



# Copilot

## Mastering Microsoft 365 Copilot for Sales, Marketing, and Finance

CONNECTION TECHNOLOGY 裝備未來  
FUTURE SKILLS

This course focuses on leveraging Microsoft 365 Copilot to enhance sales forecasting, marketing analytics, and financial decision-making. Participants will learn practical applications and hands-on techniques to optimize business processes.

Programme code	P0000197
Date and time	9 Mar 2026 ( 2:00pm – 5:30pm )
Venue	1/F, HKPC Building, 78 Tat Chee Avenue, Kowloon Tong
Medium	Cantonese, supplemented with English terminology
Course fee	HK\$1,500

### Trainer Information

**Dr Patrick TSOI**, he is a trainer with over 28 years hands-on data science, Big Data and programming experiences. He is a Doctor of Education graduate from the Hong Kong Baptist University, Master in IT Education graduate from the University of Hong Kong and B.Eng in System Engineering and Engineering Management from the Chinese University of Hong Kong.



#### Enrolment method

**Scan the QR code to register !**

If you have any inquiries, please feel free to contact us.

## Course Outline

### 1: Copilot Fundamentals for Business Functions

- Copilot Overview: Key features for business functions.
- Integration with Microsoft Office: How Copilot supports reporting and collaboration.
- AI-driven Productivity: Automating repetitive tasks and generating insights.
- Use Cases: Examples in CRM, campaign planning, and budgeting.

### 2: Sales Forecasting and Marketing Analysis

- Sales Forecasting: Leveraging historical data for projections in Excel and Copilot.
- Pipeline Management: Automating updates and summaries in Teams.
- Marketing Analytics: Campaign ROI analysis, segmentation, and trend visualization.
- Power BI Integration: Creating dashboards with Copilot assistance.
- Best Practices: Ensuring data accuracy and actionable insights.

### 3: Financial Insights and Process Optimization

- Financial Reporting: Automating monthly and quarterly reports.
- Cash Flow Analysis: Using Copilot for scenario planning.
- Expense Optimization: Identifying cost-saving opportunities.
- Compliance and Risk Management: Ensuring secure financial workflows.
- Integration with Excel with Finance: Advanced use cases.

### 4: Hands-on Lab: Data Summarization and Reporting

- Scenario 1: Generate a sales forecast report in Excel.
- Scenario 2: Summarize marketing campaign performance in PowerPoint.
- Scenario 3: Create a financial dashboard using Power BI and Copilot.
- Scenario 4: Automate compliance checks for financial documents.

### 5: Best Practices, Q&A

- Discussion: Common challenges in sales, marketing, and finance.
- Best Practices: Data governance, security, and workflow optimization.
- Q&A

