

pax8Academy

OPTIMIZING COPILOT FOR MICROSOFT 365

Syllabus

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Course Overview

Unlock the full potential of AI with our comprehensive instructor-led training course designed for partners looking to build and enhance their AI practice using Copilot for Microsoft 365. This course will guide you through the essential aspects of Copilot, from understanding its capabilities to effectively selling, using, and securing it within your Microsoft 365 environment. Over four engaging sessions, you'll gain the knowledge and skills needed to leverage Copilot to its fullest, driving value and innovation for your clients.

The overarching goal of this course is to empower partners with the knowledge and skills to effectively leverage Copilot for Microsoft 365, thereby enhancing productivity, driving value, and ensuring security and compliance within their AI practices.

This course is designed for MSP owners, those in technical and sales leadership roles, and anyone interested in learning more about Copilot for M365.

What You'll Get

- 4 hours of virtual, interactive, instructor-led content by a Microsoft Copilot expert
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and additional resources.

Learning Objectives

By attending this course, you will:

- Understand the core functionality and benefits of Copilot, including how AI enhances overall productivity in the platform.
- Identify ideal customers for Copilot and develop effective strategies to articulate its value and business impact.
- Refine the creation and use of prompts to maximize the efficiency of Copilot for M365.
- Implement best practices for securing Copilot within Microsoft 365 to ensure compliance and data protection

*Videos will either be recordings from your session, or they may be previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to reap the full benefits of Q&A with the instructor and class.

Schedule of Topics

Session 1: What is it?

1. Introduction to Copilot for Microsoft 365
 - a. Overview of Copilot and its capabilities
 - b. Key features and benefits
2. Understanding AI in Microsoft 365
 - a. Role of AI in enhancing productivity
 - b. Examples of AI applications in Microsoft 365
3. Getting Started with Copilot
 - a. Initial setup and configuration
 - b. Basic functionalities and user interface

Session 2: How to sell it? (Prime customer)

1. Identifying Target Customers
 - a. Characteristics of prime customers for Copilot
 - b. Market segmentation and customer profiling
2. Value Proposition and Benefits
 - a. Key selling points of Copilot
 - b. Demonstrating ROI and business impact
3. Sales Strategies and Techniques
 - a. Effective sales pitches and presentations
 - b. Handling objections and closing deals

Session 3: How to use it? Prompting

1. Introduction to Prompting
 - a. What is prompting and why it matters
 - b. Types of prompts and their uses
2. Creating Effective Prompts
 - a. Best practices for writing prompts
 - b. Examples of successful prompts
3. Advanced Prompting Techniques
 - a. Customizing prompts for specific tasks
 - b. Using prompts to automate workflows

Session 4: Securing your M365 Environment for Copilot

1. Security Fundamentals for Microsoft 365
 - a. Overview of security features in Microsoft 365
 - b. Importance of securing AI applications
2. Best Practices for Securing Copilot
 - a. Configuring security settings for Copilot
 - b. Monitoring and managing security risks
3. Compliance and Data Protection
 - a. Ensuring compliance with regulations
 - b. Protecting sensitive data and privacy

Instructor



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Additional Resources

Next Steps

Continue learning with these recommendations:

- Review our Pax8 Copilot page: <https://www.pax8.com/explore/americas-en-us/microsoft-copilot-ai/>
- Read these blog posts:
 - <https://www.pax8.com/blog/copilot-pilot-program/>
 - <https://www.pax8.com/blog/copilot-adoption/>
 - <https://www.pax8.com/blog/microsoft-copilot-updates/>

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