



Certificate in Microsoft Copilot Tools & Techniques for CPAs

Certificate Description

This certificate equips CPAs with the practical skills to use Microsoft 365 Copilot confidently, responsibly, and effectively in their professional work.

Go beyond the basics, learn how to work smarter, not harder, by integrating AI into your daily workflow with precision and professionalism.

Through interactive exercises, you'll discover how Copilot transforms the way you work across Word, Excel, PowerPoint, Outlook, and Teams. Draft polished financial reports and engagement letters in minutes, analyze complex datasets with ease, create impactful presentations, manage email overload, and summarize meetings effortlessly.

But this certificate isn't just about speed, it's about doing it right. You'll master the art of prompting, refine AI outputs for accuracy and clarity, and apply responsible AI principles like transparency, accountability, and security to protect client data and uphold professional standards. Learn how to guide Copilot through multi-turn scenarios, use prompt templates, and rephrase queries for optimal results, all while safeguarding confidentiality.

By the end of the certificate, CPAs will be equipped to confidently integrate Copilot into their workflows, leveraging its capabilities to streamline tasks, enhance client communications, and strengthen decision-making.

18 PD Hours

To earn your CPD hours and Digital Badge, you must attend all live sessions.



Areas of Focus

As part of this certificate, participants will receive a dedicated Microsoft 365 Copilot license within our secure training tenant.

Copilot Fundamentals

Grounding, Prompting, and Responsible AI

Focus: Introduction to Microsoft 365 Copilot and the basics of interacting with it effectively and safely.

- Effective Prompting & Grounding
- Interpreting & Verifying Outputs
- The Six Microsoft AI Principles: Transparency, Accountability, Fairness, Inclusiveness, Reliability & Safety, Privacy & Security; and how these translate into user practices.
- Privacy and Confidentiality

Effective Copilot Chat Techniques

Focus: Developing skills for interacting with Copilot in chat-based interfaces, including multi-turn conversations and advanced prompting strategies.

- Conversational Prompting Techniques
- Advanced Prompting Strategies
- Iterative Workflows
- Data Security & Best Practices

Copilot for Word

AI-Assisted Document Drafting

Focus: Using Microsoft Copilot in Word to create, edit, and summarize documents.

- Document Drafting & Editing
- Interactive Document Support
- Iterative Review & Refinement
- Responsible Use & Prompting Tips

Copilot for Excel

AI-Assisted Data Analysis

Focus: Applying Copilot in Excel for data analysis, formula generation, and insights – introductory level.

- Formula Generation & Automation
- Data Analysis & Insights
- Interactive Exploration & Validation
- Responsible Use & Data Practices

Copilot for PowerPoint

AI-Assisted Presentation Creation

Focus: Utilizing Copilot in PowerPoint to develop presentations quickly and refine slide content/design.

- Presentation Drafting & Enhancement
- Design & Formatting Support
- Iterative Slide Development
- Review & Responsible Use

Copilot for Communication

Outlook and Teams

Focus: Using Copilot in Outlook and Teams to manage communications, emails, and meetings more efficiently.

- Email Drafting & Summarization in Outlook
- Context-Aware Communication
- Meeting & Chat Assistance in Teams
- Review & Personalization



This certificate is ideal for CPAs who want to integrate Microsoft 365 Copilot confidently and responsibly into their daily work or for members who are exploring Copilot to determine if this is a good fit for their organization.

Prerequisite

This course focuses on working effectively with Copilot, not learning Microsoft 365 fundamentals from scratch. To get full value from the course, participants should already be comfortable with a small set of core Microsoft 365 capabilities outlined [here](#).

Schedule

Classes will begin at 9:00 AM and conclude at 1:00 PM EDT.

Intro and Q&A sessions conclude at 10:00 AM EDT.

- **Introductory Session:** October 1
- **Class 1:** October 6
- **Class 2:** October 13
- **Class 3:** October 20
- **Class 4:** October 27
- **Q & A Session:** October 30

Key Takeaways

Upon completion of this certificate, participants will:

- Understand Copilot’s capabilities and limitations at a fundamental level.
- Gain proficiency in conversing with Copilot, steering its responses, and redirecting.
- Use Copilot in Excel to generate formulas, explain calculations, create charts, and extract insights, with emphasis on validating outputs.
- Leverage Copilot in PowerPoint to accelerate presentation development, focusing on narrative and analysis while refining AI-generated slides.
- Employ Copilot in Outlook and Teams to streamline communication, draft professional emails, and capture meeting summaries, ensuring accuracy and professionalism.

Meet Your Instructor



Mario Morel

Mario Morel is a seasoned technology leader specializing in deploying and administering Microsoft 365 Copilot solutions at scale. With deep expertise in governance, security, and process optimization, Mario has successfully implemented Copilot across complex enterprise environments, ensuring seamless integration and measurable business impact.

A passionate educator and mentor, Mario has delivered a wide range of training sessions on Copilot, empowering professionals to harness AI-driven productivity tools effectively. His training programs span diverse industries—including banking, healthcare, real estate, and manufacturing—where he tailors strategies to meet unique operational and compliance needs. His commitment to innovation and knowledge sharing positions him as a trusted advisor for organizations seeking to unlock the full potential of Microsoft 365 Copilot.

