

# Microsoft 365 Copilot Basic

Free Version

## Course Overview

Microsoft 365 Copilot Basic provides a practical introduction to AI-powered productivity, helping professionals simplify tasks, improve communication, and work more efficiently. This workshop focuses on the core capabilities available within Microsoft 365 Copilot Basic helping users understand how the tool supports everyday work.

Participants learn how AI works, how to write effective prompts, and how to use Copilot to draft emails, summarise information, generate ideas, and improve written communication. The session builds practical habits and confidence so participants can use Copilot effectively and responsibly in everyday work.

## Program Format

This is a 2-hour program that is delivered virtually via Microsoft Teams

## Course Objectives

By the end of this workshop, participants will gain comprehensive insights into:

- Understand how Microsoft Copilot Basic works
- Write clear and effective prompts
- Use Copilot responsibly, including privacy and limitations
- Customise Copilot using instructions, memories, files, and agents
- Navigate key Copilot tools and features
- Use Copilot to summarise information and generate ideas
- Draft and improve emails using Copilot in Outlook

## Course Outcomes

### Laying the Foundation

- What is Microsoft 365 Copilot Basic
- LLMs and NLP explained in practical terms
- Data security and privacy best practices
- Prompting fundamentals
- Effective vs poor prompting techniques
- AI hallucinations and responsible use

### Customising and Live Practice

- Accessing Copilot Basic
- Custom instructions and personalisation
- Web-grounded chat
- Auto, Quick Response and Think Deeper modes
- Temporary vs saved chats
- Creating and using Copilot memories
- Using files with Copilot
- Working with agents

### Prompt Tools and Navigation

- Copy, feedback and share prompt tools
- Pages – creating and exporting to Word or PDF
- Save and copy prompts for sharing
- Read aloud and Open in Word features
- Search, Library, Create, Agents
- Managing chat history and apps

### Copilot in Outlook

- Summarising emails and threads
- Drafting new emails with Copilot
- Drafting replies with Copilot
- Coaching and improving written messages

### Copilot in Word, Excel, PowerPoint & OneNote

If your organisation has access to Copilot Basic in these apps, we will cover:

- **Word** – plan, draft, summarise and suggest improvements for documents
- **Excel** – understand and analyse data, explain, and help write formulas, summarise data
- **PowerPoint** – plan, draft, summarise and suggest improvements for presentations
- **OneNote** – plan notebooks, help structure, summarise notes, and improve clarity



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