

Microsoft 365 Copilot Workplace Productivity Course

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Overview

Microsoft 365 Copilot Workplace Productivity Course is a one-week intermediate course for business professionals, team leaders, analysts, project teams, administrators, and knowledge workers using Microsoft 365, who leave with a Role-Based Copilot Productivity Playbook. Participants build Microsoft 365 Copilot workplace productivity through grounded prompts, app workflows, output review, data protection, and adoption planning. Agile Leaders Training Center provides training in responsible Microsoft Copilot workplace use.

Who Should Attend

- Teams responsible for drafting, reviewing, and maintaining business documents
- Teams responsible for spreadsheet analysis, reporting, and decision support
- Teams responsible for presentations, stakeholder communication, and meeting follow-up
- Teams responsible for email, calendar, and collaborative work coordination
- Teams responsible for digital adoption, information handling, and workplace controls

The course assumes participants use Microsoft 365 applications in their work and leaves out tenant administration, software development, agent building, model training, and security configuration.

Departments and Industries

The course supports Microsoft Copilot workplace use across corporate services, professional services, technology, finance, healthcare, education, and industrial operations.

- Administration and corporate services
- Finance, analysis, and management reporting
- Projects, operations, and quality teams
- Human resources and learning functions
- Sales, marketing, and customer service
- Healthcare, education, and industrial support functions

Learning Objectives

By the end of this course, participants will be able to:

- Apply a structured prompt method to workplace tasks
- Use Copilot workflows in Word, Excel, PowerPoint, Outlook, and Teams
- Analyze grounding, sources, permissions, and output limitations
- Evaluate generated content for accuracy, relevance, and risk
- Build role-based productivity workflows and review controls
- Prioritize adoption actions in a Copilot Productivity Playbook

Course Agenda

Day 1: Copilot Work Context and Prompting

- Microsoft 365 Copilot Capability and License Map
- Work IQ Grounding and Information Source Canvas
- Goal, Context, Source, and Expectation Prompt Method
- Prompt Iteration and Conversation Refinement Loop
- Workplace Use Case Selection Matrix

Day 2: Documents and Presentations

- Word Draft, Rewrite, and Summary Workflow
- Document Source Referencing and Traceability Check
- PowerPoint Presentation Creation Brief
- Slide Narrative and Supporting Evidence Review
- Business Document Quality Control Checklist

Day 3: Data, Email, and Meetings

- Excel Data Question and Analysis Sequence
- Formula, Insight, and Visualization Verification Sheet
- Outlook Email Draft and Thread Summary Pattern
- Teams Meeting Recap and Action Register
- Cross-Application Business Workflow Map

Day 4: Responsible Use and Adoption

- Microsoft 365 Permission Boundary Review
- Enterprise Data Protection Handling Checklist
- Generated Output Accuracy and Source Review
- Human Decision Authority and Escalation Matrix
- Role-Based Adoption and Performance Measure Plan

Day 5: Copilot Productivity Practice

- Suggested Exercise: Refine a Grounded Workplace Prompt
- Suggested Exercise: Produce and Review a Business Document
- Suggested Exercise: Analyze Data and Verify an Insight
- Suggested Exercise: Convert a Meeting into Follow-Up Actions
- Capstone Exercise: Role-Based Copilot Productivity Playbook

Practical Exercises

The course uses suggested activities to connect Microsoft Copilot techniques with controlled workplace execution.

- Suggested activity: turn a business request into a prompt with a stated goal, context, source, output expectation, and review point
- Suggested activity: create a document or presentation, trace its sources, challenge unsupported statements, and revise the result
- Suggested activity: analyze a spreadsheet question, inspect formulas and visualizations, and record verification evidence
- Suggested activity: assemble a role-based playbook covering workflows, permissions, review, ownership, measures, and escalation

FAQs

Who suits Microsoft 365 Copilot workplace productivity training, and what does it assume?

The course suits professionals who already use Microsoft 365 for documents, data, presentations, email, meetings, or team coordination. It assumes functional application experience but not AI development or tenant administration.

How does Microsoft 365 Copilot workplace productivity training differ from prompt engineering?

Microsoft 365 Copilot workplace productivity training applies prompts inside real office workflows and adds grounding, permissions, source review, data protection, and adoption controls. Prompt engineering courses usually focus more broadly on prompt techniques across AI systems.

How does Microsoft 365 Copilot use workplace information?

Microsoft 365 Copilot can ground responses in work information that a user is permitted to access, as well as attached content and web information. Participants practice choosing sources and checking whether the evidence supports the output.

Why must Microsoft Copilot outputs be reviewed?

Microsoft Copilot outputs may be incomplete, inaccurate, outdated, or insufficiently grounded. Participants apply accuracy, relevance, source, permission, and risk checks before using generated content in business work.

How can teams plan Microsoft Copilot adoption?

Teams can define role-based use cases, owners, information boundaries, review steps, escalation routes, and practical performance measures. The course brings these decisions together in a playbook for controlled adoption.

Conclusion

Participants take back a Role-Based Copilot Productivity Playbook linking prompts, applications, grounding, source checks, permissions, review controls, adoption owners, and performance measures. It creates a repeatable basis for Microsoft 365 Copilot workplace productivity. It keeps business judgment and accountable review with people.

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