

2-Day Gen AI

For Functional Teams

Using Microsoft Product Suite

13/14 hours Full day Workshop

Talent Acquisition, L&D, HR Operations, Business HR, C&B, HR Analytics, HR/IR, and Engagement Teams

Mode: Preferably in-person (with guided practice labs)

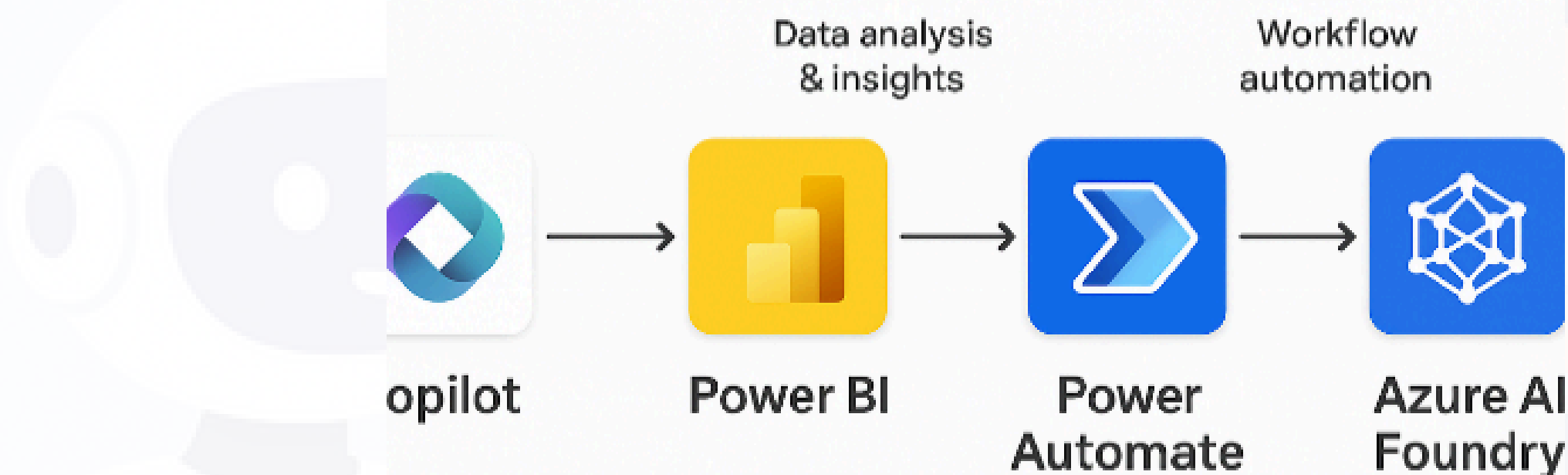
Below is a fully redesigned, Microsoft-only, enterprise-Safe version of our 2-Day GenAI Program — built exclusively for functional teams, fully compliant with the organization constraints, makes it 100% Microsoft-native, enterprise-ready, and safe for large IT/ITES, NBFC teams.

Copilot Practitioner Program for Functional Teams (2 Days)

Audience: Functional teams across HR, Finance, Operations, Delivery, Quality, Pre-Sales, PMO, Marketing, L&D

Mode: In-person preferred (hands-on labs)

Goal: Enable teams to use Copilot + Microsoft AI tools to transform their day-to-day work securely within the enterprise environment



DAY 1 – Copilot Foundations + Productivity Mastery (Microsoft-Only)

Module 1: The Enterprise AI Revolution (Microsoft Edition)

Duration: 60 min

Why: Context-setting for large-scale ITES workflows

Topics:

- Why enterprises trust Microsoft AI (security, compliance, Azure grounding)
- How Office365 Copilot fits into enterprise workflows
- Approved AI usage vs restricted tools
- Real examples from IT/ITES:
 - SLA reporting,
 - Customer escalation analysis,
 - backlog summaries, HR ticket resolution,
 - workflow automation
- Outcome: Teams understand why Copilot is safe, compliant, and enterprise-ready.

Module 2: Prompt Engineering for Microsoft Copilot

Duration: 75 min

Topics:

- Microsoft-style prompting (Tasks, Intent, Source Files, References)
- Effective prompting inside Word, PowerPoint, Excel, Outlook, Teams
- Using OneDrive as your source-of-truth for contextual prompts
- Creating reusable prompt libraries for each department

Outcome: Participants master how to drive Copilot output quality with structured prompting.

Module 3: Copilot in Office Apps – Deep Practical Labs

Duration: 180 min (Core Hands-on)

A. Outlook Copilot

- Email summarization
- Drafting replies aligned with tone
- Extracting action items
- Conversation history analysis

B. Word Copilot

- Auto-create SOPs, proposals, BRDs, and project charters
- Convert bullet points into documents
- Rewrite / restructure documents

C. PowerPoint Copilot

- Create slides directly from documents
- Generate client-ready presentations
- Visual summaries of reports

D. Excel Copilot

- Faster data cleanup, formula writing
- Variance, forecasts, pivot summaries
- "Explain this data" & "Find insights"

E. Teams Copilot

- Meeting transcripts
- Action item extraction
- Post-meeting project plans



F. OneDrive Integration

- Using OneDrive to feed source context
- File chaining: “Read X, Build Y, Summarize Z”

Outcome: Teams learn to automate 40–50% of daily tasks using only the Office365 suite.

Module 4: Day 1 Functional Capstone

Duration: 60 min

Participants pick their domain, and a problem statement/task from their own team and complete a hands-on challenge using only Microsoft tools, complimented by live mentoring by tutor:

Examples:

- HR: “Generate a Job Description + Interview Plan + Candidate Evaluation Template”
- Finance: “Build a monthly business summary from Excel data”
- PMO: “Create a client-ready project status deck from Teams transcript + Excel sheet”
- Sales/Presales: “Auto-generate a proposal from reference documents”

Outcome: Real business output produced using only Copilot.

DAY 2 – Microsoft Agentic Workflows + Power Platform + AI Foundry

Module 5: Decision Intelligence with Excel & Power BI Copilot

Duration: 90 min

A. Excel Copilot—Advanced

- Insight generation
- KPI explanation
- Scenario comparison
- What-if analysis

B. Power BI Copilot

- Create dashboards using Natural Language Query (NLQ)
- Auto-generate DAX formulas
- Narrative insights
- Interactive question-answering

Outcome: Teams turn raw enterprise data into dashboards & insights without writing code.

Module 6: Agentic Workflows using Power Automate + AI Foundry with Real world case studeies

Duration: 150 min

Outcome:

- Build automation-first workflows using Power Automate across Outlook, Teams, Excel, Planner, OneDrive & Power BI
- Design and deploy secure, Azure-governed autonomous agents tailored to their department
- Convert routine functional tasks into repeatable, AI-powered processes
- Implement agentic workflows that reduce manual work, improve accuracy, and enhance decision visibility

A. Power Automate (Enterprise Replacement for n8n/make.com)

Build automated workflows such as:

- Email → Excel → Dashboard update
- Teams → Planner → Outlook calendar automation
- Approval workflows
- Service desk ticket automation

Example Case studies (We will do any 3 case studies Live from below)

Case Study 1: PMO – ‘Automated Weekly Project Dashboard Refresh’

- Trigger: Client delivery mail received in **Outlook**
- Extract key data points → update **Excel** tracker
- Refresh the **Power BI** dashboard
- Notify delivery lead on **Teams**

Outcome: PMO teams eliminate 2–3 hours/week of manual consolidation.

Case Study 2: Operations – ‘Teams to Planner to Outlook Workflow Automation’

- A discussion in **Teams** generates a task
- Power Automate creates a corresponding item in **Planner**
- Sends a structured calendar block to **Outlook**
- Auto-reminder 24 hours before deadline

Outcome: Zero manual task entry; improved SLA adherence.

Case Study 3: HR Shared Services – ‘Automated Approval Workflows’

- Employee submits policy request via a form
- Data is classified, routed to the right approver
- Approver receives email + Teams notification
- Automated status update + record archive to OneDrive

Outcome: Faster approvals with complete audit trail.

Case Study 4: IT Support – ‘AI-assisted Service Desk Ticket Automation’

- Incident email received
- Auto-create ticket in ITSM
- Categorize severity using rules
- Notify on Teams + assign owner

Outcome: Reduces manual L1 triage and accelerates response times

B. Azure AI Foundry (Enterprise-Safe Agentic AI)

- Introduction to secure LLM orchestration
- Creating internal agents using MS ecosystem
- Agents that read files, send updates, summarize, follow steps
- Building a simple autonomous agent (e.g., “Daily Project Summary Agent”)

Outcome: Teams learn to build automation + AI agent workflows securely inside Azure.

Example Case studies (We will do any 3 case studies Live from below)

Case Study 5: Delivery/PMO – “Daily Project Summary Agent”

A secure autonomous agent that can:

- Read project files from SharePoint/OneDrive
- Summarize yesterday’s progress
- Flag risks based on status notes
- Write a structured daily summary
- Publish update to Teams channel at 9 AM

Outcome: Leaders save 20–30 minutes/day on project review.

Case Study 6: HR – “Candidate Profile Intelligence Agent”

Agent reads:

- Resumes stored in OneDrive
- Job description document
- Interview feedback notes

Then produces:

- Candidate-fit summary
- Skill gap analysis
- Recommended interview questions

Outcome: Faster and standardized HR decision support.

Case Study 7: Finance – “Month-End Close Insight Agent”

- Reads Excel P&L, variance reports, MIS files
- Generates narrative insights
- Highlights anomalies & missing data
- Prepares a draft email to finance leads

Outcome: Saves hours during month-end reporting cycles.

Module 7: Responsible AI & Microsoft Security Governance

Duration: 60 min

- Microsoft’s AI Safety architecture
- Data privacy, DLP, encryption
- What is safe vs unsafe prompting
- Organizational Copilot usage policies
- Setting up role-based AI access

Outcome: Teams adopt AI in a safe, compliant, and controlled manner.

Module 8: Final Capstone + Microsoft-Only Implementation Roadmap

Duration: 60 min

Teams present a Microsoft-native AI solution for their functional domain.

Examples:

- Ops: Automated SLA/QoQ variance deck using Excel + Power BI Copilot

- HR: Automated recruitment pipeline using Outlook + Teams + Power Automate
- PMO: Autonomous “Daily Standup Agent” using Teams Copilot + AI Foundry
- Marketing: Slide deck + campaign outline from historical docs using PowerPoint Copilot

Outcome: A clear, practical 30–60 day rollout plan for each business unit using only Microsoft AI.

At End of Workshop Each participant Receives:

- Copilot Prompt Handbook (Microsoft-specific)
- Power Automate starter workflows
- Azure AI Foundry agent templates
- Functional prompt library (HR, Finance, Ops, PMO, Marketing, Sales)
- 30-Day Team AI Adoption Plan
- Certification

