Microsoft Copilot Prompt Card – AI Sales Forecasting

This Copilot Prompt Card provides ready-to-use prompts for analyzing the AI_Sales_Forecasting_SampleData.xlsx workbook in Excel, Power BI, or Teams using Microsoft Copilot. Simply copy and paste a prompt into Copilot to generate instant insights.

■ Copilot Prompts

- Using the ‘Historical Sales (Daily)’ sheet, summarize total revenue, units sold, and average discount rate for each product over the past year. Highlight the top 3 customers by total revenue.
- From the ‘Historical Sales (Daily)’ sheet, create a monthly line chart showing total units sold for Product A, B, and C. Identify any seasonal patterns or spikes.
- From the ‘Sales Pipeline (Opps)’ sheet, group opportunities by stage and calculate the average probability of close, total quantity, and total value. Highlight stages with the highest potential revenue.
- From the ‘Market Trends (Weekly)’ sheet, compare the DemandIndex for Product A, B, and C over time. Identify which product’s demand has grown the most and in which weeks it peaked.
- From the ‘Customer Buying Patterns’ sheet, calculate the average orders per week and repurchase probability per product. Identify which customers have the highest loyalty for each product.
- From the ‘Inventory Levels (Daily)’ sheet, identify dates when StockOnHand dropped below 500 units for any product. Highlight any days with backorders and restock quantities.
- From the ‘Supplier Lead Times’ sheet, calculate the average lead time in days for each product and highlight any weeks where lead times were more than 20% above average.
- From the ‘Production (Weekly)’ sheet, identify weeks where DowntimeHours exceeded 10 hours for any product. Estimate the lost production capacity in units for those weeks.
- From the ‘Promotional Campaigns’ sheet, calculate the average ObservedUplift and SpendUSD per product. Identify the most cost-effective campaign based on uplift per dollar spent.
- Using the ‘Historical Sales (Daily)’ and ‘Market Trends (Weekly)’ sheets, build a forecast for the next 3 months of units sold for each product. Factor in demand trends, seasonality, and recent promotional uplifts.