

# Microsoft 365 Copilot for Executives

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## Course Overview

Our Microsoft 365 Copilot course for managers offers all the knowledge necessary to improve the use of the platform in the company. This course, taught by experts, will help you manage and improve decision making.

Students will be able to:

- Focus on strategic and creative work by delegating operational tasks to Copilot.
- Improve collaboration and communication using Copilot tools.
- Increase productivity through better agenda, email, meeting, and project management.
- Learn best practices and tips to maximize Copilot's value and tailor it to specific goals.

## Audience Profile

CEOs, directors, managers, department heads, and management professionals.

## 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 Copilot 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 Microsoft 365 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 Copilot by roles: Managers, Sales, Finance, Marketing, HR, Operations and IT

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

- - Streamline agenda activities
- - 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
- - 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
- - Know the news from the collaborators, topics they work on and group activities
- - 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: Manage your past, present and future meetings**

- - Prepare for future meetings
- - Summarize meetings with generative AI
- - Optimize results from past meetings whether or not you participated
- - How to participate in past meetings that you have not attended
- - Know who contributes, how and explore details of the meetings
- - Learn other points of view
- - Ask for details about what was discussed at the meeting
- - Analyze other points of view
- - Interact in meetings where you have not participated
- - If you are late for a meeting, know what was discussed without interrupting
- - Define meeting tasks and follow-up lines
- - Improve the work environment by knowing the feeling of the meeting