

# Getting Started with Microsoft 365 Copilot

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## Course Overview

This course provides a practical introduction to Microsoft 365 Copilot, helping participants understand how AI can enhance everyday work across Microsoft 365 apps.

Learners will explore how Copilot works, its core components, and Microsoft's approach to responsible AI. The course then dives into real-world productivity scenarios across Word, Excel, Outlook, PowerPoint, and Teams, followed by best practices for prompting and extending Copilot capabilities.

Finally, participants will apply their learning through business-focused use cases in Finance and Sales, enabling them to confidently use Copilot in real workplace scenarios.

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### Module 1: Introduction to Microsoft 365 Copilot

- What is Microsoft 365 Copilot?
- Explore how Microsoft 365 Copilot works
- Explore the core components of Microsoft 365 Copilot
- Examine how Microsoft is committed to responsible AI

### Module 2: Explore the Possibilities with Microsoft 365 Copilot

- Compose and summarize documents with Copilot in Word
- Summarize and draft emails with Copilot in Outlook
- Design presentations with Copilot in PowerPoint
- Analyze and transform data with Copilot in Excel
- Elevate productivity with Copilot in Teams
- Empower employees with Microsoft 365 Copilot Chat

### Module 3: Optimize and Extend Microsoft 365 Copilot

- Best practices for using Copilot
- How to build effective prompts
- Prompting best practices
- Extending Microsoft 365 Copilot
- Copilot in Teams

#### **Module 4: Finance Use Case**

- Draft an email to an insurance company using Copilot in Outlook
- Analyze a financial spreadsheet using Copilot in Excel
- Create a financial analysis report using Copilot in Word
- Summarize financial results using Copilot in Word

#### **Module 5: Sales Use Case**

- Create a market research report using Copilot in Loop
- Create a sales presentation using Copilot in PowerPoint
- Prepare meeting notes from emails using Copilot Chat
- Compare supplier agreements using Copilot in Word

#### **Module 6: Q&A**

- Open discussion
- Address participant questions
- Key takeaways and next steps