



Course:

Microsoft Excel 365 Copilot for Business Professionals (Using AI)

Duration: 1 Day (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



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