



# WorkingSm@rt® using Copilot for a Better Way to Work

## Leveraging Copilot for a Better Way to Work

This workshop is designed to empower professionals with the knowledge and tools to integrate Copilot into their daily workflows. Participants will explore the capabilities of Microsoft Copilot, learning how to automate routine tasks, enhance communication, and streamline their processes.

Key benefits include:

- Equipping professionals with practical knowledge to automate routine tasks, enhance communication, and streamline workflows using Microsoft Copilot.
- Providing tools for improving efficiency, including managing emails, prioritising tasks, and creating documents with AI support.

### This course will help you:

- Automate routine tasks with Microsoft Copilot.
- Manage email overload and prioritising daily tasks.
- Create summaries of emails, documents, and meetings.
- Run effective meetings with real-time AI feedback.
- Conduct data analysis and generating insights in Excel.
- Design reusable templates for documents, reports, and presentations

### Related Training:

- WorkingSm@rt with Microsoft Outlook
- WorkingSm@rt with Microsoft OneNote
- WorkingSm@rt with Microsoft Teams

### Who Should Attend

- Professionals looking to enhance their efficiency and effectiveness through the integration of Copilot in their daily operations. This workshop is exploring Microsoft Copilot Pro, a paid subscription version.

### Format:

- 1 x half day, instructor-led online session

### What's Included

- Ongoing support through a responsive AI chat resource to reinforce learning
- Comprehensive Learning Guide
- LearningLink: Our monthly productivity e-newsletter to keep you updated.

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## Synopsis:

# Master Efficiency with AI: Streamline Your Work, Empower Your Day

- Difficulty managing a high volume of emails daily?
- Struggling to prioritise tasks effectively throughout the day?
- Found it challenging to keep track of meeting notes and action items?
- Struggling to create documents or presentations from scratch?
- Finding it time-consuming to summarise key points from meetings or emails quickly?
- Encountering challenges when trying to extract valuable insights from data?
- Struggling to collaborate effectively with team members in virtual meetings?

By the end of this workshop, participants will be equipped with practical knowledge and skills to leverage Copilot, improving their processes and staying ahead in the rapidly evolving workplace.

## Unit 1: Laying the Foundation

- The Evolution of Work with AI
- What is Copilot?
- Best Practices for Prompt Engineering
- Ethics, Privacy & AI Best Practices
- Using Viva Insights

## Unit 2: A Day in the Life

- Managing Email Overload & Daily Priorities
- Creating Email Summaries
- Turning Emails into Collaborative Meetings
- Running an Effective Meeting with Real-Time AI Feedback
- Extracting Post-Meeting AI Notes & Assigning Action Items

## Unit 3: Advanced Copilot Application

- Completing Data Analysis in Excel
- Creating Documents in Word



## WorkingSm@rt<sup>®</sup> using Copilot for a Better Way to Work

- Building Slide Decks in PowerPoint
- Following Through on Action Items

## AI Competencies:

Within the Microsoft 365 suite, these skillsets align with various tools and functionalities:

- Prioritizing – Using Microsoft To Do, Planner, and Outlook to manage tasks, set priorities, and organize workflows efficiently.
- Writing – Leveraging Microsoft Word, Editor, and Copilot for drafting, refining, and enhancing written content.
- Data Analysis – Utilizing Excel, Power BI, and Copilot for data organization, visualization, and insights generation.
- Template Creation – Designing reusable templates in Word, PowerPoint, and Excel to standardize documents, reports, and presentations.
- Summarizing – Using Copilot in Word, OneNote, Teams, and Outlook to generate concise summaries of documents, emails, and meeting notes.

*Priority*<sup>®</sup>

A Better Way To Work

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