Cloud Contraptions
TRAINING & CONSULTING

To discuss this course and customizations:
Call: +1 434-509-6890 or Email: sales@cloudcontraptions.com

Microsoft 365 Copilot for Everyday Work

Class Duration

7 hours of live training delivered over 1-2 days to accommodate your scheduling needs.

Student Prerequisites

- Comfort with everyday office software: documents, spreadsheets, email, and a web browser
- Regular use of Microsoft 365 apps such as Word, Excel, Outlook, and Teams
- No technical background or programming experience required

Target Audience

Staff in every role whose organization has licensed Microsoft 365 Copilot, including operations, HR, finance, marketing, sales, support, and management. It suits a Copilot rollout where people have licenses but don't use Copilot every day yet. Staff who use more than one AI assistant can start with *AI Fundamentals for All Staff*. To build agents for a team, continue to *Building Agents with Microsoft 365 Copilot*.

Description

This course teaches staff to use Microsoft 365 Copilot in their daily work, with no programming. Participants learn how Copilot uses their work data and how to write prompts that get useful results. They use Copilot Chat and Copilot in Word, Excel, PowerPoint, Outlook, and Teams on everyday tasks. They also use the Researcher and Analyst agents and organize ongoing work in Copilot Notebooks. Each section includes checking Copilot's output and protecting confidential information.

Learning Outcomes

- Explain how Microsoft 365 Copilot uses your work data and permissions.
- Choose between work and web grounding for a question.
- Write prompts with a clear goal, context, sources, and expectations.

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- Find and summarize files, email, and meetings with Copilot Chat.
- Draft, rewrite, and summarize documents in Word.
- Analyze data, write formulas, and build charts in Excel.
- Create and refine presentations in PowerPoint.
- Triage email, draft replies, and prepare for meetings in Outlook.
- Get meeting recaps, action items, and chat summaries in Teams.
- Use the Researcher and Analyst agents for multi-step research and analysis.
- Organize ongoing work with Copilot Notebooks and Pages.
- Check Copilot’s answers against their sources.
- Protect confidential information and follow your organization’s AI policy.

Training Materials

Comprehensive courseware is distributed online at the start of class.

Software Requirements

Students need a Microsoft 365 account with a Microsoft 365 Copilot license, access to the Microsoft 365 Copilot app, Word, Excel, PowerPoint, Outlook, and Teams (web or desktop), and a web browser. No installation required.

Training Topics

How Microsoft 365 Copilot Works

- Copilot and your work data
- Permissions decide what Copilot sees
- Work and web grounding
- Licensed Copilot versus Copilot Chat
- Where Copilot appears
- What Copilot does well

Prompting Copilot

- Goal, context, sources, and expectations
- Referencing files, people, and meetings
- Refining through follow-up
- Saved and scheduled prompts
- The Prompt Gallery

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- Personalization and memory

Copilot Chat and Search

- Finding files and messages
- Questions across your work
- Catching up after time away
- Copilot Search
- Uploading files to chat
- Citations and source links

Copilot in Word

- Drafting from notes and files
- Rewriting for tone and length
- Summarizing long documents
- Questions about a document
- Agent Mode for multi-step edits
- Reviewing changes before keeping them

Copilot in Excel

- Questions about a table
- Formula suggestions and explanations
- The COPILOT function
- Charts and PivotTables
- Cleaning up data
- Checking calculated figures

Copilot in PowerPoint

- Creating a deck from a document
- Using organization templates
- Adding and rewriting slides
- Speaker notes
- Summarizing a presentation

Copilot in Outlook

- Summarizing email threads
- Drafting replies
- Coaching on tone and clarity
- Prioritizing your inbox

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- Preparing for meetings
- Scheduling with Copilot

Copilot in Teams

- Meeting recaps and action items
- Asking Copilot during a meeting
- Transcript settings for meetings
- Catching up on chats and channels
- Drafting messages

Researcher and Analyst Agents

- When to use a reasoning agent
- Multi-step research with Researcher
- Data analysis with Analyst
- Reviewing sources and steps
- Finding and using shared agents

Notebooks and Pages

- Copilot Notebooks for ongoing projects
- Adding files and notes
- Copilot Pages for shared drafts
- Editing a page together

Checking Output and Protecting Data

- Checking answers against sources
- Spotting made-up details
- Oversharing and file permissions
- Sensitivity labels
- Enterprise data protection
- Your organization’s AI policy

Building Copilot Habits

- Copilot tasks in your week
- Team prompt libraries
- Tracking what works
- Next steps with agents

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