

Sample prompts for Implementation workshops

In a Frontier Consultancy performing AI First Delivery of projects, it is important to store all information digitally, to be able to feed the right data to AI agents to perform work on your behalf.

Below is a **ready-to-use prompt library** with prompt samples to run *immediately after (or during)* an implementation workshop meeting that was recorded + transcribed in Teams, so you can distill **decisions, actions, gaps, risks, and status** into clean implementation artifacts.

If you are new to prompting, this short course helps you get started writing good prompts using the GCSE method (Goal → Context → Source → Expectations): [Write Effective Prompts to Achieve Optimal Results - Training | Microsoft Learn](#).

Please note this guide assumes the user has a valid Microsoft 365 Copilot License.

1) “One-shot” meeting distillation prompts (high value, low effort)

1. Executive recap (for sponsor / steering committee)

Prompt

“Create an executive recap of this workshop.

Source: *use the meeting transcript + meeting chat + any notes shared in the meeting.*

Output:

1. 6–10 bullet ‘What we accomplished’
 2. Key decisions (with decision owner + rationale)
 3. Top risks/issues (impact + mitigation + owner)
 4. Next 5 actions (owner + due date)
 5. Open questions that block progress
- Keep it concise and written for executive sponsors.”*

2. “Decisions log” (decision register)

Prompt

*“Extract every **decision** made in this workshop from the transcript.*

For each decision, capture: Decision statement, owner/approver, date/time (if present), rationale, impacted workstream, dependencies, and follow-up actions.

If something sounds like a decision but is not confirmed, label it ‘Proposed’.”

3. “Action register” (tasks + owners)

Prompt

*“List all **action items** from this workshop, with: description, owner, due date (or ‘TBD’), dependency, and where it was mentioned (quote a short supporting line).*

If owner is missing, suggest the most likely role (e.g., Solution Architect, Functional Consultant, Data Migration Lead) and mark as ‘needs confirmation’.”

4. “Open questions & parking lot”

Prompt

“Create an ‘Open Questions / Parking Lot’ list from this workshop.

Group by topic (process, data, integration, security, testing, change management, timeline).

For each question: why it matters, who should answer, and suggested next step to resolve.”

5. “Scope & boundary extraction”

Prompt

“From this workshop, extract:

- *What is explicitly **in scope***

- *What is explicitly **out of scope***
- *Items that are **uncertain / pending decision***
Then produce a short ‘scope statement’ suitable for a Statement of Work appendix.”

6. “Status update” (for the project team channel)

Prompt

“Draft a project-team status update based on this workshop:

- *Progress since last workshop*
- *Decisions made*
- *Risks/issues (new/changed)*
- *Actions due next week*
- *Topics for next workshop*
Tone: professional, short, and suitable to post in Teams.”

2) Workshop-structured prompts

Every workshop should have one or more predefined objectives, and each workshop includes an agenda + default key questions to drive discussion and decisions.

Tip: use Facilitator agent in your Teams meeting to make sure your workshop stays on track ([Set up Facilitator in Microsoft Teams - Microsoft Teams | Microsoft Learn](#)).

7. Agenda-item summarizer (maps to workshop agenda)

Prompt

*“Summarize this workshop **by agenda section**.*

For each section:

- *What we learned*
- *Decisions*
- *Gaps/issues*
- *Actions*
- *Any unresolved questions*

If the agenda isn't explicit, infer sections from the flow of the discussion and label them clearly as 'inferred'.”

8. “Workshop objectives check” (did we achieve what we intended?)

Prompt

“Based on this workshop transcript, evaluate whether we achieved these objectives:

1. *Clarified/refined requirements*
2. *Shared understanding across stakeholders*
3. *Identified gaps/issues*
4. *Configurable solution approach identified*
5. *Prepared for next step (CRP/demo/next workshop)*

For each objective: evidence from the transcript + what's missing + recommended follow-up.”

9. “Assumptions list”

Prompt

*“Extract all **assumptions** stated or implied in this workshop.*

For each: assumption statement, risk if wrong, how to validate, and owner to validate.”

10. “Requirements to backlog candidates”

Prompt

“Identify all requirements discussed. Convert them into backlog-ready items with:

Title, user story format, acceptance criteria (3–5 bullets), priority suggestion, and dependency notes.

Mark which ones are ‘fit’ vs ‘gap’ if indicated.”

3) Fit-to-standard / Fit-gap specific prompts

When implementing standard Line of Business applications, fit/gap analysis is an important phase. For Dynamics 365, Microsoft recommends using the [business process catalog](#) to guide and organize evaluations in workshops.

11. Fit/gap summary

Prompt

“Create a Fit-to-Standard summary from this workshop:

- *Which business processes were reviewed*
 - *For each process: Fit / Configure / Gap*
 - *Evidence from the transcript for each classification*
 - *Next step per gap (config, extension, ISV, process change)*
- Output as a table.”*

12. Fit-gap “gap register” (ready for design review)

Prompt

*“Produce a **Gap Register** from this workshop.*

For each gap: description, impacted process, business impact, severity, proposed solution approach, unknowns, and required proof-of-concept (yes/no).

Flag any gaps that sound like ‘nice-to-have’ rather than business-critical.”

13. Fit-gap: “prevent unnecessary customizations”

Prompt

“Identify any moments where the team proposed recreating legacy behavior.

List each instance and suggest a fit-to-standard alternative (process change, configuration, or standard capability), and note the trade-off.”

4) Implementation-workstream prompts (use whichever workshop type you ran)

Below are some prompt samples to use for common workshop topics, like **data migration, security model design, solution performance, integration design**, etc.

14. Data migration workshop prompts

1. **Data migration decisions & plan**

“Extract data migration strategy decisions from this workshop: scope (entities), volume assumptions, tooling, environments, cutover approach, and ownership. Output: decisions + actions + risks.”

2. **Data readiness blockers**

“List all data-quality or data-availability blockers mentioned. For each, define remediation steps, owner, and how it impacts timeline.”

15. Integration design workshop prompts

1. **Integration inventory**

“Create an integration inventory: each integration, source/target, triggering event, frequency, volume, latency/near-real-time needs, error handling, security/auth, and owner.”

2. **Integration risks & test needs**

“Extract integration-related risks and translate them into test scenarios (happy path + failure modes), with suggested owners.”

16. Security workshop prompts

1. **Security decisions**

“Summarize security model decisions: roles, segregation of duties concerns, admin model, compliance requirements, and any open security questions.”

2. **Security risk register**

“Create a security-focused risk register with severity, impacted data/process, mitigation, and owner.”

17. Testing workshop prompts

1. **UAT plan extraction**

“From this workshop, draft a UAT plan outline: test scope, test data needs, entry/exit criteria, roles, and timeline.”

2. **Traceability check**

“List which requirements discussed have no clear test coverage mentioned. Propose test cases to close the gap.”

18. Cutover / go-live readiness prompts

1. **Cutover runbook skeleton**

“Draft a cutover runbook skeleton based on this workshop: phases, checkpoints, owners, timing assumptions, rollback criteria, communications plan.”

2. **Go-live readiness scoreboard**

“Create a go-live readiness scoreboard with categories: Data, Integrations, Security, Testing, Training, Support model, Performance, Operations. For each: status (Green/Amber/Red) based on transcript evidence + key actions to move to Green.”

5) “Agentic-first” prompts (turn workshop content into reusable assets)

These prompts help partners build a **repeatable delivery system** (your “agentic first motion”): turn every workshop into a structured knowledge asset Copilot can query later.

19. Create a “single source of truth” workshop artifact

Prompt

“Turn this workshop transcript into a structured artifact with these sections:

- 1. Objectives*
 - 2. Attendees/roles*
 - 3. Decisions (final vs proposed)*
 - 4. Requirements outcomes (fit/config/gap)*
 - 5. Risks/issues*
 - 6. Actions (owner/date)*
 - 7. Open questions*
 - 8. Appendix: glossary of terms used*
- Format it so it can be pasted into a Loop page or wiki.”*

20. Produce “next workshop agenda” automatically

Prompt

*“Based on unresolved items and decisions, propose the agenda for the **next workshop**. Include: objectives, required attendees by role, pre-reads needed, and time-boxed sections.”*

21. Create a “project memory” entry (short)

Prompt

“Write a ‘project memory’ entry (max 12 bullets) capturing what future team members must know from this workshop—especially decisions and why we made them.”

22. “What changed?” (diff vs previous workshop)

Prompt

“Compare this workshop with the previous workshop(s) in this project (use meeting history if available).

Output: what changed in scope, decisions, risks, timeline, and ownership.

If you can’t access prior workshops, say so and still summarize the delta within this meeting (new vs already-known).”
