

Copilot Foundations Course

This course will introduce finance professionals to the basics of Copilot, a generative AI-powered assistant, to enhance their productivity and decision-making in various Microsoft applications. Participants will learn about Copilot features and capabilities, and practice applying use cases with a focus on finance such as data analysis, research, document drafting, presentation creation, and email communication. This course includes best practices, tips and considerations of using Copilot including prompt engineering as well as ethical and security concerns.

WHAT YOU WILL LEARN

- Mastering Prompt Engineering
- Speed up Microsoft Workflows
- How to Navigating the Pitfalls
- Applications Within the Context of a Finance Case Study



+1 (704) 927-9688
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COURSE DETAILS

Copilot Foundations Course

WHO IS THIS COURSE FOR?

- Participants who have no or limited prior experience effectively using LLMs such as Copilot and ChatGPT
- Business and finance professionals who have a Microsoft 365 Copilot license enabled by their organization
- New and existing hires in finance, private equity, consulting, hedge funds, pension funds

PREREQUISITES

Participants should have some experience with Microsoft applications such as Excel, Word, PowerPoint and Outlook.

Participants must have a paid subscription of Microsoft 365 Copilot to complete course exercises and case study activities.

SCHEDULE

Copilot Foundations is a 3-hour course.

LEARNING OPTIONS

This course is available in-person and virtually.

COURSE PRICING

Early Registration: \$399*

Standard Registration: \$450

** register at least 30 days in advance*

Additional discounts offered to existing clients

Group rates available



COURSE CALENDAR

Course syllabus on next page



SYLLABUS

Copilot Foundations Course

Mastering Prompt Engineering

- Techniques for crafting initial and follow-up prompts to maximize output quality
- Strategies for eliciting the most relevant and accurate responses from Copilot

Navigating the Pitfalls

- Understanding the limitations of Copilot and how to prevent misinformation by recognizing and mitigating hallucinations

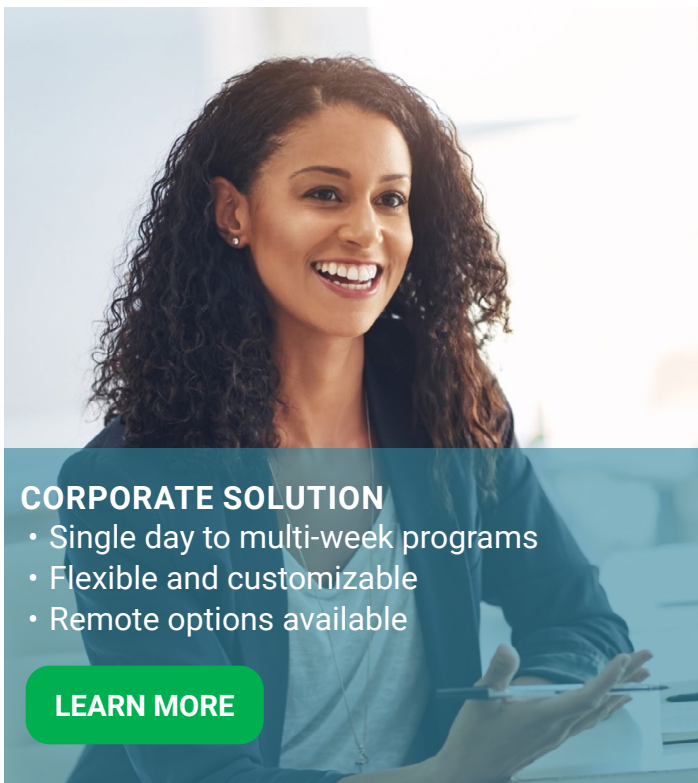
Practical Applications in Finance

- Technical Task Assistance: Utilizing Copilot for Excel for automating tasks such as data analysis, creating complex formulas for extracting data, generating insights, creating pivot tables and charts, performing what-if analysis
- Research Enhancement: Leveraging Copilot for Edge, Word and Microsoft 365 Chat for in-depth financial research and analysis
- Streamlining Daily Operations: Implementing Copilot for Word, Outlook, PowerPoint and Teams for drafting proposals and presentations, client communications, rewording and summarizing documents and meetings, and brainstorming innovative solutions

Finance Case Study

- The course includes a completed case study of using Copilot to automate and expedite the deal process of analyzing a portfolio company in the e-commerce sector and creating a draft investment memo presentation summarizing key trends in the industry, key insights from competitors and KPIs of the portfolio company's sales

ADDITIONAL COPILOT OFFERINGS



CORPORATE SOLUTION

- Single day to multi-week programs
- Flexible and customizable
- Remote options available

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SELF-STUDY COURSE

Getting Started with Copilot

- Micro self-study course
- Perfect for busy professionals
- Learn at your own pace

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