

RESEARCH

Intermediate

45 MIN

• UPDATED 2026-10-01

Research and update your technology strategy with Copilot.

Use Copilot to research current best practices and draft an updated technology strategy instead of starting from a blank document.

MICROSOFT 365

Word

WORKS WITH

ChatGPT

Claude

Copilot

Business Outcome

An updated technology strategy grounded in current practice, ready for leadership review.

Workflow Steps

Step 1: State what's driving the update

Word

Write one clear sentence naming the actual trigger — a new business priority, a specific technology shift, or a prior strategy that's visibly out of date — at the top of the doc before researching anything.

Without that anchor, the research in step 2 tends to sprawl into a generic "what's trending in IT" survey instead of staying focused on the one thing that actually needs to change.

Step 2: Ask for current best practice, not generic advice

Copilot

ChatGPT

Claude

Ask specifically about how organizations similar to yours are approaching the trigger you named, not a broad "what's trending in IT."

PROMPT

Our technology strategy is three years old and doesn't address our shift to [specific priority]. Research current best practice for organizations our size addressing this, and draft an updated strategy section with reasoning for each recommendation.

Step 3: Stress-test each recommendation against your actual constraints

Word

A recommendation that ignores your budget, headcount, or existing vendor commitments isn't actionable — flag anything that doesn't survive contact with reality.

Step 4: Route to leadership with the reasoning intact

Word

Keep the "why" behind each recommendation visible in the document, not just the "what" — leadership approving a strategy needs to see the reasoning to sign off confidently.

✓ Check the work

- Every recommendation states the reasoning behind it, not just the conclusion.
- Recommendations were checked against actual budget and resourcing constraints.
- The update addresses the specific trigger named in step 1, not a generic refresh.

Expected Outcome

A draft technology strategy document with each recommendation tied to a stated reason, ready for stakeholder review.

Want help rolling this out across your team? **Go to Liminals.Tech** ■