



**Course:**

# **Microsoft 365 Copilot for Business Professionals (Using AI)**

---

**Duration:** 2 Days (9:00 – 16:00)

**Course Outline:**

**Module 1: Introduction to Excel 365 Copilot**

- What is Microsoft Copilot for Excel?
- How Copilot integrates with Excel 365 and Microsoft ecosystem
- Business use cases:
  - Financial analysis
  - Sales and marketing reporting
  - Operations and performance tracking
- Limitations and prerequisites (licenses, data structure)

**Module 2: Preparing Data for Copilot**

- Data quality principles for AI-assisted analysis
- Structuring tables for Copilot (headers, formats, ranges)
- Common data issues that affect Copilot accuracy
- Best practices for enterprise data usage

**Module 3: Prompting Copilot in Excel**

- How Copilot interprets natural language
- Prompt design for business outcomes:
  - Descriptive prompts (summarize, explain)
  - Analytical prompts (compare, find trends)
  - Prescriptive prompts (recommend, forecast)
- Prompt refinement techniques

**Module 4: Data Analysis and Visualization with Copilot**

- Using Copilot to:
  - Create formulas automatically
  - Perform variance and trend analysis
  - Generate PivotTables and charts
- Turning data into executive-ready visuals
- Validating AI-generated results



## **Module 5: Automation and Productivity Scenarios**

- Automating repetitive Excel tasks with Copilot
- Scenario-based applications:
  - Budget vs actual analysis
  - Sales performance tracking
  - Forecasting and what-if analysis
- Combining Copilot with Excel features (Power Query, functions)

## **Module 6: Governance, Risk, and Responsible Use**

- Data privacy and security considerations
- Copilot limitations and human validation
- Responsible AI principles in business decision-making
- Organizational policies and best practices

## **Module 7: Business Use Case Workshop & Wrap-Up**

- Designing a Copilot-enabled workflow
- Common mistakes and troubleshooting
- Key takeaways and next steps

## **Module 8: Cross-Application Workflow Requirements**

- Data Analysis → Business Insight
- Use Excel Copilot to: Analyze operational and technical data
- Use Excel Copilot to: Compare scenarios and performance indicators

## **Module 9: Automated Reporting & Output Formats**

- Word (Summary & Reports)
  - Generate executive summaries from Excel or OneNote content
  - Convert analysis into formal business reports
  - Adjust tone and level of detail (technical vs executive)
- PowerPoint (Presentation)
- Automatically generate slide decks from:
  - Excel analysis results
  - Word summaries
  - OneNote meeting notes
- Create management-ready presentations with clear narratives

## **Module 10: PDF Handling**

- Summarize PDF documents using Copilot
- Extract key insights from PDF reports
- Combine PDF content with Excel or Word outputs for reporting



## Why Boston Network?

---

- **World Class Curriculum** - our course curriculums incorporate best-in-business thinking and practices and are designed for all organizational levels.
- **Renowned Trainers** - all our seminars, conferences are led by senior executives, managers, authors, educators, consultants, even CEOs. They're not only skilled speakers, but top business practitioners who have been in the trenches
- **Satisfaction Guarantee** - we are totally focused on customer satisfaction. Our 100% customer satisfaction guarantee is the factor that will distinct us from others.
- **Experienced Training Specialist** - with more than five years of experiences, we bring in latest business know-how, world-class cutting edge management knowledge, and valuable insights to Thai society. We held over 200 seminar events each year with more than 10,000 executive participants countrywide.



### **100% Satisfaction Guarantee**

After attending Boston Network seminar or event, if you are not fully satisfied that we have delivered everything promised. Simply notify the seminar administrator by the lunch break and we will refund the entire registration fee.