

Microsoft 365 Copilot (Basic) Training

Build Everyday Confidence with Microsoft 365 Copilot

Microsoft 365 Copilot Basic helps users apply AI to everyday productivity tasks such as drafting, summarising, brainstorming, restructuring information, and improving communication. This training programme gives pilot users a practical introduction to Copilot Basic and helps them understand how to use it appropriately within familiar Microsoft 365 workflows.

Through guided demonstrations, hands-on exercises, structured prompting practice, and a collaborative innovation challenge, participants learn how to turn Copilot from a general AI assistant into a useful day-to-day work companion.

Who Is This For?

This programme is designed for:

- Pilot users
- Business users
- Team leads
- Knowledge workers
- Microsoft 365 users who regularly work with Word, Outlook, PowerPoint, Excel, Copilot Chat, or other Microsoft 365 experiences.

No coding or technical background is required. The programme is designed for end users who want structured guidance on practical prompting, responsible usage, and common productivity scenarios.

Prerequisites

Microsoft 365 Copilot Basic Access

Participants should have access to Microsoft 365 Copilot Basic within their organisation's Microsoft 365 tenant before the training day. This allows participants to follow the hands-on exercises using their own work account and familiar Microsoft 365 environment.

Microsoft 365 Work Account and Laptop

Participants should use their own laptops and Microsoft 365 work accounts. Access to commonly used Microsoft 365 applications such as Word, Outlook, PowerPoint, Excel, and Copilot Chat is recommended for the best learning experience.

What Makes This Training Different?

Most AI training introduces features.

This programme focuses on practical adoption.

Participants learn how to write clearer prompts, apply Copilot Basic to realistic business tasks, recognise appropriate usage boundaries, and identify where AI can support their daily work. The session also creates space for users to compare use cases, share adoption insights, and develop practical ideas for broader rollout.

By the end of the programme, participants do not leave with tool awareness alone. They leave with hands-on experience, stronger prompting habits, practical productivity use cases, and a working idea or prototype that demonstrates how Copilot Basic can create value in their organisation.

Programme Structure

Programme Component	Duration
Microsoft 365 Copilot Basic Training	1 Full Day

Recommended Participation

The programme works best with an interactive group of up to 25 participants from a mix of roles, departments, or work functions. Participants are encouraged to attend with colleagues who share similar workflows or business priorities so they can compare scenarios, discuss practical use cases, and develop ideas that are relevant to their organisation.

One-Day Hands-On Training

Microsoft 365 Copilot Basic for Everyday Productivity

The training day introduces participants to Microsoft 365 Copilot Basic and helps them apply AI to everyday productivity scenarios. Participants begin by mapping their current workday, then practise common Copilot skills across Copilot Chat, Copilot Pages, Copilot Create, Outlook, and chat-based workflows. Towards the end of the day,

participants work in groups to build a practical Copilot-enabled solution, present their idea, and take part in a friendly prize-based showcase.



1. Map Their Current Workday

Participants start by mapping a typical workday, including the tasks they perform, the information they search for, the documents they create, the communication they manage, and the bottlenecks or repetitive activities they encounter. This gives participants a clear reference point for identifying where Copilot Basic can support their real work.

2. Understand Copilot and Responsible AI

Participants begin with an introduction to Microsoft 365 Copilot Basic, its role within everyday productivity work, and the importance of responsible AI usage. They learn where Copilot can add value, where human review is still required, and how to sense-check AI-generated outputs before using them in business contexts.

3. Practise Copilot Chat and Copilot Pages

Participants explore how Copilot Chat can support drafting, summarising, brainstorming, restructuring, and analysis tasks. They also learn how Copilot Pages can help capture, refine, and organise working content into a more useful format.

4. Draft Emails with Outlook Copilot

Participants practise using Outlook Copilot to draft, refine, and improve email messages for common workplace scenarios. They learn how to provide the right

context, adjust tone, clarify key points, and review Copilot-generated responses before sending them.

5. Create Content with Copilot

Participants practise using Copilot to create and improve business content, including first drafts, outlines, presentation ideas, summaries, and structured outputs based on realistic workplace scenarios.

6. Write Better Prompts

Participants learn how to write clearer prompts by defining the goal, providing context, setting expectations, and identifying useful source material. This helps them obtain more relevant and usable responses from Copilot.

7. Convert Meeting Notes into Useful Outputs

Using prepared meeting notes or suitable sample content, participants practise converting raw meeting transcripts into structured summaries, action items, follow-up messages, decisions, and next-step documentation.

8. Explore Copilot Chat Agents and Notebooks

Participants are introduced to Copilot Chat Agents and Notebooks which can be used to support specific tasks, workflows, or information needs within the boundaries of their organisation's Microsoft 365 environment.

9. Review, Reflect and Reimagine Their Workflow

Participants revisit the workflow maps created at the start of the training day and use them to identify where Microsoft 365 Copilot could support better ways of working.

- Accelerate work
- Retrieve information
- Improve quality
- Reduce manual effort
- Enable new ways of working

10. Group Solution Build, Presentation and Prize Award

Towards the end of the training day, participants work in small groups to build a practical Copilot-enabled solution based on a real work challenge or productivity opportunity identified earlier in the session. Each group defines the problem, explains how Copilot Basic would be used, and describes the expected business value or productivity gain.

Groups then create a working solution, prototype, or prompt flow and present it to the class. The presentations allow participants to practise explaining the value of their solution while learning from the ideas developed by other teams.

The session concludes with a friendly showcase where the class votes on the most creative, practical, and impactful solution. The winning team receives a prize, creating energy and encouraging participants to think beyond individual productivity towards practical adoption ideas.

Key Learning Outcomes

- Use Microsoft 365 Copilot Basic more confidently in daily work
- Write clearer and more effective prompts for common business tasks
- Apply Copilot to drafting, summarising, restructuring, and brainstorming activities
- Convert meeting notes or raw content into useful business outputs
- Identify suitable scenarios for Copilot Chat and Copilot Chat Agents
- Apply responsible AI practices and human review when using Copilot outputs
- Share practical adoption insights with peers and stakeholders
- Develop a simple Copilot-enabled idea, prototype, or prompt flow for a business use case

From Learning to Adoption Readiness

Participants leave with practical Copilot Basic skills, stronger prompting habits, hands-on experience with everyday productivity scenarios, and a better understanding of where AI can support their work. The organisation also gains useful feedback, example use cases, and next-step recommendations to support broader Copilot adoption.