

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.

AI-Powered Research, Analysis & Workflows

Platform Focus: Microsoft 365 Copilot + Excel + Analyst + Researcher + Copilot Agents + Workflows

Level: Intermediate

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

Duration: 4 Hours

Course Objectives

This course helps participants use AI for **data analysis, research, insight generation, and business decision support**.

Participants will learn to:

- Analyze business data using Copilot in Excel and Gemini.
- Use **Analyst** for deeper data analysis.
- Use **Researcher** for structured, source-based research.
- Identify trends, patterns, exceptions, and insights.
- Convert research and analysis into decision-ready reports.
- Validate AI-generated findings before making decisions.

Target Audience

- Business, finance, sales, marketing, strategy, and planning professionals who work with reports, data, and insights.
- Project managers, PMO teams, managers, and decision-makers who need AI support for planning and decisions.
- Audit, legal, risk, compliance, data, and AI teams who need reliable research, analysis, agents, and workflows.

Prerequisites

- Basic Microsoft 365 Copilot knowledge
- Basic Excel knowledge
- Familiarity with business reports and datasets
- No coding required

Tools & Platforms Required

- Microsoft 365 Copilot
Gemini

Course Modules

Module 1 — AI for Analysis and Decision Support

- Role of AI in business analysis
- Data analysis vs research
- Descriptive and diagnostic analysis
- AI-assisted decision support
- Choosing between Excel, Analyst, Researcher, Copilot Chat, and Gemini

Task: Select the appropriate AI capability for different business scenarios.

Module 2 — Data Analysis with Copilot in Excel and Analyst

- Understanding business datasets with Copilot
- Asking questions about data in simple language
- Generating and explaining formulas in Excel
- Using Analyst for deeper data analysis
- Working with single and multiple datasets
- Identifying trends, patterns, relationships, and outliers
- Creating charts, tables, and insight summaries
- Asking follow-up questions to refine analysis

Task: Analyze a business dataset using Copilot in Excel and Analyst, then create a short insight summary.

Module 3 — Data Analysis with Gemini

- Understanding Gemini for business data analysis
- Working with data and business information
- Asking questions and exploring data in simple language
- Identifying trends, patterns, relationships, and exceptions
- Using Canvas to organize analysis and findings
- Creating visual summaries and data views
- Refining and validating AI-generated insights

Task: Analyze a business dataset with Gemini and organize the key findings in Canvas.

Module 4 — Business Research with Researcher

- Introduction to the Researcher agent
- Researcher vs Copilot Chat
- Defining a research question
- Working with internal and external sources

- Multi-source research
- Source-grounded reports
- Citations and references
- Refining research results

Task: Create a structured research brief using Researcher.

Module 5 — Creating Infographics and Data Dashboards Using Copilot

- Turning data findings into visual stories
- Planning an infographic for business communication
- Using Copilot to summarize key data points
- Creating simple dashboard layouts from analysis results
- Choosing the right chart or visual for the message
- Using Copilot to create dashboard explanations and labels
- Reviewing visuals for clarity, accuracy, and business value

Task: Create a simple infographic plan and data dashboard outline using Copilot-generated insights.

Module 6 — Creating Copilot Agents

- Understanding what Copilot agents are
- Identifying business tasks suitable for an agent
- Planning the goal, instructions, and knowledge sources for an agent
- Creating a simple agent for a business use case
- Testing agent responses
- Improving the agent based on feedback

Task: Create a simple Copilot agent for a common business scenario.

Module 7 — Creating Workflows in Copilot

- Understanding what workflows are
- Identifying repeated steps that can be automated
- Planning a workflow from start to finish
- Connecting prompts, files, approvals, and actions
- Testing the workflow output
- Improving the workflow for accuracy and usefulness

Task: Design a simple Copilot workflow to automate a repeated business activity.

Q&A

Discussion around:

- When to use Excel, Analyst, or Gemini
- When to use Researcher vs Copilot Chat
- Improving analytical prompts
- Validating AI-generated insights
- Working with multiple sources
- Creating decision-ready reports
- Using AI without replacing human judgment

Course Outcome

Participants will be able to use Microsoft 365 Copilot, Excel, Analyst, Researcher, Gemini, Copilot Agents, and Workflows to analyze data, conduct structured research, create visual insights, build simple agents, design workflows, and support better business decisions.

Optional Microsoft Credential: Microsoft Applied Skills — **Generate reports with AI research agents.**

AI Transformation for Leaders

Level: Executive / Business Leadership

Delivery Mode: Instructor-led

Duration: 4 hours

Recommended Cohort Size: 15-20 participants

Course Objectives

This course prepares senior business leaders to identify high-value AI opportunities, make informed investment decisions, establish responsible AI governance, and lead successful AI-enabled transformation across their functions — using Microsoft 365 Copilot and the broader Microsoft AI portfolio as the reference platform.

By the end of the course, participants will be able to:

- Explain AI, generative AI, copilots, and AI agents in plain business language.
 - Identify the business value of generative AI solutions, including scenarios where scalability, automation, and ROI justify investment.
 - Recognize the challenges and limits of generative AI, including fabrications, reliability issues, and bias.
 - Decide when to **use, extend, or build** using the Microsoft 365 Copilot extensibility framework.
 - Produce a 90-day executive AI transformation action plan.
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Target Audience

- Chief officers and business executives
- General managers, directors, and vice presidents
- Practice heads and business-unit leaders
- Senior managers and functional heads across marketing, sales, operations, HR, finance, and strategy
- Transformation sponsors and change-management leaders

Course Modules

Module 1 — AI Transformation in the Business Context (25 minutes)

Topics

- AI, generative AI, copilots, and agents in business language
- Differences between generative AI and other types of AI
- Differences between AI models, including fine-tuned and pretrained models
- Challenges of generative AI: fabrications, reliability, and bias
- Why human oversight remains essential
- The leader's role in setting direction, guardrails, and accountability

Module 2 — Business Value of Generative AI Solutions

Topics

- Selecting a generative AI solution to meet a business need
- Scenarios where generative AI provides business value, including scalability and automation
- Cost drivers in generative AI usage, including tokens and return-on-investment (ROI) considerations
- The impact of prompt engineering, grounding, and retrieval-augmented generation (RAG)
- The impact of data on AI solutions, including data type, data quality, and representative datasets
- The importance of secure AI
- When machine learning adds value versus when generative AI adds value
- Security considerations for AI systems, including application security, data security, and authentication requirements

Module 3 — Microsoft AI Capabilities for Decision-Makers

Topics

- Microsoft 365 Copilot Chat capabilities on web and mobile
- The Copilot experience across Microsoft 365 apps (Word, Excel, PowerPoint, Outlook, Teams)
- Differences in capabilities between versions of Copilot
- Capabilities of **Microsoft Copilot Studio** for extending Copilot
- Capabilities of **Microsoft Graph** for grounding responses in trusted organizational information
- When to use **Researcher** or **Analyst** agents in Copilot
- The Microsoft 365 Copilot extensibility framework: **use, buy, extend, or build**

- Benefits of an integrated Microsoft AI solution, including risk mitigation and safety benefits
- Scalability and security benefits of Microsoft Foundry and Foundry Tools

Module 4 — AI Opportunity Identification and Prioritization

Topics

- Mapping business processes and use cases to Copilot and to Microsoft's AI apps and services
- Balancing value, feasibility, readiness, risk, and urgency
- Distinguishing quick wins from strategic transformation initiatives
- Recognizing repeatable, high-frequency, low-risk tasks best suited to Copilot
- Recognizing when workflow redesign is required before AI deployment
- Assessing dependencies on data quality, permissions, and Microsoft Graph grounding

Module 5 — Responsible AI, Governance, and Risk

This module addresses the accountability dimension that senior leaders must own directly. Participants translate Microsoft's responsible AI principles into governance decisions for their organization.

Topics

- Why responsible AI is a leadership responsibility
- Microsoft's six responsible AI principles: **fairness, reliability and safety, privacy and security, inclusiveness, transparency, and accountability**
- Establishing an **AI council** to guide strategy, oversight, and cross-functional alignment
- Aligning AI policies with existing corporate governance for data governance, security, and risk management

Module 6 — Leading AI Adoption and Organizational Change

Topics

- Establishing an **adoption team**
- Identifying common barriers to adoption (awareness, trust, fear of job impact, weak management support, unclear policies, lack of relevant use cases)
- Establishing an **AI champions program**
- Understanding potential impacts to data, security, privacy, and cost
- Understanding **Copilot license types**, including pay-as-you-go, monthly, and included with Microsoft 365 subscription

- Measuring adoption, usage, value, and sentiment
- Using the Microsoft Copilot Optimization Assessment to evaluate data-governance maturity and data-security controls before deployment

Module 7 — Executive AI Action Plan

This module converts insight into a decision. Participants complete a controlled-pilot plan that they can activate immediately after the workshop.

Topics

- Moving from idea to controlled pilot
- Defining scope, success measures, ownership, governance checkpoints, and review points
- Pilot decision criteria: scale, improve, or stop
- Capturing learning for future initiatives

Course Outcome

On completion, participants will be able to:

- Explain generative AI, copilots, and agents in business terms and articulate their limits (fabrications, reliability, bias).
- Map business processes and use cases to Microsoft 365 Copilot, Copilot Studio, Microsoft Graph, Researcher, Analyst, and Foundry Tools.
- Apply the **use / buy / extend / build** decision framework using the Microsoft 365 Copilot extensibility model.
- Align AI strategy with Microsoft's six responsible AI principles and integrate governance with existing corporate risk, security, and compliance processes.
- Establish an AI council, adoption team, and champions program.
- Measure adoption, value, quality, and risk.
- Deliver a 90-Day AI Transformation Action Plan for a prioritized opportunity.

Optional Certification Alignment

The workshop is aligned to — but does not fully replace — the **Microsoft Certified: AI Transformation Leader** credential. Leaders who wish to certify may pursue **Exam AB-731**

Agentic AI and Business Process Automation using Microsoft Copilot and Power Platform

Platform Focus: Microsoft Power Automate + Microsoft Copilot Studio + Microsoft 365 Copilot

Level: Intermediate

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

Duration: 4 Hours

Course Objectives

This course introduces participants to **AI-powered automation and AI agents** using Microsoft Power Automate and Copilot Studio.

Participants will learn to:

- Identify processes suitable for automation.
- Understand workflows, automation, and AI agents.
- Create basic automated workflows using Power Automate.
- Build a simple AI agent using Copilot Studio.
- Connect agents with knowledge and business processes.
- Test and improve agents.
- Apply basic security and governance practices.

Target Audience

- Managers and team leads
- AI champions
- IT professionals
- Data and AI teams
- Power users
- Employees interested in automation and AI agents

Prerequisites

- Basic Microsoft 365 Copilot knowledge
- Understanding of common business processes
- No coding required
- Power Automate and Copilot Studio access recommended

Tools & Platforms Required

- Microsoft 365 Copilot

- Microsoft Power Automate
- Microsoft Copilot Studio

Course Modules

Module 1 — Introduction to AI Automation and Agents

- Automation vs AI automation
- What is an AI agent?
- Copilot vs agents
- Prompt vs workflow vs agent
- Common business automation scenarios
- Identifying suitable processes

Task: Identify one business process suitable for automation or an AI agent.

Module 2 — Introduction to Power Automate

- What is Power Automate?
- Cloud flows
- Triggers and actions
- Automated flows
- Instant flows
- Scheduled flows
- Connectors
- Conditions and approvals
- Using Copilot to create flows

Task: Create a simple automated cloud flow using Power Automate.

Module 3 — Business Process Automation

- Identifying repetitive processes
- Designing simple workflows
- Notifications and reminders
- Approval workflows
- Connecting Microsoft 365 applications
- Human approval in automated processes
- Monitoring flow execution

Task: Build a business workflow such as:

Request → Approval → Notification → Follow-up

Module 4 — Introduction to Microsoft Copilot Studio

- What is Copilot Studio?
- Understanding AI agents
- Agent instructions
- Topics and conversations
- Knowledge sources
- Suggested prompts
- Tools and actions
- Testing agents

Task: Create a basic AI agent in Copilot Studio.

Module 5 — Building a Knowledge-Based AI Agent

- Defining the agent's purpose
- Writing clear agent instructions
- Adding approved knowledge sources
- Grounding agent responses
- Creating conversation topics
- Adding tools and actions
- Handling questions outside the agent's scope

Task: Build a simple knowledge agent such as:

- HR Policy Assistant
 - IT Support Assistant
 - Procurement Assistant
 - Project Knowledge Assistant
 - Customer Service Assistant
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Module 6 — Connecting Agents with Automation

- Agents and business workflows
- Using actions from agents
- Connecting agents with Power Automate

- Triggering business processes
- Human-in-the-loop workflows
- Notifications and approvals
- Agent-to-workflow scenarios

Task: Design an **Agent → Automation → Human Approval** workflow.

Module 7 — Testing, Security and Governance

- Testing agent responses
- Checking accuracy
- Managing knowledge sources
- User permissions
- Protecting sensitive information
- Human review and escalation
- Agent ownership
- Monitoring and maintenance
- Responsible AI considerations

Task: Test the agent with:

- 5 valid questions
 - 1 out-of-scope question
 - 1 sensitive-information scenario
 - 1 escalation scenario
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Course Outcome

Participants will be able to understand and create **basic AI-powered workflows and AI agents** using Power Automate and Microsoft Copilot Studio, while applying appropriate testing, security, governance, and human oversight.

Optional Microsoft Credential: Microsoft Applied Skills — **Build an agent in Microsoft Copilot Studio.**