

Working Smarter with Microsoft 365

OVERVIEW

The **Working Smarter with Microsoft 365** course focuses on improving productivity and helping users manage their daily work more efficiently using Microsoft 365 tools.

Designed for users who are already familiar with the basics of Microsoft 365, this course builds on foundational knowledge to introduce practical techniques for managing email, organising tasks, structuring files, and streamlining workflows.

Participants will learn how key applications - including Outlook, Planner, OneDrive, Teams, Word, Excel and OneNote - can be used together to reduce duplication, improve visibility of work, and support more effective ways of working. Emphasis is placed on developing habits and workflows that are consistent and aligned with modern workplace practices.

LEARNING OUTCOMES

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

- Manage email and calendar more effectively using Microsoft Outlook
- Plan, organise, and track work using Microsoft Planner
- Structure and manage files efficiently using OneDrive
- Work seamlessly across Microsoft 365 applications, including Word and Excel
- Share and manage information in a way that reduces duplication and confusion
- Use Microsoft Teams for day-to-day communication and task visibility
- Capture and organise information using OneNote
- Apply practical techniques to reduce workload overwhelm and improve efficiency
- Build a simple, repeatable personal workflow using Microsoft 365 tools

These outcomes support improved productivity, clearer visibility of work, and more effective use of Microsoft 365 across daily tasks.

DURATION & DELIVERY

The duration of this course is typically **3–4 hours or 1 day**, depending on the level of depth and practical exercises included.

This course can be delivered in a range of formats to suit your team:

- **Onsite training** - delivered at your workplace
- **Live online training** - delivered virtually in real time
- **Hybrid delivery** - a combination of onsite and online participants for teams working across multiple locations

All training is delivered by experienced Microsoft 365 specialists with a focus on practical, real-world application.

PREREQUISITES

Participants should have a basic understanding of Microsoft 365 applications or equivalent experience, including familiarity with email, file management, and general computer use.

COURSEWARE

Learning materials are available for purchase at the time of booking. These may include training materials, reference guides or supporting resources, depending on the course.

While Microsoft 365 continues to evolve with new features and updates, the key concepts and workflows covered in this course remain highly relevant across all current versions. Where updates or enhancements exist, trainers will incorporate these into the session to ensure participants receive the most current, practical, and applicable guidance.

MICROSOFT 365: MODERN WORKPLACE TRAINING PATHWAY

Our Microsoft 365 Modern Workplace training is designed to help individuals and teams work more efficiently, collaborate effectively, and get better value from the tools they use every day.

All courses can be delivered as outlined below, or we can customise a training program to ensure your team completes the exact topics they need in the timeframe that best suits your organisation.

MODERN WORKPLACE COURSES

- **Getting Started in Microsoft 365** – Build confidence using the core Microsoft 365 applications, including Outlook, OneDrive, Word, Excel, OneNote, and Teams. Ideal for new users or those requiring a strong foundation.
- **Working Smarter with Microsoft 365** – Improve personal productivity by managing email, organising work, structuring files, and building efficient daily workflows across Microsoft 365 applications.
- **Collaborating Effectively in Microsoft 365** – Transform how teams work together using Microsoft Teams, shared files, and real-time collaboration tools, with a focus on reducing reliance on email.
- **Managing Files & Information in Microsoft 365** – Learn how to organise, store, and manage documents across OneDrive and SharePoint to reduce duplication and improve accessibility.
- **Modern Work Habits with Microsoft 365** – Develop better ways of working by improving communication practices, managing meetings effectively, and using the right tools for the right tasks.
- **Managing Tasks & Work in Microsoft 365** – Use Microsoft Planner as a central tool to assign, track, and manage work across teams, improving accountability and visibility.
- **Using Copilot in Microsoft 365** – Leverage AI capabilities to enhance productivity across Microsoft 365 applications, including drafting content, summarising information, and analysing data.

COURSE DETAIL

Managing Email & Calendar Effectively (Outlook)

- Reviewing common email challenges and inefficiencies
- Organising the inbox using folders, categories, and search
- Managing incoming email and prioritising responses
- Using flags and reminders to track work
- Managing calendar commitments and availability
- Scheduling meetings efficiently
- Reducing unnecessary email traffic

Managing Tasks & Work Using Microsoft Planner

- Understanding task management in Microsoft 365
- Introduction to Microsoft Planner and its role in team productivity
- Creating plans, buckets, and tasks
- Assigning tasks and setting priorities
- Tracking progress and managing due dates
- Using Planner within Microsoft Teams
- Updating and communicating task status
- Understanding visibility and accountability within teams

Working with Files Across Microsoft 365 (OneDrive + Office Apps)

- Structuring files for easy access and clarity
- Applying consistent naming conventions
- Saving and accessing files across applications
- Working between Word, Excel, and OneDrive
- Understanding file locations and avoiding duplication
- Sharing files instead of sending attachments

Working with Others Day-to-Day (Microsoft Teams)

- Using Teams for communication instead of email where appropriate
- Understanding chats, channels, and conversations
- Sharing files within Teams
- Linking conversations, files, and work tasks
- Supporting team visibility and communication

Capturing & Managing Information (OneNote)

- Using OneNote to capture ideas, notes, and information
- Structuring notebooks, sections, and pages
- Recording meeting notes
- Linking notes to tasks and work items
- Replacing informal or fragmented note-taking methods

Building a Personal Productivity Workflow

- Understanding how Microsoft 365 apps work together in daily tasks
- A “day in the life” workflow:
Email → task (Planner) → document
→ collaboration → update
- Reducing interruptions and managing workload
- Applying simple, repeatable productivity habits
- Improving consistency in how work is managed