

# **Copilot for Microsoft 365: Empower your Workforce with Copilot for Microsoft 365: Sales Use Case**

**Course Duration: 4 Hours (1 Day)**

## **Overview**

Unlock your sales potential with Koenig Solutions' "Copilot for Microsoft 365: Sales Use Case" course. This program empowers your workforce by teaching practical applications of Copilot in real-world business scenarios. You will learn to leverage Copilot's AI capabilities for summarizing documents, drafting emails, and creating presentations. Dive into modules that cover everything from Market research and Sales presentations to efficient meeting notes compilation and supplier agreement comparisons. The course ensures you understand best practices and effective prompting techniques while extending Copilot's functionalities through Plugins and Microsoft Graph connectors. Equip yourself with engaging hands-on exercises to master these essential skills.

## **Audience Profile**

The "Copilot for Microsoft 365: Sales Use Case" course is designed to enhance sales professionals' proficiency with Microsoft 365, focusing on productivity, collaboration, and AI-driven insights.

- Sales Managers
- Sales Representatives
- Business Development Executives
- Marketing Professionals
- Sales Operations Analysts
- Account Managers
- Sales Consultants
- Customer Relationship Managers (CRM)
- Product Managers
- IT Professionals supporting sales teams
- Collaboration Specialists
- Project Managers
- Sales Trainers and Coaches
- Data Analysts in Sales
- Pre-Sales Engineers
- Sales Enablement Specialists
- Sales Support Coordinators

## **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.

### **Demos/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: Sales use case**

- Utilize Copilot within Loop to generate a comprehensive market research report
- Craft a dynamic sales presentation with the assistance of Copilot in PowerPoint
- Efficiently compile meeting notes from emails using Microsoft Copilot.
- Streamline the comparison of supplier agreements with Copilot in Microsoft Word
- Effortlessly Elevate Collaboration: Harness Copilot in Teams to Summarize Chat and Channel Threads

### **Demos/Exercises**

- Create a market research report using Copilot in Loop
- Create a sales presentation using Copilot in PowerPoint
- Prepare your meeting notes from emails using Microsoft Copilot
- Compare supplier agreements 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.

### **Demos/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