CompTIA Copilot 365 Essentials Training

Duration: **1 Day**

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Overview

CompTIA Copilot 365 Essentials Training is a practical course for professionals who want to use Microsoft Copilot more effectively, safely, and productively in their everyday work.

Through this training, participants will:

- Learn to use **Microsoft Copilot across Word, Outlook, Excel, PowerPoint, and Teams** to support common workplace activities.
- Improve AI-generated results by applying **effective prompting techniques**.
- Understand how **Web mode, Work mode, and organisational context** influence Copilot responses.
- Explore prebuilt Copilot agents such as **Researcher, Analyst, and People Agent** for research, analysis, and workplace information retrieval.
- Develop practical skills in **verifying AI outputs, protecting sensitive information, and using Copilot responsibly**.
- Gain the opportunity to validate their skills through a **CompTIA CompCert assessment**.

CompTIA Copilot 365 Essentials is a **one-day, hands-on training course** designed for non-technical, desk-based **knowledge workers** who want to use Microsoft Copilot confidently in their daily activities.

The course focuses on developing practical skills in **writing contextual prompts, improving generated content, verifying information, and applying responsible AI practices** within an organisational environment.

Participants will explore the differences between **Web mode and Work mode**, including how context provided through referenced **files, emails, and meetings** can affect Copilot's responses. They will also learn how to use these capabilities across core **Microsoft 365 applications**.

Through **scenario-based activities**, learners will practise drafting and rewriting content, producing summaries, analysing data, supporting collaboration, and developing repeatable workflows.

The training also highlights the importance of **protecting sensitive organisational information**, recognising potentially inaccurate AI-generated responses, and understanding when **human judgement and verification** are essential.

No previous AI experience is required to participate.

The course concludes with the **Copilot 365 Essentials Competency Assessment**. Successful participants receive a downloadable **CompTIA CompCert** demonstrating their acquired skills.

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Prerequisites

No prior experience with artificial intelligence is required.

This course is designed for **non-technical, desk-based knowledge workers** who have access to **Microsoft Copilot within their organisation's Microsoft 365 environment**.

Who Should Attend

This training is suitable for non-technical professionals who want to develop practical Microsoft Copilot skills for everyday workplace activities.

It is particularly relevant to individuals who want to:

- Build confidence using **Copilot across Microsoft 365 applications**
- Improve the **quality and consistency of AI-generated content**
- Apply **prompting techniques** to achieve more relevant results
- Follow **responsible AI practices** when working with organisational information
- Develop **practical Copilot skills** that can be applied immediately at work

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What You Will Learn

By the end of this course, participants will be able to:

- Use **Microsoft Copilot safely and responsibly** within an organisational environment.
- Understand **Copilot's capabilities and limitations** and identify appropriate workplace use cases.
- Create **clear, contextual, and goal-focused prompts**, refining them iteratively to improve results.
- Explain how **Web mode, Work mode, and referenced files, emails, and meetings** can influence Copilot outputs.
- Apply Copilot across **Word, Outlook, Excel, PowerPoint, and Teams** for common workplace activities.
- Use prebuilt Copilot agents, including **Researcher, Analyst, and People Agent**, for relevant business tasks.
- Save and reuse effective prompts to develop **consistent and repeatable workflows**.
- **Verify Copilot-generated information**, identify inaccurate or unsuitable responses, and address potential issues.
- Refine AI-generated content to meet **specific workplace requirements**.
- Protect **sensitive organisational information** and recognise when human judgement and verification are required.
- Apply Copilot skills **consistently, responsibly, and accountably** in everyday work.

Outline

1. Using Copilot Responsibly and Safely

This module develops the awareness and judgement needed to use**Microsoft Copilot safely and effectively** within an organisational environment.

Key Topics:

- Understanding **Copilot's capabilities and limitations**
- Identifying tasks where **Copilot is appropriate**
- Recognising **hallucinations and unreliable AI-generated outputs**
- Understanding the importance of **human verification** before acting on Copilot-generated information
- Protecting **sensitive information** when using Copilot

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2. Prompting Effectively and Iteratively

Learn how to create **clear, contextual, and goal-oriented prompts** and improve Copilot results through iterative refinement.

Key Topics:

- Defining **goals, context, and expectations** within prompts
- Structuring prompts to produce **more relevant outputs**
- Using **follow-up prompts** to improve responses
- Revising and refining **Copilot-generated content**
- Breaking complex requests into **smaller, manageable tasks**

3. Using Context and Modes Effectively

Explore how **context** influences the quality and relevance of Copilot responses.

Key Topics:

- Understanding the differences between **Web mode and Work mode**
- Exploring how referenced **files, emails, and meetings** can influence results
- Identifying when to **search for information**
- Deciding when to continue an existing conversation or **start a new chat**
- Using context effectively to improve **Copilot responses**

4. Working Across Microsoft 365 Applications

Apply Microsoft Copilot to common workplace scenarios across core **Microsoft 365 applications**.

Key Topics:

- **Word:** Drafting and rewriting content with Copilot
- **Outlook:** Supporting everyday email communication
- **Excel:** Analysing data with Copilot
- **PowerPoint:** Assisting with presentation development
- **Teams:** Supporting team communication and collaboration
- Applying Copilot to **practical workplace tasks and workflows**

5. Using Copilot Agents and Reusable Workflows

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Explore how **prebuilt Copilot agents** can support workplace activities and how effective prompts can be reused for recurring tasks.

Key Topics:

- Using **Researcher** for guided research activities
- Applying **Analyst** to structured data analysis
- Using **People Agent** to find recent work from colleagues
- Saving useful **prompts for future tasks**
- Building **repeatable workflows** that support consistent Copilot usage

6. Verifying, Refining, and Applying Outputs

Develop the skills needed to **review, validate, and improve Copilot-generated outputs** before using them in workplace activities.

Key Topics:

- **Verifying information** produced by Copilot
- Identifying and correcting **inaccurate or unsuitable responses**
- Refining outputs to meet **workplace requirements**
- Protecting **sensitive information** throughout the process
- Applying Copilot skills **consistently and responsibly** in daily work