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Copilot Cowork for Managers

Transforming Managers into AI-Augmented Leaders - 1 day

FA-0142 · 1 day

Agentic & Generative AI · AI for Leaders & Business · Data & Analytics

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Introduction

Modern managers face an unprecedented challenge: making faster decisions, leading distributed teams, reducing administrative overhead, and delivering measurable business outcomes while navigating constant change. Microsoft Copilot and the emerging Copilot Cowork capabilities are redefining how managers plan, coordinate, delegate, analyze, and execute work across the enterprise. Rather than simply assisting with content creation, modern AI copilots are evolving into collaborative digital coworkers capable of helping managers orchestrate projects, streamline operations, improve communication, and support data-driven decision-making. Recent developments in Microsoft 365 Copilot, Agent Mode, AI agents, and Copilot Cowork are accelerating this shift toward AI-enabled management practices.

This practical one-day workshop is designed specifically for managers and team leaders who want to leverage Microsoft Copilot and Copilot Cowork to enhance productivity, improve leadership effectiveness, and empower their teams. The course is delivered by an instructor with over 30 years of industry experience, incorporating real-world business practices, operational lessons, and industry-demanded use cases rather than purely academic concepts.

Learning outcomes

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

- Understand the evolution of Microsoft Copilot and Copilot Cowork within modern workplaces
- Identify management activities that can be enhanced through AI-assisted collaboration
- Apply effective prompting techniques for managerial and leadership scenarios
- Utilize Copilot across Outlook, Teams, Word, Excel, PowerPoint, and Copilot Chat
- Leverage Copilot for planning, reporting, decision support, and stakeholder communication
- Use Copilot Cowork concepts to delegate, coordinate, and monitor business activities

- Improve meeting effectiveness through AI-assisted preparation and follow-up
- Analyze business data and operational information using Copilot capabilities
- Establish governance, security, and responsible AI practices within management teams
- Develop practical strategies for integrating AI into daily management workflows

Prerequisites

- Basic understanding of Microsoft 365 applications
- Experience managing teams, projects, departments, or business functions
- Familiarity with business reporting and communication processes
- Basic knowledge of Microsoft Teams, Outlook, Word, Excel, and PowerPoint
- No prior AI or prompt engineering experience required

Training outline

1. Introduction to AI-Powered Management

Evolution of Workplace AI

1. From productivity tools to AI assistants
2. Emergence of AI coworkers
3. Managerial challenges in modern organizations
4. AI augmentation versus AI replacement

Microsoft Copilot Ecosystem Overview

1. Microsoft 365 Copilot architecture
2. Copilot Chat capabilities
3. Embedded Copilot experiences
4. Agent-based productivity concepts
5. Introduction to Copilot Cowork concepts
6. Current Microsoft AI roadmap and direction

The Manager's Role in the AI Era

1. AI-assisted leadership
2. Decision support and intelligence

3. Human oversight responsibilities
4. Change management considerations
5. Building AI-enabled teams

2. Foundations of Effective Copilot Usage

Understanding How Copilot Works

1. Large language models
2. Organizational data grounding
3. Context and business relevance
4. Limitations and constraints
5. Accuracy and validation requirements

Prompting Fundamentals for Managers

1. Prompt structure and composition
2. Defining objectives and outcomes
3. Providing context effectively
4. Role-based prompting techniques
5. Iterative refinement methods

Advanced Prompting Strategies

1. Executive communication prompts
2. Analytical prompts
3. Strategic planning prompts
4. Performance management prompts
5. Decision support prompts
6. Multi-step prompting workflows

3. Copilot for Communication and Leadership

Outlook Productivity

1. Email summarization
2. Drafting professional responses

3. Inbox prioritization
4. Stakeholder communications
5. Executive correspondence management
6. Calendar management support

Teams Collaboration

1. Meeting preparation
2. Meeting agenda creation
3. Real-time meeting assistance
4. Post-meeting summaries
5. Action item generation
6. Team communication optimization

Leadership Communication

1. Department announcements
2. Change management messaging
3. Executive briefings
4. Escalation communications
5. Employee engagement communications
6. Stakeholder updates

4. Copilot for Planning and Decision Making

Strategic Planning Support

1. Business objective development
2. SWOT analysis assistance
3. Risk identification
4. Opportunity assessment
5. Scenario planning
6. Strategic roadmap creation

Project and Operational Management

1. Project planning support

2. Task prioritization
3. Resource planning
4. Dependency identification
5. Milestone tracking
6. Operational workflow optimization

Managerial Decision Support

1. Data interpretation techniques
2. Comparative analysis
3. Decision frameworks
4. Risk evaluation
5. Executive recommendations
6. Decision documentation

5. Copilot for Reporting and Analysis

Working with Business Data

1. Data summarization
2. Trend identification
3. Performance analysis
4. KPI evaluation
5. Operational insights generation
6. Business intelligence support

Excel Integration

1. Spreadsheet analysis
2. Formula assistance
3. Data visualization support
4. Trend discovery
5. Reporting automation
6. Executive dashboard preparation

Report Development

1. Executive summaries
2. Operational reports
3. Performance reports
4. Management presentations
5. Board-level reporting
6. Action-oriented recommendations

6. Copilot for Content Creation

Word Integration

1. Business document drafting
2. Policy documentation
3. Proposal development
4. Procedure creation
5. Strategic documentation
6. Management reports

PowerPoint Integration

1. Presentation generation
2. Executive presentations
3. Management briefings
4. Business storytelling
5. Slide refinement
6. Presentation optimization

Cross-Application Productivity

1. Content reuse across applications
2. Information extraction workflows
3. Knowledge consolidation
4. Multi-document analysis
5. Productivity acceleration techniques

7. Copilot Cowork and AI Agents for Managers

Introduction to Copilot Cowork

1. AI coworker concepts
2. Planning and delegation capabilities
3. Workflow orchestration concepts
4. Task execution models
5. Human-in-the-loop management
6. Emerging enterprise use cases

AI-Assisted Delegation

1. Delegation planning
2. Task assignment workflows
3. Monitoring work progress
4. Coordination across teams
5. Managing recurring activities
6. Productivity optimization

AI Agents in Management Operations

1. Agent-based workflows
2. Research and information gathering
3. Automated reporting processes
4. Business process assistance
5. Multi-step task execution
6. Operational efficiency improvements

8. Governance, Security and Responsible AI

AI Governance Fundamentals

1. Organizational AI policies
2. Data protection considerations
3. Compliance requirements
4. Information security awareness

5. Responsible AI principles

Risk Management

1. Hallucination awareness
2. Verification methodologies
3. Decision accountability
4. Data quality considerations
5. Ethical AI usage

Managerial Oversight

1. Human review processes
2. Approval workflows
3. Quality assurance practices
4. Trust and transparency
5. AI adoption governance

9. Building an AI-Enabled Management Framework

Identifying High-Value Use Cases

1. Administrative workload reduction
2. Communication enhancement
3. Meeting optimization
4. Reporting acceleration
5. Decision support opportunities

Team Adoption Strategies

1. Change management planning
2. Adoption roadmaps
3. Team enablement approaches
4. Training considerations
5. Success measurement

Future of AI-Powered Management

1. Emerging Copilot capabilities
2. Agentic workflows
3. Digital workforce concepts
4. AI transformation trends
5. Organizational readiness planning

Disclaimer

This training outline is provided as a general framework intended to guide the delivery of the course. The actual content, sequence, depth of coverage, demonstrations, exercises, and topics may be modified, expanded, condensed, substituted, or otherwise adjusted by the instructor based on participant profiles, organizational requirements, technology updates, product enhancements, time constraints, and learning objectives. The trainer reserves the right to amend the course content and delivery approach at any time, without prior notice, to ensure relevance, accuracy, and maximum learning effectiveness.

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