



Copilot Essentials

Microsoft Copilot

About The Course

This one-day class will teach you how to use Microsoft 365 Copilot to improve your productivity, make communication easier, and work more efficiently across all of Microsoft's 365 apps. You'll learn how to use Copilot as your AI-powered helper to write better, analyze things more quickly, and work together more efficiently. The program fills in the gaps between what you can do with technology and how it can be used in the real world. It gives you the power to automate repetitive tasks, get new ideas, and improve the quality of business outputs. By the end of the course, you'll know how to use Copilot in your daily work to save time and get more done.

Duration: 1 day

Class size: 10 students max

Times: 9:00am - 5:00pm

Price: Refer to our website for current course and package pricing

After the course?

Each student will receive:

- Certificate of completion
- Training manual
- 12 months FREE email support
- FREE class re-sit (if necessary)

Who Should Do This Course?

This course is suitable for people and professionals who want to use AI to work smarter, not harder. It teaches you how to make workflows more efficient, boost productivity, and use Microsoft 365 as a powerful decision-support tool.

Prerequisites

You don't need any prerequisite skills before taking this Copilot Beginners course. We do, however, suggest that you be familiar with the Microsoft 365 apps (Word, Excel, PowerPoint, Outlook, and Teams).

Content

Unit 1: Introduction To Microsoft M365 Copilot

- Overview of Microsoft 365 Copilot
- Differentiate Free Vs Paid Copilot Features
- Get Familiar with Microsoft Copilot Studio
- Explore Copilot & Microsoft Graph Integration
- Understand organizational Access Levels
- Learn About Copilot Security & Data Privacy

Unit 2: AI, Copilot & Productivity

- Understand how AI Supercharges Work
- Compare Copilot Vs ChatGPT Differences
- Explore Real-World Business Examples
- Recognize why Humans Still Matter
- Discover Copilot's Productivity Impact
- Explore Contextual AI Responses by User Profile
- Copilot's Evolution & Model Updates

Unit 3: Security & Responsible Use

- Understand how Copilot Handles your Data
- Learn about Permissions & Role-Based Access
- Ensure Safe Handling of Sensitive Information
- Explore AI Ethics & Responsible Best Practices
- Understand Microsoft's Security and Trust Framework

Unit 4: Copilot Chat Basics

- Navigate the Copilot Chat Interface
- Switch Between Work and Web Modes
- Upload and Reference Files in Chat
- Customize Tone, Style, and Settings
- Use the Prompt Gallery for Ideas and Tasks
- Understand Copilot Memory and Personalization
- Integrate Copilot with Teams, Outlook & M365 Apps
- Manage Contextual Conversations and Sessions
- Evaluate and Refine AI Responses for Accuracy

Unit 5: Effective Prompting Strategies

- Define Clear Output Expectations
- Apply Structured Prompt Controls
- Implement the RACE Framework
- Diagnose and Enhance AI Responses
- Create Consistent Prompt Templates

Unit 6: Refining & Reusing Prompts

- Refine Prompts for Improved Accuracy
- Reuse Effective Prompts Across Apps
- Save Prompt Templates for Quick Use
- Adjust Prompts Using AI Feedback
- Track and Update Prompt Versions
- Prompt Like a Pro: Analyst, Coach, Teacher
- Switch Tone Between Formal and Casual
- Write In Styles: Report, List, or Story

Unit 7: Agents & Notebooks in Copilot Studio

- Explore Agent and Notebook Capabilities
- Create Task-Focused AI Agents
- Use Notebooks for Guided Task Execution
- Link Agents with Notebooks for Workflows
- Refine Outputs; Update Goals and Rules

Unit 8: Copilot Workspaces & Pages

- Get Started with Microsoft 365 Copilot Pages
- Create, Share, and Collaborate in Real Time
- Organize Work with Copilot Workspaces
- Co-Author and Edit AI Content with Teams
- Manage and Reuse Pages across Projects

Unit 9: Copilot for Microsoft Word

- Activate and Access Copilot in Word
- Draft and Rewrite Text Instantly
- Summarize Documents and Key Points
- Use Prompts to Generate or Refine Content
- Translate and Localize Text Easily
- Write, organize, and Transform Content

Unit 10: Copilot for PowerPoint

- Create New Presentations from Text or Files
- Rewrite and Refine Slide Content Instantly
- Add Slides, Images, or Visuals with Prompts
- Insert Slides from other Files Seamlessly
- Summarize Full Presentations in One Click
- Apply your organization's Branding & Themes
- Generate AI Visuals and Layout Suggestions
- Edit Tone, Style, and Structure for Clarity
- Use Copilot on Desktop and Mobile Devices

Unit 11: Copilot for Excel

- Get Started with Copilot in Excel
- Format and clean up your Data Easily
- Import Data from Web or Excel Files
- Generate and Explain Excel Formulas
- Highlight, Sort, and Filter Key Data
- Get Insights from Numbers and Text
- Create Charts and Pivot Tables Quickly
- Build Lookups and Summarize Results

Unit 12: Copilot for Outlook

- Get Started with Copilot in Outlook
- Craft Clear and Impactful Emails
- Draft Email Messages Instantly
- Make Drafts Sound Natural and Personal
- Summarize Long Email Threads Quickly
- Prioritize and organize your Inbox
- Receive Real-Time Email Coaching
- Schedule Effective Meetings with Ease

Unit 13: Copilot for Microsoft Teams

- Get Started with Copilot Chat in Teams
- Use Copilot in Teams Meetings
- Rewrite and Refine Teams Messages
- Catch Up on Chats and Channel Updates
- Add Copilot Agents to Group Chats
- Use Copilot as a Meeting Facilitator
- Get Started with Channel Agent
- Allow Copilot without Meeting Recordings
- Generate Multi-Meeting Audio Recaps

Unit 14: Copilot for Collaboration & Brainstorming

- Collaborate in Real Time with Copilot Loop
- Brainstorm Ideas Visually in Whiteboard
- Summarize Discussions and Shared Notes
- Get Learning insights and Goals in Viva
- Co-Create and Refine Plans with your Team

Unit 15: Copilot for Productivity & Workflow

- Generate Surveys and Analyse Responses
- Draft SharePoint Pages with Copilot Help
- Summarize and organize Site Content
- Create Task Lists and Progress Updates
- Automate Planning Across M365 Tools

Unit 16: Copilot in Microsoft Designer

- Get Started with Copilot in Designer
- Generate Designs from Text Prompts
- Apply Brand Colours, Fonts, and Layouts
- Edit Images and Refine Visual Tone
- Create Social Posts, Flyers, and Banners
- Use AI Suggestions to Enhance Creativity
- Export Designs for Web and Print Use

Unit 17: Ethical Use and Best Practices with Copilot

- Understand AI Ethics and Accountability
- Use Copilot Responsibly and Transparently
- Protect Data Privacy and Confidentiality
- Avoid Bias in AI-Generated Content
- Review and Verify all Copilot Outputs
- Follow organizational Compliance Policies
- Promote Human Oversight in All Workflows

Looking for course dates?

To view a full list of course dates, please visit our website at www.dynamicwebtraining.com.au

Alternatively please contact our office on **1300 888 724**