Transform Ideas into Action with Copilot Chat (Basic) (MS-4023) Training

Duration: **3 Day**

BİLGİNÇ IT Academy
info@bilginc.com
bilginc.com

Overview

This **instructor-led {*training}** provides a hands-on introduction to Microsoft 365 Copilot Chat. Learners will:

- **Launch and navigate Copilot Chat**,
- **Craft context-aware prompts**,
- **Embed AI-powered collaboration tools into workflows**.

Through **real-world labs and simulations**, participants will discover how Copilot Chat streamlines communication, document creation, and data analysis securely and effectively.

Prerequisites

- Basic knowledge of Microsoft 365 apps (Word, Excel, Teams, Outlook)
- Familiarity with cloud-based collaboration in Microsoft 365 environments

Who Should Attend

- IT professionals, collaboration leads, and business users adopting Copilot Chat
- Individuals driving AI-enhanced productivity while maintaining governance standards

What You Will Learn

By the end of this {*training}, you will have gained knowledge and skills in the following areas:

- Use Copilot Chat across supported apps (desktop & online)
- Write prompts that deliver accurate and context-aware responses
- Streamline workflows (document creation, email, data visualization, scheduling)
- Integrate Copilot Chat into Teams for collaboration
- Apply secure and responsible AI practices

Outline

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1. Introduction to Copilot Chat

- Features, benefits, and integration within Microsoft 365
- Common use cases for individuals and teams
- Permissions, tenant setup, and access configuration

2. Prompt Engineering Best Practices

- Writing effective, context-aware prompts
- Managing context, follow-ups, and iterations
- Evaluating AI outputs for tone, accuracy, and relevance

3. Productivity Across Microsoft 365 Apps

- Outlook: Drafting, summarizing, refining emails
- Word: Creating outlines and structured content
- Excel: Generating summaries and visualizations
- Calendar: Automating scheduling and follow-ups

4. Real-Time Collaboration with Teams

- Using Copilot Chat during meetings
- Summarizing discussions and action items
- AI-powered co-authoring in real time

5. Governance, Compliance & Security

- Microsoft 365 security features for Copilot Chat
- Privacy and compliance best practices
- Managing permissions and AI usage policies

6. Hands-On Labs

- Persona-based scenarios (marketing, finance, etc.)
- Prompt design improvement exercises
- Guided instructor feedback

7. Wrap-Up & Next Steps

- Review of key skills

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- Intro to advanced features (Graph, Power Automate)
- Resources for ongoing learning