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DIGITAL INNOVATION AND TRANSFORMATION | DIT-014

Microsoft Copilot for Business Productivity

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Course content

Why Attend

Microsoft Copilot is reshaping how professionals work with documents, email, meetings, presentations, spreadsheets, and organizational information. The greatest productivity gains come from knowing which tasks are suitable for AI assistance, how to communicate requirements effectively, and how to review Copilot-generated outputs before they influence business decisions.

This Microsoft Copilot for Business Productivity course focuses on practical workplace applications across Microsoft 365. Participants learn how to use Copilot capabilities in Word, Excel, PowerPoint, Outlook, and Teams, while developing effective prompting techniques and AI-assisted workflows for research, communication, meetings, reporting, analysis, and content creation. The programme also addresses data protection, permissions, accuracy, responsible AI use, and methods for measuring productivity improvements.

Professional Problems This Course Is Designed to Solve

• Time-consuming document creation: Reducing the effort required to draft, summarize, restructure, and refine reports, proposals, policies, and other business documents.

• Email and communication overload: Using Copilot to summarize conversations, prepare responses, organize information, and identify important actions more efficiently.

• Inefficient meetings: Improving meeting preparation, capturing discussions, identifying decisions, and turning meeting information into follow-up actions.

• Slow presentation development: Converting business information and source material into structured presentations while maintaining human control over the final message.

• Difficulty extracting value from business data: Supporting analysis and interpretation of spreadsheet information to identify patterns, comparisons, and performance issues.

• Inconsistent AI results: Improving Copilot outputs through better prompting, contextual instructions, iterative refinement, and human verification.

• AI governance and information risks: Managing permissions, sensitive information, inaccurate outputs, overreliance, and responsible use of AI within Microsoft 365 environments.

Course Methodology

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Course Methodology

The programme combines instructor demonstrations, guided Microsoft Copilot exercises, business scenarios, prompt workshops, document and spreadsheet activities, meeting simulations, and workflow redesign exercises. Participants work through realistic Microsoft 365 tasks and learn how to integrate Copilot into everyday business processes while maintaining appropriate human review and information controls.

Course Objectives

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

- Understand how Microsoft Copilot supports business productivity across Microsoft 365
- Develop effective prompts for professional tasks and workplace scenarios
- Use Copilot in Word to draft, summarize, restructure, and improve business documents
- Apply Copilot capabilities in Excel to support data exploration and business analysis
- Use Copilot in PowerPoint to accelerate presentation development and refinement
- Improve email, meeting, and collaboration workflows using Outlook and Teams
- Design reusable AI-assisted workflows for recurring business activities
- Evaluate Copilot-generated content for accuracy, relevance, and completeness
- Apply responsible AI, data protection, and information governance principles
- Measure productivity improvements and identify high-value Copilot use cases

Target Audience

This course is suitable for:

- Managers and team leaders
- Executive and administrative professionals
- Business analysts and reporting professionals

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Target Audience

- Finance and commercial teams
- Human resources professionals
- Marketing and communications teams
- Project and operations professionals
- Microsoft 365 users seeking to improve productivity with Copilot

Target Competencies

Participants will develop competencies in:

- Microsoft Copilot
- Microsoft 365 productivity
- AI prompting
- AI-assisted document creation
- Business data analysis
- Presentation development
- Email and meeting productivity
- Workflow optimization
- Responsible AI use
- Human-AI collaboration

Course outline

Day 1: Microsoft Copilot, Prompting and AI-Assisted Workflows

- Understanding Microsoft Copilot and its role within the Microsoft 365 work environment

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Course outline

• Identifying suitable Copilot use cases across documents, communication, meetings, presentations, and business analysis

• Understanding how organizational content, context, and user permissions affect Copilot responses

• Structuring effective prompts using goals, context, source information, audience, constraints, and expected outputs

• Improving responses through follow-up prompts, refinement, verification, and human judgment

• Practical exercise: Mapping recurring workplace activities and identifying opportunities for Copilot-assisted productivity

Day 2: Copilot in Word and PowerPoint for Business Content

• Using Copilot in Word to draft reports, proposals, briefing documents, policies, and professional correspondence

• Summarizing lengthy documents and extracting decisions, risks, actions, and important business information

• Rewriting and restructuring content for different audiences, purposes, formats, and levels of detail

• Using Copilot in PowerPoint to support presentation creation from prompts and available source material

• Refining presentation structure, messaging, slide content, and executive-level communication

• Practical workshop: Transforming business source material into an executive document and management presentation

Day 3: Copilot in Excel for Business Analysis and Decision Support

• Preparing business data for effective analysis and understanding the importance of structured, reliable information

• Using Copilot capabilities to explore spreadsheet data and support analytical questions

• Identifying trends, patterns, exceptions, relationships, and performance differences in business datasets

• Supporting formula development, calculations, summaries, and interpretation while validating analytical outputs

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• Applying Copilot-assisted analysis to finance, sales, operations, performance, and management reporting scenarios

• Case study: Analyzing business performance data and converting findings into management insights and recommended actions

Day 4: Copilot in Outlook and Teams for Communication and Meetings

• Using Copilot to support email summarization, response preparation, and professional communication in Outlook

• Extracting important information, commitments, questions, and follow-up requirements from communication threads

• Using Copilot capabilities in Teams to support meeting preparation, discussion review, and follow-up activities

• Identifying decisions, responsibilities, unresolved questions, and action items from meeting information

• Converting meetings and communications into structured tasks, summaries, briefings, and stakeholder updates

• Practical scenario: Managing a complex project communication cycle using Copilot-assisted email and meeting workflows

Day 5: Copilot Adoption, Responsible AI and Business Productivity

• Designing repeatable Copilot workflows for recurring individual and team responsibilities

• Identifying high-value opportunities for AI-assisted productivity across different business functions

• Understanding permissions, information access, confidentiality, and organizational data considerations when using Copilot

• Managing risks related to inaccurate content, unsupported conclusions, sensitive information, and excessive reliance on AI

• Measuring Copilot value through time savings, work quality, consistency, adoption, and process improvement indicators

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Course outline

• Capstone exercise: Developing a Microsoft Copilot Business Productivity Plan covering priority use cases, prompts, workflows, controls, and measurable outcomes

Seminar dates

Available seminar dates

Live dates and pricing for Microsoft Copilot for Business Productivity generated from the course details page.

Date	Location	Format	Fee
Dates on request	Venue on request	Classroom	**Contact us**

Live online option	Online delivery is available at €1,850.-.