MS-MS4004: EMPOWER YOUR WORKFORCE WITH MICROSOFT 365 COPILOT USE CASES

DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
1 Day	Beginner	Microsoft 365	Instructor-led	NA

INTRODUCTION

This one-day course is composed of two parts - Getting started with Microsoft 365 Copilot and Empower your workforce with Microsoft 365 Copilot Use Cases. The first part of the course introduces you to Copilot for Microsoft 365, examines how you can use Copilot throughout the various Microsoft 365 apps, explores best practices for using Copilot and building effective prompts, and examines how you can extend Copilot. The second part of this training content is really the heart of this course. Students perform a series of hands-on exercises involving seven Use Cases - Executives, Sales, Marketing, Finance, IT, HR, and Operations. These exercises focus on using Copilot in various Microsoft 365 apps (such as Word, PowerPoint, Outlook, and so on) to complete a series of common business-related tasks pertaining to each Use Case. To complete the Use Case exercises in this course, each student must have access to a Microsoft 365 subscription (BYOS) in which they're licensed to use Microsoft 365 Copilot. Each student must also have a Microsoft OneDrive account, since Copilot requires OneDrive to complete the file sharing tasks used throughout the Use Case exercises.

* Delegates must have an active license for Copilot M365 enabled.

AUDIENCE PROFILE

This course is targeted towards business users who want to enhance their Microsoft 365 Copilot skills to solve business-related use case scenarios.

PREREQUISITES

Before attending this course, delegates must have:

–   Students should have basic functional experience with Microsoft 365 services.
–   Students must have a proficient understanding of general IT practices.
–   Students must have access to a Microsoft 365 subscription (BYOS) in which they're licensed to use Copilot for Microsoft 365.
–   Students must also have a Microsoft OneDrive account since Copilot requires OneDrive to complete the file-sharing tasks used throughout the Use Case exercises.

COURSE OBJECTIVES

After completing this course, delegates will:

–   Learn how to use Copilot in different Microsoft 365 apps like Word, PowerPoint, and Outlook.
–   Understand best practices for using Copilot and building effective prompts.
–   Perform exercises involving seven use cases-Executives, Sales, Marketing, Finance, IT,
–   HR, and Operations-to complete common business tasks.
–   Explore how to extend Copilot with plugins and Graph connectors.
–   Implement strategies to enhance productivity using Copilot tools.
–   Learn best practices for maintaining security and compliance.
–   Discover methods to drive adoption among users

COURSE CONTENT

Module 1: Introduction to Microsoft 365 Copilot
This module explores the intricacies of Microsoft 365 Copilot, offering insights into its functionality and Microsoft's dedication to implementing AI responsibly and ethically.

Lessons

–   Introduction.
–   What is Microsoft 365 Copilot?
–   Explore how Microsoft 365 Copilot works.
–   Explore the core components of Microsoft 365 Copilot.
–   Examine how Microsoft is committed to responsible AI.
–   Knowledge check.
–   Summary

By the end of this module, you'll be able to:

- Describe the purpose and functionalities of Copilot for Microsoft 365.
- Outline the working principles behind Copilot for Microsoft 365.
- Identify the core components integral to Copilot for Microsoft 365.
- Articulate Microsoft's dedication to responsible AI practices.

Module 2: Explore the possibilities with Microsoft 365 Copilot

This module explores the practical usage of Microsoft 365 Copilot across Microsoft 365 applications, demonstrating how to streamline workflow and increase productivity.

Lessons

- Introduction.
- Compose and summarize documents with Microsoft 365 Copilot in Word.
- Summarize and draft emails with Microsoft 365 Copilot in Outlook.
- Design captivating presentations with Microsoft 365 Copilot in PowerPoint.
- Analyse and transform data with Microsoft 365 Copilot in Excel.
- Elevate productivity with Microsoft 365 Copilot in Teams.
- Empower your workflow with Microsoft 365 Business Chat.
- Knowledge check.
- Summary.

By the end of this module, you'll be able to:

- Identify and apply the key features of Microsoft 365 Copilot in each Microsoft 365 application to enhance your productivity and workflow.
- Understand how Microsoft 365 Copilot integrates with Teams to provide a centralized hub for all your work-related information.
- Utilize the AI capabilities of Microsoft 365 Copilot to transform your approach to tasks in Microsoft 365, making them more intuitive and efficient.

Module 3: Optimize and extend Microsoft 365 Copilot

This module explores comprehensive best practices for Microsoft 365 Copilot and key extension methods, ensuring you harness the full potential and versatility of Copilot's functionality.

Lessons

- Introduction.
- Examine the art and science of working with AI.
- Review best practices for using Microsoft 365 Copilot.
- Examine how to build an effective prompt.
- Review prompting best practices.
- Extend Microsoft 365 Copilot.
- Knowledge check.
- Summary.

By the end of this module, you'll be able to:

- Describe the best practices for using Microsoft 365 Copilot.
- Understand how to effectively prompt Microsoft 365 Copilot.
- Understand Microsoft 365 Copilot extensibility options.

Module 4: Empower your workforce with Microsoft 365 Copilot: Executives Use Case

This module enables students to perform a series of Use Case exercises that build their Microsoft 365 Copilot skills in Executive-related business scenarios.

Lessons

- Introduction.
- Exercise: Synthesize your communication insights using Business Chat.
- Exercise: Summarize chat and channel threads using Microsoft 365 Copilot in Teams.
- Exercise: Create a speech using Microsoft 365 Copilot in Word.
- Exercise: Create a slide presentation using Microsoft 365 Copilot in PowerPoint.
- Knowledge check.
- Summary.

By the end of this module, you'll be able to:

- Use Business Chat in Teams to synthesize your emails and chats from the past week involving a specific topic.
- Use Microsoft 365 Copilot in Teams to generate a list of key points made by participants involved in chats and emails involving a specific topic over the past 30 days.
- Use Microsoft 365 Copilot in Word to create a speech you plan to deliver to company shareholders based on your company's annual income statement.
- Use Microsoft 365 Copilot in PowerPoint to create a PowerPoint presentation for your speech to company shareholders regarding your annual income statement.

Module 5: Empower your workforce with Microsoft 365 Copilot: Sales use case

This module enables students to perform a series of Use Case exercises that build their Microsoft 365 Copilot skills in Sales-related business scenarios.

Lessons

- Introduction.
- Exercise: Create a market research report using Microsoft 365 Copilot in Loop.
- Exercise: Create a sales presentation using Microsoft 365 Copilot in PowerPoint.
- Exercise: Prepare your meeting notes from emails using Business Chat.
- Exercise: Compare supplier agreements using Microsoft 365 Copilot in Word.
- Knowledge check.
- Summary.

By the end of this module, you'll be able to:

- Use Microsoft 365 Copilot in Loop to create and update a market research report for a potential new sales market.
- Use Microsoft 365 Copilot in PowerPoint to create and customize a sales presentation based on a market trend report for a new beverage product.
- Use Business Chat in Teams to summarize your emails, meetings, and chats for a specific project over the past 30 days, and then generate a list of actions items, and action items involving a specific - person or topic.
- Use Microsoft 365 Copilot in Word to compare three supplier agreements, identify the differences, and provide recommended actions.

Module 6: Empower your workforce with Microsoft 365 Copilot: IT Use Case

This module enables students to perform a series of Use Case exercises that build their Microsoft 365 Copilot skills in IT-related business scenarios.

Lessons

- Introduction.
- Exercise: Create a project plan using Business Chat.
- Exercise: Create a project plan presentation using Microsoft 365 Copilot in PowerPoint.
- Exercise: Update a technical report using Microsoft 365 Copilot in Word.
- Exercise: Draft an email based on a technical report

using Microsoft 365 Copilot in Outlook.
− Knowledge check.
− Summary.
In this module, you'll practice how to:
− Use Business Chat to summarize the information in a product spec document for a network security product and create a project plan to implement the product.
− Use Microsoft 365 Copilot in PowerPoint to create and customize a business presentation based on the product plan that you created for the new network security product.
− Use Microsoft 365 Copilot in Word to modify a technical implementation report for a customer who is planning to install your new network security product.
− Use Microsoft 365 Copilot in Outlook to draft an email that provides highlights from the technical implementation report that you created for the customer who is installing your new network security product.

Module 7: Empower your workforce with Microsoft 365 Copilot: Marketing Use Case
This module enables students to perform a series of Use Case exercises that build their Microsoft 365 Copilot skills in Marketing-related business scenarios.
Lessons
− Introduction.
− Exercise: Conduct market analysis using Microsoft Copilot.
− Exercise: Brainstorm marketing campaign ideas using Copilot in Loop.
− Exercise: Consolidate multiple marketing reports using Copilot in Word.
− Exercise: Analyse a market trend spreadsheet using Copilot in Excel.
− Knowledge check.
− Summary.
In this module, you'll practice how to:
− Use Business Chat to analyse market trends in the U.S. toy market, provide sales forecasts, and identify new sales opportunities.
− Use Microsoft 365 Copilot in Loop to generate marketing campaign ideas for your new product line of outdoor toys.
− Use Microsoft 365 Copilot in Word to consolidate three

product marketing reports into a single Market Analysis report and then make further customizations.
− Use Microsoft 365 Copilot in Excel to analyse the market trends that are captured in a spreadsheet for a new beverage product.

Module 8: Empower your workforce with Microsoft 365 Copilot: Finance Use Case
This module enables students to perform a series of Use Case exercises that build their Microsoft 365 Copilot skills in Finance-related business scenarios.
Lessons
− Introduction
− Exercise: Draft an email to your insurance company using Microsoft 365 Copilot in Outlook
− Exercise: Analyse a financial spreadsheet using Microsoft 365 Copilot in Excel
− Exercise: Create a financial analysis report using Microsoft 365 Copilot in Word
− Exercise: Summarize financial results using Microsoft 365 Copilot in Word
− Knowledge check
− Summary
In this module, you'll practice how to:
− Use Microsoft 365 Copilot in Outlook to draft an email to your insurance company that requests a meeting to discuss the increases in your company's medical insurance premiums.
− Use Microsoft 365 Copilot in Excel to analyse a spreadsheet containing projected revenue and user engagements for your company's Q1 marketing campaigns, then add new calculations and charts to visualize the data.
− Use Microsoft 365 Copilot in Word to create a marketing campaign report based on the financial results from your company's Q1 marketing campaigns.
− Use Microsoft 365 Copilot in Word to summarize your company's financial statement results for the past five years, including trends, growth patterns, profitability analysis, and areas of concern.

Module 9: Empower your workforce with Microsoft 365 Copilot: HR Use Case
This module enables students to perform a series of Use Case

exercises that build their Microsoft 365 Copilot skills in HR-related business scenarios.
Lessons
− Introduction.
− Exercise: Create a job description using Microsoft 365 Copilot in Word.
− Exercise: Analyse resumes and make a recommendation using Microsoft 365 Copilot in Word.
− Exercise: Create interview questions using Microsoft 365 Copilot in Loop.
− Exercise: Compose an email offer letter using Microsoft 365 Copilot in Outlook.
− Knowledge check.
− Summary.
In this module, you'll practice how to:
− Use Microsoft 365 Copilot in Word to create a job description based on an HR job responsibility document.
− Use Microsoft 365 Copilot to analyse multiple resumes for a job role, create a report comparing the strengths and weaknesses of each candidate, and make a final recommendation.
− Use Microsoft 365 Copilot in Loop to create a set of interview questions for a new job role.
− Use Microsoft 365 Copilot in Word to compose an email offer letter to a candidate for a new job role.

Module 10: Empower your workforce with Microsoft 365 Copilot: Operations Use Case
This module enables students to perform a series of Use Case exercises that build their Microsoft 365 Copilot skills in Operations-related business scenarios.
Lessons
− Introduction.
− Exercise: Brainstorm project plan ideas using Microsoft 365 Copilot in Whiteboard
− Exercise: Draft a meeting reply using Microsoft 365 Copilot in Outlook
− Exercise: Compare reporting results using Microsoft 365 Copilot in Word
− Exercise: Create a presentation comparing heating systems using Microsoft 365 Copilot in PowerPoint
− Knowledge check.
In this module, you'll practice how to:
− Use Microsoft 365 Copilot in Whiteboard to brainstorm project plan ideas for installing a new network security

product and then categorize the ideas.
- Use Microsoft 365 Copilot in Outlook to locate an actual email thread, summarize the thread, and then generate a reply.
- Use Microsoft 365 Copilot in Word to locate information on troubleshooting current production equipment and identify how to reset the processor.
- Use Microsoft 365 Copilot in Loop to create a set of questions for a customer discovery session with the consulting firm who will be installing a VPN in your corporate network.

Module 11: Empower your workforce with Microsoft 365 Copilot: Challenge Use Case

This module challenges learners by having them use Microsoft 365 Copilot to address various business scenarios without the aid of step-by-step instructions.
Lessons
- Introduction.
- Exercise: Create interview questions using different Copilots.
- Exercise: Enhance your social media marketing efforts.
- Exercise: Enhance your project management collaboration skills.
- Exercise: Enhance content creation and collaboration skills.
- Knowledge check.
- Summary
In this module, you'll practice how to:

- Use Microsoft 365 Copilot in Loop, Word, and Bing to create HR interview questions for a new role, and then compare the results generated by each Copilot.
- Use Microsoft 365 Copilot in Word and Excel to enhance a company's social media marketing presence.
- Use Microsoft 365 Copilot in Whiteboard and Word to create project planning documentation and visualize project timelines, milestones, and dependencies.
- Use Microsoft 365 Copilot in Word to create a marketing report and brainstorm marketing campaign ideas, and Copilot in PowerPoint to create a marketing presentation.

ASSOCIATED CERTIFICATIONS & EXAM

There is no Associated Certification & Exam for this course.