COPILOT STEP-BY-STEP GUIDE · MICROSOFT 365 COPILOT · BEYOND THE PROMPT

Showroom Sales Funnel with Copilot

Design the blueprint. Let AI lay the bricks. Discover, Develop, Design: from a raw CRM export to one management slide.

0 Start | 1 Discover | 2 Develop | 3 Design | 4 Slide

Why this guide

- Anyone can type a prompt. This guide shows how to **design the work**: context first, then clean data, then steps, then checks.
- Copilot does the building. You give the context, you check, and you decide.
- Each step uses the output of the step before. That chain is the architecture.

The flow (same as the session)

Phase	What you do	Prompts
0 Start	Set the context: rules, thought partner, ASD-STE100 Simplified Technical English	0.1 to 0.3
1 Discover	**P.R.E.P**: make the data trustworthy. **S.C.A.N**: find the signals that matter. Then turn signals into insight.	1.1 to 1.10
2 Develop	How do we tell the story? Know the crowd, shape it with **S.T.O.R.Y**, find the core.	2.1 to 2.3
3 Design	How do we show the story? **Data, then story, then visual.** Pick the chart, hybrid title, remove junk.	3.1 to 3.4
4 Slide	Put it together in one management slide. Test it.	4.1 to 4.2

Files

File	Content
Showroom_Sales_Funnel_Apr-Sep_2026.xlsx	The raw sales funnel data and the CRM control totals
Showroom_Sales_Use_Case.pdf	The situation and your task
This guide	Prompts, expected results, gates and checks

Which Copilot

Copilot	Use it for	License
Copilot Chat (`m365.cloud.microsoft` > `Chat`)	All thinking, analysis, story and titles	Basic and Premium
Excel and PowerPoint agents (type `@Excel` or `@PowerPoint` in Copilot Chat)	Build the chart and the slide	Basic and Premium, if your company enables them

NOTE Everything runs in **Copilot Chat**. Every prompt works as written for both Basic and Premium. When a step changes data or adds sheets, Copilot creates a **new copy** of the workbook in your OneDrive. Keep working in the same chat so it uses the latest copy.

4 rules

No.	Rule
1	Use one Copilot Chat for the full exercise. Copilot keeps the context.
2	Stop at each gate. Read, check, decide. You own the finding.
3	Check every number against **Control_Totals** or your own filter.
4	Real work: never paste customer names, IC numbers or phone numbers. Follow the company policy for AI tools.

How to read this guide

Box	Meaning
PROMPT	Copy and paste. Change the text in [brackets].
WHAT COPILOT GIVES YOU	A good answer has these points. Words change. Numbers must be the same.
GATE: YOU DECIDE	Stop and decide before you go on.
CHECK	What you must see.

PART 0

Start the chat: set the context

3 prompts. 3 minutes. This is the foundation. Skip it and every answer gets weaker.

0 Start | 1 Discover | 2 Develop | 3 Design | 4 Slide

1. Open Microsoft 365 Copilot Chat. Click **New chat**.
2. Attach `Showroom_Sales_Funnel_Apr-Sep_2026.xlsx` and `Showroom_Sales_Use_Case.pdf`. Click **+** > **Upload**.
3. Send Prompts 0.1, 0.2 and 0.3, one at a time.

PROMPT 0.1 — Copilot Chat

In this chat, follow these data storytelling rules:
1. The audience comes first. Every answer must help them decide.
2. One main message and one clear ask with a date.
3. Answer first: the message and the ask come before the detail.
4. Every title is an insight with a number, not a topic.
5. Simple, familiar charts. Grey for context, one colour for the point.
6. Use only facts from the attached files. Never invent a number or a name.

PROMPT 0.2 — Copilot Chat, same chat

I am a sales analyst at a car dealer group. I will work through a data story in 3 steps: Discover, Develop and Design.
Act as my thought partner.
1. Ask me when something is not clear.
2. Before you change any data, show me your plan and wait for my OK.
3. Label each point as Known (in the data), Inferred, or Suggested.
4. Keep answers short. Use tables.
Reply "Ready" if you understand.

PROMPT 0.3 — Copilot Chat, same chat

For tables, findings and steps, use ASD-STE100 Simplified Technical English: simple words, active voice, maximum 20 words for each sentence. Do not use it for slide titles. Do not use em dashes.

CHECK Copilot replies "Ready". If it starts to analyse the data, type: `Stop. Wait for my next prompt.`

PART 1

Discover: find the insight

The question first. P.R.E.P makes the data trustworthy. S.C.A.N finds the signals. Then the signals become insights.

1.1 Understand the question

PROMPT 1.1 Copilot Chat

Read the attached use case. Do not analyse the data yet.
1. State the business question, the audience and the decision in a table.
2. Break the business question into 4 or 5 sub-questions that the data must answer.
3. For each sub-question, list the columns I need.
Then wait for my OK.

WHAT COPILOT GIVES YOU Business question: why are bookings flat when leads are growing, and what do we fix first? Audience: Head of Sales. Sub-questions: which showroom's booking rate changed; at which funnel step it leaks (test drive or close); is it getting worse by month; what changed in that showroom (discount, demo cars, wait time); how many bookings we lost.

GATE 1: YOU DECIDE Add, remove or change the sub-questions. Then type: `OK. Use these sub-questions for the full analysis.`

P.R.E.P · make the data trustworthy

P Profile the data

PROMPT 1.2 Copilot Chat

P.R.E.P step 1, Profile. Look at the sheet Showroom_Sales. Do not change anything.
1. List the columns, data types and row count.
2. List every data quality issue with the row number.

WHAT COPILOT GIVES YOU

Issue	Where
Showroom names spelt differently	Row 11 (Shah alam), row 31 (SHAH ALAM), row 16 (PJ for Petaling Jaya)
Numbers stored as text in Leads	Rows 8 (Penang, May) and 32 (Johor Bahru, Aug)
Duplicate row	Rows 25 and 26 (Johor Bahru, Jul)
Blank row	Row 22
Missing Avg_Discount_RM	Row 13 (Melaka, May)

R Repair the data

PROMPT 1.3 Copilot Chat

P.R.E.P step 2, Repair. Plan the clean-up of Showroom_Sales. Do not change anything yet.
The result must be one clean table: one row for each showroom and month, one standard name for each showroom, numbers as numbers, no blank or duplicate rows.
Keep the missing Avg_Discount_RM blank and list it for me. Never fill a missing value.
Keep the sheet Showroom_Sales unchanged as evidence. Tell me each step and why. Then wait for my OK.

WHAT COPILOT GIVES YOU A plan: copy the data, fix 3 showroom names, convert 2 text values, remove 1 duplicate and 1 blank row, flag 1 missing discount, format as a table named tbl_Sales.

GATE 2: YOU DECIDE Check the plan. It must keep the raw sheet and must not fill the missing discount. If a step is missing, type: `Add this step: [step]`. Then type `OK`.

PROMPT 1.4 Copilot Chat

OK. Do the clean-up now.
Put tbl_Sales on a new sheet named Clean, keep Showroom_Sales unchanged, and give me the updated workbook.
Then give me the row count and the list of showroom names.

CHECK **36 rows** (6 showrooms x 6 months). Showroom names: only Penang, Ipoh, Petaling Jaya, Shah Alam, Johor Bahru, Melaka.

E Evaluate & Enrich

PROMPT 1.5 Copilot Chat

P.R.E.P step 3, Enrich. Add three columns to tbl_Sales, formatted as % with one decimal:
Test_Drive_Rate = Test_Drives / Leads
Booking_Rate = Bookings / Leads
Close_Rate = Bookings / Test_Drives
Give me the updated workbook.

CHECK Example: Shah Alam, Sep: Test_Drive_Rate **20.9%**, Booking_Rate **6.5%**, Close_Rate **31.2%**.

P Prove the data

PROMPT 1.6 Copilot Chat

P.R.E.P step 4, Prove. Compare tbl_Sales with the sheet Control_Totals: rows, Leads, Test_Drives, Bookings and Deliveries. Show both values in a table and say Match or No match.

WHAT COPILOT GIVES YOU

Check	tbl_Sales	Control_Totals	Result

Rows	36	36	Match
Leads	13,663	13,663	Match
Test_Drives	5,700	5,700	Match
Bookings	1,765	1,765	Match
Deliveries	1,624	1,624	Match

GATE 3: YOU DECIDE All five must match. If not, type: `Show me which rows explain the difference.` Now the data is trustworthy **information**.

S Build the views, then scan

PROMPT 1.7 Copilot Chat

Answer my sub-questions from tbl_Sales. Build these views:
V1 Booking rate: Booking_Rate by Showroom (rows) and Month (columns, Apr to Sep).
V2 Funnel: for each Showroom, total Leads, Test_Drive_Rate, Close_Rate and Booking_Rate for Apr to Jun and for Jul to Sep.
V3 Shah Alam detail: by Month, Leads, Bookings, Demo_Cars, Avg_TD_Wait_Days and Avg_Discount_RM.
Put each view on its own new sheet: V1_Booking_Rate, V2_Funnel and V3_Shah_Alam. Give me the updated workbook. Also show each view as a small table here.

NOTE Copilot builds the sheets in a **new copy** of the workbook and saves it to your OneDrive. Open that copy to see the tabs.

WHAT COPILOT GIVES YOU (V1, Booking_Rate %)

Showroom	Apr	May	Jun	Jul	Aug	Sep
Ipoh	14.5	14.6	13.3	13.2	13.8	13.4
Johor Bahru	13.3	12.9	12.9	12.7	12.1	14.4
Melaka	12.9	13.0	12.3	14.2	14.9	12.2
Penang	14.0	13.0	14.6	14.1	13.3	12.1
Petaling Jaya	14.1	12.8	14.1	14.1	14.2	14.3
Shah Alam	13.6	13.8	14.0	**9.5**	**7.3**	**6.5**

GATE 4: YOU DECIDE Check one number yourself. On the clean data, filter Shah Alam, Sep: Bookings **34**, Leads **521**, Demo_Cars **2**. If a number is different, type: `Show me the formula and the filter for this number.`

PROMPT 1.8 Copilot Chat

Apply S.C.A.N to these views: Spikes/Drops, Comparison, Anomalies, No Change.
One line with numbers for each. Label each Known or Inferred.

WHAT COPILOT GIVES YOU **S:** Shah Alam bookings drop from 64 (Jun) to 34 (Sep), down 47%, while its leads rise 14%. **C:** its booking rate falls from 14.0% to 6.5%; the other 5 showrooms hold steady at about 13.5%. **A:** Shah Alam demo cars fall from 6 to 2 and the test-drive wait rises from 2.0 to 9.5 days. **N:** its close rate stays at about 31% and its discount stays at about RM6,700, the same as the others. Total bookings look flat (286 to 299), which hides the problem.

PROMPT 1.9 Copilot Chat

Challenge the Shah Alam finding. List other explanations (for example: discounts too low, poor sales advisors, weak lead quality, seasonality, a data error).
For each, tell me which data confirms or rejects it.

WHAT COPILOT GIVES YOU Discount: rejected, Shah Alam averages about RM6,700, like the others. Sales advisors: rejected, close rate after a test drive stays at about 31%. Seasonality: rejected, other showrooms stay flat. Data error: rejected, totals match Control_Totals. Supported: fewer demo cars and a 9.5-day wait mean fewer customers take a test drive (test-drive rate 44% to 21%), so fewer book (Inferred).

GATE 5: YOU DECIDE Is this a finding? In real work, confirm with the Shah Alam showroom manager why demo cars were cut. In class, treat it as a finding.

INSIGHT · from signals to insight

Signals are not insights yet. Combine them: the drop and the gap say **WHAT happened**; the lost bookings say **WHY it matters**; the anomaly points to **WHAT to do**; No Change rules out the other causes.

S.C.A.N signal	Becomes part of the insight
S: bookings 64 to 34 (Jun to Sep)	**WHAT happened:** Shah Alam bookings fell 47% after demo cars dropped from 6 to 2
C: booking rate 6.5% vs 13.5% elsewhere	**WHY it matters:** about 86 bookings lost in 3 months
A: demo cars 6 to 2, wait 2 to 9.5 days	**WHAT to do:** return 4 demo cars to Shah Alam by 15 Nov
N: discount and close rate unchanged	Rules out price and sales skill as the cause

PROMPT 1.10 Copilot Chat

Write 3 insights from these S.C.A.N results: WHAT happened (with numbers) + WHY it matters + WHAT to do. Then give each insight in one sentence.

WHAT COPILOT GIVES YOU **Insight 1:** Shah Alam bookings fell 47% after its demo fleet dropped from 6 to 2 cars and the test-drive wait hit 9.5 days, about 86 bookings lost in 3 months, so restore its demo fleet now. **Insight 2:** Its close rate after a test drive is still 31%, so the sales team is fine; the problem is access to test drives. **Insight 3:** The other 5 showrooms convert steadily at about 13.5%, so the issue is local.

PART 2

Develop: how do we tell the story?

Don't list the numbers. Shape them with S.T.O.R.Y. Know your crowd, tell it, find the core.

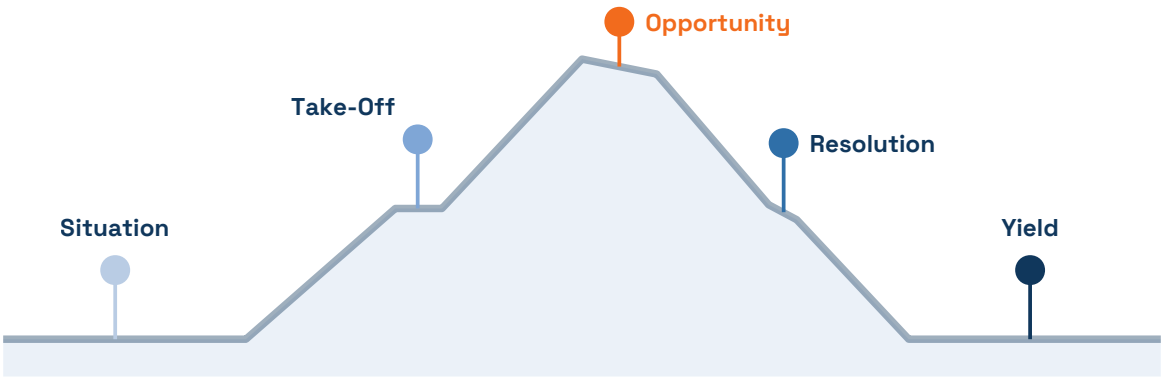
2.1 Know your crowd

PROMPT 2.1 Copilot Chat

My audience is the Head of Sales. Tell me in a table: what they already know, what they care about, the decision they make, their likely objection, and the fact from my data that answers it.

WHAT COPILOT GIVES YOU Cares about: bookings, targets, cost. Decision: return demo cars to Shah Alam. Objection: "Demo cars cost money. Maybe Shah Alam just needs more discount." Answer: its discount is the same as other showrooms, and close rate after a test drive is unchanged at 31%.

2.2 Tell it with S.T.O.R.Y



The S.T.O.R.Y arc: tension rises to the Opportunity, then the Resolution lands on the Yield.

PROMPT 2.2 Copilot Chat

Write the story for Insight 1 in S.T.O.R.Y form: Situation, Take Off, Opportunity, Resolution, Yield. Maximum 2 sentences for each. Use only numbers from this chat.

WHAT COPILOT GIVES YOU

Part	Example
Situation	Leads grew in all 6 showrooms from April to September. Total bookings stayed almost flat.
Take Off	In July, Shah Alam cut its demo cars from 6 to 2. Its test-drive wait rose to 9.5 days and bookings fell 47%.
Opportunity	Customers who do test drive still book at 31%. The demand is there.
Resolution	Return 4 demo cars to Shah Alam and add weekend test-drive slots.
Yield	Win back about 30 bookings a month and return to its June level of 64.

2.3 Find the core

PROMPT 2.3 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 decision with a date).

WHAT COPILOT GIVES YOU **Problem:** Shah Alam customers wait 9.5 days for a test drive. **Stakes:** about 86 bookings lost from July to September. **Steps:** return 4 demo cars, add weekend slots, track wait days weekly. **Call to Action:** approve the demo fleet for Shah Alam by 15 November 2026.

GATE 6: YOU DECIDE Read the story and the core. Write the Big Idea in your own words. Model: **Shah Alam lost about 86 bookings because customers could not get a test drive. Restore its demo fleet by 15 November.**

PART 3

Design: how do we show the story?

Let the story pick the chart. Not the other way round.

0 Start | 1 Discover | 2 Develop | 3 Design | 4 Slide

THE ORDER MATTERS · Data, then story, then visual

01 Data	02 Story	03 Visual
What the numbers say. From P.R.E.P and S.C.A.N.	What it means and why. From S.T.O.R.Y.	Proof of the story. Chosen last, never first.

NOTE Common mistake: Data straight to Visual. A chart picked before the story shows numbers, not a message.

3.1 Pick the chart

PROMPT 3.1 — Copilot Chat

Which data story type fits Insight 1: Ranking, Comparison, Change over time, Part of a whole, or Relationship? Then give me 2 or 3 chart options for my audience, with what each makes easy to see and what it hides.

WHAT COPILOT GIVES YOU Main type: Change over time with Comparison. Options: a line chart of Booking_Rate by month, Shah Alam vs the average of other showrooms (best: shows the break in July); a column chart of Shah Alam bookings (shows the drop, but no comparison); a funnel chart (shows where it leaks, but not when).

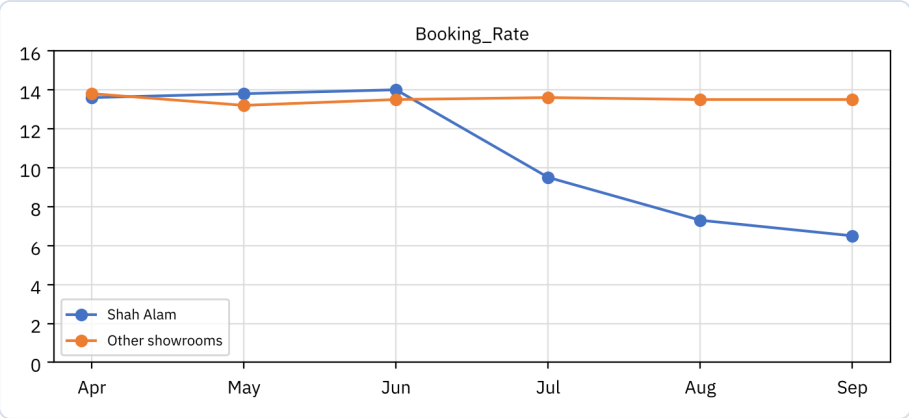
GATE 7: YOU DECIDE Choose the line chart.

3.2 Build the chart

PROMPT 3.2 — Copilot Chat, @Excel agent

From tbl_Sales, make a table of Booking_Rate by Month (Apr to Sep) with 2 rows: Shah Alam, and the average of the other 5 showrooms (total Bookings / total Leads). Then make a line chart from it.
[If @Excel is not available: give me the table as an Excel file named Chart_Data. I will insert the chart myself.]

CHECK Shah Alam: 13.6, 13.8, 14.0, 9.5, 7.3, 6.5. Other showrooms: 13.8, 13.2, 13.5, 13.6, 13.5, 13.5.



Expected: the default chart. Correct data, no story yet.

3.3 Write the hybrid title

PROMPT 3.3 Copilot Chat

Write 3 options for a hybrid title for this chart:
1. Headline: the insight in one sentence, with a number. Not a topic.
2. Call to action: one line that starts with a verb.
3. Legend: the names in the headline get the chart colours, so the headline replaces the legend box. Tell me which word gets which colour.

WHAT COPILOT GIVES YOU Headline: **Shah Alam** booking rate fell from 14.0% to 6.5% while **other showrooms** held at 13.5%. Call to action: Restore 4 demo cars to Shah Alam this month. Colours: Shah Alam orange, other showrooms grey.

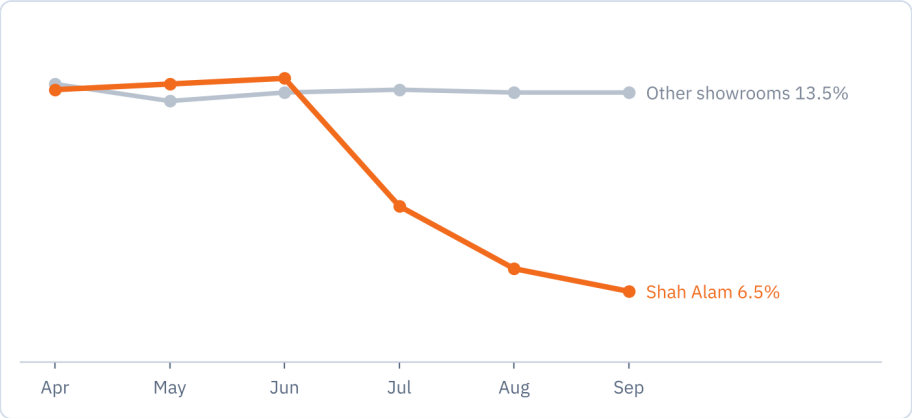
3.4 Remove the chart junk

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

PROMPT 3.4 Copilot Chat

Here is my chart. **[paste screenshot]**
Help me remove chart junk and focus attention. Grey for context, one strong colour only for the line that matters. Give me a numbered list of changes in Excel terms. Prioritise removing over adding.

WHAT COPILOT GIVES YOU Delete the title, the legend, the gridlines and the vertical axis. Make the other showrooms line grey and the Shah Alam line orange and thicker. Label each line at its last point. Use one clean sans-serif font.



Target: the clean chart.

PART 4

Put it together: one management slide

Same chat, same facts. A new agent at the end of the chain.

0 Start | 1 Discover | 2 Develop | 3 Design | 4 Slide

4.1 Build the slide

PROMPT 4.1 — Copilot Chat, @PowerPoint agent

Create one slide for the Head of Sales from this story and chart.
Title: my hybrid title. Colour "Shah Alam" orange and "other showrooms" grey.
Left: the clean line chart.
Right: 4 short points: Problem, Stakes, Steps, Call to Action. Maximum 10 words each.
Bottom: source line in small grey text: "CRM export, Apr to Sep 2026."
Design: white background, one clean font, lots of white space. No clip art, no stock photos, no 3D.
Use only facts from this chat. Do not change any number.

NOTE If your company uses a PowerPoint template, ask @PowerPoint to use it, or paste the slide text from Copilot Chat into the template.

GATE 8: YOU DECIDE Check every number on the slide against your views and Control_Totals. Read the title out loud. It must say the insight and the ask in one breath.

4.2 Test the story

PROMPT 4.2 — Copilot Chat

Act as the Head of Sales. You think Shah Alam just needs a bigger discount. Ask me one hard question at a time. Wait for my answer. Then tell me how convincing I was, using only facts from my data.

Final sign-off

Check	Yes / No
The clean table has 36 rows and matches all 5 control totals.	
The raw sheet Showroom_Sales is unchanged.	
The missing discount was flagged, not filled.	
Every number on the slide is the same as in my views.	
The title is an insight with a number, plus an ask.	
The chart has no junk. Only Shah Alam is orange.	
No real customer data went into Copilot.	

Prompt card

Step	Prompts	Short version
Start	0.1 to 0.3	Storytelling rules. Thought partner. ASD-STE100 Simplified Technical English.
Discover: P.R.E.P	1.1 to 1.6	Question. Profile. Repair (plan, then do). Enrich. Prove.
Discover: S.C.A.N	1.7 to 1.10	Views. S.C.A.N. Challenge. 3 insights.
Develop	2.1 to 2.3	Crowd. S.T.O.R.Y. Core and Big Idea.
Design	3.1 to 3.4	Chart type. Build chart. Hybrid title. Remove junk.
Slide	4.1 to 4.2	One slide with @PowerPoint. Test with a hard question.

The company, showrooms and figures are fictional. For training only.