

# COURSE OVERVIEW

## Course name

MS 4023: Transform ideas into action with Copilot Chat

**DURATION: 1 day**

### Gauteng

3rd Floor, 34 Whiteley Road,  
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Johannesburg 2196

### Gauteng

192 on Bram  
192 Bram Fischer Drive Ferndale,  
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### Cape Town

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## COURSE OVERVIEW

Copilot Chat is an AI-powered assistant integrated into Microsoft 365, designed to help users accomplish tasks more efficiently by leveraging web-based insights and intelligent automation.

This course teaches you how to get started with Microsoft 365 Copilot Chat, craft effective prompts, and use its AI-powered features to enhance productivity, streamline work, and collaborate securely in real-time.

## COURSE OBJECTIVES

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

1. Understand the capabilities of Microsoft Copilot Chat available to Microsoft 365 users without Copilot 365
2. Access and navigate Copilot Chat via Microsoft365.com and the Edge sidebar
3. Craft effective prompts to get optimal results using web-grounded AI
4. Apply Copilot Chat to real-world work scenarios, such as summarising content, generating ideas, and drafting communications

## COURSE OUTLINE

### Module 1: Get started with Copilot Chat

This module introduces Microsoft 365 Copilot Chat as a secure, AI-powered assistant that boosts productivity by leveraging web-based insights, while guiding you on how to access it, navigate the interface, and start using it effectively

- The purpose of Microsoft 365 Copilot Chat
- Distinguish between work and web grounding modes and their use cases
- Navigate the Copilot Chat interface and how to start chatting
- How Enterprise Data Protection keeps your data secure while using Copilot Chat

### Module 2: Write effective prompts to achieve optimal results

In this module, we'll cover how to write effective prompts for Microsoft 365 Copilot Chat to achieve optimal results

- Identify the four key elements of an effective Copilot prompt: context, goal, source, and expectations.
- Apply best practices to write clear, concise, and well-structured prompts.
- Recognise common prompting mistakes and how to avoid them.
- Utilise the Copilot Prompt Gallery to discover, save, edit, and share useful prompts.

### Module 3: Work smarter with Microsoft 365 Copilot Chat

Explore how to work more intelligently and collaboratively with Microsoft 365 Copilot Chat.

Whether you need market research, content brainstorming, data analysis, or AI-generated images, Copilot Chat simplifies complex tasks with intuitive prompts.

- Get summaries and stay informed
- Brainstorm and draft content quickly
- Gather insights based on your files
- Visualise your data

### Module 4: Format and collaborate on Copilot responses with Microsoft 365 Copilot Pages

Microsoft 365 Copilot Pages lets you turn a Copilot response into an editable and collaborative workspace.

- How to use Copilot Pages for editing and organising the results of your prompts
- Collaborate in real-time in a shared workspace using Pages.
- Export to Microsoft Word.
- Ideas for using pages – Project management and content creation.

### Module 5: Create your personal Copilot Agent

Agents are AI-powered tools that help automate tasks, streamline workflows, and provide intelligent assistance in Copilot Chat.

- Why agents can be so helpful to your business
- Access pre-built agents:
  - **Prompt Coach:** Create effective Copilot prompts
  - **Idea Coach:** Get brainstorming assistance
  - **Writing Coach:** Refine your writing
  - **Career coach:** Get personalised career advice and action plans
  - **Learning coach:** Learn about topics and refine your skills
- Create a custom SharePoint Agent
- How to access the agent builder
- Create an agent that allows you to access a SharePoint library

## DELIVERY METHOD

Our courses offer flexible delivery options:

- In-person classroom training at Impactful facilities in Johannesburg, Durban and Cape Town
- Virtual instructor-led training
- Nationally: On-site at the client