

# Researcher and Analyst

90-Minute Training Session

## Session Overview

This session introduces learners to how Microsoft 365 Copilot can support research, analysis, summarization, data interpretation, and decision-making workflows across Microsoft 365 applications.

## Learning Objectives

- Use Copilot to conduct and organize research.
- Summarize large volumes of information efficiently.
- Analyze trends and insights from business data.
- Generate reports and recommendations using Copilot.
- Use prompts effectively for research and analytical tasks.

## Session Agenda

Topic	Duration
Introduction to Researcher and Analyst Use Cases	10 Minutes
Research with Copilot in Word and Edge	20 Minutes
Data Analysis with Copilot in Excel	20 Minutes
Meeting and Communication Analysis	15 Minutes
Creating Reports and Insights	15 Minutes
Best Practices and Prompting Techniques	5 Minutes
Q&A and Recap	5 Minutes

## Research with Copilot in Word and Edge

- Generate research summaries and executive summaries.
- Compare multiple documents and identify key findings.
- Summarize webpages and online articles in Edge.

## Data Analysis with Copilot in Excel

- Analyze trends and anomalies in spreadsheets.
- Generate formulas, charts, and visualizations.
- Create business insights and recommendations.

## Meeting and Communication Analysis

- Summarize meetings in Teams.
- Capture action items and decisions.
- Summarize lengthy email conversations in Outlook.

## Creating Reports and Insights

- Generate executive summaries in Word.
- Turn analytical findings into stakeholder-ready reports.
- Create presentation-ready summaries.

## Best Practices

- Provide clear prompts and context.
- Validate AI-generated information.
- Use iterative prompting for better outputs.
- Ensure compliance and confidentiality.

## Sample Prompts

- Summarize this document into five key findings for leadership.
- Analyze this sales data and identify top-performing regions.
- Identify the risks, opportunities, and recommendations from this report.
- Summarize the meeting and list all assigned tasks.