

What Copilot training should include for finance & accounting

Most Copilot training shows people where the buttons are. Finance and accounting teams need help using it in Word, Outlook, Teams, PowerPoint, and Excel without losing control of the work.

THE WEEK

Close work already moves through email, meetings, slides, and the workbook.

COPILOT

It can draft a recap or a first-pass memo. It should not own the official number.

YOUR TEAM

Someone still has to check the facts before anything goes out the door.

What the agenda should cover

01 Work across Microsoft 365

Cover Chat, Word, Outlook, Teams, PowerPoint, and Excel. That is how the week actually goes.

02 Say what Copilot should not do

Let it draft commentary and recaps. Keep official numbers in formulas, queries, and reviewed files.

03 Practice the monthly cycle

Start with the workbook and follow the same facts into the meeting, the email, and the slides.

04 Teach people how to review

They need a simple way to check sources, tone, and calculations before they send anything.

What usually wastes the session

- An Excel-only demo that never gets to email, meetings, or slides
- Generic sample files when the real work is close and reporting
- A pile of prompts with no practice checking the output

Questions worth asking

ACCESS

Who has Microsoft 365 Copilot, and who only has Copilot Chat?

WORKFLOWS

Do people practice one real scenario, or sit through five app tours?

REVIEW

Will they have a way to check the work during next month's close?

AFTERWARD

What happens after the session is over?

Plan Microsoft 365 Copilot training

See the program and request a plan at copilot-training.com