M365 Copilot Hands-On Training

Comprehensive Guide for Basic and Advanced Levels

Introduction

Microsoft 365 (M365) Copilot is a powerful tool designed to enhance productivity and collaboration within organizations. By leveraging AI and automation, it helps users streamline tasks and improve efficiency. This document outlines a hands-on training program for both basic and advanced levels, incorporating the use of Copilot Studio for advanced training.

Basic Level Training

Overview

The basic level training is designed for users who are new to M365 Copilot. It covers fundamental features and functionalities, enabling participants to understand and apply the basics of the tool in their daily work. This foundational knowledge sets the stage for more advanced uses and integrations.

Section 1: Introduction to M365 Copilot

Objective: Familiarize users with the M365 Copilot interface and its core components.

Content: This section covers the layout of the M365 Copilot dashboard, navigation tips, and an overview of the main features. Users will learn about the different panels, how to customize their workspace, and where to find help and support resources.

Business Value: Helps users get started quickly, reducing the learning curve and increasing initial productivity.

Section 2: Basic Navigation and Functionality

Objective: Teach users how to navigate through M365 Copilot and utilize basic functionalities such as task management and document collaboration.

Content: Participants will explore common tasks such as creating and assigning tasks, tracking progress, and using the collaboration features to share documents with colleagues. This section also covers basic editing and commenting tools to facilitate teamwork.

Business Value: Empowers users to manage their tasks more effectively and collaborate seamlessly, leading to improved team efficiency.

Section 3: Integrating with Other M365 Apps

Objective: Demonstrate how to integrate M365 Copilot with other Microsoft 365 applications like Outlook, Teams, and OneDrive.

Content: This module provides step-by-step instructions on linking M365 Copilot with other M365 apps, setting up notifications, and using shared calendars and files. Users will also learn about syncing data across platforms to maintain consistency and accessibility.

Business Value: Enhances productivity by creating a unified workflow across different applications, minimizing the time spent switching between apps. This integration streamlines processes and ensures that all team members are on the same page.

Section 4: Basic Automation

Objective: Introduce users to simple automation tasks using M365 Copilot.

Content: Participants will learn how to automate repetitive tasks such as sending reminders, updating task statuses, and generating reports. This section covers the basics of setting up automation rules and triggers within M365 Copilot.

Business Value: Reduces manual effort and allows users to focus on more strategic activities, thereby increasing overall productivity. Automation also helps to reduce errors and ensure consistency in task execution.

Advanced Level Training

Overview

The advanced level training is aimed at experienced users who wish to leverage the full potential of M365 Copilot. It includes advanced functionalities and the use of Copilot Studio to create custom workflows and automations. This level builds upon the basic training and dives deeper into the capabilities of M365 Copilot.

Section 1: Advanced Features of M365 Copilot

Objective: Explore the advanced features of M365 Copilot, such as complex task management, advanced document collaboration, and data analysis.

Content: This section covers features like multi-level task hierarchies, advanced filtering and sorting options, and collaborative editing of documents in real-time. Users will also learn about data visualization tools and how to create dashboards for better project tracking.

Business Value: Enables users to perform more complex tasks with ease, enhancing their capability to handle sophisticated projects. Advanced features facilitate better planning, execution, and monitoring of tasks.

Section 2: Introduction to Copilot Studio

Objective: Introduce users to Copilot Studio and its capabilities for creating custom workflows and automations.

Content: Participants will get an overview of Copilot Studio, including how to access it, navigate its interface, and understand its core components. This section also introduces the concept of no-code and low-code automation solutions.

Business Value: Provides a platform for users to tailor the tool to their specific needs, increasing the relevance and effectiveness of M365 Copilot. Custom workflows can significantly enhance operational efficiency and adaptability.

Section 3: Creating Custom Workflows

Objective: Guide users through the process of creating custom workflows using Copilot Studio.

Content: This module takes a hands-on approach, walking users through the creation of workflows step-by-step. Users will learn to define triggers, set conditions, and outline actions within Copilot Studio. Examples include automated approval processes, task escalations, and email notifications.

Business Value: Allows for the automation of repetitive tasks, saving time, and reducing errors. Custom workflows ensure that processes are consistent and reliable, which leads to higher efficiency and accuracy.

Section 4: Advanced Automation with AI

Objective: Teach users how to leverage AI capabilities within M365 Copilot for advanced automation and decision-making.

Content: Participants will explore AI-driven features such as predictive analytics, intelligent task assignments, and automated insights. This section also covers how to set up and use AI models within Copilot Studio to enhance decision-making processes.

Business Value: Enhances decision-making with AI-driven insights, leading to more informed and effective business strategies. Advanced automation can help identify trends and patterns, optimize workflows, and predict outcomes to support strategic planning.

Section 5: Integrating Power Platform for Enhanced Capabilities

Objective: Demonstrate how to integrate M365 Copilot with the Power Platform to expand automation and data analysis capabilities.

Content: Users will learn how to connect M365 Copilot with Power BI for advanced analytics, Power Automate for expanded workflow automation, and Power Apps for custom app development. This

section includes case studies and practical examples of how these integrations can provide solutions to complex business challenges.

Business Value: Unlocks advanced functionalities and analytics, empowering users to drive more significant business outcomes. Integrating with the Power Platform enhances the overall capability of M365 Copilot, making it a more robust and versatile tool.

The M365 Copilot hands-on training program is designed to equip users with the skills needed to maximize the benefits of this powerful tool. By progressing from basic to advanced levels, users can enhance their productivity, streamline their workflows, and ultimately contribute to their organization's success. This comprehensive training ensures that users are well-versed in both the foundational and advanced aspects of M365 Copilot, empowering them to leverage the tool to its fullest potential.