

Hands-On Course: Crafting Effective Copilot Prompts for Microsoft 365

1 DAY

COURSE CONTENT

INTRODUCTION

- Welcome and Course Objectives
- Understand the value of well-crafted prompts in Copilot and Microsoft 365 apps
- Learn practical skills for prompt creation and deployment
- Apply knowledge in real-world business scenarios
- The Importance of Prompt Engineering
- How good prompts drive better outcomes

UNDERSTANDING LANGUAGE MODELS

- What Is a Language Model?
- Simple explanation of AI language models
- How Copilot uses language models to assist users
- Key Differences Between Models
- General-purpose vs. domain-specific models
- Capabilities and limitations in Copilot context
- Why Model Choice Matters in Prompting
- Impact on accuracy, tone, and task suitability

TYPES OF PROMPTS

- Instructional Prompts
- Directing Copilot to perform specific tasks
 - Examples: “Summarize this document,” “Create a meeting agenda”
- Creative Prompts
- Generating ideas, content, or alternatives
 - Examples: “Draft a welcome message,” “Suggest campaign themes”
- Summarization Prompts
- Condensing information clearly and accurately
 - Examples: “Summarize key points from this email thread”
- Data Extraction Prompts

- Pulling structured information from unstructured data
 - Examples: “List all action items from this meeting note”
- Troubleshooting Prompts
- Identifying and resolving issues
 - Examples: “Why won't my formula work in Excel?”
- Other Prompt Types (as appropriate)

PROMPTING IN THE COPILOT DASHBOARD

- Navigating the Copilot Dashboard
- Accessing Copilot from Microsoft 365 home
- Overview of the dashboard interface and features
- Step-by-Step Prompt Creation
- Entering and refining prompts
- Reviewing and editing Copilot responses
- Hands-On Activity
- Practice: Crafting sample prompts in the dashboard
- Group feedback and iteration

USING PROMPTS IN WORDS AND MICROSOFT 365 APPS

- Word Demonstration
- Creating outlines, drafting documents, summarizing content
- Inserting and refining prompts directly in Word
- Excel Demonstration
- Analyzing data, generating formulas, summarizing sheets
- PowerPoint Demonstration
- Drafting slides, generating speaker notes, refining presentations
- Outlook Demonstration
- Composing emails, extracting action items, summarising threads
- Best Practices for Prompting in M365 Apps
- Tips for clarity, efficiency, and accuracy
- Adapting prompts for different tasks and audiences

LICENSED VS UNLICENSED CLIENT SCENARIOS

- Feature Differences
- What’s available to licensed users vs. unlicensed users
- Limitations and alternative solutions for unlicensed clients
- Access and Permissions
- How licensing impacts feature access in Copilot and M365 apps
- Managing expectations and workarounds
- Practical Scenarios
- Use cases for both licensed and unlicensed clients

- Demonstration: Approaching tasks with/without full Copilot features

INTERACTIVE EXERCISES

- Real-World Prompt Creation
- Participants design prompts for their unique business needs
- Share and discuss outcomes as a group
- Troubleshooting and Refinement
- Debugging prompts that don't produce expected results
- Iterative improvement techniques
- Peer Review and Feedback
- Collaborative review of sample prompts

The course outline can be tailored to your organization's needs. If participants have Copilot Web access but not a Copilot Licence, we can accommodate.