Course Outline
Microsoft 365
Copilot in Practice

Duration	**6 hours** - (Can be Delivered over **Two – 3 Hour Sessions** or **One – 6 hour Session**)
Audience	Professionals who use Microsoft 365 and want practical ways to save time, improve quality and reduce repetitive work
Pre-Requisites	A working knowledge of Microsoft 365 applications. Learners should have access to an eligible Microsoft 365 Copilot environment for hands-on exercises
Delivery	Live virtual or in-person training, with demonstrations, guided practice, discussion and supplied exercise files
Group Size	Recommended maximum: 10 participants for an interactive session

Course objective
Enable participants to use Microsoft 365 Copilot confidently and responsibly in everyday work. Participants will learn how to write effective prompts, find and combine information across Microsoft 365, create and improve content, analyse information, use agents, and verify Copilot outputs before acting on them.

Learning outcomes

- Explain how Microsoft 365 Copilot, generative AI and Work IQ support work across Microsoft 365.
- Write clear prompts using a repeatable Goal, Context, Source and Expectations framework.
- Use Copilot Chat to locate, summarise and combine information from work sources, subject to permissions and licensing.
- Apply Copilot in Outlook, Teams, Word, Excel and PowerPoint to realistic business tasks.
- Use pre-built agents and understand when a focused agent is more suitable than a standard chat.
- Check accuracy, sources, calculations, confidentiality and permissions before using or sharing an AI-generated result.
- Identify high-value Copilot use cases

Module 1: Microsoft 365 Copilot, Work IQ and responsible use

- What Microsoft 365 Copilot is and where it appears in the Microsoft 365 experience
- Generative AI and large language models explained in plain English
- Work IQ: how Copilot uses work context from people, content, communications and business data
- Copilot Chat with and without a Microsoft 365 Copilot add-on license
- Permissions, privacy, confidentiality, oversharing and responsible AI
- AI limitations: errors, hallucinations, outdated information and the need for human review

Module 2: Prompting for reliable, useful results

- Use the Goal, Context, Source and Expectations framework
- Reference the right file, email, meeting, person or information source
- Break complex work into manageable steps
- Use follow-up prompts to clarify, improve, shorten, expand or change tone
- Ask Copilot to show sources and explain its reasoning where appropriate
- Recognise weak prompts and improve them through guided practice

Module 3: Microsoft 365 Copilot Chat

- Ask questions about emails, calendar items, meetings, chats and files
- Find and summarise information held in multiple Microsoft 365 locations
- Create first drafts grounded in selected work content
- Compare information and extract decisions, risks, actions and deadlines
- Use uploaded and referenced files appropriately
- Move from a first response to a useful, checked business output

Module 4: Outlook and Teams

- Draft, rewrite and summarise emails; adjust tone and length
- Summarise email threads and extract actions, questions and decisions
- Prepare for meetings using relevant emails, files and previous meetings
- Create agendas, discussion points and follow-up messages
- Summarise Teams chats and meeting content where available
- Create meeting recaps and identify decisions, owners and actions
- Understand the difference between invitees, attendance and transcribed meeting content

Module 5: Word and PowerPoint

- Create drafts, outlines and structured documents in Word
- Rewrite for a different audience, tone, length or level of detail
- Summarise, question and improve an existing document
- Transform source material into a presentation
- Build and refine slide structure, speaker notes and key messages
- Improve consistency and clarity while retaining human editorial control
- Check source accuracy, wording, branding and accessibility before sharing

Module 6: Excel: analysis, formulas and business insight

- Ask questions about structured data using natural language
- Generate, explain and troubleshoot formulas
- Clean and prepare data for analysis
- Identify trends, patterns, anomalies and potential issues
- Create charts, summaries and PivotTable-style analysis where supported
- Turn analysis into clear business observations and next questions
- Validate calculations, assumptions and conclusions before relying on the result

Module 7: Copilot agents and focused AI assistance

- What an agent is and how an agent differs from a standard Copilot conversation
- Explore relevant pre-built agents, including Researcher and Analyst where available
- Identify tasks that suit an agent rather than a one-off prompt
- Create a simple agent with a clear purpose, instructions and knowledge sources
- Test, refine and share an agent appropriately
- Understand access, permissions, governance and the risk of using poor-quality knowledge sources

Module 8: Practical workflow and action plan

- Identify repetitive, time-consuming or information-heavy tasks suitable for Copilot
- Convert one real work task into a repeatable Copilot workflow
- Create a small prompt library for immediate use
- Decide what must always be checked by a person
- Create an individual next-step action plan

Practical exercises

- Improve a weak prompt and compare the results.
- Use Copilot Chat to bring together information from more than one permitted work source.
- Turn an email thread or meeting recap into a clear action list and follow-up draft.
- Rewrite a Word document for a different audience.
- Analyse an Excel dataset and verify the resulting formulas and observations.
- Create a short presentation from supplied source material.
- Design and test a simple task-focused agent or agent brief, depending on tenant access.

Included with the course

- Course exercise files and guided practice activities
- Prompt framework and reusable prompt examples
- Responsible AI and output-checking checklist
- Post-course personal action plan template