Copilot for Microsoft 365: Empower your workforce with Copilot for Microsoft 365: Finance Use Case

Course Duration: 4 Hours (0.5 Day)

Overview

Empower Your Workforce with Copilot for Microsoft 365: Finance Use Case Enhance your team's productivity and efficiency with our "Copilot for Microsoft 365: Finance Use Case" course. This comprehensive program teaches you how to leverage Copilot's AI capabilities to streamline financial tasks. By engaging in Interactive exercises and real-world finance scenarios, participants will gain hands-on proficiency in Drafting emails, analyzing data, creating reports, and Summarizing results using Microsoft 365 applications like Word, Excel, Outlook, and Teams. Learning Objectives: - Understand Copilot's core functionalities. - Explore key features in various Microsoft 365 apps. - Optimize productivity with best practices. - Apply Copilot in finance-specific tasks. Practical Applications: - Effortlessly draft professional emails. - Seamlessly analyze and transform financial data. - Generate and summarize comprehensive financial reports. Empower your workforce today with practical Copilot skills tailored for the finance sector!

Audience Profile

The "Copilot for Microsoft 365: Finance Use Case" course empowers finance professionals with advanced Microsoft 365 skills to enhance productivity through interactive use case exercises.

- Financial Analysts
- Accountants
- Finance Managers
- Business Analysts
- Data Analysts
- Financial Controllers
- Investment Analysts
- CFOs (Chief Financial Officers)
- Financial Planners
- Risk Managers
- Auditors
- Budget Analysts
- Treasury Analysts
- Financial Consultants
- Finance Students and Graduates
- IT Professionals supporting finance teams

- Corporate Trainers in Finance
- Finance Operations Managers

Course Syllabus

Module 1 - Introduction to Copilot for Microsoft 365

- 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.
- Examine how Microsoft is committed to responsible AI

Module 2 - Explore the possibilities with Copilot for Microsoft 365

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

Demo/Exercises

- Summarize documents with Co-pilot word
- Summarize and draft email with Co-pilot in Outlook
- Create presentation with Co-Pilot in PowerPoint
- Analyze and transform data with Copilot in Excel
- Elevate productivity with Copilot in Teams

Module 3 - Optimize and extend Copilot for Microsoft 365

- Describe the best practices for using Copilot for Microsoft 365.
- Understand how to effectively prompt Copilot for Microsoft 365.
- Review prompting best practices.
- Describe the capabilities of plugins within Copilot for Microsoft 365.
- Understand Microsoft Graph connectors and how they can be used to integrate data
- from external sources into Copilot for Microsoft 365.

Module 4- Copilot for Microsoft 365: Finance Use Case

- Leverage Copilot in Outlook to Draft an Email to Your Insurance Company with Ease
- Seamlessly Analyze Spreadsheet Data with Copilot in Excel

- Harness Copilot in Word to Generate Dynamic Financial Analysis Reports
- Summarize Results with Precision using Copilot in Word
- Harness Summarize Results with Precision using Copilot in Word

Demo/ Exercises

- Draft an email to your insurance company using Copilot in Outlook
- Analyze a financial spreadsheet using Copilot in Excel
- Create a financial analysis report using Copilot in Word
- Summarize financial results using Copilot in Word
- Summarize chat and channel threads using Copilot in Teams

Module 5 - Summarize with Microsoft Copilot for Microsoft 365

- Identify the key elements of an effective prompt and apply them to your own prompts.
- Prompt Copilot to summarize or extract key information in Word documents, Excel
- tables, and PowerPoint presentations.
- Summarize chats and meetings to look for key action items with Copilot in Teams.

Demo/Exercises

- Simplify and extract key information with Copilot in Word
- Identify key information and summarize with Copilot in PowerPoint
- Spot trends and visualize data with Copilot in Excel
- Highlight key decisions and actions from Teams meetings

Module 6 - Create and draft with Microsoft Copilot for Microsoft 365

- Identify the key elements of an effective prompt and apply them to your own
- prompts.
- Use Copilot to create new agendas, to-do lists, project plans, and more from Word,
- Excel, and OneNote.
- Ask Copilot in Outlook to draft new emails, compose replies, and plan meetings.
- Prompt Microsoft Copilot for Microsoft 365 to generate new ideas, new content,
- and FAQs from existing files.

Demo/Exercises

- Draft cover letters, marketing plans, and outlines with Microsoft Copilot in Word
- Build new slides, agendas, and to-do lists with Microsoft Copilot in PowerPoint
- Draft emails, replies, and meeting agendas with Microsoft Copilot in Outlook

Module No. 7: Edit and transform content with Microsoft Copilot for Microsoft 365

- Identify the key elements of an effective prompt and apply them to your own
- prompts.
- Organize outlines and content in Word documents with Copilot.
- Add images, slides, and organize your presentation with Copilot in PowerPoint.
- Format, sort, filter, and highlight data with Copilot in Excel.
- Rewrite messages with Coaching by Copilot in New Outlook

Demo/Exercises

- Write, organize, and transform content using Microsoft Copilot in Word
- Add images, slides, and organize your presentation using Microsoft Copilot in
- PowerPoint
- Format, sort, filter, and highlight data using Microsoft Copilot in Excel
- Rewrite messages and replies for tone using Microsoft Copilot in Outlook