer is wrong.