

Copilot for Work Training Catalogue 2026

Practical Microsoft Copilot training for non-technical teams. Live, interactive, and built around the work your people actually do.

12 programmes across healthcare, legal, finance, operations, marketing, HR, education, public sector, charities, and more. Every programme includes responsible AI governance and the staged RTCCO prompting framework.

LIVE AND INTERACTIVE

12 PROGRAMMES

GOVERNANCE BUILT IN



SUSTAINABILITY INCLUDED

Book a free consultation: www.theaiworkflowlab.com

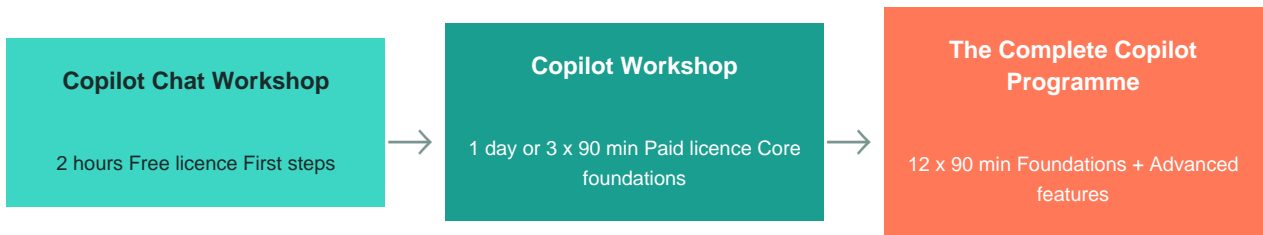
WHO WE ARE

AI Workflow Lab

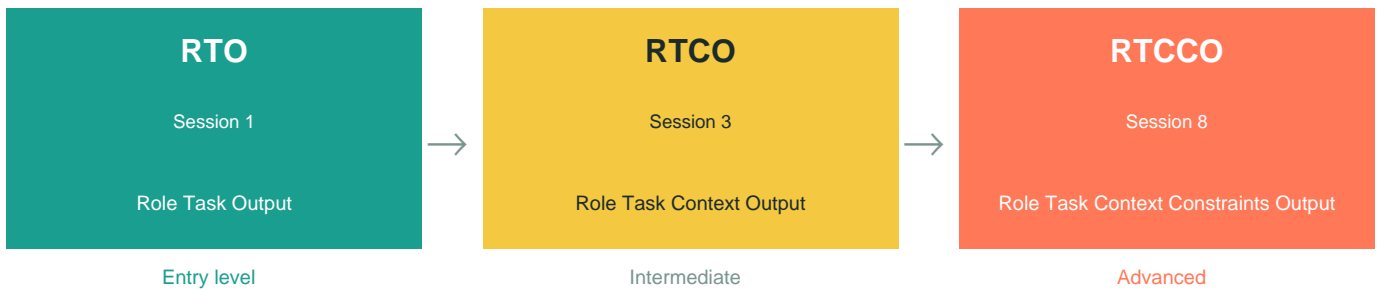
A specialist Microsoft Copilot training company built by professionals who use these tools in real clinical and commercial settings every day. Every programme is live, practical, and built around the workflows your team runs - not a generic slide deck.

 <p>Dr Carolina Oyekanmi GP · Clinical AI Trainer · Co-Founder A practising GP and clinical AI reviewer with 14 years of frontline experience. Member of the RCGP AI Special Interest Group. She brings frontline clinical knowledge to every AI Workflow Lab programme and is trained in EU AI Act requirements and their application in healthcare and professional settings.</p>	 <p>Tita Atang M365 Specialist · Copilot Deployment · Co-Founder A certified Microsoft 365 and Copilot specialist with enterprise deployment experience across healthcare, professional services, and public sector organisations. Co-designs every AI Workflow Lab programme and runs a YouTube channel of practical Microsoft 365 and Copilot tutorials.</p>
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YOUR LEARNING JOURNEY



HOW THE PROMPTING FRAMEWORK SCALES



COPILOT'S FIVE CORE FEATURES

<p>CHAT</p> <p>Ask, draft, refine, summarise.</p>	<p>CREATE</p> <p>Visuals and graphics from a sentence.</p>	<p>APPS</p> <p>Word, Outlook, Teams, Excel, PPT.</p>	<p>AGENTS</p> <p>Automate repeating tasks and workflows.</p>	<p>NOTEBOOKS</p> <p>Your AI second brain fed by your documents.</p>
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Team training: www.theaiworkflowlab.com/team-training | Full catalogue: www.theaiworkflowlab.com/catalogue

CONTENTS

12 Programmes

Foundation workshops and role-specific tracks. Every programme includes governance, the RTCCO prompting framework, and responsible AI use.

- 01 Copilot Workshop**
For teams with a paid licence who want to go from having it to using it - in a single day

- 02 Copilot Chat Workshop**
A 2-hour session for teams exploring AI before committing to a paid licence

- 03 The Complete Copilot Programme**
Flagship 12-session programme across all five Copilot features

- 04 Copilot for Healthcare Teams**
Primary care, clinics, and NHS admin - clinical governance built in

- 05 Copilot for Operations and Admin**
Coordinators, PAs, and office managers across any sector

- 06 Copilot for Marketing and Commercial Teams**
Marketers, account managers, and commercial teams

- 07 Copilot for Finance and Accounting**
Finance managers, accountants, and IFA support

- 08 Copilot for Legal Teams**
Solicitors, paralegals, and legal support

- 09 Copilot for People and HR Teams**
HR and people teams - employment law and AI bias covered

- 10 Copilot for Education Professionals**
Teachers, school admin, and further education staff

- 11 Copilot for Consultants and Analysts**
Management consultants, strategy analysts, and advisory teams

- 12 Copilot for Public Sector Teams**
Council, government, and public service teams

PROGRAMME 01

Entry Point

Copilot Workshop

For teams with a paid licence who want to go from having it to actually using it - in a single day

IN-PERSON 1 full day

ONLINE 3 x 90-minute sessions

PROGRAMME OVERVIEW

Your organisation has paid for Copilot. Most people have opened it once, felt overwhelmed, and gone back to the old way. This workshop closes that gap in a single day by focusing on the features that deliver the fastest visible results, using the RTO prompting framework to get useful outputs immediately.

Prompting framework: We start with **RTO (Role - Task - Output)** - the simplest way to get a useful response. Once this feels natural, participants progress to the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

- Welcome to AI and Copilot - what it is, what it does, and what good use looks like
- Copilot Chat - your first prompts using RTO (Role - Task - Output)
- Creating visual content with Copilot
- Copilot in your apps: Word, Outlook, and Teams
- Prompting for your real work tasks - upgrading RTO toward RTCCO

WHAT YOUR TEAM GETS

- ✓ Practical Copilot foundations using the RTO prompting framework
- ✓ Real outputs produced during the session - emails, summaries, drafts
- ✓ Visible results before the end of the day
- ✓ A certificate of completion for every participant
- ✓ A clear next step into the full 12-session programme

SUITABLE FOR

Any team with a paid Microsoft 365 Copilot licence. Managers, team leaders, executives, project managers, operations and admin staff - anyone who has the licence and has not yet made it part of their working day. More at www.theaiworkflowlab.com/team-training

PROGRAMME 02

No Licence Required

Copilot Chat Workshop

A focused 2-hour session for teams exploring AI before committing to a paid licence

ONLINE Single 2-hour session

FREE COPILOT ONLY - NO LICENCE NEEDED

PROGRAMME OVERVIEW

Not ready to commit to paid licences yet? This single 2-hour session builds real AI confidence using the free version of Copilot Chat. Participants learn the RTO (Role - Task - Output) prompting framework and leave with practical outputs and a natural sense of where a paid licence unlocks significantly more.

Prompting framework: We start with **RTO (Role - Task - Output)** - the simplest way to get a useful response. Once this feels natural, participants progress to the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

- Welcome to AI and Copilot Chat - what the free version can and cannot do
- Prompting and everyday use cases - RTO (Role - Task - Output) applied to real work
- Creating content and visuals - and where a paid licence unlocks significantly more

WHAT YOUR TEAM GETS

- ✓ Clear understanding of AI capabilities and limits
- ✓ The RTO framework applied to real tasks
- ✓ Practical outputs produced during the session
- ✓ Confidence and a natural business case for the next step

SUITABLE FOR

Teams new to AI, organisations evaluating Copilot before committing to a paid licence, and individuals building AI confidence before a formal programme begins. More at www.theaiworkflowlab.com/team-training

PROGRAMME 03

Flagship - 12 Sessions

The Complete Copilot Programme

Our comprehensive programme - across all five Copilot features, from first prompt to final project

12 x 90-MIN LIVE SESSIONS

ONLINE

PART 1 + PART 2

SUITABLE FOR

Any team with a paid Microsoft 365 Copilot licence that wants more than passive adoption. From the enthusiastic early adopter to the cautious sceptic - every participant builds practical, measurable Copilot confidence.

PROGRAMME OVERVIEW

Twelve live, interactive sessions built around the real tasks your team does every day. Participants start with RTO in Session 1, unlock Context in Session 3, and master the full RTCCO framework by Session 8. They finish with a completed final project from a pre-agreed list and a certificate.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

WHAT YOUR TEAM ACHIEVES

- ✓ Master all five Copilot features: Chat, Create, Apps, Agents, and Notebooks
- ✓ Progress from RTO to the full RTCCO prompting framework across the programme
- ✓ Save 3 to 5 hours per person per week from the first week back
- ✓ Build a custom Copilot Agent for a pre-agreed repeating task
- ✓ Use Copilot responsibly - data security, EU AI Act Article 4, and sustainable use
- ✓ Complete a pre-agreed final project and earn a certificate of completion

Full details at www.theaiworkflowlab.com/team-training

PROGRAMME 03 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1	Session 2	Session 3
Welcome to AI and Copilot	Copilot Chat	Creating Visual Content with Copilot
What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Professional graphics, visuals, and presentations from a sentence. Unlocking Context: RTO becomes RTCO.
Session 4	Session 5	Session 6
Copilot in Your Apps: Part 1	Building Your First Copilot Agent	Notebooks - Your Knowledge Base
Word, Outlook, and Teams. Real tasks, real outputs.	Automate a repeating task from the pre-agreed list.	Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7	Session 8	Session 9
Copilot in Your Apps: Part 2	Prompt Like a Pro	Analysing and Visualising Your Data
Excel, PowerPoint, and OneNote. Data, decks, and notes.	Unlocking Constraints: the full RTCCO framework in practice.	Turn spreadsheets into insight - no data skills required.
Session 10	Session 11	Session 12
Deep Research with Copilot	Governance and Responsible Use	Confident Copilot Workflows
Sourced, defensible research using Copilot's research capabilities.	Data security and responsible use. EU AI Act Article 4. Responsible and sustainable AI use.	End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a everyday work context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Draft and refine a document your team produces regularly using Copilot (minimum 3 features used)
- Build a Copilot Agent for a recurring task and document the time saving
- Create a Notebook from a set of organisational documents and demonstrate 5 use cases
- Analyse a dataset using Copilot and produce a summary report with visualisations

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 04

Healthcare

Copilot for Healthcare Teams

Primary care, private clinics, and NHS admin - with clinical governance built in throughout

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- GPs, nurses, and ANPs
- Practice managers and PCN leads
- Clinic managers and coordinators
- Medical secretaries and NHS administrators
- Healthcare assistants and social prescribers
- ICB and federation staff

PROGRAMME OVERVIEW

Delivered by a practising GP who reviews AI tools for clinical safety. Every session reflects the real governance requirements of clinical settings. NHS information governance, CQC awareness, and patient data safety are foundational to this programme.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Drafting clinical letters, referrals, and patient communications faster
- Summarising NICE guidelines and long policy documents
- Managing Outlook inbox overload
- Patient appointment letters and clinic communications
- Building Agents for recurring admin tasks
- Compliance-safe use of AI with patient data

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: NHS information governance, CQC requirements, patient data safety, GMC standards, and EU AI Act Article 4
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

Book a consultation: www.theaiworkflowlab.com/team-training

PROGRAMME 04 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Clinical Communication and Documentation Letters, referrals, and patient-facing content produced consistently. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing Healthcare Data Appointment trends and operational metrics without a data specialist.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use NHS IG, patient data safety, CQC, GMC implications. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Healthcare context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Draft a suite of five recurring clinical letters using Copilot and document the time saving
- Build a Copilot Agent for a recurring admin task (appointment reminders or referral drafts)
- Create a Notebook from NICE guidelines and demonstrate 5 clinical use cases
- Analyse operational data and produce a summary for a PCN or practice meeting

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 05

Operations

Copilot for Operations and Admin Teams

For coordinators, PAs, office managers, and operational staff across any sector

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Operations managers and coordinators
- Personal assistants and executive assistants
- Office managers and administrators
- Project coordinators
- Business support teams
- Any non-technical team using Microsoft 365

PROGRAMME OVERVIEW

Operations and admin staff have the most to gain from Copilot and often the least time to figure it out. This programme is built entirely around the tasks that fill a working day - emails, meeting notes, documents, forms, and coordination work. No technical background required.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Email triage and drafting in Outlook
- Automating meeting notes and action tracking
- Creating templates and recurring reports faster
- Building Copilot Agents for forms and recurring requests
- Producing presentations from bullet points
- Searching and summarising long policy documents

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: data security, information governance, GDPR for operational data, and responsible AI use
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

Book a consultation: www.theaiworkflowlab.com/team-training

PROGRAMME 05 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Creating Visual Content and Documents Professional graphics and documents without a designer. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing Operational Data Turn reports and spreadsheets into insight - no technical skills required.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use Data security, IG, GDPR. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Operations context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Build a Copilot Agent for a recurring operational task and document the time saving
- Create a suite of five standard document templates using Copilot
- Create a Notebook from operational policies and demonstrate 5 practical use cases
- Produce a data analysis and visual summary from an existing operational dataset

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 06

Marketing and Sales

Copilot for Marketing and Commercial Teams

For marketers, account managers, and commercial teams - content, campaigns, and clients

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Marketing managers and directors
- Campaign and brand managers
- Content managers and creators
- Account and business development managers
- Sales managers and commercial leads
- Customer success and CRM teams

PROGRAMME OVERVIEW

Marketing and sales teams spend enormous amounts of time on content, correspondence, and reporting. Copilot handles the first draft of almost all of it. Built around actual commercial tasks with advertising standards and GDPR for marketing data covered throughout.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Drafting campaign copy, briefs, and client communications
- Generating first-draft visuals and social graphics
- Personalising client outreach and proposals at scale
- Competitive research and market analysis
- Producing presentations from brief to deck in minutes
- Summarising campaign performance and reporting to stakeholders

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: advertising standards, GDPR for marketing data, AI-generated content disclosure, and responsible AI use
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

Book a consultation: www.theaiworkflowlab.com/team-training

PROGRAMME 06 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Creating Campaign and Brand Content Campaign visuals, social graphics, and brand materials from a sentence. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing Campaign and Sales Data Performance data, pipeline analysis, and commercial reporting.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use Advertising standards, GDPR for marketing data, AI content disclosure. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Marketing and Sales context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Produce a complete campaign brief, visual, and client-facing summary using Copilot (minimum 3 features)
- Build a Copilot Agent for a recurring sales or marketing workflow
- Create a Notebook from brand guidelines and demonstrate 5 on-brand content use cases
- Analyse a campaign or pipeline dataset and produce a commercial performance report

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 07

Finance

Copilot for Finance and Accounting

For finance managers, accountants, and IFA support teams - FCA and Consumer Duty context built in

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Finance managers and directors
- Management accountants
- Independent financial advisers
- Paraplanners and IFA support
- Compliance officers
- Finance administrators

PROGRAMME OVERVIEW

Built around the tasks that take up most of a finance professional's week - reporting, client communications, data analysis, and compliance documentation. FCA expectations, Consumer Duty, and client data sensitivity are woven through every session.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Building financial summaries and board packs faster
- Automating recurring reporting workflows
- Analysing data in Excel without complex formulas
- Summarising market updates and regulatory changes
- Drafting suitability letters and annual review reports
- Managing client communications more efficiently

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: FCA compliance, Consumer Duty, GDPR for client data, data sensitivity in financial contexts, and responsible AI use
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

Book a consultation: www.theaiworkflowlab.com/team-training

PROGRAMME 07 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Client Communication and Compliant Report Writing Suitability letters and review reports from meeting notes to first draft. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing and Visualising Financial Data Portfolio analysis, performance reporting, and trend identification.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use FCA compliance, Consumer Duty, GDPR for client data. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Finance context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Draft a client suitability letter and annual review report from meeting notes using Copilot
- Build a Copilot Agent for a recurring finance workflow (review packs, standard letters, or reporting)
- Create a Notebook from FCA guidance and firm policies and demonstrate 5 use cases
- Analyse a financial dataset and produce a board-ready summary with visualisations

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 08

Legal

Copilot for Legal Teams

For solicitors, paralegals, and legal support - professional privilege and SRA obligations covered

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Solicitors and lawyers
- Paralegals and legal executives
- Partners and associates
- Trainee solicitors and in-house counsel
- Legal administrators
- Practice management and business development

PROGRAMME OVERVIEW

Built around the real tasks of legal practice - drafting correspondence, summarising bundles, managing client communications, and preparing file notes. Professional privilege, client confidentiality, and SRA obligations are core session content throughout.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Drafting client letters, advice notes, and standard correspondence
- Summarising lengthy bundles and case files
- Managing client email in Outlook
- Building Agents for recurring engagement letters
- Turning precedents into a searchable knowledge base
- Producing first-draft client reports and presentations

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: SRA obligations, professional privilege, client confidentiality, data security, and responsible AI use in regulated legal environments
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

Book a consultation: www.theaiworkflowlab.com/team-training

PROGRAMME 08 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Legal Document Drafting and Client Communications First drafts of letters, advice notes, and client updates from meeting notes. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing Legal and Practice Data Billing trends, matter performance, and workload analysis.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use SRA obligations, privilege, client confidentiality, data security. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Legal context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Draft a suite of five standard client letters from a brief or meeting note using Copilot
- Build a Copilot Agent for a recurring legal admin task (engagement letters or file notes)
- Create a Notebook from precedent files and demonstrate 5 use cases
- Analyse billing or matter data and produce a practice performance summary

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 09

HR and People

Copilot for People and HR Teams

For HR professionals and people teams - employment law, GDPR for employee data, and AI bias covered

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- HR business partners and directors
- Chief people officers
- Talent acquisition and L&D; leads
- Employee relations specialists
- Reward and recognition managers
- HR coordinators and administrators

PROGRAMME OVERVIEW

HR teams handle sensitive communications, complex documentation, and people data every day. Built for the actual work - job descriptions, employee communications, policies, and people analytics - with AI bias, equality obligations, and data protection woven in throughout.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Drafting job descriptions, interview frameworks, and onboarding documents
- Writing sensitive employee communications
- Producing HR policies and process documentation faster
- Building Agents for absence reporting and standard letters
- Summarising engagement survey responses
- Creating employer brand and internal comms content

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: employment law, GDPR for employee data, Equality Act obligations, AI bias in hiring decisions, and responsible AI use
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

Book a consultation: www.theaiworkflowlab.com/team-training

PROGRAMME 09 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Employer Brand and Internal Comms Content Recruitment materials, onboarding packs, and internal comms visuals. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing People Data Engagement scores, absence trends, and recruitment data without a data analyst.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use Employment law, GDPR for employee data, Equality Act, AI bias. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a HR and People context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Draft a complete onboarding pack for a new role using Copilot (minimum 3 features)
- Build a Copilot Agent for a recurring HR workflow (absence letters or onboarding checklist)
- Create a Notebook from HR policies and demonstrate 5 use cases for HR staff
- Analyse engagement or absence data and produce a board-ready people summary

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 10

Education

Copilot for Education Professionals

For teachers, school administrators, and further education staff - safeguarding and pupil data built in

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Teachers and subject leads
- School administrators and office managers
- Headteachers and deputy heads
- Further and higher education staff
- SENCO and pastoral leads
- Learning support assistants

PROGRAMME OVERVIEW

Copilot handles the paperwork, planning prep, and communications so educators can focus on what matters. Safeguarding, pupil data protection, and Ofsted requirements are built into the programme throughout.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Lesson planning frameworks and resource creation
- Parent and stakeholder communications from notes
- Pupil report writing at scale
- Meeting summaries and action tracking
- Policy documents and administrative templates
- Summarising Ofsted frameworks and guidance

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: safeguarding obligations, pupil data protection, Ofsted requirements, and responsible AI use in educational settings
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

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PROGRAMME 10 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Creating Educational Content and Resources Lesson materials, classroom resources, and visual content faster. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing School and Student Data Pupil progress, attendance, and performance data.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use Safeguarding, pupil data protection, Ofsted context. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Education context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Produce a complete set of five pupil report templates using Copilot
- Build a Copilot Agent for a recurring school admin task (parent letters or meeting summaries)
- Create a Notebook from school policies and Ofsted frameworks and demonstrate 5 use cases
- Analyse a set of pupil or attendance data and produce a summary for a staff meeting

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 11

Consulting and Analysis

Copilot for Consultants and Analysts

For management consultants, strategy analysts, and advisory professionals

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Management and strategy consultants
- Research and industry analysts
- Engagement managers and principal consultants
- Business analysts
- Senior and associate consultants
- Advisory support and knowledge management

PROGRAMME OVERVIEW

Copilot accelerates research, analysis, client communications, and presentations. Built around the real pressures of client-facing work, with analytical rigour, client confidentiality, and appropriate AI disclosure covered throughout.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Producing first-draft research memos and client briefings
- Building presentations from notes in minutes
- Deep research and competitive analysis
- Summarising lengthy client data and market reports
- Drafting proposals, engagement letters, and recommendations
- Automating recurring reporting workflows

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: client confidentiality, analytical rigour, GDPR for client data, AI disclosure obligations, and responsible AI use
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

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PROGRAMME 11 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1 Welcome to AI and Copilot What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Session 2 Copilot Chat Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Session 3 Creating Client-Facing Content and Deliverables Research memos, briefings, and visual deliverables from working notes. Unlocking Context: RTO becomes RTCO.
Session 4 Copilot in Your Apps: Part 1 Word, Outlook, and Teams. Real tasks, real outputs.	Session 5 Building Your First Copilot Agent Automate a repeating task from the pre-agreed list.	Session 6 Notebooks - Your Knowledge Base Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7 Copilot in Your Apps: Part 2 Excel, PowerPoint, and OneNote. Data, decks, and notes.	Session 8 Prompt Like a Pro Unlocking Constraints: the full RTCCO framework in practice.	Session 9 Analysing and Visualising Client Data Turn client data and research into clear, defensible insight.
Session 10 Deep Research with Copilot Sourced, defensible research using Copilot's research capabilities.	Session 11 Governance and Responsible Use Client confidentiality, GDPR, analytical rigour, AI disclosure. EU AI Act Article 4. Responsible and sustainable AI use.	Session 12 Confident Copilot Workflows End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Consulting and Analysis context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Produce a complete client briefing from raw notes using Copilot (minimum 3 features)
- Build a Copilot Agent for a recurring consulting task (proposal templates or reporting)
- Create a Notebook from client engagement context and demonstrate 5 analytical use cases
- Analyse a client dataset and produce a presentation-ready findings summary

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

PROGRAMME 12

Public Sector

Copilot for Public Sector Teams

For council, government, and public service teams - FOI, UK GDPR, and public accountability covered

12 x 90-MIN LIVE SESSIONS

ONLINE

SUITABLE FOR

- Policy officers and civil servants
- Council officers and service managers
- Communications officers
- Programme and project managers
- Committee clerks and democratic services
- Executive officers and administrators

PROGRAMME OVERVIEW

Public sector teams are under pressure to do more with less. Copilot handles a significant portion of the drafting, summarising, and analysis that currently takes up the working week - while FOI obligations, UK GDPR, and public accountability are built in from the start.

Prompting framework: Participants begin with **RTO** in Session 1, unlock **Context** in Session 3 (becoming **RTCO**), then unlock **Constraints** in Session 8 to master the full **RTCCO (Role - Task - Context - Constraints - Output)** framework.

■ Responsible and sustainable AI use practices are included throughout this programme.

REAL TASKS COVERED

- Drafting briefings, reports, and citizen correspondence
- Summarising consultation responses and stakeholder submissions
- Analysing data and survey responses
- Managing stakeholder communications in Outlook
- Summarising policy documents and legislation
- Producing committee papers and board reports faster

- ✓ Practical skills built around the tasks your team does every day
- ✓ RTCCO prompting framework introduced in stages - RTO first, full RTCCO by Session 8
- ✓ Governance built in: UK GDPR, FOI obligations, information governance, public sector procurement context, and responsible AI use in public service
- ✓ Certificate of completion for every participant
- ✓ Content updated as Microsoft evolves Copilot - www.theaiworkflowlab.com/catalogue

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PROGRAMME 12 - SESSION STRUCTURE

12 x 90-minute live online sessions, split into two self-contained blocks.

PART 1: ESSENTIALS		
Session 1	Session 2	Session 3
Welcome to AI and Copilot	Copilot Chat	Creating Public Sector Content
What AI is, where Copilot fits, and what good use looks like. First prompts using RTO (Role - Task - Output).	Your AI conversation partner. Drafting, summarising, and responding - RTO in practice.	Consultation communications, briefings, and public-facing materials. Unlocking Context: RTO becomes RTCO.
Session 4	Session 5	Session 6
Copilot in Your Apps: Part 1	Building Your First Copilot Agent	Notebooks - Your Knowledge Base
Word, Outlook, and Teams. Real tasks, real outputs.	Automate a repeating task from the pre-agreed list.	Feed Copilot your own documents. Get answers grounded in your materials.
PART 2: MASTERY		
Session 7	Session 8	Session 9
Copilot in Your Apps: Part 2	Prompt Like a Pro	Analysing Public Sector Data
Excel, PowerPoint, and OneNote. Data, decks, and notes.	Unlocking Constraints: the full RTCCO framework in practice.	Survey responses, consultation data, and performance metrics.
Session 10	Session 11	Session 12
Deep Research with Copilot	Governance and Responsible Use	Confident Copilot Workflows
Sourced, defensible research using Copilot's research capabilities.	UK GDPR, FOI obligations, IG, public accountability. EU AI Act Article 4. Responsible and sustainable AI use.	End-to-end workflows and what is coming next from Microsoft.

THE FINAL PROJECT

Every participant completes a final project demonstrating real Copilot capability in a Public Sector context. The project topic is chosen from a pre-agreed shortlist - relevant to your team and consistent enough to assess fairly.

Pre-agreed project options:

- Draft a complete briefing paper and accompanying citizen communication using Copilot
- Build a Copilot Agent for a recurring public sector task (consultation summaries or correspondence)
- Create a Notebook from policy documents and legislation and demonstrate 5 use cases
- Analyse a consultation or survey dataset and produce a committee-ready summary

Every participant receives a certificate of completion and a completed project they can share with their manager as evidence of genuine capability. | www.theaiworkflowlab.com/catalogue

READY TO GET STARTED?

Book a free conversation with us.

Every engagement starts with a free 30-minute call. We find out what your team needs, which Copilot features will make the biggest difference, and how to fit training around your schedule. No pitch deck. No pressure. Just an honest conversation.

EMAIL

hello@theaiworkflowlab.com

TEAM TRAINING

www.theaiworkflowlab.com/team-training

FULL CATALOGUE

www.theaiworkflowlab.com/catalogue

WHY ORGANISATIONS CHOOSE US

- ✓ Built by professionals who use these tools in real clinical and commercial settings every day
- ✓ Clinical credibility - our lead trainer is a practising GP and clinical AI reviewer
- ✓ Real Microsoft expertise - certified Microsoft 365 and Copilot specialist co-designs every programme
- ✓ Practical not theoretical - every session produces real outputs your team uses the same day
- ✓ Governance built in - sector-specific compliance, EU AI Act Article 4, and data security in every programme
- ✓ Responsible and sustainable AI use woven into every programme
- ✓ Staged RTCCO prompting framework - RTO to full RTCCO, so no participant gets left behind
- ✓ Pre-agreed final projects - relevant without being so bespoke they cannot be assessed consistently
- ✓ Content that updates - programmes evolve as Microsoft evolves Copilot

AI Workflow Lab. Microsoft Copilot training built by people who use these tools every day. | www.theaiworkflowlab.com