

AI Tools for Workplace Productivity

Platform Focus: Microsoft 365 Copilot, Copilot Chat, Word, Excel, PowerPoint, Outlook, Teams

Level: Beginner to Intermediate

Delivery Mode: Instructor-led (Concepts + Demo + Guided Practice)

Duration: 4 Hours

Course Objectives

This course helps participants use Microsoft 365 Copilot for everyday workplace productivity and introduces Claude for document analysis, content development, and visual or interactive outputs.

Participants will learn to:

- Write effective prompts.
- Use Copilot Chat for everyday work.
- Draft and summarize content in Word and Outlook.
- Prepare and recap meetings in Teams.
- Create presentations with PowerPoint.
- Analyze everyday business data in Excel.
- Use Copilot responsibly and verify AI-generated content.

Target Audience

- Managers and team leaders
- Consultants and engineers
- Analysts and officers
- Project managers
- Finance, HR, Sales, Marketing, Operations, and administrative professionals
- Any employee regularly using Microsoft 365 applications

Prerequisites

- Basic knowledge of Microsoft 365 applications
- Microsoft 365 Copilot access recommended
- No coding or AI experience required

Tools & Platforms Required

- Microsoft 365 Copilot, Word, Excel, PowerPoint, Outlook, Teams

Course Modules

Module 1 — Introduction to Microsoft 365 Copilot

- What is Microsoft 365 Copilot?
- Copilot Chat vs Copilot inside Microsoft 365 apps
- Common workplace use cases
- Benefits and limitations
- Responsible AI and human review

Task: Identify three daily activities where Copilot can improve productivity.

Module 2 — Effective Prompting

- Understanding prompts
- Goal, Context, Source, and Expected Output
- Adding audience and format
- Improving weak prompts
- Follow-up prompting
- Using Prompt Gallery to find ready-made prompts for common work tasks
- Verifying responses

Task: Convert weak workplace prompts into effective Copilot prompts.

Module 3 — Copilot Chat

- Summarizing information
- Brainstorming ideas
- Drafting content
- Finding workplace information
- Preparing business briefings
- Working with files and available sources
- Using notebooks to organize notes, research, ideas, and reusable Copilot outputs
- Using Copilot Pages to save, edit, share, and collaborate on Copilot Chat responses
- Using Scheduled Prompts to run repeated Copilot requests automatically

Task: Create a short business briefing using Copilot Chat.

Module 4 — Copilot in Outlook and Teams

Outlook

- Summarize email threads
- Draft and improve emails
- Create professional responses

Teams

- Prepare for meetings
- Summarize meetings
- Identify decisions and action items
- Create follow-up communication

Task: Summarize a meeting and draft a follow-up email.

Module 5 — Copilot in Word, PowerPoint, Excel, Notebooks, and Copilot Pages

Word

- Draft documents
- Summarize content
- Rewrite and improve content
- Create executive summaries
- Use notebooks to organize notes, ideas, research, and reusable Copilot outputs

PowerPoint

- Create presentations from prompts
- Create presentations from documents
- Improve slide content
- Build executive presentations

Excel

- Understand business datasets
- Generate and explain formulas
- Identify trends and patterns
- Create charts and visualizations
- Summarize business insights

Task: Convert a business document into an executive summary, presentation, data insight summary, and shared Copilot Page.

Module 6 — Cross-Application Productivity Workflow

- Combining Copilot across Microsoft 365 apps
- Moving from meeting information to business outputs
- Maintaining consistency across applications
- Reviewing AI-generated content

Task: Complete a workflow:

Teams → Excel → Word → PowerPoint → Outlook

Module 7 — Responsible Use of Copilot

- AI limitations
- Fact-checking
- Protecting confidential information
- Reviewing accuracy and tone
- Human responsibility for final outputs

Task: Review and correct an AI-generated business response.

Module 8 — Working with Claude

- Analyzing and summarizing documents
- Developing and refining written content
- Comparing documents and identifying key themes
- Organizing ongoing work with Projects
- Creating visual and interactive outputs with Artifacts
- Reviewing and improving Claude-generated content

Task: Analyze a sample document and create a clear summary or Artifact.

Course Outcome

Participants will be able to confidently use Microsoft 365 Copilot across Chat, Word, Excel, PowerPoint, Outlook, and Teams, and use Claude for document analysis, content development, Projects, and Artifacts while applying responsible AI practices.

Optional Microsoft Credential: Microsoft Applied Skills aligned to AI-powered business workflows.