

WorkingSm@rt[®]

MICROSOFT
+Copilot 365

Unit 1: Laying the Foundation

- The Evolution of Work using AI
- What is Copilot?
- Ethics, Privacy, and Security
- AI Best Practices

Unit 2: A Day in the Life

- Productivity & AI
 - Processes, Tools, Behaviors
- Using Viva Insights
 - It's AI-powered but not fully generative AI on its own
 - Offers individual daily briefings and insights
 - Includes focus time, wellbeing tips
- Free Copilot (using MS Edge as a recommended tool)
 - Summarizing (emails, documents, webpages)
 - Drafting content (emails, documents)
 - Asking questions/Researching
 - Organizing lists with basic prioritizing (emails?)



Scenario: Alex using free Copilot for efficiency and focus

- Plan and prioritize
 - Review calendar, emails, and plan key priorities for the day
 - I'll summarize a to do list
 - A bulleted daily plan OR value-add matrix
- Respond to emails and draft messages
 - Write or respond to internal updates, client follow up or meeting requests
- Research and Analyze
 - Investigate a trend, competitor, or a new solution
- Document, Draft reports
 - Outline a proposal, presentation or report
- Collaborate, Meeting Preparation
 - Prepare for or reflect on meetings (ie prompt What are good questions to ask in the strategic planning meeting, summarize a meeting agenda from this text)
- Content Creation or Review
 - Review a colleague's draft or create content slides, a blog, training
 - I'll give me 5 headline ideas for this article topic, give me feedback on this paragraph to improve clarity
- Wrap up and Task Review
 - Reflect on the day's accomplishments and prep for tomorrow
 - I'll from this list, summarize what I've completed today, create a plan for tomorrow based on this

Unit 3: A Glimpse to the Possibilities

- Integration into the MS Suite
 - Word, PPT, OneNote, Teams, Excel
 - Turning emails into collaborative meetings
 - Extracting post-meeting AI Notes and Assigning Action Items
- Return on Investment