

Using Copilot in Microsoft 365

OVERVIEW

The **Using Copilot in Microsoft 365** course introduces participants to using AI to support everyday work across Microsoft 365 applications.

Designed for users who are familiar with core Microsoft 365 tools, this course explores how Copilot can assist with tasks such as writing, summarising, analysing information, and managing communication. Participants will learn how Copilot works within applications including Outlook, Teams, Word and Excel, and how it can be used to improve efficiency and reduce manual effort.

Emphasis is placed on practical, real-world use of Copilot to support daily work, while developing an understanding of how to use AI effectively and responsibly.

LEARNING OUTCOMES

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

- Understand the role of Copilot within Microsoft 365
- Identify where Copilot can support everyday work tasks
- Use Copilot within applications such as Outlook, Teams, Word and Excel
- Generate and refine content using Copilot
- Summarise emails, meetings and documents
- Use Copilot to analyse and work with information
- Apply simple prompting techniques to improve results
- Use Copilot to support communication and collaboration
- Understand considerations when using AI in a work environment

These outcomes support improved productivity, more efficient handling of information and confident use of AI tools within Microsoft 365.

PREREQUISITES

Participants should have a basic understanding of Microsoft 365 applications and experience using tools such as Outlook, Teams, Word and Excel in a work environment.

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.

As Copilot and AI capabilities continue to evolve, trainers incorporate current features and real examples to ensure participants receive practical and relevant guidance aligned with the latest Microsoft 365 functionality.

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.

MICROSOFT COPILOT TRAINING PATHWAY

Our Microsoft Copilot training is designed to help individuals and teams use AI effectively within their daily work.

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.

COPILOT COURSES

- **Using Copilot in Microsoft 365** – Learn how Copilot supports everyday tasks across applications such as Outlook, Teams, Word and Excel, improving efficiency and reducing manual effort.
- **Prompting with Copilot (and Beyond)** – Develop practical prompting skills to generate accurate, relevant and high-quality outputs across Microsoft Copilot and other AI tools.
- **Working Smarter with Copilot** – Apply Copilot to real work scenarios, improving productivity through writing, summarising, analysis and workflow support.
- **Working Smarter with AI & Automation** – Combine Copilot and automation tools to streamline workflows, improve efficiency and reduce manual processes across Microsoft 365.

COURSE DETAIL

Introduction to Copilot in Microsoft 365

- What is Copilot and how it works within Microsoft 365
- Where Copilot is available across applications
- Understanding how Copilot uses organisational data
- Identifying suitable use cases for AI

Using Copilot in Outlook

- Drafting and refining email responses
- Summarising email threads
- Managing communication more efficiently
- Improving clarity and tone in messages

Using Copilot in Microsoft Teams

- Summarising meetings and conversations
- Identifying key points and actions
- Supporting meeting preparation and follow-up
- Reducing time spent reviewing conversations

Using Copilot in Word

- Generating and structuring documents
- Editing and refining content
- Creating summaries and key points
- Improving clarity and consistency

Using Copilot in Excel

- Analysing data and identifying trends
- Working with summaries and insights
- Supporting data-driven decisions
- Simplifying data interpretation

Prompting & Improving Results

- Writing effective prompts
- Refining and iterating responses
- Understanding how inputs affect outputs
- Avoiding common prompting issues

Using Copilot Responsibly

- Understanding limitations of AI
- Reviewing and validating outputs
- Protecting sensitive information
- Applying appropriate use in a work environment