Microsoft 365 Copilot for Finance Professionals Training

Duration: **1 Day**

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Overview

Microsoft 365 Copilot for Finance Professionals is a practical, instructor-led training course designed to help finance professionals integrate **Microsoft 365 Copilot** and **Copilot Chat** into their everyday financial workflows.

During this one-day course, participants explore how to use Copilot for essential finance activities, including **budget variance analysis, month-end financial commentary, management reporting, presentation development, and finance-related communications**.

The training also focuses on writing **effective prompts for financial tasks**, carefully validating AI-generated figures, and applying **responsible AI practices when working with confidential financial information**.

Prerequisites

Participants should meet the following requirements:

- Access to **Microsoft 365 Copilot Chat**
- A **Microsoft 365 Copilot licence** is recommended for scenarios involving Copilot within Microsoft 365 applications. The training can be adapted to the licences available to participants.
- Working knowledge of **Excel, Outlook, Word, and PowerPoint**

No previous experience with artificial intelligence or coding is required.

Who Should Attend

This course is intended for finance professionals who want to improve productivity and incorporate **Microsoft 365 Copilot** into their daily responsibilities.

- **Financial Controllers and Financial Planning & Analysis (FP&A) Analysts**
- **Accountants and Accounts Payable / Accounts Receivable Teams**
- **Treasury and Finance Operations Professionals**
- **Finance Managers and Finance Business Partners**
- Anyone working in finance who wants to **integrate Copilot into everyday financial activities**

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What You Will Learn

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

- Identify opportunities to use Copilot throughout the **financial closing, reporting, budgeting, and analysis cycle**.
- Develop **structured, reusable prompts** tailored to common finance activities.
- Use **Copilot in Excel** to explore, interpret, and analyse financial information.
- Transform financial figures into clear **management commentary, executive summaries, and presentations**.
- Improve efficiency in **finance emails, meetings, and follow-up activities** using Outlook and Teams.
- Apply methods for **verifying AI-generated outputs** and protecting confidential financial data.
- Create a **simple Copilot agent** capable of answering questions about internal finance procedures.

Outline

1. Introduction and Learning Objectives

- Overview of the course structure and learning activities
- Introduction to practical **Copilot use cases in finance**
- Review of the expected learning outcomes

2. Responsible AI in Finance

- Principles of **data confidentiality and enterprise data protection**
- Understanding AI accuracy limitations and **hallucinations involving numerical information**
- The importance of the **Human in the Loop** approach
- Essential considerations related to the **EU AI Act**

3. Effective Prompting for Finance

- Applying the **Role, Context, Task, and Format** method to prompt creation
- Refining prompts through iteration to improve the quality of responses
- Developing a personal library of **reusable finance prompts**

4. Use Case 1: Financial Data Analysis with Excel

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- Performing **budget versus actual variance analysis**
- Using Copilot to explain complex **Excel formulas**
- Identifying **anomalies, patterns, and trends** in financial data
- Presenting results through **tables and charts**

5. Use Case 2: Month-End Activities with Copilot Chat and Excel

- Preparing a **month-end closing checklist**
- Drafting explanations and commentary for **financial reconciliations**
- Summarising internal **financial policies and procedures**

6. Use Case 3: Financial Reporting with Word and PowerPoint

- Preparing **monthly management commentary** using financial information
- Creating concise **executive summaries**
- Turning financial results into structured **management presentations**

7. Use Case 4: Finance Communication with Outlook and Teams

- Drafting professional emails for **suppliers and stakeholders**
- Summarising lengthy **email conversations and threads**
- Preparing recaps of **financial closing and budgeting meetings**
- Identifying **action items and follow-up tasks** from meeting discussions

8. Use Case 5: Copilot Agents

- Exploring the basic applications of **Copilot agents**
- Building a **simple Copilot agent** that can respond to questions about internal finance procedures

9. Applying Copilot to Your Finance Role

- Identifying practical ways to incorporate Copilot into individual finance responsibilities
- Developing a **personal action plan** for applying Copilot after the course
- Creating a **personal prompt library** for regular use in daily financial workflows

Hands-On Learning Approach

The course combines instructor demonstrations with practical activities to help participants apply their

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knowledge to realistic financial situations.

Training activities include:

- **Live demonstrations** using a realistic fictional company, including its **profit and loss statement (P&L), budget, invoices, and financial policies**.
- **Scenario-based exercises** covering each of the main use cases.
- **Peer review sessions** to evaluate prompts and AI-generated results.
- **Group discussions** focused on output verification and financial data protection.

Programme Design

The training programme was designed by **Samuel BEN SALEM**, who holds a **PhD in Computer Science** and works as an independent trainer specialising in **Microsoft 365, Copilot, and generative artificial intelligence**.