Copilot for Microsoft 365: A Comprehensive End-user Training Plan for Organizations

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Abstract

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This thesis presents a comprehensive end user training plan for Copilot for Microsoft 365, a generative AI tool that integrates with Microsoft's productivity suite of applications. The research is conducted within the context of Sulava Ltd., a Finnish consultancy company specializing in Microsoft cloud services, which has recently gained prominence for its expertise in AI-based tools like Copilot for Microsoft 365.

The core of the thesis is the creation of a training plan for Copilot for Microsoft 365 and its implementation as part of a service offered by the commissioning company for its clients. The training plan aims to equip users with the skills to utilize AI tools efficiently, potentially saving significant time in their daily tasks. The research also explores how to make the training plan simple, scalable for future expansion and high quality for both attendees and trainers.

The research method for the thesis combines a literature review with qualitative research, including a questionnaire distributed to trainers at Sulava Ltd. The results indicate a positive reception to the training materials and confidence in the program's ability to teach valuable skills to end users. The thesis presents a blueprint for a comprehensive training program that can be adapted by other organizations and scaled easily in accordance to the number of clients. The thesis also serves as a valuable resource for organizations looking to implement AI tools and training on them for their employees.

Key words
Copilot for Microsoft 365, Microsoft Copilot, Generative AI, Large Language Models, AI Training

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Glossary

Artificial Intelligence (AI)	The ability of a computer to perform tasks commonly associated with intelligent beings like humans, like the ability to generalize, reason or learn (Copeland, 2024).
Generative AI	Artificial Intelligence models that can generate content such as text, code or images from an input based on a set of training data (Pinaya *et al.*, 2023).
Language Model	Probabilistic Artificial Intelligence model understanding and predicting natural language (Daniel and Martin, 2023).
Large Language Model	A form of language model that dramatically expands the amount of data used for training (Kerner, 2024).
Microsoft Azure	A public cloud computing service offered by Microsoft (Bigelow, 2022).
Microsoft 365	Microsoft's cloud-powered productivity suite of applications (Microsoft, 2024).
Microsoft Copilot	A Large Language Model -powered chatbot made by Microsoft (Mehdi, 2023a).

1 Introduction

Since the launch of the ChatGPT LLM (Large Language Model) and service on November 30th, 2022, the world has been taken by storm with a new wave of AI innovation and hype. Artificial Intelligence and tools based on it have also crossed the line into full mass-market adoption, with ChatGPT reaching 100 million active users in just a few months, making it the fastest-growing consumer application in history (Carr, 2023). This interest in Generative AI didn't stop only at consumers, but crossed also into business, where organizations were quick to start investing heavily on AI, hoping to gain a competitive edge (Chui *et al.*, 2023). Estimates from sources like McKinsey estimate that Generative AI could contribute an equivalent of $2.6 trillion to $4.4 trillion to the global GDP (McKinsey, 2023). With huge expectations for the future, and new developments coming out every single week, AI has become a field that almost no company has been able to fully ignore since 2023.

It has also become clear that organizations adopting AI-powered solutions need to learn new skills. Some of the top skills required for the effective use of AI in the workplace according to leaders include better analytical judgement and bias detection and handling ('Will AI Fix Work? 2023 Work Trend Index: Annual Report', 2023). With Generative AI -based tools often working with text-based inputs (prompts) from the user, companies are required to also re-train their employees to take full advantage of these solutions.

1.1 Background

Microsoft has been a big contributor to AI research for a long time, holding up to 20% of all AI related patents in the start of 2019 (Columbus, 2019). Microsoft has also for a long time offered AI-based solutions to its customers, offering AI models and training capabilities through its cloud computing platform Azure, and integrating AI features into its productivity solutions through Microsoft 365. After the launch and success of ChatGPT, Microsoft made a 10-billion-dollar investment and increased its ownership of ChatGPT creator OpenAI to 49% (Metz and Weise, 2023). Microsoft already had invested in OpenAI earlier and had them using Azure infrastructure to train and develop their AI Models.

In February 2023 Microsoft introduced Bing Chat (Mehdi, 2023b), which was an implementation of OpenAI's language models integrated into the Bing search engine. Bing Chat was also adopted by organizations as a version for business use was introduced under the name of "Bing Chat Enterprise". Bing Chat was later renamed into Microsoft Copilot and continues to evolve as one of the biggest generative AI based tools for both organizations and individuals. In March 2023 Microsoft also introduced Copilot for Microsoft 365 (then named Microsoft 365 Copilot), which

integrated Large Language Models into their Microsoft 365 Suite of productivity applications. Copilot would make it possible for users to utilize Generative AI in creating PowerPoint presentations from Word documents, quickly summarizing emails, meetings and more (Spataro, 2023).

For many companies working as partners in the Microsoft ecosystem, the sudden barge of Copilots came as quite of a surprise. The demand for Copilot for Microsoft 365 from companies also surprised many, with 40% of Fortune 100 companies already participating in the Early Access Program (Spataro, 2024). Personally, I was also very interested, since the tool presented on the announcement seemed very futuristic, and what people had been dreaming about for years. Now having personally worked with Copilot for Microsoft 365 for around 6 months and having trained hundreds of people in Finland and all over Europe, it still seems like the pace of innovation isn't slowing down any time soon, and that AI tools like Copilot for Microsoft 365 are here to stay and are to become an integral part of our daily information work, just like the internet did 20 years ago. I am also now responsible for all Copilot-related trainings at the commissioning company, so I'm in a great position to conduct the research outlined in this thesis.

1.2   Commissioning organization

Sulava Ltd. is a Finnish consultancy (later mentioned 'Sulava') and training company specializing in Microsoft cloud services and solutions. Sulava operates in Finland with offices in Helsinki and Kuopio, and in the United Arab Emirates through its subsidiary Sulava Gulf. The company is also part of The Digital Neighborhood, which is a European centrally owned collective of 14 companies focusing on Microsoft cloud solutions. This thesis has been commissioned for the company. Sulava has also recently been regarded to as one of the headlines consultancy companies in new AI-based tools released by Microsoft, having a large amount of highly experienced consultants focusing on tools like Copilot for Microsoft 365.

Sulava offers a variety of services for companies looking to implement and adopt Copilot for Microsoft 365 in their operations. The main offerings are CMWaaS (Copilot Modern Work as a Service) and Copilot Essentials, which is what the training plan outlined in this thesis was created for. The need for a general training plan was identified, when starting to create a service that would use a one-to-many way of delivery, meaning that the training and implementation plans couldn't be customized for each customer. The training plan should also be created to support the scalability of the service and in a way that it could easily be implemented in other sister companies of Sulava in The Digital Neighborhood and offered to their clients as well.

The training plan created as the product of this thesis could then be used to serve as a blueprint for creating a comprehensive end-user training practice for the new Copilot Essentials service, and other services based on the same model in other companies as well. The main goals of the training plan were outlined to be its simplicity, easy to implement structure and high-quality materials.

2   Research question and research methods

In this section, we will outline the research questions which will guide the research outlined in this thesis. It will also explain the research methods employed in the thesis, and the goals of what the research hopes to achieve.

2.1   Research question

The goal of this research is to look at the creation of a training program for AI-based tools aimed at information workers like Copilot for Microsoft 365, and how its implementation can be arranged in the context of the commissioning company. The goal of the research is to answer the following research question and its sub-questions:

1. What are the components that should be included in a successful AI tool training programme for information workers?
    a. How can information workers learning to use AI-based tools as easily as a conventional tool?
    b. What means can be implemented to make the training more effortless for the trainer?

This research will be conducted with just one research question due to the open-ended matter of the research question, and to quantify the required components to enable the time savings outlined in the research presented in Chapter 3.3.

2.2   Research methods

The goal of this thesis is to produce a product-based thesis by the means of action research, where the end-product is a finished training plan and its implementation at the commissioning company for their service. The research employs the methods of literature review, delving into academic research and other written and published sources of information about the subject. The theoretical background for this thesis is built on the basics of Artificial Intelligence and especially generative AI. The thesis also utilizes qualitative research in the form of a questionnaire submitted to the trainers at the commissioning company. The online questionnaire was constructed using Microsoft Forms and distributed to the trainers utilizing an internal Microsoft Teams channel. The questionnaire was conducted in a fully anonymous manner, with no user details being recorded. This was done to facilitate the giving of fully honest feedback.

This thesis also utilizes the Mendeley reference manager for citation management and referencing support. Mendeley can be used to organize articles and other references like web pages and scientific studies in its library. The program also offers a search tool, which can be used to find

relevant material in its crowdsourced library. Mendeley's add-in was then used in Microsoft Word, which helps to reference sources correctly for both in-text citations and the standalone sources chapter.

2.3   Goals of research

The goal of this research is to discover how to plan and implement a successful training plan for AI based tools for information workers in a scalable and easy-to-implement way. This research is very topical right now in the field of modern knowledge work, as the use of generative AI in companies has skyrocketed, and many organizations have begun to adopt cutting-edge tools for their information workers. This leads to companies having needs for AI competency and training related to AI, as studies show 57% of workers stating that they want their employers to train them on the use of AI tools (*What's Working? Navigating the AI Revolution and the Shifting Future of Work*, 2023). This research will present valuable learnings from one of the first implementations and offer a great template that other organizations can utilize to build on their own implementations. The research also offers valuable insight into the benefits of generative AI for information workers, and great learnings into how end-user training should be structured, as the research question in Chapter 2.1 sets out to answer this question. The benefits aren't only limited to the IT departments and personnel of companies, as organizational leadership can learn what the implementation of generative AI tools like Copilot for Microsoft 365 can offer to their information workers ('Will AI Fix Work? 2023 Work Trend Index: Annual Report', 2023), and how it could affect productivity and overall performance if implemented correctly.

This research will also benefit the commissioning company by breaking down the most important components of the training plan for the trainers and their success, as mentioned in one of the research sub-questions. The research is also beneficial in quantifying how to make the training plan and its future development scalable. It also serves as a retrospective on the implementation of the training plan in the commissioning company in the start of 2024.

3   Theoretical framework

In general, Artificial Intelligence is not a new phenomenon, rather having existed for over decades now. We can find numerous articles on the subject, even going back to the 1970s, when there already were over 1500 scientific articles concerning the field of Artificial Intelligence (Hunt, 1975). In the following decades, AI in its numerous applications has become an integral part of our daily computing experience, ranging from the recommendation algorithms of online stores (Ricci, Rokach and Shapira, 2011) to automatic fraud detection with your credit card (Levitt, 2023). One of the biggest concepts in Artificial Intelligence are neural networks, which are models that compute data through levels of nodes, which are created in a way to mimic neurons in the human brain (CSU Global, 2021). This has made it possible for Artificial Intelligence models to learn in a human-like manner.

The concepts outlined in chapters 3.1 – 3.3 have been chosen as part of this theoretical framework and included due to their possibility to provide insight to the research questions presented in chapter 2.1. Chapter 3.1 provides background on the recent developments and breakthroughs in the field of Large Language Models, which assists in research sub-question A with understanding the differences between these tools to regular IT tools. The following chapters 3.2 and 3.3 go into more detail with Microsoft in relation to AI and especially Copilot for Microsoft 365, which is the focus of the training plan constructed in the empirical part of this thesis. The research presented in this chapter serves as a valuable framework for possible important elements of a training programme that the main research question is after.

3.1   Breakthrough of Large Language Models

One of the breakthrough points of AI research was in 2017, when a group of researchers at Google developed a new form of neural network architecture, the Transformer. This new type of model revolutionized language-based AI, making it possible to train a neural network in a dramatically smaller timeframe, even as little as 12 hours (Vaswani *et al.*, 2017). The scientific paper titled "Attention Is All You Need" has been called a "landmark paper" in the field of Artificial Intelligence research (Goldman, 2024).

Large Language Models are artificial neural networks that can generate general-purpose language and complete other language-based tasks like classification or semantic analysis. The reason why we call these large is due to the amount of data used to train the AI model, with is ranging possibly up to even millions of gigabytes worth of text (Cloudflare). Examples of Large Language models include OpenAI's GPT-4, Google's Gemini, and Meta's LLaMA family of models. Applications utilizing LLMs (Large Language Models) became increasingly popular in the end of 2022, following

the release of OpenAI's ChatGPT on November 30th. ChatGPT implemented an LLM in the format of a chatbot, where users could converse with the AI through text.

Large Language Model -based applications are often used as a form of Generative AI, which can create content for its user based on a specific input to the model called a prompt. Quickly after the release of Generative AI applications like ChatGPT, it was researched and analyzed that these kinds of applications could also be beneficial to businesses in the use of decision-making and other processes (Chuma and De Oliveira, 2023). This serves as a basis for the need and business requirement of the training plan constructed in this thesis.

3.2 Microsoft and Artificial Intelligence

Microsoft has long been offering a wide variety of AI services through its Azure cloud computing platform. These services range from computer vision to language and speech services (Azure AI Services). Through the consumption-based pricing model of Azure resources, this has made it possible for companies of all sizes to try out and scale up the usage of AI-based resources. In July of 2019 Microsoft announced an exclusive partnership with OpenAI, building its first AI supercomputers exclusively for OpenAI to use to train their AI models (Microsoft, 2019). After the breakthrough success of OpenAI's ChatGPT, Microsoft announced the general availability of Azure OpenAI Service, bringing the Large Language Model behind ChatGPT to everyone through their cloud computing platform (Boyd, 2023).

Microsoft later in February of 2023 announced its own contribution to the field of Generative AI tools with the new AI-powered Bing search engine. Bing Chat was built on OpenAI's language models powering ChatGPT but was augmented by Microsoft's own Prometheus model (Mehdi, 2023b). Prometheus allowed the tool to search and reference online sources in its answers in real-time, where ChatGPT had been held back by its relatively old set of training data (Khan, 2023). Later in July Microsoft released Bing Chat Enterprise, which was a version of the AI tool meant for business and enterprise use with the addition of commercial data protection (Stallbaumer, 2023). This meant chat businesses could utilize AI with their data without the risk of confidential organizational data leaking out, which had happened prior to this with other AI tools like ChatGPT (Park, 2023).

3.3 Copilot for Microsoft 365

Copilot for Microsoft 365 was introduced in March 2023 as an addition to the Microsoft 365 Suite of productivity apps, bringing AI tools to programs like Microsoft Word, PowerPoint, and Teams (Spataro, 2023). The functionality was built on top of the Large Language Models from OpenAI running in Microsoft's Azure data centers augmented with data about the users' documents,

calendar, emails, and other information from Microsoft Graph, which is a unified API platform underpinning Microsoft 365 (Brown *et al.*, 2024). These connect to already used applications in the Microsoft 365 Suite to perform actions like drafting a document based on a PowerPoint presentation in Word, automatically generating meeting notes in Teams, and summarizing email chains in Outlook.

The value proposition for Copilot for Microsoft 365 lies in possible time saved by information workers in their daily tasks. Microsoft initially surprised organizations by pricing the functionality quite steeply as an add-on to existing licensing at the cost of $30/user/month (Warren, 2023). This pricing seemed high but was quite quickly disregarded as many companies started calculating how much time and money the tool could save them. It was even referred to as a no-brainer, since the average knowledge worker's hourly salary is in many western countries higher than the license cost (Arstila, 2023). This would mean that a user with a Copilot license would have to achieve an hour's worth of time saved a month for the company to reach a return on their investment.

Quickly after Copilot for Microsoft 365's release to general availability for enterprise customers on November 1st, 2023, Microsoft Research released its first studies on the impact of the tool on information work. The research presented a significant increase in speed of task completion in various scenarios, like catching up with a missed meeting or information retrieval (Cambon *et al.*, 2023). The results showed users completing tasks in up to 26,2% of the time it took for the control group with no access to Copilot for Microsoft 365. This research further solidified the theoretical standing for the utilization of AI-powered tools in information work and serves as a valuable framework for potentially valuable components of a training plan to be addressed in the empirical part of this thesis.

4   Creating a training plan

The project which the creation of this training plan was a part of started at the end of January 2024, when the commissioning company's leadership approved the creation of the Copilot Essentials service, which was decided to be launched at the start of March 2024. The work was to be conducted by individuals chosen as part of the project team, including me as the most experienced trainer around the subjects of the upcoming service. This experience of training a large amount of people was needed due to the business requirements of the training program to be as successful and widely applicable as possible. A wide understanding of generative AI tools and their utilization in business was also deemed beneficial and one of the factors of choosing me for the job. I was also given the resource of another consultant with slightly less experience, who could be used to better distribute the workload, as later outlined in chapter 4.5. For completing the work, the project team chose a very iterative and self-directing method of working, where team members would mostly work on their own, receiving and giving feedback to each other asynchronously and then iterating based on given feedback. These methods were chosen due to the limited timeframe allotted for development, and the mutual trust between the members of the project team and the stakeholders.

4.1   Requirements

Creating a training plan that fully answers all the business requirements is always a challenge and a game of give and take, where there most likely isn't a scenario that covers everything. It was early on concluded that the training sessions would not focus on narrow learning where users would be hand-held through predetermined commands. Rather, the sessions should work as a showcase of what is possible, and inspiration for the users to start experimenting on their own. All features in all tools were considered, and based on those sessions should be created that prioritize the most important features and skills. It was also quickly concluded that these end-user training sessions should stray away from technical explanations and details, since those don't really provide value for all end-users. If some end-users end up going more in-depth with some technical features and details, our trainers could however answer their questions and provide some insight into the technical architecture and inner workings of Copilot for Microsoft 365.

We can conclude that some specific skills and features can be prioritized over others based on how much they can potentially save time for users. As concluded by the study referred to in chapter 3, especially meeting catch-up and information retrieval scenarios can be greatly sped up by use of Copilot for Microsoft 365. So the training plan should focus on at least covering those scenarios and features, and then move onto other features.

The trainers are expected to be regular consultants at Sulava, meaning that they possess intermediate to advanced knowledge of Microsoft 365 components, their usage, and technical details. This knowledge could be displayed by either experience or certified completion of Microsoft provided on-demand training content like MS-4004. In addition, the trainers are expected to possess the basic skills of utilizing Copilot in different applications, at least in the applications they are training. They can gain this knowledge by attending our internal training sessions, which are provided to all our employees every month. Trainers are also encouraged to share their knowledge with others to keep everyone up to date with the rapidly progressing and changing feature sets of the various applications.

4.2 Structure

The training plan presented in figure 1 was created to revolve around specific sessions for each application and how Copilot for Microsoft 365 can be utilized inside them. In addition to this set of four sessions of Word, PowerPoint, Excel and Teams/Outlook, an introductory session named "Copilot Basics" was constructed, working as a quick session going through the rough basics of all the major applications and their new Copilot features. The need for this session was concluded due to the need to inspire and provide a wow-factor to the end-users in a quick one-hour time frame. The last session to be added was a specified advanced training on prompt creation and prompt engineering, and this session would also serve as an advanced training into the use of Copilot Chat, which is the only new application introduced in the Copilot for Microsoft 365 suite.
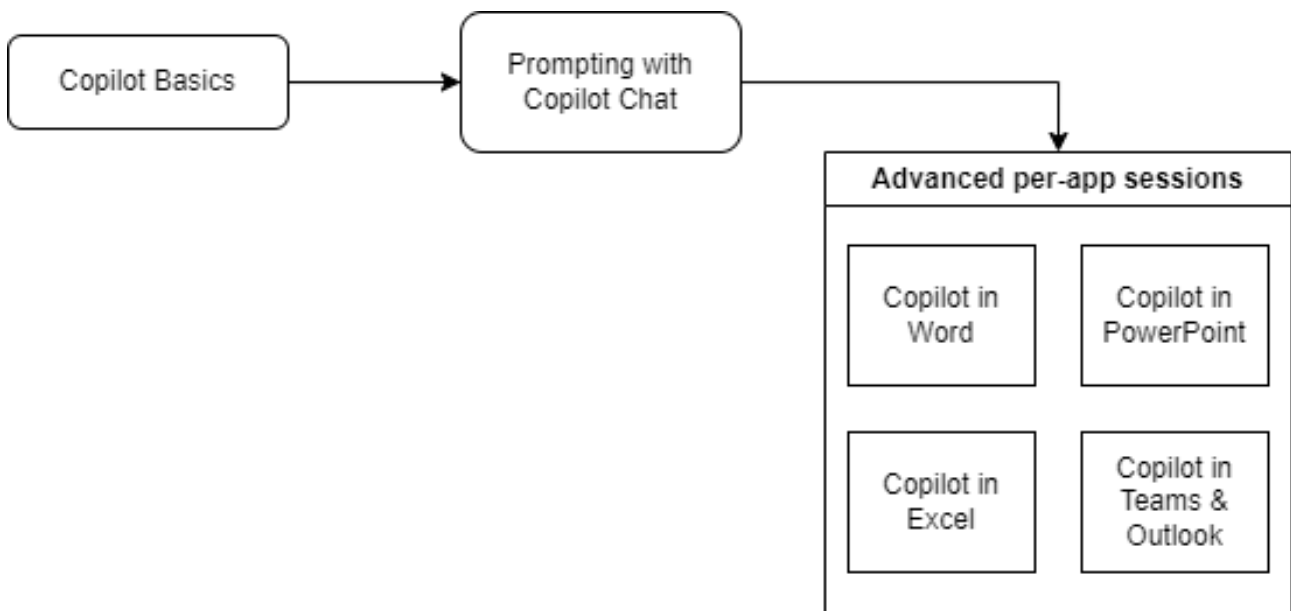

Figure 1 Planned training sessions and their order

The format decided for the trainings was guided by the one-to-many and online format outlined by the Essentials service, so the training sessions were created to be one hour long each. This was decided on due to the shorter length making the sessions easier to fit the trainers' schedules and lowering the barrier for end-users to join the trainings compared to longer sessions, making them easier to fit into their already busy calendars. The sessions would be mostly presentation based with also some live demos to give attendees more concrete examples on the usage of different features. It was also planned that trainers can reserve five minutes at the end of the trainings for possible questions from the attendees. In some cases, like with Microsoft Teams and Outlook, it was concluded that the content and features for each application wouldn't be sufficient for a full one-hour session, so they were merged to just one session featuring both applications.

4.3   Training content and exercises

For the training sessions, basic goals outlined in following figure 2 were set for what the end-user attendees enrolled in the service would know and be able to do after attending the training sessions
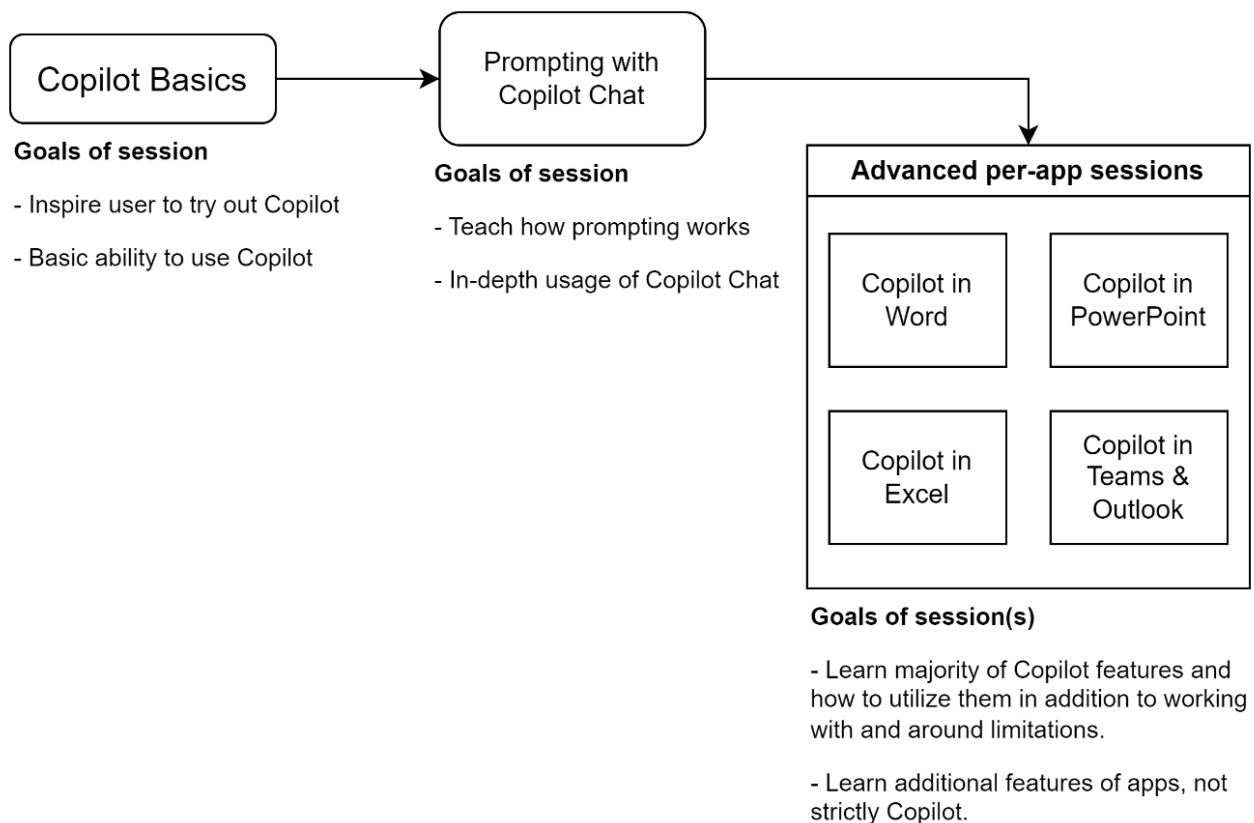

Figure 2 Training flow mapped with attendee goals

These were then kept in mind while constructing the sessions and exercises. Due to the limited one-hour length of sessions, it was decided that exercises wouldn't be done during the session, but rather distributed to the attendees after the training session. In general, the training sessions are carried out in a lecture style, where interaction between attendees and trainer is limited outside of time reserved for questions. However, attendees are encouraged to reach out to their colleagues and IT admins also part of the adoption project in their organizations.

After attending training sessions, the attendees are provided with a handout file containing exercises related to various Copilot-features presented in the training session. The attendees also have a form in which they can submit their answers, allowing Sulava to track progression of users on a wider scale, as showcased in figure 3 with the personal information of end-user attendees censored. After submitting answers to all the handouts, the end-users will receive a badge they can share on LinkedIn to showcase their completion.

Figure 3 Handout completion tracking system implemented utilizing a SharePoint List.

4.4   Supporting the trainer

The training plan and content was created so that onboarding new trainers was as effortless as possible, to support the scalability of the service in the future. Initially, a few trainers were identified with the help of Sulava's resourcing manager, with plans for expanding the trainer pool in the future. These first trainers had been identified with a form submitted to all the company's consultants, gauging interest in becoming a trainer for the upcoming service.

The trainers were then presented with the following resources to support them in gaining a grasp of the materials and training content:

1. A collection of recorded training sessions ran using the materials. 4 sessions in Finnish and 1 in English.
2. A "demo script" with step-by-step instructions and prompts used in the demos for the Basic Training -session.
3. A Microsoft Teams chat for trainers to ask questions and share best practices.
4. A video walkthrough and instructions on how to utilize our demo environment for trainings.

In the start, the number of trainers competent enough to run sessions was quite low, but with active internal training and creating robust onboarding materials, the number of trainers has been increased to over 10, which lessens the burden on internal resourcing and increases scalability. In addition, regular "train the trainer" sessions have been organized to give the possibility for trainers to freely ask questions and share their problems and solutions. The trainers' feedback is also used to update and improve the training materials.

4.5 Implementation

The creation and implementation of the whole training plan was a part of the bigger implementation project of Sulava's *Copilot Essentials* service. The project was approved by the steering group and started at the end of January 2024, with a deadline set on 22.3.2024 (Figure 4). The launch of the service was set for the 1st of March, giving just around a month for everything to be finished.
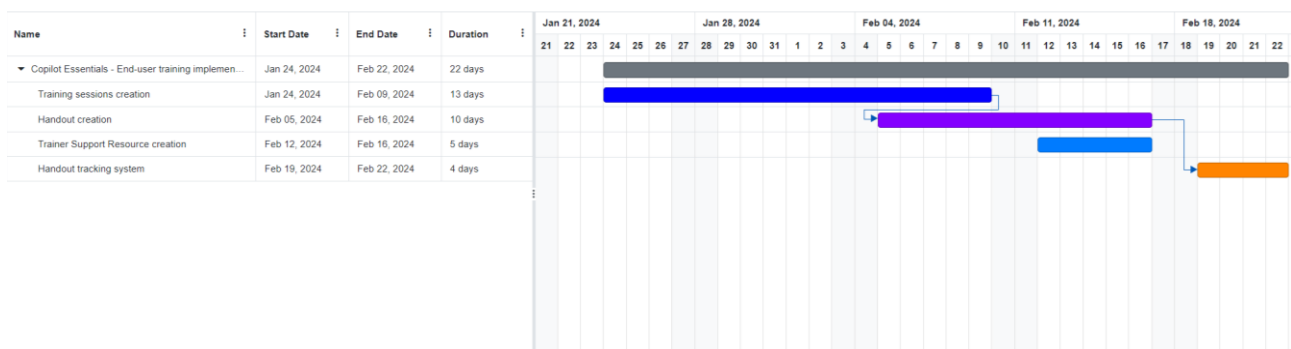

Figure 4 Gantt-chart plan of end-user training implementation

The creation of training materials was split between two consultants (one of them being me), allowing the distribution of the workload to help get everything finished by the deadline. The second consultant served as help to create some of the sessions, allowing me to focus on the big picture and trainer support resources. Select trainers were also consulted during the creation of

materials to gather their feedback and suggestions. The responsibilities were divided according to the RACI matrix in Table 1

Table 1 RACI (Responsible, Accountable, Consulted, Informed) matrix

Component	Responsible	Accountable	Consulted	Informed
Basic Training (incl. handouts)	Consultant **A**	Consultant **A**	Select trainers	Steering Group
Prompt training (incl. handouts)	Consultant **A**	Consultant **A**	Select trainers	Steering Group
Word (incl. handouts)	Consultant **A**	Consultant **A**	Select trainers	Steering Group
Excel (incl. handouts)	Consultant **B**	Consultant **A**	Select trainers	Steering Group
Teams & Outlook (incl. handouts)	Consultant **B**	Consultant **A**	Select trainers	Steering Group
PowerPoint (incl. handouts)	Consultant **A**	Consultant **A**	Select trainers	Steering Group
Trainer Support Resources	Consultant **A**	Consultant **A**	Trainers	Steering Group
Handout Tracking system	Consultant **A**	Consultant **A**	Service Owner	Steering Group

In the end, implementation was successful in the allotted time frame, and the original schedule was upheld, with the service going live on 1st of March, and the first end-user training sessions hosted a week later.

5 Results and analysis

5.1 Trainer questionnaire results

In this section, the results of the quantitative research outlined in Chapter 2 will be presented. The goal of this questionnaire was to gauge the feedback and overall sentiment from trainers about the training materials and program in general, going into questions like their confidence in utilizing the materials, possible issues, and additional resources they would still want. The survey was distributed to 11 people with 6 responses, making the answer percentage of the questionnaire around 55%.

The first questions of the questionnaire revolved around rating the quality of training materials, the confidence of the trainer and the conceived usefulness of training to the end-users. All these questions in figures 5 and 6 utilized a numerical scale ranging from 1-5, 1 being the lowest and 5 being the highest grade.

1. On a scale of 1-5, how would you rate the quality of training materials?

   More Details
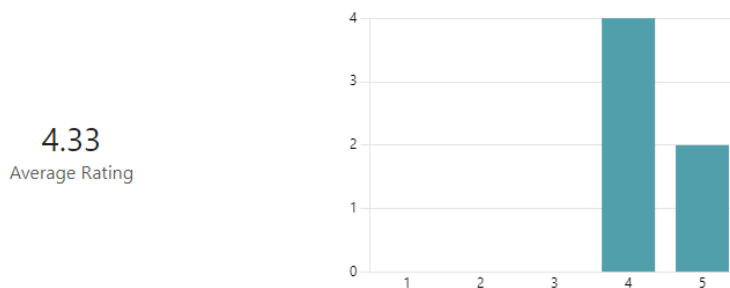
4.33
Average Rating

2. How confidently do you think you are able to run the training sessions?

   More Details

4.83
Average Rating

Figure 5 Results of the first two questions of the trainer questionnaire.

3. On a scale of 1-5, how well do you think the end-users will learn to use Copilot after your training sessions?

More Details

4.50
Average Rating

Figure 6 The answers to the third question of the trainer questionnaire.

The next question in figure 7 was an open question looking for possible topics where the given materials weren't enough, trying to find a spot the training plan might have missed.

4. Was there a topic (maybe a specific tool) that would have required more materials? Why?

6 Responses

ID ↑	Name	Responses
1	anonymous	Possible background story shared on slide notes. Without this slide content can't be understood immediately unless train the trainer -session is kept 100% in mind.
2	anonymous	Excel needed more content. Evergreen needed to lift some older slides.
3	anonymous	No
4	anonymous	No
5	anonymous	Practical examples
6	anonymous	I'd like to expand the compliance & DataSec materials to cover the lifecycle and eDiscovery/compliance storage of Copilot interactions in Exchange Online infrastructure in a bit more detail to better demonstrate how interactions can for example be inventoried and produced by admins when the need arises.

Figure 7 The answers to the fourth question of the trainer questionnaire.

The following questions in figure 8 and 9 (Figure 8 and 9, 18) revolved around possible issues or

problems around training sessions, with a possibility for elaboration and explanation of issues and workarounds utilized.

Figure 8 Answers to the fifth question of the trainer questionnaire.

Figure 9 Answers to the optional sixth question of the trainer questionnaire

Next the trainers answering the form were asked to rank the training modules in accordance to how beneficial they thought the sessions would be to the end-users attending the sessions. The rankings provided by each trainer answering the questionnaire are presented in figure 10 on the next page (Figure 10, 19).

7. Rank the training modules in accordance with how beneficial you think they are to the end user

6 Responses

Rank	Options
1	Prompting with Copilot Chat
2	Copilot for M365 Basics
3	Copilot in Teams & Outlook
4	Copilot in PowerPoint
5	Copilot in Word
6	Copilot in Excel

First choice ■ ■ ■ ■ ■ Last choice
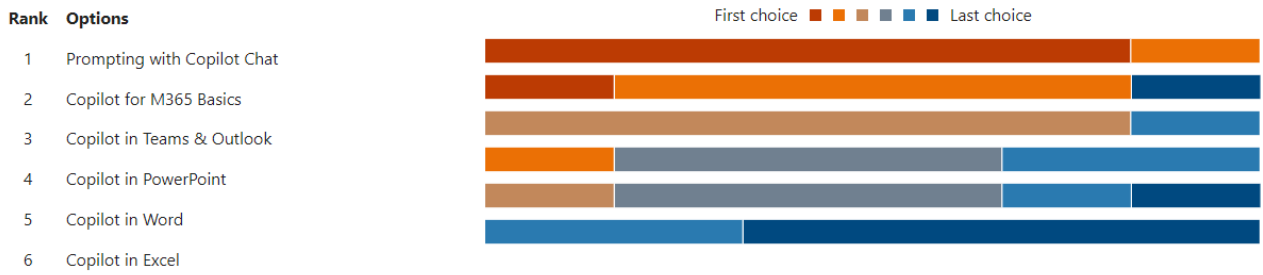
ID ↑	Name	1st	2nd	3rd	4th	5th	6th
1	anonymous	Prompting with Copilot Chat	Copilot for M365 Basics	Copilot in Word	Copilot in PowerPoint	Copilot in Teams & Outlook	Copilot in Excel
2	anonymous	Prompting with Copilot Chat	Copilot in PowerPoint	Copilot in Teams & Outlook	Copilot in Word	Copilot in Excel	Copilot for M365 Basics
3	anonymous	Prompting with Copilot Chat	Copilot for M365 Basics	Copilot in Teams & Outlook	Copilot in Word	Copilot in PowerPoint	Copilot in Excel
4	anonymous	Copilot for M365 Basics	Prompting with Copilot Chat	Copilot in Teams & Outlook	Copilot in PowerPoint	Copilot in Word	Copilot in Excel
5	anonymous	Prompting with Copilot Chat	Copilot for M365 Basics	Copilot in Teams & Outlook	Copilot in PowerPoint	Copilot in Excel	Copilot in Word
6	anonymous	Prompting with Copilot Chat	Copilot for M365 Basics	Copilot in Teams & Outlook	Copilot in Word	Copilot in PowerPoint	Copilot in Excel

Figure 10 The answers to the seventh question of the trainer questionnaire.

The final questions of the questionnaire presented in figure 11 and figure 12 on the following page (Figure 12, 20) were regarding additional materials that would be helpful to the trainers, and other possible suggestions to improve the training plan and sessions in the future.

9. Which of the following additional materials would be helpful for you? (Select all that apply)

More Details

●	Video tutorials	1
●	Recordings of previous trainings	3
●	More scripted examples	2
●	Other	1

Figure 11 The answers to the ninth question of the trainer questionnaire.

10. Do you have any suggestions or ideas on what to add to the training plan or sessions?

5 Responses

ID ↑	Name	Responses
1	anonymous	Go-through examples where different Copilots are linked either with material or different tasks, also Copilot+Notebook combo.
2	anonymous	Made script for the demo, which trainers can make better every training time.
3	anonymous	All is good
4	anonymous	Clear structure / contents of this training (+ section start slides) General "how to" slide about essentials in each slide deck (other trainings, headouts, questions after this session etc)
5	anonymous	Not right now, sorry. Need more experience running user-focused non-compliance sessions to acquire insights into this.

Figure 12 The answers to the tenth question of the trainer questionnaire.

5.2 Analysis of questionnaire results

The questionnaire's results showed that trainers were in general satisfied with the training plan and materials. They also shared a feeling of confidence about being able to run the training sessions and that end users attending the trainings would learn valuable skills in utilizing Copilot for Microsoft 365. It was also expressed that some sessions, like the training revolving around Excel would benefit from more content. At the time of this study, the Copilot-features in Excel are quite limited, leading to the trainers sometimes struggling to find content to fill the whole one-hour session. A minority of answers also expressed problems with the training sessions in scenarios where Copilot features wouldn't work in the case of a live demonstration.

Regarding how beneficial different sessions were thought to be to the end users, it was clear that the session around prompting and advanced usage of Copilot Chat was highly regarded as the most beneficial. As previously stated, Copilot for Excel's limited feature set most likely led to it being ranked last on the list. Most responses also regarded the Copilot Basics -session to be particularly beneficial to end users, most likely due to its importance in inspiring the end users, and due to it being the session most trainers had the most experience with.

In terms of materials to support the trainer, it was felt that almost any type of material would be beneficial. Trainers valued especially recordings of previous trainings to review and more scripted examples to run during their live demonstrations in sessions. Many trainers utilized recordings of training sessions to learn how other trainers ran their live demonstrations and what examples they used when explaining the different features of Copilot to end users. It was also expressed in the open-ended questions that scripted examples would make it easier for trainers to iterate on them to

improve the training sessions. Training sessions revolving around usual use cases rather than specific applications were also suggested, implementing a wide variety of tools in a single session.

6   Discussion and further development

The development of this end-user training plan functioned as a great opportunity for me to document and reason over all of the work that had been done over the last spring. The research conducted for this thesis also serves great value to me as feedback on my work, and as inspiration and ideas for further development discussed more in Chapter 6.2. During the progress the writer learned a lot about iterative development and especially the importance of delegation and communication in a project where time is truly of the essence. The development process was also a great opportunity to learn the management of the multiple variables in a training plan like session topics and exercises, and how to execute on a development project in a limited time frame.

6.1   Evaluation of thesis process

The goal of this research was to conduct was to produce a product-based thesis through the means of action research, and to answer the research question of what should be the components of a successful AI tool training programme information workers, how to make an information worker learn the use of AI-based tools, and what can be done to make the training as easy as possible for the trainer.

It can be concluded that a successful AI tool training programme for information workers in this case includes components like a variety of training sessions, exercises, and a very much required part of inspiration to try out new tools and ways of working. While the content of training sessions can change with the AI tools in question, the style of exercises being more open-ended and requiring more problem solving utilizing the tools rather than more passive involvement with pre-made prompts was a good practice to take with AI tool training, with this view also being supported by other studies conducted in the field of education (Bower *et al.*, 2024).

Regarding how we can make information workers learn to use AI tools as easily as conventional tools, we need to look at especially how trainers pose this new tool to end users and how they take their first steps using it. It's important to not overload the end user with technical explanations, but rather present them with the possible advantages of utilizing these tools to their fullest. Giving them the inspiration and confidence to try things out on their own serves as an important part of this learning process, especially when they are just getting their first experiences with the tools.

For supporting the trainers as much as possible, a wide variety of supporting resources are suggested according to chapter 4.4 and figure 11. This is to make the onboarding of new trainers as effortless as possible, and giving them a reference point on how they should deliver the trainings. Also providing trainers with a technical platform and the possibility to share their

experiences and ask questions has proved valuable, with experience sharing being very active with the current trainers.

The results of this research are not only relevant to the writer and the commissioning company, but also other organizations in a wide variety of fields looking into creating AI training plans for their employees or clients. The insights from this research could be applied to training program development in either Finland or anywhere in the world by a variety of companies, be they either public or private sector entities.

6.2   Further development

Regarding the further development of the training plan, it is crucial to pay attention to new updates and developments regarding Copilot for Microsoft 365 and its implementations in various applications. Microsoft is rapidly iterating on the product and adding new features almost every week, with Copilot-features also being added to even more applications, like Microsoft Forms, Stream, and OneDrive (Devine, 2024). It would be integral to the development of the training plan and sessions to keep them up to date with new features, and possibly evaluating the need for more sessions to be added to the training plan.

Due to the scalable nature of the service this training plan functions as a part of, onboarding new trainers and making the process as easy for them as possible is also a facet that could be improved in further development. Especially as the service starts to be delivered in other countries, solidifying the trainer onboarding experience could cut down on time required for trainers to get familiar with the plan and materials. As expressed in one of the answers to the questionnaire in Chapter 5.1, documenting knowledge and examples for trainers could be beneficial, as this way the reliance on live train-the-trainer -sessions could be reduced.

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Appendices

Appendix 1. Online questionnaire sent out to trainers

* Required

1. On a scale of 1-5, how would you rate the quality of training materials? *
   (1 = poor, 5 = excellent)

1	2	3	4	5

2. How confidently do you think you are able to run the training sessions? *
   (1 = very unconfidently, 5 = very confidently)

1	2	3	4	5

3. On a scale of 1-5, how well do you think the end-users will learn to use Copilot after your training sessions? *
   (1 = not really well, 5 = really well)

1	2	3	4	5

4. Was there a topic (maybe a specific tool) that would have required more materials? Why? *

5. Did you encounter any issues while running the training sessions? *

   ◯   Yes

   ◯   No

6. If you answered 'Yes' to the previous question, please describe the issues you encountered.

> [text box]

7. Rank the training modules in accordance with **how beneficial you think they are to the end user** *

| Copilot for M365 Basics |
| Prompting with Copilot Chat |
| Copilot in Teams & Outlook |
| Copilot in PowerPoint |
| Copilot in Excel |
| Copilot in Word |

8. For each of the training modules, how sufficient is the **1 hour length for the session**?

	Clearly not sufficient (Too short)	Perfectly sufficient (Just the right length)	Overly sufficient (Too long)	Not Applicable / Haven't ran this session
Copilot Basics	○	○	○	○
Prompting with Copilot Chat	○	○	○	○
Copilot in Teams & Outlook	○	○	○	○
Copilot in Word	○	○	○	○
Copilot in PowerPoint	○	○	○	○
Copilot in Excel	○	○	○	○

9. Which of the following additional materials would be helpful for you? (Select all that apply) *

- [ ] Video tutorials

- [ ] Recordings of previous trainings

- [ ] More scripted examples

- [ ] Other

10. Do you have any suggestions or ideas on what to add to the training plan or sessions?