StoryIQ

Mastering Microsoft Copilot

Beyond the Basics



Go Beyond Prompts.
Work Smarter. Achieve More.

1-day training program



Overview

Microsoft Copilot offers capabilities that go beyond generating content and answering questions. When used effectively, it can help professionals analyze information, develop insights, improve decision-making, and streamline complex workplace tasks.

This intermediate-to-advanced course equips participants with practical techniques to maximize Microsoft Copilot through advanced prompting, contextual analysis, Microsoft 365 integration, and AI-assisted workflow improvement.

Through hands-on demonstrations, business scenarios, and guided activities, participants will explore how to use Copilot for multi-step tasks, work across documents and data, generate actionable insights, and develop repeatable AI-assisted workflows.

The program emphasizes critical thinking, responsible AI use, and human judgment to ensure that Copilot-generated outputs are accurate, relevant, and useful.

What Will You Learn?

By the end of the program, participants will be able to:

- Apply advanced prompting techniques for complex business tasks.
- Use Copilot to analyze information and generate actionable insights.
- Leverage Copilot across Microsoft 365 applications.
- Perform multi-step tasks using structured, iterative prompts.
- Develop repeatable AI-assisted workflows to improve productivity.
- Evaluate AI-generated outputs for accuracy, quality, and reliability.
- Explore Copilot agents and their potential for task automation.



Who is this course for?

This course is designed for professionals who already have basic experience using Microsoft Copilot and want to expand their capabilities, including business leaders, managers, analysts, and professionals from Finance, HR, Sales, Marketing, Operations, and other business functions.

Prerequisites: Basic familiarity with Microsoft Copilot, including writing prompts, generating content, and summarizing information.

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Course Outline

About This Program

The training uses practical business scenarios to demonstrate and practice intermediate-to-advanced Copilot capabilities. Participants will progressively apply techniques throughout the day, culminating in an AI-assisted workflow improvement activity.

Topics	Discussion and Activities
Maximizing Microsoft Copilot	Review Copilot capabilities, limitations, and differences between basic and advanced use. Explore opportunities to improve everyday business tasks.
Advanced Prompting Techniques	Apply contextual, iterative, and multi-step prompting. Use prompt chaining, examples, constraints, and structured outputs to improve results.
Prompt Optimization (Activity)	Transform basic prompts into advanced prompts for complex business scenarios.
Copilot for Analysis and Decision-Making	Analyze documents and business information, identify patterns, compare options, generate insights, and develop recommendations.
From Information to Insights (Activity)	Use Copilot to analyze a business case and generate evidence-based recommendations.
Copilot Across Microsoft 365	Explore practical applications in Excel, Word, PowerPoint, Outlook, and Teams for analysis, reporting, presentations, and communication.
Building AI-Assisted Workflows	Break down complex tasks, connect multiple prompts, reuse instructions, and design repeatable workflows that combine Copilot with human review.
Workflow Improvement Challenge (Activity)	Redesign an existing business process using Copilot to reduce repetitive work and improve efficiency.
Introduction to Copilot Agents	Understand agents, their use cases, and how they differ from standard Copilot conversations. Explore agent creation, instructions, knowledge sources, and automation opportunities.
Responsible and Effective AI Use	Validate outputs, identify hallucinations, protect sensitive information, and apply human judgment when using Copilot.
AI-Assisted Workflow Design (Activity)	Develop and present a practical Copilot-assisted workflow for a real-world business task.
Closing	Reflect on key learnings and identify opportunities to apply advanced Copilot techniques in daily work.

Organize a private class for your team or join a public session



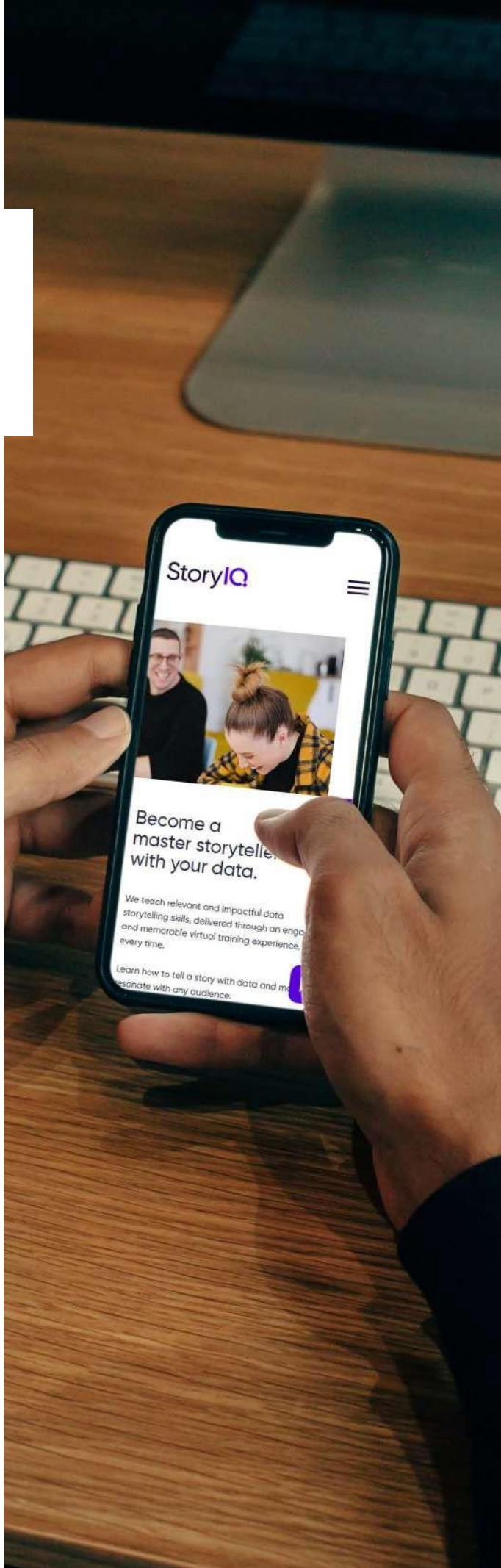
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