

## AI FOR BUSINESS AND NON-TECHNICAL AUDIENCES

# Getting Value from Microsoft 365 Copilot

Level: Foundation • 2 days (expandable to 3) • Virtual, In-person

## Overview

Many organizations have bought Microsoft 365 Copilot licenses and are still waiting for the productivity gains to show up. The tool is capable, but value does not arrive automatically: it comes from people knowing where Copilot fits in each app, how to ask it for what they actually need, and how to fold it into the work they already do in Word, Outlook, Teams, and Excel. Without that, Copilot becomes an expensive button no one presses.

This is a hands-on, foundation course. It assumes comfort with Microsoft 365 but nothing about AI, and it deliberately goes deep on the everyday workflows where Copilot earns its license fee rather than skimming every feature in every app. The gradient starts with how Copilot works and what it can see, moves through the core apps one working context at a time (writing, email, meetings, data), and finishes with role-based use cases and the habits that make the value stick. Every module includes a hands-on lab and builds on the one before.

## Who Should Attend

- Employees whose organization has rolled out, or is piloting, Microsoft 365 Copilot
  - Managers and team leads who want their teams to get real value from Copilot licenses
  - Champions and trainers responsible for driving Copilot adoption internally
- Attendees using standalone assistants instead should look at *Everyday AI: Boosting Productivity with ChatGPT and Claude*.

## Prerequisites

- Everyday working comfort with Microsoft 365: Word, Outlook, Teams, and Excel
- A Microsoft 365 Copilot license for the hands-on labs
- No AI background is assumed

## What You Will Learn

- Explain how Copilot works in Microsoft 365, what data it can see, and why answers differ between people
- Draft, rewrite, and summarize documents and email with Copilot in Word and Outlook
- Run meeting workflows in Teams: recaps, action items, and catching up on what you missed
- Analyze data and build first-draft presentations with Copilot in Excel and PowerPoint
- Apply role-based use-case patterns to your own job
- Judge Copilot output, work within data governance, and build habits that sustain the value

## Course Outline

### Day one: how Copilot works, and the core writing workflows

- How Copilot Works in Microsoft 365

- Where Copilot shows up across the suite, and what each surface is for
- What Copilot can see: your files, mail, meetings, and permissions, and why two people get different answers
- Lab: a guided tour, then run your first working prompts in Copilot Chat
- Copilot for Writing: Word and Outlook
  - Drafting and rewriting documents from notes, outlines, and existing files
  - Taming email: summarizing long threads, drafting replies, and triaging the inbox
  - Lab: draft a real document in Word, then work through a day's worth of email in Outlook with Copilot
- Copilot in Meetings: Teams
  - Meeting recaps, action items, and answering "what did I miss"
  - Using Copilot during and after meetings without losing the human thread
  - Lab: run a full meeting workflow: prepare, recap, and turn the recap into follow-up actions

### **Day two: data, roles, and lasting value**

- Copilot for Data and Presentations: Excel and PowerPoint
  - Analyzing data in Excel: questions, formulas, and charts in plain language
  - Building a first-draft presentation from a document, and why it is a draft
  - Lab: analyze a workbook with Copilot, then generate and refine a presentation from a document
- Role-Based Use Cases
  - Use-case patterns by role: sales, HR, finance, operations, and management
  - Finding the recurring tasks in your own week where Copilot pays off
  - Lab: build and test a personal use-case set for your own role
- Getting Real Value: Habits and Guardrails
  - Prompt habits that work in the Microsoft 365 context
  - Verifying output, respecting data boundaries, and staying inside company policy
  - Lab: create a personal Copilot playbook and one adoption recommendation for your team

### **Extended Version**

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The three-day version keeps the same gradient and adds depth and practice:

- A taste of Copilot agents and Copilot Studio: when a custom agent is worth building
- Deeper role-based tracks, with attendees working use cases specific to their function
- An overview of admin, data governance, and rollout concerns for champions
- A capstone that runs a complete end-to-end workday scenario across Word, Outlook, Teams, and Excel