

AI Tool Selection & Prompt Engineering Guide (Enterprise Use Case)

Quick Reference: Which Tool Should I Use?

This guide provides a practical framework for selecting and applying AI tools across enterprise roles, based on real-world use within software development and operational environments.

Prompt Engineering Approach

This guide is based on applied prompt engineering techniques used to improve accuracy, consistency, and efficiency when working with AI tools across business and technical roles.

Key practices include:

Context Framing:

- Clearly defining role, task, and expected output (e.g., “Act as a Business Analyst...”)

Structured Prompting:

- Using bullet-based or step-based prompts to guide output format and completeness

Iterative Refinement:

- Improving responses through follow-up prompts rather than expecting perfect first-pass results

Output Validation:

- Reviewing AI-generated content for accuracy, completeness, and alignment with business requirements

These techniques enable consistent, production-quality outputs across documentation, analysis, development support, and operational workflows.

M365 Copilot - Your Integrated Assistant

Best for: Documentation, meeting follow-up, quick questions with AHS-related context, working with your existing files.

Who uses it: Everyone - PM, BA, Dev, QA, DA

Key strengths:

- Works directly in Word, Excel, PowerPoint, Outlook, Teams
- Accesses your OneDrive/SharePoint files automatically
- Transcribes and summarizes meetings with action items (can add direct to MS “To-Do List”)
- Great for drafting project docs (BRDs, SOPs, plans, status reports)

Common uses by role:

- **PM:** Meeting minutes, status reports, risk identification, project plans
- **BA:** Requirements documentation, user story drafts, process flows
- **Dev:** Code comments, documentation, email summaries

- **QA:** Test plan outlines, bug report summaries
- **DA:** Data analysis summaries, report formatting

How to access:

- URL: <https://www.microsoft.com/en-us/microsoft-365-copilot>
- Access: Requires Microsoft 365 account (Work or School)
- Licensing: Paid add-on (Copilot license required; typically enterprise or business subscription)
- **Notes:** Must be enabled by organization admin

***Pro tip:** Always record meetings - Copilot turns them into organized notes and tasks. Preferred when working with organization-specific data and integrated Microsoft 365 content.*

ChatGPT (Business) - The Generalist

Best for: Quick answers, brainstorming, general content creation

Who uses it: Everyone

Key strengths:

- Fast and conversational
- Great for iteration and rapid drafts
- Good general knowledge base
- Easy to use for beginners

Common uses by role:

- **PM:** Task breakdown, email drafts, agenda creation
- **BA:** User story formatting, requirements clarification
- **Dev:** Code examples, debugging help, documentation templates
- **QA:** Test scenario generation, test case ideas
- **DA:** SQL query help, data interpretation

How to access:

- URL: <https://chat.openai.com>
- Access: Email/password, Google, Apple, or Microsoft login
- Licensing: Free tier available; Plus/Pro subscription for advanced features
- **Notes:** Web-based; mobile apps also available

***Pro tip:** Good for quick tasks when you don't need to access your AHS files. Copilot is otherwise recommended over ChatGPT.*

Claude - The Deep Thinker

Best for: Complex analysis, long documents, detailed reasoning, document drafting, code writing

Who uses it: BA, Dev, PM, DA (for complex work)

Key strengths:

- Handles very long inputs (entire contracts, specs, technical drafts)
- Excellent at multi-step analysis
- Strong code generation and technical documentation

- Great for structured datasets and process design

Common uses by role:

- **BA:** RFP analysis, gap analysis, requirements extraction from long documents, complex process mapping
- **Dev:** Code refactoring, architecture analysis, technical documentation
- **PM:** Risk assessment, multi-project analysis, complex planning
- **DA:** Complex data transformations, statistical analysis explanations

How to access:

- URL: <https://claude.ai>
Access: Email login (verification required)
- Licensing: Free tier available; Pro subscription for higher usage and priority access
- Notes: Web-based interface

Pro *tip:* Claude is for all, and Claude Code is for developers. Upload entire repositories of **documents** for analysis - Claude can handle 100+ page contracts.

Scope Bot (By Contract)

Best for: Quick contract reference and scope validation

Who uses it: PM, BA

Key strengths:

- Direct access to contract clauses
- Provides cited answers with clause numbers
- Fast contract lookups

Common uses:

- Validating if work is in/out of scope
- Finding specific contract terms
- Quick clause references during planning

How to access:

- URL: [Organization-specific or vendor-provided URL]
- Access: Typically SSO (company credentials)
- Licensing: Contract-based / enterprise tool
- **Notes:** May require internal provisioning or admin access

Figma - Design & Collaboration

Best for: UI/UX design, wireframes, prototypes

Who uses it: BA (process flows), Dev (UI planning), PM (visual documentation)

Key strengths:

- Visual design and mockups
- Real-time collaboration
- Process and workflow diagramming alternative to Visio

How to access:

- URL: <https://www.figma.com>
- Access: Email, Google, or SSO login
- Licensing: Free tier available; Professional and Organization plans (paid)
- Notes: Browser-based; desktop app optional

Napkin - Visual Communication

Best for: Quick visual diagrams from text

Who uses it: PM, BA (presentations and visual docs)

How to access:

- URL: <https://www.napkin.ai>
- Access: Email or Google login
- Licensing: Free tier (limited); paid plans for expanded usage
- **Notes:** AI-assisted content and ideation tool

UiPath - RPA

Best for: Process automation, repetitive tasks

Who uses it: End user: Call Centers or Business Partners. Who programs it: UiPath Engineers and Analysts.

Key strengths:

- Automates repetitive rule-based tasks within operations
- Improves efficiency, reduces errors, saves time to focus on higher-value tasks
- Task capture for process documentation
- Scheduled bot execution

How to access:

- URL: <https://cloud.uipath.com>
- Access: Email login or enterprise SSO
- Licensing: Free Community Edition; paid enterprise licenses
- **Notes:** Requires account setup; Studio/Desktop tools may need installation

Infobot (By Contract)

Best for: Internal knowledge base assistant

Who uses it: End user: Call Centers

Key strengths:

- Assists CSRs on a call
- Conversational QnA with contract's knowledge base
- Decreases escalations to leads or supervisors
- Increases call quality and decreases call time

How to access:

- URL: [Organization-specific URL or embedded within platform (e.g., Microsoft Teams, Info Hub, or internal portal)]
- Access: Typically via SSO (company credentials)
- Licensing: Contract-based / enterprise tool (no public free tier)
- **Notes:**
 - Often embedded within internal systems such as **Microsoft Teams, Dynamics 365**, or on **Info Hub** interface
 - Access and functionality are role-based and require provisioning by system administrators
 - May not be directly accessible via a standalone public website

Quick Decision Tree

Need to work with cross-company files? → M365 Copilot

Analyzing or creating a long, complex document (50+ pages)? → Claude

Generating Code? → Claude Code

Quick question or simple draft? → M365 Copilot or ChatGPT

Contract question? → Scope Bot

Automating a repetitive process? → UiPath

Creating visual designs? → Figma