

Team Enablement

Microsoft 365 Copilot · Private 2-Day Workshop · RefineM

Two days, your team, your own Microsoft 365 environment, your real work. Not a demo and not a lecture — a hands-on working session that leaves a single team or department able to use Copilot inside their actual week, with a working agent built on your own data before they leave.

AT A GLANCE

Format: 2 days, private, on-site or virtual · hands-on (~70–75% exercises)

Who: one team or department · anyone who works in Outlook, Teams, Word, Excel, PowerPoint · no technical background needed

Requirement: paid/licensed Microsoft 365 Copilot (the free version doesn't support agents well)

Credit: PDUs and SEUs (RefineM is a PMI Authorized Training Partner) · group discounts up to 30%

Bridge: upgrade to the 90-Day Adoption Program within 30 days and this fee applies to it

Day 1 — Foundations & role-specific workflows

The day people stop using Copilot as a search box and start using it inside their real work.

Time	Session
Morning	Foundations that stick How Copilot works across Outlook, Teams, Word, Excel, and PowerPoint — and where it helps versus where it doesn't. Prompting fundamentals, then straight into practice.
	Your workflows, not samples We map the team's real recurring work and rebuild it with Copilot live: email and inbox triage, meeting recaps and follow-ups, first-draft documents and decks, spreadsheet analysis and cleanup.
Afternoon	Role-specific playbooks Each role builds the handful of Copilot moves that matter for their week, captured as a reusable prompt playbook they keep.
	Governance & responsible use What's safe to put into Copilot, data boundaries, and prompt hygiene — before habits form, not after.

End of Day 1: every attendee has a personal prompt playbook and can run their core weekly tasks with Copilot.

Day 2 — Agents, champions & making it stick

The day the value stops living in one power user's head and starts living in the team's process.

Time	Session
Morning	From prompts to agents When to use an agent versus a prompt versus a template — the judgment call most teams get wrong. What a Copilot agent is, and what it isn't.
	Build an agent on your data Hands-on: we find the recurring, rules-based work in the team's week that's genuinely agent-shaped and build a working agent together in Copilot Studio, grounded in your own content.
Afternoon	Agent governance Ownership, approval, data scope, and lifecycle — so every agent that ships has a boundary and an owner.
	Champions & keeping it going

Time	Session
	We equip the team's champions to carry it forward, plus a simple plan for reinforcement after we leave.

End of Day 2: the team has at least one working agent live on your data, named champions to sustain it, and a governance model to keep it safe.

What your team leaves with

- A personal Copilot prompt playbook per role, built on your actual work
 - At least one working agent, live on your data, with an owner and a governance boundary
 - Named, equipped champions to sustain and extend it
 - A shared standard for safe, responsible Copilot use
 - PDUs and SEUs for every attendee
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Ready to go organization-wide? Team Enablement makes one team capable. The 90-Day Adoption Program takes it across the organization and proves the ROI — assess, enable, embed, measure. Book a 30-minute readiness call: nks@refinem.com