



How To Get Value From Copilot

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How To Get Value From Copilot

Your Personal Copilot: A Leader's Guide to Hybrid AI Workflows

Foreword

When I ask our corporate Copilot a question, the answer often reminds me of something my six-year-old son might say. Yet, when I give the same prompt to the latest public models from ChatGPT, Google, or Anthropic, I frequently receive answers at a Ph.D. level.

The reality is that Copilot generally delivers lower-quality responses than other large language models.

This happens by design. Microsoft has encased the powerful language model at Copilot's core within a strict governance framework. Its primary function is to operate within your organization's existing security and compliance boundary. This ensures corporate data remains protected, but it also makes the tool feel restrictive and less capable.

As a result, many professionals try Copilot briefly, become frustrated, and return to the public models that provide radically better answers. This behavior creates a serious organizational risk known as Shadow AI, which occurs whenever specialists and leaders use unapproved tools for work.

In Denmark, about half of all knowledge workers are "Shadow AI" users. While there are several reasons for this, one of the most severe consequences is the risk of irreversible data exposure. I wrote this guide to provide a solution.

The core challenge this guide addresses is how to get the best possible answers from your AI tools within a secure framework. My intention is to provide a guide that stretches Copilot's capabilities to their utmost, enabling you to get the best output the model can deliver.

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I initially intended to write a simple how-to guide for Copilot. In the process, it became clear that the greatest value would come from a hybrid model workflow. The result of that realization is the guide you are now reading.

The workflow is straightforward. You begin your task in one of the powerful public models. When your work requires confidentiality, you move the conversation into the secure environment of Copilot. This guide provides numerous examples of this process with detailed cases, prompts, and transition points.

To structure this approach, I use four central dimensions of leadership work, a framework I have developed for a forthcoming book. They are:

- **Strategic Focus:** The capacity to set direction, see patterns, accelerate processes, challenge the status quo, and maintain a coherent strategy.
- **Engagement & Relations:** The ability to navigate people dynamics, interpersonal trust, emotional intelligence, and psychological safety.
- **The Adaptive Zone:** The domain of detailed execution, process excellence, effective routines, continuous improvement, and performance management.
- **Create New:** The domain of innovation, business modeling, creativity, and rethinking established frames of reference.

Within these dimensions, our AI collaboration can be understood through three distinct roles. This is a model I developed for my AI trainings and workshops to distill the collaboration into clear levels. The roles are:

- **The Mental Janitor:** Clearing cognitive clutter and managing the small frictions in your workflow.
- **The Glorified Stenographer:** Summarising, retrieving, and documenting meetings and organizational knowledge.
- **The Cognitive Partner:** Engaging with strategy, language, innovation, and creative insight.

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Reading Guidance

You are welcome to read this guide from beginning to end. However, it is designed to be just as effective when used selectively.

Choose one of the main chapters most relevant to your role or a current challenge (e.g., *Strategic Focus*) and read only that section, perhaps in combination with headlines that interest you from Chapters 5 and 6. At a later point, when a challenge emerges from one of the other leadership dimensions (e.g., *Create New*), you can return to the guide and that particular chapter.

In other words, you are encouraged to jump directly to the chapters and scenarios that address your immediate needs. Each case functions as a small blueprint you can adapt.

If you have any comments to the guide, I would love to hear them.

P.s. If you are an advanced user, and the content is too simple for you, I think you might get something valuable from the section Prompt Literacy as a Leadership Competence in Chapter 5.

[Learn more about Shadow AI](#)

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Chapter 1: Strategic Focus

Strategic focus is the foundational responsibility of a leader. It is the continuous work of setting a clear direction, identifying meaningful patterns within complex information, and maintaining a coherent strategy over time. In any modern organization, this process is dynamic and demanding. It requires the constant synthesis of external market data, internal performance metrics, project statuses, and stakeholder feedback. The result of this synthesis must be clear decisions and compelling narratives that align the organization.

Using artificial intelligence in this high-stakes dimension can feel uncertain or even risky. The objective is always to augment your professional judgment, not to replace it. An AI tool can easily become a source of distraction, producing generic or superficial content that pulls you away from the core task. A hybrid AI model, however, provides a structured and secure way to make the tool a genuine asset. This approach enables you to use public models for brainstorming conceptual frameworks, outlining complex documents, and exploring potential scenarios in a secure sandbox. Following this, you can use the protected environment of Copilot to connect these abstract ideas to your organization's proprietary data, project files, and internal conversations. This deliberate process transforms high-level concepts into grounded, actionable strategy.

The primary role you will occupy in this dimension is the **Cognitive Partner**. When you act as a Cognitive Partner, the AI serves as a strategic assistant, helping you orchestrate information, stress-test your logic, and generate insights. You are not simply asking the tool for answers or summaries. You are designing and directing a workflow that clarifies your own thinking, deepens your analysis, and strengthens your final output. Your value is not in writing the perfect prompt, but in architecting the perfect thinking process.

To see how this works in practice, let us examine a series of common leadership tasks, starting with the preparation of a quarterly business review.

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Case 1: Quarterly Business Review – Structuring Strategic Dialogue with the Hybrid Model

Dimension and Role: Strategic Focus, Cognitive Partner

Scenario Description: A divisional leader at a Danish technology company is tasked with preparing the first version of the company's new quarterly business review (QBR) report. The QBR must present a coherent strategic narrative to the executive board, combining high-level financial performance, project milestones, and market trends. The leader faces the dual challenge of structuring a complex document and ensuring all insights are grounded in proprietary company data.

Phase 1 Prompt (Public LLM): “Generate a comprehensive outline for the framework of a quarterly business review (QBR) report for a mid-sized technology company. Structure should include Executive Summary, Financial Performance, Key Project Milestones, Customer Feedback Analysis, and Strategic Goals for Next Quarter. Provide 3–4 bullet points for each section, suitable for presentation to a Danish executive board.”

Phase 2 Prompt (Copilot): “Using the outline above, populate the ‘Financial Performance’ section with key takeaways from the file ‘Q2_Financial_Report.xlsx’. For the ‘Key Project Milestones’ section, summarize current status from the internal document ‘Project_Phoenix_Update.docx’. Ensure that all figures and updates are current and tailored to our internal metrics.”

Guide Annotation: This case demonstrates the hybrid workflow at the heart of the guide. Public LLMs help leaders quickly structure complex outputs, while Copilot anchors these frameworks in up-to-date, company-specific information. The leader's role as a Cognitive Partner is evident in the way they orchestrate both insight and execution, with the hybrid loop ensuring both speed and confidentiality.

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- **Beginner variant:** Instead of a full outline, ask the public model for 5 essential topics to include in a QBR.
- **Advanced variant:** Incorporate SharePoint links and request Copilot to auto-populate charts using live data.

Analysis: Orchestrating the Strategic Narrative

This QBR case illustrates a clear and effective separation of tasks which is fundamental to the hybrid model. The leader begins the process by addressing the structural challenge first. By asking a public LLM for a comprehensive outline, they receive a robust, logical framework in seconds. This initial step is low risk because it contains no confidential information. It simply provides a well-organized skeleton for the report, saving valuable time and preventing the "blank page" problem that often hinders the start of complex writing tasks.

Let us deconstruct the Phase 1 prompt. It asks the AI to "Generate a comprehensive outline", which defines the desired output format. It specifies the context as a "mid-sized technology company", which helps the AI tailor the sections appropriately. Crucially, it defines the audience by stating the outline should be "suitable for presentation to a Danish executive board", signaling the need for a professional and concise tone. Each component of the prompt adds a layer of precision, leading to a higher quality starting point.

The second step is where the hybrid model creates unique value. The leader transitions to Copilot, bringing the generic outline into the company's secure M365 environment. The prompt for Copilot is precise and actionable. It references specific internal filenames like `Q2_Financial_Report.xlsx` and `Project_Phoenix_Update.docx`. This precision is essential for success. It instructs Copilot to ground the report in verified, proprietary data, ensuring the final output is both relevant and credible for the executive board.

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Prompt Literacy Tip: The effectiveness of the Phase 2 Copilot prompt comes from its specific and unambiguous data references. Vague requests like "add the financial data" or "update the project status" would likely fail or produce irrelevant, untrustworthy results. You must always provide clear filenames and locations when you need Copilot to access your organizational context. This discipline makes you the confident orchestrator of the information flow. It is the very essence of the Cognitive Partner role.

Strategic work is not limited to reporting on past performance. It also involves exploring future possibilities and making sound decisions under uncertainty. Our next case examines how to use the hybrid model to build and evaluate strategic options.

Case 2: Strategic Options Paper – Building and Stress-Testing Decision Scenarios

Dimension and Role: Strategic Focus, Cognitive Partner

Scenario Description: A strategy director must prepare an options paper for the executive committee, evaluating whether the company should expand into a new market. The task requires both creative ideation and grounded risk assessment, with inputs from multiple business units and access to proprietary market analyses.

Phase 1 Prompt (Public LLM): "As a corporate strategist, draft a high-level options paper outline for expanding into the Swedish market. Include sections on Market Opportunity, Competitive Landscape, Key Risks, Resource Requirements, and Strategic Recommendations. List 2–3 guiding questions for each section to shape the internal analysis."

Phase 2 Prompt (Copilot): "Populate each section of the outline using the latest 'Nordic_Market_Analysis.pdf' and our internal competitive intelligence file 'CompSet2025.docx'. For Strategic Recommendations, use figures from our 'Q3_Resource_Planning.xlsx'."

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Guide Annotation: This case anchors the value of prompt iteration. Initial scenario-building with a public LLM creates breadth and structure, while Copilot secures depth and factual alignment. The leader acts as a Cognitive Partner, moving seamlessly from idea generation to data-backed recommendation.

- **Beginner variant:** Reduce the number of sections and focus on one scenario only.
- **Advanced variant:** Request Copilot to add a sensitivity analysis, referencing historic expansion data.

Analysis: From Broad Ideation to Grounded Recommendation

In this scenario, the leader uses the public LLM to act as a corporate strategist. The prompt asks for more than just an outline; it requests "guiding questions" for each section. This is a subtle but powerful technique. It uses the AI to help structure the thinking process itself, ensuring all critical aspects of the decision are considered. This phase is about opening up the problem space and establishing a sound analytical framework. It elevates the AI from a content generator to a Socratic partner that helps the leader think more deeply about the problem.

The transition to Copilot is where the analysis becomes specific to the organization. The prompt directs Copilot to populate the framework with information from multiple, highly confidential documents: a market analysis PDF, an internal competitive intelligence document, and an Excel file with resource planning figures. The leader is using Copilot as a secure synthesis engine. This is a high-value activity that is often time-consuming and difficult to perform manually. The ability to connect a strategic framework from Phase 1 to the real-world data and constraints of the business is a core strength of an integrated enterprise tool like Copilot. The result is a data-driven options paper that is both creative in its structure and rigorous in its foundation, a crucial combination for high-stakes decision making.

Finally, strategic work involves navigating the human landscape of an organization. Our third case demonstrates how to use the hybrid model to prepare for a significant change by first understanding and aligning the key stakeholders.

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Case 3: Stakeholder Mapping – Orchestrating Alignment Before a Strategic Change

Dimension and Role: Strategic Focus, Glorified Stenographer transitioning to Cognitive Partner

Scenario Description: Prior to launching a major digital transformation, a project leader must map all internal and external stakeholders. The challenge is to move beyond a static list and capture nuanced positions and potential conflicts. The leader must then prepare a strategy document that will inform leadership meetings.

Phase 1 Prompt (Public LLM): “Create a stakeholder mapping template for a digital transformation project in a Danish manufacturing company. Include columns for Stakeholder Name, Department, Level of Influence, Primary Concerns, and Suggested Engagement Strategy.”

Phase 2 Prompt (Copilot): “Using the template above, fill in stakeholders from the latest ‘OrgChart2025.xlsx’ and ‘Digital_Transformation_Readiness.docx’. Add notes on primary concerns based on recent project feedback emails in the ‘Leadership_Team’ mailbox.”

Guide Annotation: The strength of this case lies in role transition. The leader starts as a Glorified Stenographer (gathering and listing data), but through Copilot, changes to a Cognitive Partner by integrating live feedback and real context. The case highlights how prompt design must evolve to support both administrative clarity and deeper strategic alignment.

- **Beginner variant:** Ask for a simple list of departments only.
- **Advanced variant:** Prompt Copilot to run a sentiment analysis on feedback emails before filling the “Primary Concerns” column.

Analysis: From Data Collection to Strategic Insight

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This scenario illustrates a powerful evolution of purpose within a single workflow. The leader's first action is purely structural. Requesting a template from a public LLM is an efficient method to establish a best-practice format without any risk. This task is well-suited for the **Glorified Stenographer** role, where the primary focus is on capturing and organizing information correctly and efficiently.

The transition to Copilot marks a critical change in intent. The prompt becomes much more sophisticated. It asks Copilot to populate the template not just with names from an organizational chart, but with nuanced information about "primary concerns" drawn from recent emails. This moves the task from simple data entry to complex synthesis and interpretation. The ability to securely analyze unstructured data like emails is a profound advantage. These communications often contain the hidden political, emotional, and operational realities of a project. By asking Copilot to connect people to their expressed concerns, the leader is using the AI to build a richer, more insightful strategic tool that reflects the true landscape of the organization.

Role Change Marker: The leader begins as a Glorified Stenographer, using the AI to create and populate a list. This work saves time. They transition to a **Cognitive Partner** when they prompt Copilot to analyze unstructured data (emails) and connect it to the stakeholder map. This second step requires a higher level of strategic insight and transforms the simple list into a genuine instrument for planning and risk mitigation. This work creates strategic advantage. The role change is not just a label; it represents a fundamental change in the value of the work being performed.

Common Error: A frequent mistake in this type of task is to ask Copilot for strategic insights without providing a clear structure or specific data sources. Had the leader simply prompted Copilot with "map the stakeholders for the project," the output would have been generic and incomplete. It would lack the tailored columns from the template and the specific, nuanced concerns from the email analysis. The sequential, two-phase approach ensures the final result is both well-structured and deeply contextualized.

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In this chapter, we have seen how the hybrid AI model can support multiple facets of strategic work. The process moves from structuring thought and planning documents (Case 1), to analyzing future scenarios (Case 2), and finally to aligning the key people involved in execution (Case 3). These cases show a holistic view of strategy in practice. The key is to remain the architect of the process, using your judgment to design precise prompts that lead to genuine insight. This disciplined approach ensures that AI serves as a powerful amplifier of your strategic focus, helping you navigate complexity with greater clarity and confidence. The soundest strategy, however, must be communicated with care, which brings us to our next dimension.

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Chapter 2: Engagement & Relations

Leadership is fundamentally a human endeavor. The dimension of Engagement and Relations covers the crucial work of building trust, navigating team dynamics, managing the emotional climate of the organization, and communicating with precision. It is often in this domain that leaders feel the most hesitant about using artificial intelligence. The idea of using a machine to help with human connection can seem counterintuitive or even inappropriate.

This perspective is understandable, and the boundary is important. The goal of using AI in this dimension is never to automate relationships or outsource sincerity. To do so would be to undermine the very trust you seek to build. Instead, the hybrid AI model serves as a private, preparatory tool. It is a thinking partner that helps you structure your thoughts, clarify your message, and tune your tone before you engage in important conversations. It provides a space to work through your own reactions and move from a reactive emotional state to a more considered and constructive one. By handling the initial drafting and information gathering, the AI can free up your cognitive capacity to focus on the person you are about to engage with. It allows you to be more present and intentional in the actual human interaction.

The primary role change in this chapter is from **Mental Janitor** to **Cognitive Partner**. You may start in the Janitor role by asking the AI to perform a simple task like drafting a standard email, simply to clear a task from your list and overcome inertia. You transition to the Cognitive Partner role when you begin to use the AI to analyze the nuances of a situation, refine your language for a specific audience, and ground your communication in specific, contextual data to build credibility and trust.

Let us explore this through a scenario that many leaders face: delivering bad news to an important client.

Case 1: Handling a Sensitive Project Delay with a Key Client

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Dimension and Role: Engagement & Relations / Mental Janitor transitioning to Cognitive Partner

Scenario Description: A Danish project leader must communicate an unexpected project delay to an important client. The task requires careful tone management: balancing honesty and transparency with reassurance and professionalism, while drawing on company data to personalize the message.

Phase 1 Prompt (Public LLM): “Create a professional and empathetic email template to inform a client about an unexpected project delay. The tone should be transparent and reassuring, not defensive. Use placeholders like ‘[Client Name]’, ‘[Project Name]’, and ‘[Next Steps]’. Include a mitigation plan and offer to schedule a follow-up call.”

Phase 2 Prompt (Copilot): “Fill in the placeholders. The client is ‘Innovate Corp’, the project is ‘Project Atlas’. For mitigation and next steps, summarize from the latest Teams chat with the engineering lead. Suggest three 15-minute timeslots from my calendar for next week.”

Guide Annotation: This case demonstrates how to use a hybrid workflow for highly sensitive client communication. A public model establishes a tone-appropriate template, while Copilot integrates company data, calendars, and chat logs for a personal and concrete response. The leader changes from a janitorial, “clearing the way” role to a cognitive partner focused on tailored, high-trust dialogue.

- **Beginner Variant:** Ask only for an email template without requesting a mitigation plan.
- **Advanced Variant:** Ask Copilot to review previous email correspondence with the client to match the tone more closely. For example: “Review my last five emails to Innovate Corp and adjust the tone of this draft to match our established professional and collaborative style.”

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Analysis: From Damage Control to Trust Building

This case is a core example of using AI to manage a high-stakes, relational moment. The leader's first step in the hybrid workflow is to create a safe space for drafting. By using a public LLM to generate a template with placeholders, they can focus entirely on getting the tone right without risking the exposure of client or project names. The prompt is carefully constructed to define the required emotional texture. It specifies a tone that is "transparent and reassuring, not defensive." This instruction is vital because it guides the AI to produce a draft that balances accountability with forward-looking confidence. It avoids the common pitfalls of sounding either evasive or overly apologetic.

The transition to Copilot is where the message becomes truly effective. The Phase 2 prompt accomplishes three critical things that build trust. First, it personalizes the message with the specific client and project names, showing direct attention. Second, it grounds the email in reality by asking Copilot to summarize the mitigation plan directly from a Teams chat with the technical lead. This ensures the proposed solution is current and accurate, not just a vague promise. It demonstrates that work is already being done. Third, it makes the message immediately actionable by instructing Copilot to propose specific meeting times from the leader's calendar. This removes friction for the client and signals a commitment to resolving the issue promptly.

Role Change Marker: The leader begins this task in the **Mental Janitor** role. They use the AI to quickly clear a difficult administrative task, that of drafting a sensitive email. This helps overcome the initial inertia or hesitation that often accompanies delivering bad news. The change to **Cognitive Partner** occurs with the second prompt. Here, the leader is no longer just drafting; they are orchestrating the synthesis of conversational data (Teams), calendar data (Outlook), and client information to create a single, coherent, and proactive piece of communication. This elevates the task from simple message delivery to active relationship management. The final output transforms a moment of potential conflict into an opportunity to demonstrate professionalism and build trust.

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Effective relational work also extends inward to the team. A leader's communication is especially critical after a setback. Our next case examines how to use the hybrid model to rebuild motivation and trust within your own team.

Case 2: Addressing Team Tension After a Cancelled Project

Dimension and Role: Engagement & Relations / Cognitive Partner

Scenario Description: A regional manager in a pharmaceutical company must address her team following the cancellation of a high-visibility project. The mood is tense; motivation is low and trust is fragile. The leader needs to communicate both the rationale for the decision and a path forward, without deflecting blame or creating new unrest.

Phase 1 Prompt (Public LLM): “Draft a compassionate but clear message to a team whose project has been cancelled unexpectedly. The tone should be honest and supportive, while still explaining the broader strategic reasoning. Include three concrete actions for the coming month that will help the team regain momentum.”

Phase 2 Prompt (Copilot): “Personalize the message by referencing specific feedback from the last employee engagement survey (found in ‘Survey_March2025.xlsx’) and incorporate upcoming milestones from the team’s project tracker. Add a closing line that highlights individual strengths of the team members, drawing on recent performance reviews.”

Guide Annotation: This example shows how the hybrid model supports leadership in emotionally charged contexts. The public LLM is used for emotional intelligence and clarity, while Copilot personalizes and substantiates the message with private HR and survey data. The Cognitive Partner role is central, mediating between empathy and organizational priorities.

- **Beginner Variant:** Ask for a general message without requesting concrete next steps.
- **Advanced Variant:** Prompt Copilot to identify recurring themes in the survey feedback and connect them to the proposed actions for the coming month.

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Analysis: Grounding Empathy in Specificity

This case moves beyond simple communication into the realm of true leadership. The manager is facing a difficult situation where a generic message would likely fail. The Phase 1 prompt is designed to create a message that is emotionally intelligent. It explicitly asks for a tone that is "compassionate but clear" and "honest and supportive", while also requesting a forward-looking element with "three concrete actions". This is an excellent use of a public LLM as a sparring partner to find the right balance in a sensitive message. It helps the leader manage their own emotional labor in a private, reflective space before addressing the team.

The true power of the hybrid workflow is revealed in the Phase 2 prompt. The manager asks Copilot to personalize the message by connecting it to multiple internal data sources. This act of grounding the message in specific data is what gives it weight and sincerity. Referencing feedback from an engagement survey shows the team they have been heard. Incorporating upcoming milestones provides a sense of continuity and purpose, showing that their work has a future. The final instruction, to highlight individual strengths from performance reviews, is a great touch. It allows the leader to recognize and validate each team member personally, making the message feel deeply authentic and carefully considered. It demonstrates that leadership is paying attention on a granular level and sees the team as a collection of valued individuals.

Common Error: The most common error in such a situation would be to deliver the generic message from Phase 1 without the deep personalization from Phase 2. An unspecific message, however well-written, can feel impersonal and distant to a team that is feeling vulnerable. A statement like, "I appreciate all your hard work," can sound like simple corporate rhetoric. In contrast, a message informed by Copilot that says, "I want to specifically recognize the resilience mentioned in our last survey and the individual strengths shown in recent reviews," feels authentic and has a much greater impact. The leader's use of Copilot to weave specific, positive data points into the narrative demonstrates a high level of care and preparation, which is a critical step in rebuilding trust and motivation.

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Finally, let us look at a situation that combines both recognition for past work and the need to address conflict.

Case 3: Team Recognition and Conflict Resolution After a Difficult Quarter

Dimension and Role: Engagement & Relations / Glorified Stenographer transitioning to Cognitive Partner

Scenario Description: A department head needs to recognize team members after a tough quarter marked by internal conflict and lower-than-expected results. The aim is to boost morale, acknowledge real tensions, and map out clear steps for improvement.

Phase 1 Prompt (Public LLM): “Generate a speech draft for a department meeting that thanks team members for their resilience during a challenging period. The message should acknowledge both individual and collective achievements, refer openly to the recent conflicts, and introduce three improvement areas for Q3.”

Phase 2 Prompt (Copilot): “Incorporate data from last quarter’s pulse survey (file: ‘PulseSurvey_Q2_2025.xlsx’) and specific examples from recent performance logs (file: ‘Dept_PerformanceReview.docx’). Tailor key phrases to mention notable individual contributions, using the latest internal feedback.”

Guide Annotation: This case illustrates how to transform generic recognition into a context-aware leadership act. The leader starts in a stenographer role (gathering and structuring input), but through Copilot’s data integration, the address becomes both precise and personal, deepening trust and engagement.

- **Beginner Variant:** Ask for a speech draft that only thanks the team, without mentioning conflict or improvements.
- **Advanced Variant:** Ask Copilot to cross-reference the pulse survey data with the performance logs to identify potential correlations between team sentiment and results.

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Analysis: Balancing Acknowledgment and Ambition

This case tackles a complex leadership challenge: how to address poor results and internal friction while simultaneously motivating the team. The leader must acknowledge reality without dwelling on negativity. The Phase 1 prompt sets this balance perfectly. It asks for a draft that recognizes resilience, acknowledges achievements, refers openly to conflict, and introduces improvements. This structured approach ensures all necessary components are included in a logical flow.

The Phase 2 prompt brings the message to life with specificity. As in the previous case, the leader directs Copilot to connect the speech to real data from pulse surveys and performance logs. This is not just about personalizing praise; it is about demonstrating that the leader has a deep and factual understanding of the previous quarter. When the leader acknowledges the conflicts, their words have more weight because the team knows they have reviewed the feedback. When they praise individual contributions, the recognition feels earned because it is tied to specific examples from performance logs.

This process of grounding a difficult conversation in data makes it feel more objective and fair. It moves the conversation away from blame and towards a shared understanding of the facts. This is a critical step in resolving conflict and aligning a team for the future. The leader uses the AI to prepare a message that is not only emotionally intelligent but also analytically sound, allowing them to lead the team forward from a position of credibility.

In this chapter, we have seen that using AI in the dimension of Engagement and Relations is not about removing the human element. It is about using technology to be more prepared, thoughtful, and precise in our most important communications. The AI helps draft the message, but the leader must always own its substance and deliver it with sincerity. By using these tools to clarify our intent and ground our words in specifics, we can build stronger relationships and lead more effectively. This foundation of trust is essential for the next dimension we will explore: execution in the Adaptive Zone.

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Chapter 3: The Adaptive Zone

Strategy and relationships provide the foundation for organizational success, but value is ultimately created through execution. Welcome to the Adaptive Zone. This is the dimension of leadership focused on implementation, process alignment, project momentum, and operational control. It is where high-level strategic intent meets the complex reality of day-to-day work. Success in this zone requires clarity, consistency, and the ability to identify and remove friction that impedes progress.

In this domain, artificial intelligence is not a conceptual partner but a powerful operational tool. Its primary function is to bring structure and transparency to complex workflows. You can use the hybrid model to document processes, track project progress, synthesize operational data, and diagnose bottlenecks that are often hidden within the noise of daily activities. The goal is to create a clear line of sight from strategic goals to tangible outputs, ensuring that the team's effort is applied effectively.

The primary roles you will inhabit in the Adaptive Zone are the **Glorified Stenographer** and the **Mental Janitor**. As the Glorified Stenographer, you use the AI to accurately document and summarize operational realities, such as meeting notes, project updates, and process maps. As the Mental Janitor, you use these insights to clear away the procedural clutter, ambiguity, and inefficiencies that slow work down. While these roles may seem less glamorous than the Cognitive Partner, their impact is profound. By ensuring the operational engine of the organization runs smoothly, you create the stability and capacity required for higher-level strategic work and innovation. A core workflow pattern in this zone is to summarise -> decide -> act. AI is exceptionally good at the first step, enabling you to perform the next two with greater speed and confidence.

Let us begin by examining a classic Adaptive Zone problem: a hidden process bottleneck that is disrupting project delivery.

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Case 1: Troubleshooting a Process Bottleneck in Project Delivery

Dimension and Role: The Adaptive Zone / Mental Janitor

Scenario Description: A project manager is facing repeated delays in a core deliverable due to a recurring process bottleneck. The issue appears to be caused by an undocumented workflow in the team's handover between departments. The leader must identify, clarify, and communicate a practical solution, quickly and without blame.

Phase 1 Prompt (Public LLM): “Describe a process mapping strategy to identify bottlenecks in handover procedures between departments. Suggest a checklist or template to clarify steps and accountabilities for each stage of the process.”

Phase 2 Prompt (Copilot): “Using data from the last three project debrief reports ('Debrief_Feb2025.docx', 'Debrief_March2025.docx', 'Debrief_April2025.docx'), summarize concrete handover failures and propose process amendments tailored to this team. Attach the new workflow template for approval and circulate to relevant managers.”

Guide Annotation: This case demonstrates how the hybrid model is used for targeted, pragmatic troubleshooting. The public LLM is deployed for best-practice mapping and structure, while Copilot grounds the fix in actual team experience and documents. The leader operates first as a janitor, removing barriers, then as a process architect.

- **Beginner Variant:** Ask only for a simple handover checklist, not a full process mapping strategy.
- **Advanced Variant:** After identifying the failures, ask Copilot to draft a short training module for the team on the new handover process, using the identified failures as examples of what to avoid.

Analysis: The AI as Process Analyst

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This case demonstrates how a leader can use the hybrid model to rapidly diagnose and solve an operational problem. The workflow starts with the leader seeking external best practices. The Phase 1 prompt asks the public LLM for a "process mapping strategy," effectively tapping into a vast library of management knowledge to find a proven method for analysis. This provides a sound, generic approach and a template to work with.

The real analytical work happens in Phase 2. The leader directs Copilot to act as a process analyst, synthesizing information from three separate project debrief documents. This is a task that would be tedious and time-consuming to do manually, requiring the leader to read through pages of reports and mentally connect the dots. Copilot can perform this synthesis in moments, identifying a pattern of "concrete handover failures" across different time periods. The prompt then goes a step further, asking Copilot to "propose process amendments tailored to this team." This moves from diagnosis to solution.

The Mental Janitor Role in Action: This is a perfect illustration of the Mental Janitor role creating high-impact value. The "clutter" in this case is the hidden process friction that is causing delays and frustration. By using AI to identify and remove this bottleneck, the leader restores flow and improves the team's productivity and morale. The role is not about low-level cleaning; it is about surgically removing the obstacles that prevent effective work. The AI enables the leader to perform this crucial function with a speed and precision that would be difficult to achieve otherwise.

Solving existing problems is one part of the Adaptive Zone. The other is proactively aligning the organization to ensure new initiatives are implemented consistently. Our next case looks at how to translate a strategic KPI structure into clear, operational reality.

Case 2: Aligning KPIs and Execution in a Distributed Team

Dimension and Role: The Adaptive Zone / Cognitive Partner

How To Get Value From Copilot

Scenario Description: A department head is rolling out a new KPI structure in a geographically distributed team. There is confusion about ownership and measurement, and local managers interpret targets inconsistently. The leader must bridge the gap between central strategy and local adaptation.

Phase 1 Prompt (Public LLM): “Draft a guideline for rolling out new KPIs in a distributed team. Outline how to clarify ownership, communicate expectations, and handle local variations in targets and reporting.”

Phase 2 Prompt (Copilot): “Review the current KPI dashboard (‘KPI_Dashboard_Q2.xlsx’) and extract examples of misaligned metrics. Personalize the rollout message for each subteam leader using performance data from the last quarter, and flag areas needing extra support or clarification.”

Guide Annotation: This case illustrates a classic adaptive zone problem: translating strategic intent into consistent execution across contexts. The public LLM supports general structuring, but only Copilot can personalize instructions and support based on internal team data and current metrics. The leader’s role moves from architect to partner, building shared understanding with nuance.

- **Beginner Variant:** Draft a single, generic rollout message without personalization.
- **Advanced Variant:** Ask Copilot to create a “Frequently Asked Questions” document based on the identified areas of confusion from the KPI dashboard.

Analysis: Connecting Strategy to Operational Reality

This case provides a direct bridge between the Strategic Focus dimension and the Adaptive Zone. The new KPI structure is the strategy; ensuring it is implemented correctly is the execution work. The leader’s challenge is to ensure that the strategic intent is not lost in translation as it moves through the organization. The Phase 1 prompt uses the public LLM to create a solid communication and rollout plan based on general best practices for change management.

How To Get Value From Copilot

The Phase 2 prompt uses Copilot to perform a sophisticated alignment task. First, it acts as a monitoring system, reviewing the KPI dashboard to "extract examples of misaligned metrics." This gives the leader a clear, data-driven picture of where confusion exists. Second, it acts as a tool for mass-customization of leadership communication. The instruction to "personalize the rollout message for each subteam leader" using their specific performance data is incredibly powerful. It allows the department head to send communications that feel personal and relevant, acknowledging each local manager's context while reinforcing the central strategy.

This use of AI serves as a powerful control and alignment mechanism. It allows a leader to manage a complex rollout at scale without losing nuance. The ability to "flag areas needing extra support" enables proactive leadership. The leader can anticipate problems and offer help before teams become frustrated or disengaged. This is a clear example of moving into the Cognitive Partner role within an operational context, using the AI to manage complexity and guide the team toward a shared goal.

Finally, let us examine how the hybrid model can be used to improve a routine but critical organizational process: onboarding new employees.

Case 3: Improving Onboarding of New Employees in a Process-Heavy Department

Dimension and Role: The Adaptive Zone / Mental Janitor

Scenario Description: A process leader wants to streamline onboarding in a department with high procedural complexity. Recent hires have struggled to reach full productivity, and HR feedback points to information overload and unclear sequencing.

Phase 1 Prompt (Public LLM): "Draft a step-by-step onboarding checklist for new employees in a process-heavy department. Include tips for self-orientation, role shadowing, and early milestones for success."

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Phase 2 Prompt (Copilot): “Personalize the checklist using recent feedback from onboarding surveys (‘OnboardSurvey_Q1_2025.xlsx’) and HR records of time-to-productivity. Add department-specific links and integrate the checklist into the department’s SharePoint resource hub.”

Guide Annotation: This case highlights the use of hybrid AI to bring practical clarity to a routine but critical process. The leader acts as a janitor, removing friction and cognitive overload, and as a steward of procedural culture. Copilot ties recommendations directly to lived team experience.

- **Beginner Variant:** Create the checklist without referencing internal feedback.
- **Advanced Variant:** Ask Copilot to analyze the onboarding surveys for the most common pain points and then design a new module in the checklist specifically to address the top three issues.

Analysis: Closing the Feedback Loop for Process Improvement

This case focuses on improving the experience of new employees, which is a critical function for long-term organizational health. The leader’s goal is to reduce friction and cognitive load for recent hires. The Phase 1 prompt efficiently generates a structured, best-practice checklist, providing a solid foundation.

The real leverage comes from the Phase 2 prompt, which creates a data-driven feedback loop. The instruction to “personalize the checklist using recent feedback from onboarding surveys” is key. It ensures that the onboarding process evolves based on the lived experience of the people who have actually gone through it. This is a hallmark of a learning organization. The AI serves as the mechanism that connects past feedback to future improvements. By also asking Copilot to add department-specific links and integrate the checklist into SharePoint, the leader ensures the final output is not just a document, but a usable, integrated resource.

How To Get Value From Copilot

Common Error: A common mistake would be to create a generic onboarding plan and assume it works for everyone. The true source of value in this process is the specific feedback from past employees. By ignoring this data, an organization is doomed to repeat its mistakes. The leader in this scenario avoids this error by using Copilot to systematically mine internal data for insights, ensuring the onboarding process is continuously refined. In this context, the Mental Janitor role is about clearing the path for new employees so they can become productive and engaged members of the team as quickly as possible.

In this chapter, we have explored the Adaptive Zone, where leadership is about effective execution. The cases have shown how the hybrid AI model can be used to diagnose and fix process issues, align teams around new initiatives, and optimize core organizational workflows. The recurring pattern is one of using AI to summarize complex operational data, which enables you as a leader to make better decisions and act with more precision. Once your processes are clear and your operational engine is running smoothly, you create the organizational capacity needed to explore the next frontier: creating what is new.

How To Get Value From Copilot

Chapter 4: Create New

The final dimension of leadership we will explore is Create New. This is the domain of innovation, ideation, foresight, and rethinking established frames of reference. While the Adaptive Zone is focused on optimizing what currently exists, the Create New dimension is concerned with building what does not yet exist. It is often the most challenging and ambiguous leadership work, yet it is also the source of future growth and relevance. It requires a tolerance for uncertainty, a willingness to experiment, and the discipline to move from a promising idea to a viable concept.

The role of artificial intelligence in this dimension is frequently misunderstood. It is not a magical invention machine that will deliver a perfect, fully formed business idea on command. Attempts to use it this way almost always result in superficial or generic outputs. Instead, the hybrid model provides a structured environment for augmenting the human creative process. You can use public models to provoke new thinking, generate a wide variety of possibilities, and design creative workflows. You then use Copilot to test these nascent ideas against the strategic realities and data of your organization.

The central role you will perform in this dimension is the **Cognitive Partner**. Your primary function is to act as a curator, a critic, and a catalyst. You use the AI to broaden your perspective and generate options, you apply your own judgment and experience to select and refine the most promising threads, and you use the tools to connect creative concepts to operational and strategic constraints. The key pattern of prompting in this chapter follows a two-part rhythm: a **divergent phase**, where you aim to generate a wide range of ideas, followed by a **convergent phase**, where you critically evaluate and select from those options.

Let us begin by exploring how AI can be used to design and manage the process of innovation itself.

Case 1: Launching an Innovation Sprint for New Product Development

Dimension and Role: Create New / Cognitive Partner

How To Get Value From Copilot

Scenario Description: A product innovation lead is tasked with launching a two-week sprint to generate new product concepts in response to an emerging market trend. The challenge is to spark ideation, avoid groupthink, and ensure that proposals align with both strategic priorities and available resources.

Phase 1 Prompt (Public LLM): “Act as an innovation facilitator. Suggest a detailed agenda for a two-week product innovation sprint. Include activities for idea generation, idea evaluation, stakeholder review, and selection for prototyping.”

Phase 2 Prompt (Copilot): “Using data from the company’s product backlog (‘Product_Backlog_2025.xlsx’) and market analysis (‘MarketTrends_Spring2025.docx’), filter the brainstormed ideas for feasibility and strategic fit. Generate a shortlist of top three concepts and assign next steps for prototyping, with owners and deadlines.”

Guide Annotation: This case demonstrates the hybrid workflow for innovation management. Public LLMs drive the creative design of process and structure, while Copilot ensures proposals are both realistic and aligned to internal strategy and constraints. The leader operates as a cognitive partner, guiding and curating the innovation pipeline.

- **Beginner Variant:** Ask only for a list of brainstorming techniques, not a full two-week agenda.
- **Advanced Variant:** Ask Copilot to identify team members with relevant skills for each of the top three concepts, based on HR data and past project involvement.

Analysis: Structuring the Creative Process

This first case highlights a critical aspect of successful innovation: it is a disciplined process. The leader here does not ask the AI for product ideas directly. Instead, they use it to structure the human process of creativity. The Phase 1 prompt is particularly effective because it asks the AI to “Act as an innovation facilitator.” This role-playing instruction guides the public LLM to provide a response that is not just a list of items, but a coherent, expert-level agenda for a complex two-week sprint. This is the divergent phase, focused on creating a robust process for generating many ideas.

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The Phase 2 prompt represents the convergent phase. After the team has generated ideas during the sprint, the leader uses Copilot to perform a critical filtering and evaluation task. This prompt is powerful because it connects the creative output of the sprint to the strategic and operational realities of the business. By cross-referencing ideas with the existing product backlog and the latest market analysis, the leader can quickly assess which concepts have the highest potential for success. The final instruction, to generate a shortlist with owners and deadlines, moves the process from ideation to action.

In this workflow, the leader acts as the director of the innovation process. They use the AI first to build a strong container for creativity (the sprint agenda) and then to apply strategic filters to the output. The AI provides structure and data-driven analysis, but the human team provides the creative spark, and the leader provides the final judgment.

Beyond structuring the process, AI can help develop the substance of a new idea. This next case shows how to build a compelling, data-grounded proposal for a significant strategic change.

Case 2: Creating a Proposal for a New Business Model

Dimension and Role: Create New / Cognitive Partner

Scenario Description: A business development manager wants to propose a radical new business model to the executive board. The proposal must be both visionary and grounded in real data, and must address both potential risks and long-term impact.

Phase 1 Prompt (Public LLM): “Draft an executive summary for a new business model proposal in the consulting sector. Include sections on value proposition, market opportunity, risk analysis, and implementation roadmap.”

Phase 2 Prompt (Copilot): “Populate the proposal template with company-specific market data (‘MarketShare_Q2_2025.xlsx’), past client success stories from the CRM (‘CRM_Stories.docx’), and internal financials. Add a risk assessment section based on recent board feedback (‘BoardMinutes_April2025.docx’).”

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Guide Annotation: This case showcases the use of hybrid prompting to both imagine and validate new business opportunities. The public LLM develops a strong narrative and structure; Copilot injects credibility and specificity. The leader's cognitive partnership is expressed through disciplined creativity.

- **Beginner Variant:** Ask only for an outline of a business model proposal.
- **Advanced Variant:** Ask Copilot to generate counterarguments for each point in the proposal and suggest how to address them, based on the risks identified in the board minutes.

Analysis: Balancing Vision with Credibility

This case tackles the core tension of innovation: a new idea must be visionary enough to inspire, yet grounded enough to be credible. The leader uses the hybrid model to manage this balance perfectly. The Phase 1 prompt is the visionary step. It uses a public LLM to draft the narrative structure of a compelling proposal. This allows the leader to focus on the story and the high-level components of the idea without getting bogged down in details.

The Phase 2 prompt is the grounding mechanism. This is where the visionary idea is rigorously tested against organizational reality. The prompt is a sophisticated act of synthesis, instructing Copilot to pull information from multiple, diverse sources. It asks for quantitative data from a market share spreadsheet, qualitative evidence from CRM success stories, and strategic context from board meeting minutes. This process transforms a generic proposal into a document that speaks the language of the business and is deeply embedded in its specific context.

This workflow is an example of disciplined creativity. The public LLM provides a space for expansive, creative thinking. Copilot provides a secure environment for connecting that creativity to the confidential data that will ultimately determine its feasibility. The leader as the Cognitive Partner guides this entire process, ensuring that the final proposal is not just an interesting idea, but a well-researched and defensible business case.

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Sometimes, the most powerful innovation is not creating a new product, but finding a new way to see an old problem. Our final case looks at how AI can be used to break cognitive habits and reframe a complex challenge.

Case 3: Strategic Brainstorm – Alternative Structuring of a Complex Problem

Dimension and Role: Create New / Cognitive Partner

Scenario Description: A strategy director faces a “wicked problem” that resists standard approaches: integrating sustainability targets into multiple ongoing projects. The need is to reframe the problem space and break habitual thinking patterns.

Phase 1 Prompt (Public LLM): “Act as a problem structuring coach. Suggest alternative framings for integrating sustainability targets into ongoing operations. Propose at least three novel perspectives, each with an illustrative question for team discussion.”

Phase 2 Prompt (Copilot): “Draw on recent project charters (‘Charters_Sustainability2025.docx’) and the company’s sustainability roadmap (‘SustainRoadmap.xlsx’). For each alternative framing, identify a live project that could serve as a pilot case and propose tailored metrics for evaluation.”

Guide Annotation: This case emphasizes reframing and “breaking the frame” as key innovation behaviors. Hybrid prompting is used to break conceptual inertia, while Copilot brings speculative thinking back to operational reality. The cognitive partner role is to be both catalyst and integrator.

- **Beginner Variant:** Ask the public model to simply list reasons why sustainability is important.
- **Advanced Variant:** For the most promising framing, ask Copilot to draft a pre-mortem analysis, identifying potential reasons a pilot project might fail.

Analysis: Using AI to Change Perspective

How To Get Value From Copilot

This final case demonstrates one of the most advanced applications of AI in leadership: using it as a tool to enhance your own cognition. The leader is not asking for a solution, but for a new way to see the problem. The Phase 1 prompt is a masterful piece of prompt engineering. By asking the AI to "Act as a problem structuring coach" and suggest "alternative framings", the leader is using the tool to deliberately break out of their own established thinking patterns. This is a method for generating cognitive flexibility, which is essential for solving "wicked problems" that have no easy answer.

The Phase 2 prompt is what makes this conceptual exercise practical. It takes the abstract "framings" from the public model and asks Copilot to connect them to the real world of the organization. The instruction to "identify a live project that could serve as a pilot case" for each framing is brilliant. It grounds the conceptual work in concrete action. The further request to "propose tailored metrics for evaluation" ensures that these experiments can be measured and learned from.

Common Error: A common mistake when facing a complex problem is to ask the AI for "the solution." This type of under-specified prompt usually leads to generic, unhelpful advice. The leader in this case avoids this by focusing the AI on a more productive task: not solving the problem, but helping the leader and their team to think about the problem in new and more creative ways. This is the Cognitive Partner role at its most sophisticated, where the AI becomes a true partner in the process of strategic thought.

In this chapter, we have explored how the hybrid AI model can support the work of creating what is new. We have seen its application in structuring the process of innovation, in developing the substance of a new proposal, and in changing the perspective on a complex problem. The recurring theme is a disciplined, two-step process of divergence and convergence. You use the AI to generate possibilities, and then you use it to ground those possibilities in the data and reality of your organization. This requires you, the leader, to be a discerning critic and an active guide. The quality of the output depends entirely on the quality of this iterative process. Mastering this workflow depends on mastering the art of the prompt itself, which is the subject of our next chapter.

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Chapter 5: The Prompt Workshop

In the previous chapters, we have explored how to apply the hybrid AI model across the four key dimensions of leadership. We have seen how specific, well-structured prompts are the engine of this workflow. A good prompt can transform a frustrating, generic interaction into a precise and valuable collaboration. This chapter is a workshop. We will move from looking at the *what* to understanding the *how*. We will deconstruct the anatomy of an effective prompt, identify common errors, and explore the iterative process that turns a simple question into a strategic tool.

The goal of this workshop is not to provide you with a library of prompts to copy. It is to help you develop your own internal sense of what makes a prompt work. It is about cultivating prompt literacy. This is more than a technical skill; it is a form of leadership competence. It is the ability to use language to direct one of the most powerful technologies of our time with clarity, intention, and control. By the end of this chapter, you will not just have better prompts; you will have a better framework for thinking.

What Makes a Prompt Good?

At its core, an effective prompt is a clear and complete instruction. It provides the AI with all the context it needs to deliver a relevant and high-quality response. While there is no single magic formula, the best prompts almost always contain four key elements, which can be remembered with the acronym GCES:

Goal: What is the ultimate purpose of this task? What do you want the AI to help you achieve? Be explicit about the desired outcome. For example, instead of saying "write about our new project," say "draft an internal announcement to build excitement for our new project."

Context: What background information does the AI need to know? This can include the audience, the industry, the specific situation, or any relevant constraints. The more context you provide, the more tailored the response will be.

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Expectations: What does the final output need to look like? Specify the desired format (e.g., an email, a bulleted list, a report outline), the tone (e.g., formal, empathetic, professional), and the length.

Source: Where should the AI get its information? In the hybrid model, this is a critical component. In Phase 1 with a public LLM, the source is the model's general knowledge. In Phase 2 with Copilot, you must provide specific filenames, document locations, or data sources to ground the output in your company's reality.

A prompt that successfully integrates these four elements provides the AI with a clear job description. It transforms you from a passive questioner into an active director of the work.

Five Typical Errors and How to Fix Them

Even with a good framework, it is easy to make mistakes. Most prompting errors stem from a lack of specificity. Here are five of the most common errors and how to correct them.

1. The Vague Request: This is the most common error. Prompts like "summarize this meeting" or "write a report" are too open-ended.

Example of Error: "Summarize the Q2 financial report."

Why it fails: The AI does not know who the summary is for, what the key points should be, or what format to use. It will likely produce a generic, unhelpful summary.

The Fix: Add context and expectations. "Acting as a CFO, create a three-bullet-point summary of 'Q2_Financial_Report.xlsx' for the sales team. Focus on the key revenue trends and their implications for Q3 sales targets."

2. Missing Context: This error occurs when you assume the AI knows things that it does not. It has no access to your private thoughts, your company's culture, or the subtext of a situation.

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Example of Error: "Draft an email to the team about the project and funding."

Why it fails: The AI does not know which project, what the news is (good or bad), or what the desired tone of the email should be.

The Fix: Provide the necessary background. "Draft a positive and motivating email to the 'Project Phoenix' team, announcing that we have secured Phase 2 funding. Highlight their hard work and outline the immediate next steps."

3. Unclear Data Sourcing: This is a critical error when using Copilot. A prompt that says "use the latest sales data" will fail if the AI does not know where to find that file.

Example of Error: "Update the presentation with the Q3 figures."

Why it fails: Copilot cannot guess which of the dozens of files with "Q3 figures" you mean. It will either fail or ask for clarification, slowing you down.

The Fix: Be precise with filenames and locations. "In the presentation 'Q4_Strategy_Deck.pptx', update the chart on slide 5 with data from the 'Q3_Sales_Results.xlsx' file located in the 'Sales/Reports/2025' SharePoint folder."

4. No Role Assignment: A prompt without a defined role for the AI often results in a generic, neutral tone.

Example of Error: "Write about the market trend of AI in manufacturing."

Why it fails: The output will likely be a dry, encyclopedic summary.

The Fix: Assign a persona. "Act as a market analyst for a venture capital firm. Write a short investment memo on the top three most promising applications of AI in the Danish manufacturing sector."

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5. The One-Shot Attempt: Many users treat prompting as a single event. They write one prompt, and if the result is poor, they give up. This ignores the conversational nature of the technology.

Example of Error: The user gets a long, verbose answer and immediately discards it.

Why it fails: The user misses the opportunity to refine the output.

The Fix: Use iterative dialogue. Follow up the initial response with a new prompt like, "That is a good start. Now make it more concise. Focus only on the top three risks and present them as a bulleted list."

The Power of Iterative Prompting

The last error brings us to one of the most important concepts in prompt literacy: iteration. The best results rarely come from a single, perfect prompt. They emerge from a short conversation, a loop of prompting, reviewing, and refining. This is a natural process for leaders, who are accustomed to guiding conversations, providing feedback, and course-correcting in real time.

Think of your first prompt as the opening statement in a meeting. It sets the direction. The AI's first response is like a first draft from a team member. Your job is to review that draft and provide clear feedback to guide it toward the desired final output.

Here is what an iterative loop looks like in practice:

Prompt 1 (Broad): "Draft a proposal for a new employee wellness program."

AI Response: A long, generic document covering everything from yoga to financial planning.

Prompt 2 (Refining): "Good. Now focus only on mental health and work-life balance. Cut the other sections and give me three specific, low-cost initiatives."

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AI Response: A more focused list with three concrete ideas.

Prompt 3 (Formatting): “Excellent. Please present these three initiatives in a simple table format with columns for 'Initiative', 'Primary Benefit', and 'Estimated Time to Implement'.”

AI Response: A clean, formatted table ready to be inserted into a presentation.

In just three steps, the leader has moved from a vague idea to a clear, actionable proposal. This iterative process is the fastest way to get the specific output you need. It also mirrors the natural cadence of human collaboration.

[Learn more about priming](#)

Prompt Literacy as a Leadership Competence

The ability to prompt effectively is not a new technical skill. It is the modern expression of core leadership capabilities that you have already spent years developing. The interface of these new tools is not code; it is natural language. This means that the skills that make an effective leader are now the same skills that create value with AI. Let us examine this connection more closely.

1. Language as the New Interface: For decades, the language of technological development was code, a domain reserved for technical experts. Large language models have changed this. The new interface is human language. As a leader, you have a highly developed professional vocabulary for navigating complexity, defining goals, managing relationships, and orchestrating work. This linguistic mastery is now your primary advantage in using AI. Your ability to communicate with clarity and precision directly translates into higher-quality outputs.

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2. The Competence of Clear Instruction: Leaders are constantly defining roles, clarifying expectations, and setting goals for their teams. This is the exact skill required for effective prompting. You know how to frame a task to ensure it is understood and executed correctly. When you prompt an AI, you are doing the same thing. You are providing a clear brief to a team member, and the quality of the result is a direct reflection of the quality of your instruction.

3. The Discipline of Iterative Dialogue: Leadership is an ongoing conversation, a process of feedback, adjustment, and iteration. This is precisely how you should interact with an AI. You are uniquely equipped to spot when a conversation is drifting, when an output "hallucinates" or misses context, and how to gently course-correct to get the work back on track. This natural ability to guide a dialogue is a core competency in harnessing LLMs.

4. Strategic Thinking in Practice: You are trained to think in patterns, scenarios, and business models. You can use an LLM as a true Cognitive Partner to stress-test your ideas, simulate outcomes, and analyze possibilities. You can ask it to apply strategic frameworks like a SWOT analysis or Porter's Five Forces to a given problem, using the AI to augment your own capacity for strategic reflection.

5. Orchestration and Cognitive Scaling: Finally, you know how to orchestrate the work of others. You can use an AI as a powerful cognitive multiplier, a tool to augment your own ability to synthesize vast amounts of information, analyze complex data, and prepare for critical decisions. You are not being replaced or offloaded; you are being amplified. The combination of your experienced judgment with the AI's data-processing power produces results that are far greater than what either could achieve alone.

This deep alignment between leadership skills and AI functionality is the central argument of this guide. You are not starting from zero. You are starting from a position of unique advantage. Your existing expertise is the key to unlocking the value of these powerful new tools.

How To Get Value From Copilot

This workshop has provided a framework for improving your prompt literacy. We have covered the building blocks of a good prompt, the most common errors to avoid, and the power of iterative dialogue. Most importantly, we have seen that effective prompting is a natural extension of the skills you already possess as a leader. Your journey to mastering this new technology is not about becoming a technical expert. It is about learning to apply your existing wisdom in a new context. This practice of thoughtful, iterative engagement is how you will stay in control and drive real value. In our final chapter, we will discuss how to embed these skills into your daily work and cultivate a sustainable, professional practice for the long term.

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Chapter 6: Cultivating a Professional Practice

Throughout this guide, we have explored a structured, hybrid model for using artificial intelligence across the core dimensions of leadership. We have moved from strategy to relations, from execution to innovation. We have deconstructed the anatomy of an effective prompt and seen how this new technology can amplify professional judgment. This final chapter is about the transition from learning these techniques to building a sustainable, personal practice. The goal is to move beyond simply using a new tool and toward cultivating a new form of leadership literacy.

This is not about becoming an AI power user or maximizing your productivity in a narrow sense. It is about reorienting your relationship with these tools away from a focus on speed and toward a focus on sense-making. The prompts and cases in this guide are blueprints. The ultimate aim is for you to develop your own methods and your own style, turning prompting into a reflective act that helps you observe how your own thinking takes form in language. This chapter provides a framework for developing your practice, evolving your judgment, and truly making this technology your own.

1. Build Your Personal Prompting Library

An effective prompt is a valuable professional asset. As you craft prompts that deliver excellent results, you should treat them as such. Instead of letting them disappear into your chat history, you should develop a system for capturing, organizing, and refining them over time. This turns your learning into a reusable resource.

You can use a tool like Microsoft OneNote, Loop, or a similar application to create a living repository for your best prompts. The key is to organize this library in a way that mirrors the strategic architecture of your own thinking. I recommend creating sections based on the four leadership dimensions we have explored:

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- **Strategic Focus:** Store prompts for outlining reports, analyzing market data, and building strategy papers.
- **Engagement & Relations:** Keep your best prompts for drafting sensitive communications, preparing for difficult conversations, and giving team feedback.
- **The Adaptive Zone:** Save prompts for process mapping, project tracking, and generating status updates.
- **Create New:** Capture your most effective prompts for brainstorming, problem reframing, and facilitating innovation sessions.

Within each dimension, you can further tag your prompts by the role they represent (Mental Janitor, Glorified Stenographer, Cognitive Partner), the tone they produce, or the specific task they accomplish. Over time, this library will become a powerful extension of your professional memory. It makes well-crafted prompts a second language for you, always accessible and always available for adaptation to new challenges.

2. Design Repeatable Hybrid Workflows

The hybrid model of using public LLMs for ideation and Copilot for secure execution is the central method of this guide. As you become more comfortable with this workflow, you can begin to formalize it into repeatable patterns for your most common leadership tasks. Instead of improvising each time, you can design your own archetypal workflow maps for recurring activities.

Consider a task like preparing a monthly decision memo for your leadership team. A repeatable workflow might look like this:

Phase 1 (Public LLM - Ideation): Use a public model to brainstorm the key arguments and structure the memo.

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1. *Prompt: "Act as a strategic advisor. I need to write a decision memo arguing for investment in Project X. Outline the key sections, including Problem Statement, Proposed Solution, Risk Analysis, and Financial Implications."*
2. **Phase 2 (Copilot - Execution):** Move the approved outline into Copilot and use it to populate the memo with confidential data.

Prompt: "Using the outline above, populate the 'Financial Implications' section with data from 'Project_X_Budget.xlsx'. For the 'Risk Analysis', summarize the key points from the latest project risk log."

By mapping out these workflows for your key responsibilities, you make your approach more consistent and efficient. You learn to recognize the natural "transition signals" that tell you when to switch from an open model to your secure enterprise environment. This turns an ad-hoc process into a disciplined professional method, allowing you to move fluidly from open ideation to closed execution without losing strategic coherence.

3. Use the Three Roles for Self-Calibration

The three roles of Mental Janitor, Glorified Stenographer, and Cognitive Partner are more than just descriptions; they are a diagnostic tool. You can use this model to reflect on your own AI usage and identify your default posture. This meta-awareness is a key component of developing a mature practice.

Periodically, ask yourself these questions:

- **Where am I spending most of my time?** Am I stuck in clean-up tasks, primarily using the AI as a Mental Janitor to summarize emails and format documents?
- **Am I only retrieving information?** Do I mainly use the AI as a Glorified Stenographer to recall facts from meetings and documents, without asking for synthesis or insight?
- **Am I actively shaping strategy?** How often do I engage the AI as a Cognitive Partner to analyze complex problems, stress-test ideas, or reframe my perspective?

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There is no single "correct" balance. Different roles are appropriate for different moments. The goal is to be deliberate in your choice of role. If you find you are stuck in one of the more basic roles, you can consciously design prompts that elevate the interaction to the level of a Cognitive Partner. This framework is also highly effective for team leaders. You can observe the prompting patterns across your team to spot role imbalances and then use that insight to provide targeted micro-coaching and support.

4. The AI as a Mirror: Entering the Pattern Layer

When prompting becomes a regular habit, something deeper begins to emerge. You start to notice patterns in your own requests and tendencies. This is the pattern layer, and observing it offers a powerful opportunity for self-reflection. What are the themes you constantly revisit in your work? What tone do you naturally gravitate toward in your communications? Which tasks do you tend to over-automate, and which do you avoid?

This is the stage where the AI can evolve from being a lens on your work to being a mirror on your thinking. You can use advanced "meta-prompts" to explore your own behavior. A meta-prompt is a reflective command that asks the AI to analyze your previous interactions with it.

Imagine this prompt to Copilot:

"Review the last 10 prompts I gave you related to the quarterly business review. Based on these prompts, identify the recurring assumptions in my strategy framing and suggest one area that I may be overlooking."

This is a profound change in the human-AI relationship. The AI is no longer just an assistant executing tasks; it is a reflective partner helping you to see your own blind spots. This is where the practice of using AI transitions from improving your output to evolving your judgment.

5. Final Reflection: From Tool to Craft

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In a landscape where artificial intelligence is often framed as either an existential threat or a magical shortcut, this guide has offered a third perspective: AI as a tool for professional *craft*. The work of a leader is a craft, honed over years of practice, and these tools can be integrated into that craft with care and intention.

You do not need to become an AI specialist to excel in this new era. You must, however, become a practitioner of *discernment* in how you use these tools. That discernment is visible in every prompt you write, in every choice of model for a given task, and in every handoff between a public LLM and your secure Copilot environment. This discernment is the new leadership literacy.

The ultimate goal of this guide is to help you cultivate that literacy. It is to help you become a leader who uses AI not just to do more, but to know more clearly why you are doing it. The most significant change that AI brings to leadership is not found in the output it generates. It is found in the posture of thoughtfulness, precision, and judgment behind it. That is where your work begins.

[Read more articles and learn more about personal AI Coaching](#)

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Appendix

A. Glossary of Key Concepts

- **Hybrid AI Model:** The core method of this guide. It involves using public LLMs (like ChatGPT, Claude) for general ideation and structuring, followed by a transition to a secure enterprise tool (Microsoft Copilot) for any work involving confidential or proprietary data.
- **Shadow AI:** The use of unapproved, public AI tools by employees for work-related tasks, often involving the input of sensitive company data. This creates significant security, privacy, and compliance risks.
- **The Four Dimensions:** The author's framework for categorizing leadership work: Strategic Focus (planning and direction), Engagement & Relations (people and communication), The Adaptive Zone (execution and process), and Create New (innovation and ideation).
- **The Three Roles:** A model for describing different modes of interaction with AI: the Mental Janitor (clearing away administrative clutter), the Glorified Stenographer (documenting and recalling information), and the Cognitive Partner (engaging in high-level analysis and strategy).
- **Divergent & Convergent Prompting:** A two-stage process used in creative work. Divergent prompting aims to generate a wide variety of ideas and possibilities. Convergent prompting aims to evaluate, filter, and select the best options from the generated set.
- **Prompt Literacy:** The ability to design and refine prompts to effectively direct an AI to achieve a specific, high-quality outcome. It is treated in this guide as a core leadership competence, not just a technical skill.
- **Meta-Prompt:** An advanced type of prompt where the user asks the AI to analyze their previous prompts or interactions to reveal patterns, assumptions, or blind spots in the user's own thinking.

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B. Further Reading and Resources

The ideas in this guide are part of an ongoing exploration of how leadership is changing in the age of AI. For continued learning, the following resources are recommended.

aipioneer.eu: This is the author's personal website and professional home for his work on AI in leadership. It contains further articles, podcasts, frameworks, and information about talks and executive sessions designed to help organizations use AI in a way that is strategic, human, and ethically grounded.

C. About the Author

Tom Hansen is a leadership facilitator, author, and speaker who has spent two decades working at the intersection of facilitation, strategic development, and technology. He works with leaders who want to think more clearly, act with greater courage, and lead with more presence in complex environments.

Tom facilitates seven leadership networks for F5, Denmark's largest leadership community, including groups for senior executives and international leaders working in Denmark. His sessions are designed as dynamic learning spaces where leaders engage collaboratively to solve real-world problems and challenge their own thinking.

In 2023, Tom immersed himself in the world of generative AI to understand its impact on leadership, decision-making, and collaboration. Today, he works extensively with leaders and teams to integrate AI into their daily practice in a way that is strategic, human, and ethically grounded. He designs modular frameworks and facilitation tools that make AI not just usable, but meaningful. His approach is practical, resting on systems thinking and learning-by-doing.

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Through his work at aipioneer.eu, Tom gives talks and leads executive sessions that help organizations develop their own methods for working with generative models while keeping the human dimension alive. His work connects a deep understanding of leadership dynamics with a practical grasp of how new technologies are reshaping professional life. You are welcome to connect with him on LinkedIn: <https://www.linkedin.com/in/tom-r-hansen/>