

# Microsoft 365 Copilot

## Western Tractor Training

### **Complete Prompt Reference Guide**

All prompts organized by department and use case

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# Administrative

## 1. Quarterly Sales Report

**Scenario:**

Generate a quarterly sales report with insights and recommendations for management.

**Prompt:**

Analyze the Q4 sales data and create a comprehensive quarterly sales report. Include: total sales by category, sales by location, top-performing products, trends and insights, and recommendations for Q1. Format as a professional report suitable for management presentation.

## 2. Employee Training Schedule

**Scenario:**

Create a training schedule for new service technicians covering equipment maintenance procedures.

**Prompt:**

Create a comprehensive 2-week training schedule for new service technicians. Include: daily topics, hands-on practice sessions, safety training modules, equipment-specific training (tractors, combines, implements), assessment checkpoints, and trainer assignments. Format as a clear calendar-style document with time blocks.

## 3. Budget Variance Analysis Report

**Scenario:**

Analyze budget variances for the quarter and create a report for management review.

**Prompt:**

Analyze the quarterly budget data and create a variance analysis report. Include: budgeted vs actual amounts by department (Sales, Parts, Service), significant variances with explanations, trends and patterns, recommendations for adjustments, and action items. Format as a professional management report with charts and tables.

## 4. Customer Satisfaction Survey Analysis

**Scenario:**

Analyze customer satisfaction survey results and create an action plan.

**Prompt:**

Analyze customer satisfaction survey data and create a comprehensive report. Include: overall satisfaction scores, feedback themes by department, areas of strength, areas needing improvement, specific customer comments, and an action plan with priorities and timelines. Format as a professional analysis document.

## 5. Create Calendar Event (.ics file)

**Scenario:**

Create a calendar event file for a customer service appointment that can be imported into any calendar application.

**Prompt:**

Create an .ics calendar file for a customer service appointment. Include: event title "Western Tractor Service Appointment", date and time, location (Lethbridge Service Department), description with customer name and equipment details, reminder 24 hours before, and contact information. Format as a downloadable .ics file that can be imported into Outlook, Google Calendar, or Apple Calendar.

## ***6. Team Meeting Calendar Invite***

**Scenario:**

Create a recurring calendar event for weekly team meetings with all necessary details.

**Prompt:**

Create a recurring calendar event for weekly service department meetings. Include: meeting title, recurring schedule (every Monday at 2 PM), location, meeting agenda template, required attendees, optional attendees, and meeting link if virtual. Format as an .ics file that can be distributed to all team members.

# Data Analysis

## 1. Identify High-Value Customers

**Scenario:**

Analyze customer data to identify customers who meet specific criteria for a targeted marketing campaign.

**Prompt:**

Analyze the customer database and identify all customers who meet these criteria: purchased equipment in the last 2 years, total purchase value over \$200,000, located in Lethbridge or Taber, and have completed at least one service appointment. Create a filtered list with customer names, contact information, purchase history, and total lifetime value.

## 2. Find Customers Needing Equipment Upgrades

**Scenario:**

Identify customers whose equipment is aging and may be ready for an upgrade.

**Prompt:**

Analyze customer equipment data and identify customers who: purchased equipment 5+ years ago, have equipment with 3000+ hours of use, have not made a purchase in the last 3 years, and are located in our service area. Create a list with customer contact info, current equipment details, estimated trade-in value, and recommended upgrade options.

## 3. Identify Customers for Parts Promotion

**Scenario:**

Find customers who own specific equipment models that would benefit from a parts promotion.

**Prompt:**

Analyze customer data and identify all customers who: own John Deere 8R series tractors, purchased equipment in the last 3 years, have not ordered parts in the last 6 months, and are located within 50 miles of our locations. Create a targeted list with customer information, equipment models, and suggested parts promotions.

## 4. Find Customers Overdue for Service

**Scenario:**

Identify customers whose equipment is overdue for scheduled maintenance.

**Prompt:**

Analyze service records and customer data to find customers who: have equipment that is 50+ hours past the recommended service interval, have not scheduled a service appointment, purchased equipment in the last 2 years, and are active customers. Create a prioritized list with customer contact info, equipment details, hours since last service, and recommended service type.

## 5. Identify Payment Pattern Anomalies

**Scenario:**

Analyze payment data to find interesting patterns or anomalies that need attention.

**Prompt:**

Analyze payment and transaction data to identify: customers with unusual payment patterns (late payments, payment method changes), transactions that deviate significantly from average, seasonal payment trends, correlation between payment method and customer type, and any anomalies that might indicate issues. Create a report with findings and recommendations.

## ***6. Find Sales Trends and Patterns***

**Scenario:**

Analyze sales data to discover interesting patterns that can inform business strategy.

**Prompt:**

Analyze sales data from the last 12 months to identify: seasonal sales patterns by equipment category, correlation between location and equipment preferences, customer type buying patterns, payment method trends, sales rep performance patterns, and any unexpected trends or anomalies. Create a comprehensive analysis with visualizations and insights.

## ***7. Identify Parts Demand Patterns***

**Scenario:**

Analyze parts sales data to find patterns that can optimize inventory management.

**Prompt:**

Analyze parts sales data to identify: seasonal demand patterns by part category, correlation between equipment sales and parts demand, parts that frequently sell together, geographic demand variations, parts with increasing or decreasing demand trends, and any unusual patterns. Create an analysis report with recommendations for inventory optimization.

## ***8. Find Service Efficiency Patterns***

**Scenario:**

Analyze service data to identify patterns that can improve efficiency and customer satisfaction.

**Prompt:**

Analyze service department data to identify: patterns in service duration by equipment type, correlation between service type and customer satisfaction, peak service times and days, technician efficiency patterns, common service issues by equipment model, and any patterns that could improve scheduling or resource allocation. Create a detailed analysis with actionable insights.

## ***9. Customer Lifetime Value Analysis***

**Scenario:**

Analyze customer data to calculate lifetime value and identify high-value customer segments.

**Prompt:**

Analyze customer purchase history and calculate lifetime value for each customer. Identify: customers with highest lifetime value, average lifetime value by customer type, lifetime value trends over time,

factors that correlate with high lifetime value, and customer segments with growth potential. Create a comprehensive analysis with segmentation and recommendations.

## ***10. Cross-Sell Opportunity Identification***

### **Scenario:**

Identify customers who own certain equipment and might benefit from complementary products.

### **Prompt:**

Analyze customer equipment ownership data to identify cross-sell opportunities. Find customers who: own tractors but no implements, own equipment but have not purchased extended warranty, purchased equipment but not service packages, and match profiles of customers who typically buy multiple products. Create a prioritized list with customer info and recommended products.

## ***11. Predictive Maintenance Analysis***

### **Scenario:**

Analyze service history to predict which equipment might need service soon.

### **Prompt:**

Analyze service records and equipment usage data to predict: which equipment is likely to need service in the next 30-60 days based on usage patterns, which customers have equipment approaching critical service milestones, patterns in service frequency by equipment type, and optimal service scheduling windows. Create a predictive analysis report with recommendations.

# Parts

## 1. Parts Inventory Analysis

**Scenario:**

Analyze parts inventory data to identify slow-moving items and recommend reorder points.

**Prompt:**

Analyze the parts inventory spreadsheet and identify: parts with low stock levels, slow-moving inventory items (no sales in 90+ days), and recommend reorder points for high-demand parts. Create a summary report with key findings and action items.

## 2. Parts Ordering Email

**Scenario:**

Draft a professional email to a supplier requesting parts order with specific quantities and delivery requirements.

**Prompt:**

Draft a professional email to our parts supplier requesting an order. Include: part numbers, quantities, requested delivery date, shipping address, and reference our account number. Use a professional, courteous tone and request confirmation.

## 3. Customer Parts Inquiry Response

**Scenario:**

Respond to a customer inquiry about part availability and compatibility for their equipment.

**Prompt:**

Draft a professional email response to a customer asking about part availability. Include: confirmation of part number, current stock status, pricing, compatibility confirmation with their equipment model, estimated delivery time if ordering, and offer to check alternative parts if needed. Use a helpful, customer-service focused tone.

## 4. Parts Compatibility Check Document

**Scenario:**

Create a document checking parts compatibility across different equipment models.

**Prompt:**

Analyze parts compatibility across multiple John Deere equipment models. Create a document showing: part numbers, which models they fit, cross-reference numbers, alternative parts if original is unavailable, and compatibility notes. Format as a clear reference table for the parts department.

## 5. Parts Catalog Update Summary

**Scenario:**

Summarize updates to the parts catalog including new parts, discontinued items, and price changes.

**Prompt:**

Create a summary document of parts catalog updates. Include: newly added parts with descriptions and pricing, discontinued parts with alternatives, price changes (increases/decreases), special promotions, and important notes for the sales team. Format it clearly with sections for each category.

## ***6. Parts Catalog Document***

**Scenario:**

Create a parts catalog document organized by equipment category.

**Prompt:**

Create a parts catalog document for John Deere equipment parts. Organize by equipment category (tractors, combines, implements). For each part, include: part number, description, compatible models, price, availability status, and ordering information. Format as a professional catalog document with tables and clear organization.

# Sales

## ***1. Customer Thank-You Email***

**Scenario:**

A customer purchased a new John Deere 8R 370 tractor last month. Create a personalized thank-you email with service reminders.

**Prompt:**

Draft a professional, friendly email to a customer thanking them for their recent purchase of a John Deere 8R 370 tractor. Include a reminder about our service department availability, mention the importance of regular maintenance, and invite them to our upcoming customer appreciation event. Use a warm, appreciative tone.

## ***2. Equipment Comparison Document***

**Scenario:**

Create a comparison document for two similar tractor models to help customers make informed decisions.

**Prompt:**

Create a professional comparison document comparing the John Deere 8R 370 and 8R 410 tractors. Include specifications, features, pricing, and use case recommendations. Format it as a clear, easy-to-read table with a summary section.

## ***3. Customer Proposal Document***

**Scenario:**

Create a customized proposal for a bulk equipment purchase by a large farming operation.

**Prompt:**

Create a professional proposal document for a bulk equipment purchase. Include: customer information, equipment list with specifications, pricing breakdown, financing options, delivery timeline, and terms. Format it professionally with clear sections and a compelling summary.

## ***4. Post-Demo Follow-Up Email***

**Scenario:**

Follow up with a customer who attended an equipment demonstration but hasn't made a purchase decision yet.

**Prompt:**

Draft a personalized follow-up email to a customer who attended a John Deere equipment demonstration last week. Thank them for their time, address any questions they had, provide additional information about financing options, and offer to schedule a second demonstration or site visit. Use a friendly, consultative tone without being pushy.

## ***5. Trade-In Evaluation Summary***

**Scenario:**

Create a summary document evaluating a customer's trade-in equipment for purchase consideration.

**Prompt:**

Create a professional trade-in evaluation summary for a customer's used equipment. Include: equipment details (make, model, year, hours), condition assessment, market value research, recommended trade-in value, comparison to similar listings, and notes on any needed repairs. Format it clearly for customer presentation.

## ***6. Financing Application Follow-Up***

**Scenario:**

Follow up with a customer whose financing application needs additional documentation.

**Prompt:**

Draft a professional email to a customer whose equipment financing application requires additional documentation. Clearly list what documents are needed, explain why they're required, provide submission instructions, include a deadline, and offer assistance if they have questions. Use a helpful, supportive tone.

## ***7. Equipment Demo Calendar Invite***

**Scenario:**

Create a calendar invitation for an equipment demonstration that includes all relevant details.

**Prompt:**

Create a calendar event invitation for an equipment demonstration. Include: event title, date and time, location (showroom or customer site), equipment to be demonstrated, customer name, sales rep contact info, preparation notes, and a reminder. Format as an .ics file that can be sent to the customer and automatically added to their calendar.

## ***8. Equipment Warranty Document***

**Scenario:**

Create a comprehensive warranty document for new equipment purchases.

**Prompt:**

Create a professional warranty document for John Deere equipment. Include: warranty period and coverage details, what is covered and what is not, service requirements to maintain warranty, claim procedures, contact information, warranty transfer process, and exclusions. Format as a formal Word document with clear sections and legal language.

## ***9. Equipment Financing Agreement Template***

**Scenario:**

Create a financing agreement template for equipment purchases.

**Prompt:**

Create a financing agreement template for equipment purchases. Include: customer information section, equipment details, financing terms (loan amount, interest rate, term length), payment schedule,

late payment policies, early payoff terms, and signature sections. Format as a formal Word document template with fillable fields.

# Service

## 1. Service Report Template

**Scenario:**

Create a standardized service report template for technicians to use after equipment maintenance.

**Prompt:**

Create a professional service report template for John Deere equipment maintenance. Include sections for: customer information, equipment details, service date, work performed, parts used, technician notes, and next service recommendations. Format it as a clean, easy-to-fill Word document.

## 2. Meeting Summary & Action Items

**Scenario:**

Summarize a service department meeting and extract action items for follow-up.

**Prompt:**

Summarize the service department meeting transcript. Extract all action items with owners and deadlines. Create a clear summary of key discussion points and decisions made. Format as a structured document with sections for summary, action items, and next steps.

## 3. Warranty Claim Documentation

**Scenario:**

Document a warranty claim for equipment that requires manufacturer approval.

**Prompt:**

Create a comprehensive warranty claim document for a John Deere equipment issue. Include: customer details, equipment serial number and model, date of purchase, description of the problem, service technician findings, photos or evidence, and recommended resolution. Format it professionally for submission to John Deere warranty department.

## 4. Preventive Maintenance Schedule

**Scenario:**

Create a customized preventive maintenance schedule for a customer's equipment fleet.

**Prompt:**

Create a preventive maintenance schedule for a customer's equipment fleet. Include: equipment list with serial numbers, recommended service intervals (hours/months), seasonal maintenance tasks, parts needed for each service, estimated costs, and a calendar view. Format it as an easy-to-follow maintenance plan.

## 5. Equipment Inspection Checklist

**Scenario:**

Create a comprehensive inspection checklist for used equipment being prepared for sale.

**Prompt:**

Create a detailed equipment inspection checklist for used John Deere equipment. Include: exterior condition, engine and mechanical systems, hydraulic systems, electrical systems, tires/tracks, cab interior, attachments, safety features, and overall condition rating. Format as a fillable checklist with space for notes and photos.

## ***6. Service Appointment Calendar File***

**Scenario:**

Generate a calendar file for a scheduled service appointment that customers can add to their calendar.

**Prompt:**

Create an .ics calendar file for a scheduled service appointment. Include: customer name, equipment model and serial number, service type, appointment date/time, service department location, estimated duration, technician name, and what to expect during the service. Format as a downloadable calendar file.

## ***7. Equipment Operating Manual Summary***

**Scenario:**

Create a simplified operating manual summary for customers who need quick reference information.

**Prompt:**

Create a simplified operating manual summary for John Deere equipment. Include: basic operation procedures, safety guidelines, daily pre-operation checklist, common controls and their functions, troubleshooting quick reference, and emergency procedures. Format as an easy-to-read Word document with clear headings and bullet points.

## ***8. Safety Protocol Document***

**Scenario:**

Create a comprehensive safety protocol document for service technicians.

**Prompt:**

Create a safety protocol document for service technicians. Include: personal protective equipment requirements, equipment-specific safety procedures, lockout/tagout procedures, emergency response protocols, hazard identification, incident reporting procedures, and safety training requirements. Format as a comprehensive Word document with clear sections and checklists.