

Copilot for HR: Dashboards, Policies & Appraisals

Learn to use Copilot across Microsoft 365 to draft HR policies, build dashboards and write appraisals.

1 Day

DURATION

7

MODULES

30

TOPICS

5

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers Copilot for HR, starting with its underlying AI principles and use cases across the employee lifecycle. It then examines Copilot within Microsoft 365 applications, including drafting HR policies, job descriptions, offer letters and appraisal summaries in Word, composing sensitive HR emails in Outlook, and building HR dashboards for attrition, hiring status, leave usage and training needs in Excel. Later modules address employee records and compliance documentation, HR case studies and simulations across recruitment, grievance and workforce planning, and using Copilot to draft performance feedback, appraisal narratives and development plans.

WHO THIS COURSE IS FOR

HR Professionals

HR Managers

Recruitment Specialists

Performance Management Teams

HR Compliance Officers

LEARNING OBJECTIVES

- Explain Copilot types and AI principles for HR
- Identify HR use cases across the employee lifecycle
- Draft HR policies, job descriptions and offer letters with Copilot
- Compose sensitive HR emails and communications in Outlook
- Build HR dashboards for attrition, hiring and training in Excel
- Generate compliance reports and HR SOPs with Copilot
- Apply Copilot to recruitment and workforce planning case studies
- Draft performance feedback, appraisal narratives and development plans

7 Modules, 30 Topics

01

Understanding Copilot for HR

TOPICS

- What is Copilot?
- Types of Copilot (MS365 Copilot, Copilot Studio, Bing Chat Enterprise)
- AI principles for HR – Transparency, Privacy, Compliance
- HR use cases across the employee lifecycle

02

Hands-on

Copilot in Microsoft for HR

TOPICS

- Drafting HR Policies faster
- Creating job descriptions using prompts
- Writing offer letters, warning letters, appraisal summaries
- Converting meeting notes to HR memos

03

Hands-on

Copilot in Outlook for HR

TOPICS

- Writing complex HR emails
- Drafting rejection, interview scheduling, reminders
- Improving tone for sensitive HR communication

04

Hands-on

Copilot in Excel for HR

CREATING HR DASHBOARDS:

Attrition · Hiring Status · Leave Usage · Training Need Analysis

Cleaning HR data using Copilot · Asking copilot for formulas

05

Hands-on

Employee Records & Compliance

TOPICS

Generating compliance reports · Documentation Summary · Creating HR SOPs · Drafting policy updates with copilot

06

HR Case Studies and Simulations

TOPICS

Case Study 1: Recruitment · **Case Study 2:** Employee grievance · **Case Study 3:** Workforce planning · **Case Study 4:** Performance management · **Case Study 5:** Training need analysis

07

Hands-on

Copilot for Performance Management

TOPICS

Drafting performance feedback · Analyzing employee performance data · Writing performance appraisal narratives · Creating development plans

NOTES

- Additional topics: Draft Emails, Create PPTs, Research (prompting)

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
02	Copilot in Microsoft for HR	Create an Employee Handbook Chapter with Copilot
03	Copilot in Outlook for HR	HR email scenario simulation
04	Copilot in Excel for HR	Create Recruitment Dashboard with Copilot
05	Employee Records & Compliance	Create 3 HR SOPs with Copilot
07	Copilot for Performance Management	Generate 3 performance improvement plans

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.

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