

# Copilot Adoption and Change Management Catalogue

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Technologies have increasing emphasis on collaboration and teamwork, but having the access to the technology is no longer enough. Our Team of Adoption and Change Management (ACM) Specialists can help your organisation unlock the capabilities of your investments.

Phoenix achieve this by providing ACM services that energise our customers and harnesses their employee's enthusiasm for new technology. We help you to embrace new ways of working by encouraging behavioural changes and showcasing how the technology will enhance each area of your organisation.

Phoenix can provide a wide variety of training, and are able to facilitate this in several ways including:



**Instructor led workshops:** these can be delivered face-to-face or remote, providing a virtual training experience



**Video content:** short 'how to' topics recorded within your own tenant to walk your staff through the basics or specific workflow streams



**Infographics or guides:** covering the 'how to' of a topic/ product provided in a PDF version branded to your organisation.

The range of workshops that the Phoenix ACM Team offer are:

## Copilot Workshops

[Responsible and Ethical AI](#)

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# Copilot end user training



# Responsible and Ethical AI



Discover the future of innovation with our "Ethical and Responsible AI Workshop." Phoenix Software is dedicated to advancing AI technology while upholding the highest moral and ethical standards. In this workshop, we delve into our eight core principles that guide the development and deployment of Artificial Intelligence — Integrity and Trust, Fair and Inclusive, Safe and Reliable, Transparent and Explainable, Privacy and Security Aligned, Environmentally Responsible, Continuously Advancing, and Customer-Centric AI.

Our three-hour interactive session empowers you with practical knowledge to integrate these principles into your AI endeavours and policies, fostering a future where innovation serves humanity's best interests. Join us and be a part of this vital conversation on shaping AI for the better.

|                                |  |
|--------------------------------|--|
| Target audience                | BDM, Legal Teams, IT Leader, Policy Makers |
| Workshop duration              | 3 hours                                    |
| Skills Level/Delivery/Pre-req: | Intermediate/Steady pace/Policy experience |
| Maximum attendees              | 15   |
| Delivery                       | Remote (via Teams) or Classroom            |

- Defining key principles of ethical AI (20 minutes)
  - Microsoft's six key ethical principles for AI
  - Phoenix's eight key ethical principles for AI
- Ethical AI frameworks (10 minutes)
- Discussion on established ethical AI frameworks and how these frameworks guide AI development and implementation.
- Breakout group discussions (30 minutes)
  - Divide into small groups for discussion
  - Each group assigned a case study or ethical scenario related to AI
  - In groups, discuss the ethical dilemmas and potential solutions

## Agenda:

- Welcome and introduction (5 minutes)
- Understanding AI and ethics (15 minutes)
  - Define Artificial Intelligence (AI) and its applications
  - Discuss the importance of ethics in AI.
  - Highlight the potential ethical challenges in AI

- Break (10 minutes)
- Group share and discussion (30 minutes)
  - Each group shares the key takeaways from their discussions
  - Larger group discussion on the different perspectives and solutions presented
- Responsible AI practices (20 minutes)
  - Discuss responsible AI practices, including data privacy, bias mitigation, and model explainability
  - Discuss the importance of continuous monitoring and improvement
- Tools and resources to support policy development (10 minutes)
  - Share valuable resources, such as books, articles, and online courses, for participants to further their knowledge on ethical AI
- Q&A session (30 minutes)
  - Participants' network, exchange contact information, and continue the conversation informally

### Learning Outcomes:

- Participants will have a greater understanding of the challenges and dilemmas faced by modern work and innovation in an AI landscape
- Participants will be better equipped to define policies for their organisation's use of AI technologies



# Prepare for M365 Copilot



This interactive workshop aims to give a brief overview of what Copilot is and how it can benefit your way of working within your organisation. This session will give you different examples across the Microsoft 365 suite to give you an idea of how it can work and how you can use it to boost productivity. The examples given can be tailored to the products you tend to use most within your organisation. This can be a great opening session that links up with other workshops in our offering.

|                                |                                 |
|--------------------------------|---------------------------------|
| Target audience                | Any level within organisation   |
| Workshop duration              | 1.5 hours                       |
| Skills Level/Delivery/Pre-req: | No previous experience needed   |
| Maximum attendees              | 25                              |
| Delivery                       | Remote (via Teams) or Classroom |

## Agenda:

- Welcome and introduction
- Overview of Copilot and AI
- Demonstration of Copilot within Microsoft 365
- Next steps
- Q&A and discussion

## Session Outcomes:

- Understanding of Copilot within Microsoft 365
- Awareness of how it can be used within Microsoft 365 products
- Information on further training to deepen understanding of Copilot



# Copilot in Teams



Have more effective meetings, catch up on chats, and bring everything together in Teams using M365 Copilot.

## Training

Our M365 Copilot in Teams training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in Teams and how to use this for collaboration and productivity within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|                                |   |
|--------------------------------|---|
| Target audience                | M365 Copilot users (new and existing)   |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft Teams familiarity desirable |
| Maximum attendees              | 25  |
| Delivery                       | Remote  |

- Copilot in Teams chat
  - Chat summary
  - Quick review
  - Action items
  - Response prompt
- Bring everything together in Teams
  - Content creation
  - M365 chat integration
- Teams Voice
- Q&A

## Agenda:

- Accessing M365 Copilot in Teams
- How it works
- M365 Copilot Prompts in Teams
- Have more effective meetings
  - Meeting summary
  - Suggest action items
  - Meeting recap
  - Meeting prompts

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in Teams
- Utilising M365 Copilot in Teams Meetings
- Utilising Copilot in Teams Chat

# Copilot in Outlook



Start emails quickly, generate a summary, and catch up on emails easily. Learn how to create, edit, and be more productive using M365 Copilot in Outlook.

## Training

Our M365 Copilot in Outlook training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in Outlook and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|                                |   |
|--------------------------------|---|
| Target audience                | M365 Copilot users (new and existing)   |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft Outlook familiarity desirable |
| Maximum attendees              | 25  |
| Delivery                       | Remote  |

- Email summary with M365 Copilot
  - Conversation / thread summary
  - Navigating M365 Copilot summaries
  - Summary overview
- Q&A

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in Outlook
- Utilising M365 Copilot for email summaries
- Utilising M365 Copilot for email creation

## Agenda:

- Accessing M365 Copilot in Outlook
- How it works
- M365 Copilot Prompts in Outlook
- Drafting Content with M365 Copilot in Outlook
  - Content creation
  - Drafting
  - Using prompts
  - Generation options
  - Regeneration



# Copilot in Word



Start a draft, add to an existing document, rewrite text, generate a summary, or chat with Copilot.

## Training

Our M365 Copilot in Word training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in Word and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|                                |  |
|--------------------------------|--|
| Target audience                | M365 Copilot users (new and existing)  |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft Word familiarity desirable |
| Maximum attendees              | 25   |
| Delivery                       | Remote   |

- Add to your document
  - Inspire me
  - Referencing
  - Add details from files
  - Generate summary
- Document review
  - Executive summary generation
  - Expanding results
  - Asking questions
- Q&A

## Agenda:

- Accessing M365 Copilot in Word
- How it works
- M365 Copilot Prompts in Word
- Content creation and draft
  - Generate a draft
  - Draft context
  - Reviewing results
  - Adding images
  - Start from a file

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in Word
- Utilising M365 Copilot for generating content
- Utilising M365 Copilot for content reviews

# Copilot in Powerpoint



Create a new presentation, organise and summarise presentations, and more.

## Training

Our M365 Copilot in PowerPoint training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in PowerPoint and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A

|                                |  |
|--------------------------------|--|
| Target audience                | M365 Copilot users (new and existing)  |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft PowerPoint familiarity desirable |
| Maximum attendees              | 25   |
| Delivery                       | Remote   |

- Organise your presentation
  - Creating sections
  - Creating heading slides
  - Creating presenter notes
- Q&A

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in PowerPoint
- Using M365 Copilot for creating presentations
- Using M365 Copilot for organising and summaries

## Agenda:

- Accessing M365 Copilot in PowerPoint
- How it works
- M365 Copilot Prompts in PowerPoint
- Create a new presentation
  - Start from blank presentation
  - Start from existing file
  - Start from an outline
  - Editing the results
- Presentation summary
  - Summarise this presentation
  - Key slides
  - Show action points



# Copilot in Excel



Go deeper with data, identify insights, generate formulas, and more.

## Training

Our M365 Copilot in Excel training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in Excel and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|                                |  |
|--------------------------------|--|
| Target audience                | M365 Copilot users (new and existing)  |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft PowerPoint familiarity recommended |
| Maximum attendees              | 25   |
| Delivery                       | Remote   |

- Generate formulas
  - Suggested formulas
  - Formula description
  - PowerBI integration
- Q&A

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in Excel
- Using M365 Copilot for data visualisation and formulas
- Using M365 Copilot for generating reports

## Agenda:

- Accessing M365 Copilot in Excel
- How it works
- M365 Copilot Prompts in Excel
- Visualise your data
  - Creating tables
  - Creating charts
  - Highlighting key data
  - Importing data
- Analyse your data
  - Data discovery
  - Data insights
  - Show summary
  - Filer and summary



# Copilot in OneNote



Summarise your notes, create a to-do list, design a plan, and chat with Copilot.

## Training

Our M365 Copilot in OneNote training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in OneNote and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|                                |   |
|--------------------------------|---|
| Target audience                | M365 Copilot users (new and existing)   |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft OneNote familiarity desirable |
| Maximum attendees              | 25  |
| Delivery                       | Remote  |

- Get organised
  - Notes, page and section creation
  - Give me ideas
  - Draft content
  - Integration into other apps
  - Team meeting summary
- Q&A

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in OneNote
- Using M365 Copilot for content creation
- Using M365 Copilot for organising notes

## Agenda:

- Accessing M365 Copilot in OneNote
- How it works
- M365 Copilot Prompts in OneNote
- Understand your notes
  - Cross page content generation
  - Summary creation
  - Create to-do list
  - Pros and cons
  - Rewrite



# Copilot in Loop



Plan, brainstorm, create, and collaborate easier to stay in sync.

## Training

Our M365 Copilot in Loop training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 Copilot in Loop and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|                                |  |
|--------------------------------|--|
| Target audience                | M365 Copilot users (new and existing)  |
| Skills Level/Delivery/Pre-req: | Beginner/ Steady pace/ No familiarity with Copilot required - Microsoft Loop familiarity desirable |
| Maximum attendees              | 25   |
| Delivery                       | Remote   |

## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Copilot in Loop
- Using M365 Copilot for managing projects and tasks
- Using M365 Copilot for event planning

## Agenda:

- Accessing M365 Copilot in Loop
- How it works
- M365 Copilot Prompts in Loop
- Managing your project
  - Inspiration options
  - Brainstorming
  - Content creation
- Event planning
  - Using loop between M365 apps
  - Bringing it all together
- Q&A



# M365 Chat



Combine the power of AI with your work data and apps to help you unleash creativity, unlock productivity, and uplevel skills.

## Training

Our M365 Chat training session is an up to 90-minute interactive workshop delivered remotely via Microsoft Teams. This engagement gives users a basic understanding of M365 chat and how to use this for collaboration within M365. Each session can be tailored to the requirements of the organisation and will allocate time for Q&A.

|   |   |
|---|---|
| Target audience                           | M365 Copilot users (new and existing)   |
| Skills Level/Delivery/Pre-req: kill level | Beginner/ Steady pace/ No familiarity with Copilot required – M365 apps familiarity desirable |
| Maximum attendees                         | 25  |
| Delivery                                  | Remote  |

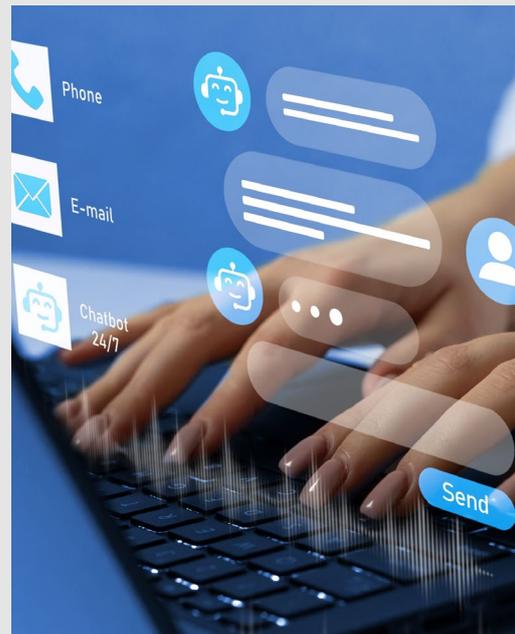
## Learning Outcomes:

By the end of the session, attendees will be confident in the following:

- Navigating M365 Chat
- Using M365 Chat across apps

## Agenda:

- Accessing M365 Chat
- How it works
- M365 Copilot Prompts in Chat
- Combing your data
  - Creating content summaries
  - Generating content across apps
- Get answers
  - Using your data
  - Catching up
- External plugins
- Q&A



# M365 Copilot Prompts



This 90-minute remote or classroom workshop will empower participants to harness the full potential of M365 Copilot Prompts, making their work within the Microsoft 365 ecosystem more efficient and productive. It encourages hands-on learning, collaboration, and customisation to ensure that Copilot becomes a valuable asset in their daily tasks and workflows.

|                                |   |
|--------------------------------|---|
| Target audience                | M365 end users and IT admins  |
| Skills Level/Delivery/Pre-req: | Foundation level/Steady pace/ Experience of M365 Office Apps or attendance at foundation level office workshops recommended |
| Maximum attendees              | 25  |
| Delivery                       | Remote (via Teams) or Classroom   |

- Customising M365 Copilot Prompts (10 minutes)
- Troubleshooting, tips and tricks and best practice (10 minutes)
  - Look at common issues or challenges you may face when using Copilot
  - Share best practice when using Copilot
  - Share tips and tricks
- Q&A and discussion (10 minutes)

## Learning Outcomes:

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

- Understand the key features and capabilities of M365 Copilot prompts
- Effectively utilise M365 Copilot prompts to enhance productivity and efficiency in their day-to-day work
- Customise and create Copilot prompts tailored to their specific needs and tasks

## Agenda:

- Introduction to M365 Copilot Prompts (10 minutes)
  - Welcome and introductions
  - Overview of M365 Copilot Prompts
- Key features and capabilities of M365 Copilot Prompts (10 minutes)
- Demonstration of M365 Copilot Prompts in action (40 minutes)
  - Immersive demo of M365 Copilot Prompts in
    - Word
    - Excel
    - PowerPoint
    - Outlook
    - Teams

# Bing Chat



This workshop equips participants with the skills and knowledge to make the most of Bing Chat in their professional communication and collaboration. Whether you're a seasoned user or new to Bing, this session offers a comprehensive understanding of its capabilities and advanced features. It encourages hands-on learning, collaboration, and customisation to ensure Bing Chat becomes a valuable tool for streamlined communication and increased productivity.

|                                |  |
|--------------------------------|--|
| Target audience                | Bing end users and IT admins   |
| Skills Level/Delivery/Pre-req: | Foundation level/Steady pace<br>Experience of Bing and Microsoft Edge is recommended |
| Maximum attendees              | 25   |
| Delivery                       | Remote (via Teams) or Classroom  |

- Advanced features and integrations (10 minutes)
- Customising, troubleshooting and best practices (10 minutes)
- Q&A and discussion (15 minutes)

## Learning Outcomes:

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

- Understand the key features and capabilities of Bing Chat
- Effectively use Bing Chat to streamline communication and collaboration in their work
- Explore advanced features of Bing Chat, such as integrations and chatbots, for enhanced productivity
- Customise Bing Chat to match their specific communication needs.
- Troubleshoot common issues and optimise their experience with Bing Chat
- Collaborate with peers and share best practices for seamless communication using Bing Chat

## Agenda:

- Introduction to Bing Chat (5 minutes)
  - Welcome and introductions
  - Overview of the workshop's objectives
  - Overview of Bing Chat and its significance in modern communication and collaboration
- Key features and capabilities (10 minutes)
  - Explore the core features of Bing Chat including chat, file sharing and collaboration
  - Discussion on how these features can enhance communications within your organisation
- Immersive Demo of Bing Chat (40 minutes)

# Managing Change from Copilot



Join us for an interactive workshop discussing the potential changes that Copilot will bring to your organisation, led by a Change Management certified expert. This will allow you to explore how the change is going to impact your organisation, lead discussion on how to adjust to the changes, and set out clear next steps to take away to implement within your organisation. This three-hour session will include instructor-led discussion and activities to promote deep thinking around the topic of AI and how it will impact your business.

|                                |  |
|--------------------------------|--|
| Target audience                | BDM, Legal Teams, IT Leader, Policy Makers |
| Workshop duration              | 3 hours                                    |
| Skills Level/Delivery/Pre-req: | Intermediate/Steady pace/Policy experience |
| Maximum attendees              | 25   |
| Delivery                       | Remote (via Teams) or Classroom            |

## Session Outcomes:

- Robust dialogue on the impact AI will have on procedures and culture on the organisation and its staff
- Establish direction for policies on AI
- Clear vision on changes to working practices
- Outline of change management plan through each of the steps of ADKAR

## Agenda:

- Welcome and introduction
- Overview of Copilot and AI
- Discussion on current policy around AI (if applicable)
- Discussion around culture surrounding AI
- Establishing clear outcomes for policies that need to be written, agreed, and rolled out
- Talking through ADKAR steps for bringing the organisation along with the journey
- Next steps
- Q&A and discussion



The Phoenix Customer Success Team are able to offer adoption and change management on Adobe and Microsoft applications.

Please refer to our [Adoption and change management catalogue](#)

Contact a member of the team or book a chat today

