

ARTIFICIAL INTELLIGENCE

BEGINNER

2 DAYS

Microsoft 365 Copilot for Business Teams

Practical Copilot skills across the apps people use every day. Covers prompting that produces usable output, Copilot in Word, Outlook, Teams, Excel and PowerPoint, working with Copilot Chat and everyday agents, and the verification habits that keep AI-assisted work trustworthy.

Why Microsoft 365 Copilot for Business Teams?

Applied to real work

Exercises use your own documents, meetings and data rather than sample files.

Honest about limits

Clear guidance on where Copilot helps and where it quietly wastes your time.

Prompting that transfers

A repeatable approach that works across every app, not app-specific tricks.

Team-consistent output

Shared prompts and conventions so quality does not depend on who asked.

What you'll be able to do

- ✓ Explain how Copilot retrieves organisational content and grounds its answers
- ✓ Write prompts with clear context, task, format and constraints
- ✓ Draft, rewrite and summarise effectively in Word and Outlook
- ✓ Use Copilot in Teams for meeting recall, summaries and follow-up actions
- ✓ Analyse and visualise data with Copilot in Excel
- ✓ Build and refine presentations with Copilot in PowerPoint
- ✓ Use Copilot Chat and build simple agents for recurring tasks
- ✓ Verify AI-assisted output and apply organisational data policy correctly

Who this is for

- Business professionals and knowledge workers
- Managers and team leads
- Administrative, operations and support functions
- Any department receiving Copilot licences

Curriculum

01 How Microsoft 365 Copilot Works

- Where Copilot gets its answers from, in plain terms
- Why it can see some of your content and not other parts
- Realistic expectations: what it does well and where it struggles
- The difference between Copilot Chat and Copilot inside an app
- Data boundaries and what stays inside your organisation

02 Prompting for Reliable Results

- The four ingredients: context, task, format and constraints
- Pointing Copilot at the right files, meetings and people
- Showing an example of what good output looks like
- Iterating and correcting rather than starting over
- **Hands-on:** rebuild a prompt you already use and compare the results

03 Copilot in Word and Outlook

- Drafting from a brief, existing documents or reference material
- Rewriting for tone, length and audience
- Summarising long documents and extracting decisions
- Email triage, thread summaries and drafting replies
- **Hands-on:** produce a real document and an email thread summary

04 Copilot in Teams

- Meeting recall: decisions, actions and who committed to what
- Catching up on a meeting you missed or joined late
- Summarising long chat threads and channel activity
- Drafting follow-ups and turning discussion into actions
- Etiquette and consent around recording and summarisation

05 Copilot in Excel and PowerPoint

- Exploring and questioning a dataset in natural language
- Formulas, transformations and highlighting patterns
- Charts, summaries and what to check before you trust a number
- Building a deck from a document, brief or outline
- Restructuring, summarising and tightening existing slides
- **Hands-on:** take a spreadsheet through to a presented conclusion

06 Copilot Chat and Everyday Agents

- Copilot Chat for research, drafting and cross-app work
- Referencing files, sites and people in a request
- Building a simple agent for a task you repeat weekly
- Sharing agents and prompts across a team
- **Hands-on:** build and share a small agent of your own

07 Verification, Confidentiality and Responsible Use

- What always needs checking, and the failure modes to watch for
- Recognising output that is confident and wrong
- Confidentiality, client data and organisational policy
- Sensitivity labels and why some content stays out of reach
- Building a personal working checklist you will actually use