Faysal Aziz

Microsoft 365 Copilot and Salesforce Einstein Copilot

Unlock the power of AI to transform your daily tasks and elevate your Salesforce experience - 1 day

FA-0321 · 1 day

Agentic & Generative AI

Introduction

Ready to transform the way you work? AI is changing the game, and two game-changers - Microsoft 365 Copilot and Salesforce Einstein Copilot - are leading the charge. They're not just fancy add-ons; they're your new digital teammates, ready to help you work smarter, not harder. Join us for an immersive day of learning where you'll discover how to put these AI powerhouses to work. Whether you're looking to streamline your daily tasks or supercharge your productivity, this hands-on course will show you how these tools can make your workday smoother and more efficient. By the end of our time together, you'll be confident using AI to tackle your work in ways you never thought possible.

Learning outcomes

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

- **Integrate AI into Daily Tasks:** Seamlessly incorporate Microsoft 365 Copilot into everyday applications to automate routine tasks and enhance productivity.
- **Enhance Communication:** Utilize AI features to draft emails, summarize meetings, and manage calendars efficiently.
- **Leverage Data-Driven Insights:** Employ Copilot to analyze data and generate actionable insights within Microsoft Excel and Power BI.
- **Optimize Salesforce Operations:** Implement Salesforce Einstein Copilot to automate customer interactions and streamline sales processes.
- **Customize AI Solutions:** Tailor AI functionalities to meet specific organizational needs and workflows.

Prerequisites

- **Experienced Computer Proficiency:** Comfortable with navigating and using Microsoft 365 applications and Salesforce platform.
- **Familiarity with AI Concepts:** A general understanding of artificial intelligence and its applications in business.
- **Active Accounts:** Access to Microsoft 365 and Salesforce environments for hands-on practice.

Training outline

1. Introduction to AI in the Modern Workplace

- **The Role of AI:** Understanding how AI is reshaping business operations and workflows.
- **Overview of Microsoft 365 Copilot and Salesforce Einstein Copilot:** Exploring the capabilities and benefits of these AI tools.

2. Getting Started with Microsoft 365 Copilot

- **Accessing Copilot Features:** Navigating the Microsoft 365 interface to locate and activate Copilot functionalities.

  Personalized Assistance in Office Applications:

  - **Word:** Utilizing Copilot to draft, edit, and format documents with AI assistance.
  - **Excel:** Automating data analysis, generating visualizations, and creating complex formulas.
  - **PowerPoint:** Designing compelling presentations with AI-generated content and design suggestions.

  Enhancing Communication with Outlook and Teams:

  - **Email Management:** Drafting responses, summarizing email threads, and prioritizing messages.
  - **Meeting Summaries:** Generating concise meeting recaps and action items.

  Data Analysis and Visualization:

  - **Excel Integration:** Leveraging Copilot to interpret complex datasets and provide insights.
  - **Power BI:** Creating interactive dashboards and reports with AI assistance.

3. Exploring Salesforce Einstein Copilot

- **Introduction to Einstein Copilot:** Understanding its role within the Salesforce ecosystem.

  Automating Customer Interactions:

  - **Chatbots and Virtual Assistants:** Setting up AI-driven customer support channels.
  - **Personalized Responses:** Utilizing AI to generate context-aware replies to customer inquiries.

Streamlining Sales Processes:

- **Lead Management:** Automating lead qualification and follow-up tasks.
- **Sales Forecasting:** Using AI to predict sales trends and outcomes.

Data-Driven Decision Making:

- **Analytics Integration:** Incorporating AI insights into Salesforce reports and dashboards.
- **Custom Actions:** Creating and deploying AI-driven workflows tailored to specific business needs.

4. Hands-On Practice and Real-World Applications

- **Interactive Exercises:** Participants will engage in practical scenarios to apply Copilot features in both Microsoft 365 and Salesforce environments.
- **Case Studies:** Analyzing how businesses have successfully implemented these tools to achieve measurable improvements in efficiency and customer satisfaction.

5. Customization and Best Practices

Tailoring AI Tools to Your Organization:

- **Setting Preferences:** Adjusting Copilot settings to align with individual and team workflows.
- **Developing Custom Actions:** Creating bespoke AI functions to address unique business challenges.

Ensuring Data Security and Compliance:

- **Understanding Data Governance:** Implementing best practices to protect sensitive information while using AI tools.
- **Compliance Considerations:** Navigating regulatory requirements related to AI and data usage.

6. Future Trends and Continuous Learning

- **Emerging Features:** Staying updated with the latest developments in Microsoft 365 Copilot and Salesforce Einstein Copilot.
- **Resources for Ongoing Education:** Identifying platforms, communities, and courses to further enhance AI proficiency.

This course is led by an instructor with over 30 years of industry experience, ensuring that the content is not only theoretically sound but also rich with practical insights and real-world applications. By the end of the day, you'll be equipped to transform your workflow and leverage AI to its fullest potential.

© 2026 Faysal Aziz · Kuala Lumpur