

Microsoft 365 Copilot training for finance and accounting teams

Build the training around a familiar task, such as preparing a monthly management report. Follow the work through Excel, Outlook, Teams, Word, and PowerPoint, with time to check the results.

AUDIENCE

Finance and accounting analysts, managers, and team leads.

SCOPE

Analysis, email, meetings, documents, and presentations.

APPROACH

One shared finance example, with practice and review throughout.

What participants will practice

01 Use Copilot across Microsoft 365

Summarize email and meetings, draft documents and slides, and support analysis in Excel.

02 Keep reporting logic checkable

Use formulas and Power Query for recurring calculations and data preparation. Use Copilot to help build and explain the steps.

03 Follow a monthly reporting cycle

Use checked results and department updates to prepare variance commentary, management slides, and follow-up questions.

04 Review before sharing

Compare the output with its sources. Check figures, dates, explanations, and agreed actions before using it.

A sample reporting exercise

- Summarize department updates and flag missing explanations.
- Draft variance commentary from checked figures and supporting notes.
- Prepare management slides and questions for the next review meeting.

Before setting the agenda

PEOPLE

Which roles are involved, and what work do they need to complete?

ACCESS

Which Copilot features and source files can participants use?

TIME

How much time is available for practice, review, and questions?

SUCCESS

What should people be able to produce after the session?

Discuss training for your team

Share your team's roles, available tools, and one recurring task.

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