

Office 365 Copilot: Excel PivotTables, Word & PPT

Duration: 2 Days (Full Time)

2 Days

DURATION

10

MODULES

39

TOPICS

6

HANDS-ON ACTIVITIES

2 days (Full Time)

COURSE OVERVIEW

This 2-day training program is designed to empower professionals with advanced Excel techniques, AI integration in Microsoft Office (Word & PowerPoint), and financial workflows using Microsoft Copilot. Participants will gain hands-on experience in advanced data analysis, document automation, and AI-powered productivity. By the end of the course, attendees will be equipped with practical skills to improve efficiency, accuracy, and decision-making in their day-to-day work.

WHO THIS COURSE IS FOR

This program is ideal for working professionals, analysts, managers, and decision-makers who regularly use Microsoft Office tools and want to enhance their productivity with AI. It is especially useful for finance teams, business analysts, and corporate trainers who deal with data, reporting, and presentations.

PREREQUISITES

- Basic to intermediate knowledge of Microsoft Excel
- Familiarity with Microsoft Word and PowerPoint
- A Microsoft 365 subscription with Copilot (if available)
- General comfort with digital tools and document handling

LEARNING OBJECTIVES

- Apply logical, lookup and statistical functions in Excel
- Build PivotTables, pivot charts and interactive dashboards
- Use Copilot in Word to draft, edit and summarise text
- Create and enhance PowerPoint slides with Copilot prompts
- Link Excel data into Word and PowerPoint files
- Apply Copilot in Excel for bank reconciliation tasks
- Generate financial summaries and insights using Copilot prompts
- Explore Copilot Studio agents for business automation

10 Modules, 39 Topics

DAY 1

Advanced Excel Training

01

Advanced Formulas & Functions

TOPICS

- **Logical Functions:** IF, Nested IF, AND, OR, IFERROR
- Data Validation (rules, dropdowns, error alerts)
- Custom Conditional Formatting with Formulas
- Working with Excel Tables

02

Lookup & Statistical Functions

TOPICS

- **Lookup Functions:** VLOOKUP, HLOOKUP, XLOOKUP
- Advanced Lookup Use Cases (dynamic search, cross-sheet lookups)
- **Statistical Functions:** SUMIF, SUMIFS, COUNTIF, COUNTIFS, AVERAGEIF, AVERAGEIFS
- MIN, MAX, LARGE, SMALL, RANK

03

Hands-on

PivotTables & Dashboards

TOPICS

- Creating & Customizing PivotTables
- **Pivot Enhancements:** Slicers, Timelines, Multi-Select Options
- Inserting Pivot Charts
- Designing Interactive Dashboards

04

Microsoft Word

TOPICS

Intro to Copilot in Word · Drafting & editing text with Copilot · Formatting and summaries · Linking Excel file to Word

05

Microsoft PowerPoint

TOPICS

Intro to Copilot in PowerPoint · Creating slides from prompts/Word · Enhancing slides (design + notes) · Linking Excel file to PowerPoint

01

Activity

Introduction & Excel AI Integration

TOPICS

- Introduction to Microsoft Copilot
- Key benefits of using Copilot in business workflows
- How Copilot integrates with Excel for productivity
- Real-world examples of AI-powered Excel usage

02

Activity

Bank Reconciliation with Excel & Copilot

TOPICS

- Understanding the bank reconciliation workflow
- Role of Excel formulas vs Copilot automation
- Using Copilot to detect mismatches and outliers
- Summarizing reconciliation insights

03

Activity

Enabling Copilot & Extracting Key Financial Insights

TOPICS

- Navigating the Copilot interface in Excel
- Understanding key features and capabilities
- Using prompts to summarize P&L, expenses, and trends

04

Activity

Copilot Studio & Agents

TOPICS

- Introduction to Copilot Studio
- Exploring built-in agent capabilities for automation
- Demonstrating generalized business use cases
- Enhancing Copilot with Microsoft 365 tools

Collaborative Workflows & Business Insights

TOPICS

- Leveraging Microsoft 365 tools for teamwork and automation
- Integrating Excel, Copilot, and SharePoint for collaboration
- Managing shared data access and version control
- Generating and interpreting business insights using AI

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
03	PivotTables & Dashboards	Hands-on: Building a Business Dashboard
01	Introduction & Excel AI Integration	Activity: Hands-on demo with simple Copilot prompts
02	Bank Reconciliation with Excel & Copilot	Activity: Practice reconciliation with a sample dataset
03	Enabling Copilot & Extracting Key Financial Insights	Activity: Create a financial summary using Copilot
04	Copilot Studio & Agents	Activity: Build a Copilot Agent scenario for finance workflows
05	Collaborative Workflows & Business Insights	Group Activity: Team collaboration to analyze and present findings

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com

✉ info@koenig-solutions.com