

KOENIG SOLUTIONS · COURSE OUTLINE

Copilot for Microsoft 365: Empower Your Workforce with Copilot for Microsoft 365: Finance Use Case

Learn to apply Copilot for Microsoft 365 to finance tasks such as drafting emails, analysing data and summarising reports.

4 Hours

DURATION

7

MODULES

29

TOPICS

21

HANDS-ON ACTIVITIES

0.5 days

COURSE OVERVIEW

Empower Your Workforce with Copilot for Microsoft 365: Finance Use Case Enhance your team's productivity and efficiency with our "Copilot for Microsoft 365: Finance Use Case" course. This comprehensive program teaches you how to leverage Copilot's AI capabilities to streamline financial tasks. By engaging in Interactive exercises and real-world finance scenarios, participants will gain hands-on proficiency in Drafting emails, analyzing data, creating reports, and Summarizing results using Microsoft 365 applications like Word, Excel, Outlook, and Teams. Learning Objectives: - Understand Copilot's core functionalities. - Explore key features in various Microsoft 365 apps. - Optimize productivity with best practices. - Apply Copilot in finance-specific tasks. Practical Applications: - Effortlessly draft professional emails. - Seamlessly analyze and transform financial data. - Generate and summarize comprehensive financial reports. Empower your workforce today with practical Copilot skills tailored for the finance sector!

WHO THIS COURSE IS FOR

The "Copilot for Microsoft 365: Finance Use Case" course empowers finance professionals with advanced Microsoft 365 skills to enhance productivity through interactive use case exercises.

Financial Analysts

Accountants

Finance Managers

Business Analysts

Data Analysts

Financial Controllers

Investment Analysts

CFOs (Chief Financial Officers)

Financial Planners

Risk Managers

Auditors

Budget Analysts

Treasury Analysts

Financial Consultants

Finance Students and Graduates

IT Professionals supporting finance teams

Corporate Trainers in Finance

Finance Operations Managers

What You Will Learn

- Describe the purpose, working principles and core components of Copilot
- Explain Microsoft's approach to responsible AI
- Identify key Copilot features across Word, Excel, Outlook and Teams
- Apply prompting best practices for effective Copilot use
- Describe plugin capabilities and Microsoft Graph connectors
- Draft finance-related emails and reports using Copilot
- Analyse and transform financial spreadsheet data with Copilot
- Summarize financial results, chats and meeting threads with Copilot

COURSE SYLLABUS

7 Modules, 29 Topics

01

Introduction to Copilot for Microsoft 365

TOPICS

- 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

02

5 Demo/Exercises

Explore the Possibilities with Copilot for Microsoft 365

TOPICS

- 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

03

Optimize and Extend Copilot for Microsoft 365

TOPICS

- 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

04**5 Demo/ Exercises**

Copilot for Microsoft 365: Finance Use Case

TOPICS

- Leverage Copilot in Outlook to Draft an Email to Your Insurance Company with Ease
- Seamlessly Analyze Spreadsheet Data with Copilot in Excel
- Harness Copilot in Word to Generate Dynamic Financial Analysis Reports
- Summarize Results with Precision using Copilot in Word
- Harness Summarize Results with Precision using Copilot in Word

05**4 Demo/Exercises**

Summarize with Microsoft Copilot for Microsoft 365

TOPICS

- 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

06**3 Demo/Exercises**

Create and Draft with Microsoft Copilot for Microsoft 365

TOPICS

- 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



Edit and Transform Content with Microsoft Copilot for Microsoft 365

TOPICS

- 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

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
02	Explore the Possibilities with Copilot for Microsoft 365	DEMO/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
04	Copilot for Microsoft 365: Finance Use Case	DEMO/ EXERCISES ■ Draft an email to your insurance company using Copilot in Outlook ■ Analyze a financial spreadsheet using Copilot in Excel ■ Create a financial analysis report using Copilot in Word ■ Summarize financial results using Copilot in Word ■ Summarize chat and channel threads using Copilot in Teams
05	Summarize with Microsoft Copilot for Microsoft 365	DEMO/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
06	Create and Draft with Microsoft Copilot for Microsoft 365	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	ACTIVITY
07	Edit and Transform Content with Microsoft Copilot for Microsoft 365	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

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.

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