

Microsoft 365 Copilot for Finance

Course Overview

The Microsoft 365 Copilot for Financiers course is tailored for finance professionals, CFOs, CEOs, and anyone dealing with financial data. This course teaches how to simplify communication and enhance content creation using Microsoft 365 Copilot, focusing on productivity and efficiency in financial tasks. No prior AI experience is required.

Pre-requisites

Knowledge of the main Microsoft 365 applications.

Course Content

Module 1: What is Microsoft 365 Copilot?

- - Microsoft 365 Copilot overview: The copilot system
- - Employee aptitude and the AI work paradigm
- - The advantages of AI for every job
- - Notices and natural language.
- - Where does Copilot apply?

Module 2: Copilot in Outlook

- - Prioritizing the most important emails with Copilot
- - How to resume communication threads in long emails
- - Reply to emails with data from Excel or other sources.
- - Change of styles and creation of summaries for writing the email.
- - Optimizing message content with Copilot

Module 3: Copilot in Word

- - Creation of documents based on other information.
- - Generation of drafts with the main data referring to the document to be created or edited
- - Customization of documents according to models or styles with natural language.
- - Create summaries about documents and use suggestions.
- - Automatic creation of questions and answers about documents.

Module 4: Copilot in Excel

- - Data analysis and trending with AI
- - Delve into trends
- - How to use natural language in Excel to generate data

- - Using copilot to create highlighted charts based on natural language queries
- - Creation of new models
- - Making quick conclusions about data

Module 5: Copilot in PowerPoint

- - Move an email or Word document to PowerPoint
- - Creating documents from PowerPoint
- - Creating presentations from a base file
- - Slide animation
- - Speaker Note Generation
- - Using AI with Dall-e to optimize images and slide graphics

Module 6: Copilot in Microsoft Teams

- - How to increase productivity in Teams with AI
- - Managing meeting resumes.
- - How to analyze unresolved questions and key takeaways from the meeting
- - Creation of new proposals and integrated management with other applications.
- - How to track meetings and summaries of actions
- - The management of tasks established in meetings.
- - How to improve understanding of the topics covered by clarifying issues
- - How to save time managing meetings with Teams Copilot

Module 7: The co-pilot in OneNote

- - The management of resumes of notes.
- - How to identify unanswered questions in notes and group them in a centralized place
- - Creation of work plans.
- - List creation
- - Creation of tasks based on notes made
- - Generating creative ideas based on AI with OneNote and my notes
- - How to remember the information that the employee needs
- - Visual management of notes with relevant images.

Module 8: Microsoft 365 Management for Managers

- - Case studies of organizations that have successfully used Microsoft365 Copilot
- - Practical examples of how to get the most out of Microsoft 365 Copilot features
- - The profitability of using Microsoft 365 copilot in organizations
- - The ROI of using Microsoft 365 co-pilot by roles: Managers, Sales, Finance, Marketing, HR, Operations and IT

Module 9: How to use Microsoft 365 Copilot by a manager

- - Find relevant information on the company.
- - Review of business results.

- - Summarize the main business trends.
- - Improve presentations and their content.
- - Design more convincing speeches
- - Follow topics more quickly
- - Summarize meetings with generative AI
- - Analyze the main issues and make more productive decisions
- - Summarize email threads and design message bodies with impact
- - Automate daily routines
- - Quickly generate reports and analyze data.
- - Be permanently updated by managing important messages
- - How to delegate tasks with Microsoft 365 Copilot and manage their follow-up
- - Manage workloads more effectively with Microsoft 365 Copilot
- - How to eliminate repetitive work with Microsoft Copilot and focus on strategic work
- - Practical examples of how to get the most out of Microsoft 365 Copilot features

Module 10: Microsoft 365 for Finance

- - Summarizing financial information with Microsoft 365 Copilot
- - Discover financial information with AI and verify income proposals
- - Refine analysis of proposals based on customer negotiations with Microsoft Copilot 365
- - Answer invoice questions quickly
- - Simplify financial reporting
- - Make quick conclusions
- - Identify performance improvements
- - Track financial conversations