

Microsoft Copilot for Oil & Gas Finance Applications

Training Course

OGI-1146 · 5 days · 15 CPD hours · English

Overview

Microsoft Copilot for Oil & Gas Finance Applications Training Course from [Institute For Oil & Gas Training](#) develops practical capability in Using Microsoft Copilot for Oil & Gas Finance across finance, accounting, commercial and operational reporting environments. The course focuses on applying Microsoft 365 Copilot to finance workflows where large volumes of financial data, management information, reports, contracts, correspondence and operational inputs require efficient analysis and clear business communication.

Oil and gas finance teams operate across complex commercial structures, project economics, cost centres, capital expenditure programmes, operating expenditure, joint venture information, procurement transactions, production-related data and management reporting. Finance professionals are increasingly expected to interpret information quickly while maintaining control over data quality, confidentiality, documentation and financial governance. Generative AI tools such as Microsoft 365 Copilot provide practical capabilities for supporting these workflows, but effective use requires more than familiarity with an AI interface.

This course addresses the capability gap between having access to Copilot and using it effectively for professional finance activities. Participants develop structured approaches to prompt writing for finance tasks, data analysis prompts, formula generation, report narrative drafting, document drafting assistance and meeting summarisation. The programme also examines Copilot in Excel and its practical application to financial analysis, reconciliation support, data interpretation and management reporting.

Using Microsoft Copilot for Oil & Gas Finance requires users to understand both the business objective and the quality of the information supplied to the AI tool. Participants therefore learn how to construct precise prompts, provide appropriate context, define desired outputs and review generated content before incorporating it into professional work. The course treats Copilot as a productivity and analytical support capability within established finance processes rather than as a replacement for professional judgement.

The programme connects Microsoft 365 Copilot capabilities with realistic oil and gas finance scenarios. These include analysing financial datasets, preparing management commentary, reviewing cost information, drafting finance communications, developing report narratives, preparing meeting summaries and improving spreadsheet workflows. Participants work with scenarios that reflect the demands of corporate finance departments and cross-functional oil and gas organisations.

Copilot in Excel receives particular attention because spreadsheets remain central to financial planning, analysis, budgeting, forecasting and management reporting. Participants explore how Copilot can support formula generation, data interpretation, trend identification and the development of analytical questions. The focus remains on controlled and reviewable use, with participants learning to validate formulas, check outputs and retain accountability for financial decisions.

The course also examines how Microsoft 365 Copilot can support activities beyond spreadsheets. Meeting summarisation can help finance professionals capture decisions, actions and follow-up requirements from business discussions. Document drafting assistance can support the preparation of finance communications, briefing documents and management materials. Report narrative drafting can help transform analysed information into structured management commentary while keeping professional review and financial judgement with the responsible finance professional.

For organisations, the relevance extends beyond individual productivity. Consistent Copilot practices support more efficient finance workflows, improved information handling and better use of professional time. Teams can establish common approaches to prompting, reviewing AI-generated content and integrating Copilot into existing processes. This creates a structured foundation for productivity gains in finance workflows while supporting responsible technology adoption.

The course is designed for oil and gas professionals who already understand their finance or commercial responsibilities and want to apply Microsoft Copilot within those responsibilities. It therefore combines digital finance capability with practical knowledge of accounting, reporting, budgeting, forecasting, commercial analysis and business communication.

Institute For Oil & Gas Training delivers the programme through applied scenarios rather than purely theoretical technology demonstrations. Participants examine how Copilot interacts with typical finance tasks, identify suitable use cases, construct prompts, evaluate generated responses and refine outputs. The approach enables attendees to transfer the techniques directly into their working environment.

The programme also emphasises information governance and professional accountability. AI-generated analysis, formulas, summaries and narratives require appropriate review before use in financial or management processes. Participants develop a disciplined workflow covering prompt creation, output evaluation, verification, refinement and final approval. This approach helps organisations capture the practical value of Copilot while maintaining established controls over financial information and reporting.

Objectives

- Understand the role of Microsoft 365 Copilot in modern oil and gas finance workflows.
- Apply Using Microsoft Copilot for Oil & Gas Finance techniques to practical finance activities.
- Develop effective prompt writing for finance tasks.
- Create structured data analysis prompts for financial datasets.
- Use Copilot in Excel to support spreadsheet analysis and financial interpretation.
- Apply formula generation capabilities while maintaining appropriate validation and review.

- Improve the preparation of financial summaries and management commentary.
- Use report narrative drafting to structure financial information for management audiences.
- Apply document drafting assistance to routine finance communications and business documents.
- Use meeting summarisation to organise finance-related decisions, actions and follow-up items.
- Identify suitable finance processes for Copilot-supported productivity improvements.
- Recognise limitations and verification requirements when using AI-generated financial outputs.
- Strengthen professional review of AI-generated formulas, analysis and written content.
- Establish consistent approaches to incorporating Copilot into existing finance workflows.
- Improve the efficiency of information analysis and business communication within finance functions.
- Connect digital finance practices with information security and governance requirements.
- Support responsible adoption of AI-assisted tools within corporate finance environments.
- Translate Copilot capabilities into practical applications across accounting, budgeting, reporting and commercial finance.
- Develop a structured workflow for prompting, reviewing, refining and approving Copilot outputs.
- Build organisational capability for productivity gains in finance workflows.

Training methodology

Institute For Oil & Gas Training uses a practical corporate delivery model designed around real-world finance applications. The methodology combines guided demonstrations, oil and gas case studies, financial scenarios, structured exercises, group analysis and prompt development activities.

Practical Copilot Demonstrations

Participants examine Microsoft 365 Copilot capabilities through realistic finance workflows. Demonstrations show how the tool can assist with spreadsheet analysis, document preparation, meeting summarisation and management reporting.

Finance Scenario Exercises

Scenarios are based on common oil and gas finance activities such as budget review, cost analysis, variance interpretation, forecasting commentary and project financial reporting. Participants assess the business requirement before determining how Copilot can support the task.

Prompt Writing Workshops

Prompt writing for finance tasks forms a central element of the programme. Participants develop prompts that clearly identify the required task, relevant context, financial data, analytical objective, output structure and review requirements.

Copilot in Excel Exercises

Participants work through spreadsheet-based activities involving formula generation, data analysis prompts, financial comparisons and structured interpretation. Exercises focus on validating outputs rather than accepting generated formulas or conclusions without review.

Document and Report Simulations

Document drafting assistance and report narrative drafting are explored through practical business scenarios. Participants refine Copilot-generated content to achieve the appropriate level of accuracy, clarity, financial terminology and management relevance.

Meeting Summarisation Scenarios

Participants examine how meeting summarisation can support finance teams by organising discussions into decisions, actions, responsibilities and follow-up requirements. Exercises emphasise verification against the original business discussion.

Group Review and Discussion

Group exercises allow participants to compare prompts, examine different generated outputs and identify weaknesses in AI-assisted finance workflows. This supports the development of consistent practices across finance teams.

Real-World Application

The final stage of delivery connects the techniques to each participant's professional environment. Attendees identify suitable finance workflows for Copilot adoption and establish practical approaches for reviewing and controlling generated outputs.

Organisational impact

Effective adoption of Microsoft 365 Copilot can improve how finance teams manage repetitive analytical and administrative activities. The course gives sponsoring organisations a structured approach for identifying appropriate applications and integrating Copilot into existing finance workflows.

Finance teams can use structured prompts to obtain more consistent assistance with data interpretation, document preparation and reporting tasks. This supports more efficient use of professional time and allows finance specialists to concentrate on analysis, review, commercial interpretation and decision support.

The course also supports improved spreadsheet productivity. Copilot in Excel can assist users with formula generation, data analysis prompts and interpretation of structured datasets. When supported by appropriate verification procedures, these capabilities help finance professionals work more efficiently with complex spreadsheet information.

Management reporting benefits from more structured approaches to report narrative drafting. Participants learn how to use Copilot to organise financial information into business-focused narratives while retaining responsibility for checking the accuracy and relevance of the final report.

Meeting summarisation supports more organised follow-up from finance meetings. Capturing decisions, actions and responsibilities in a structured format helps teams maintain continuity between meetings and improves visibility of outstanding finance activities.

Document drafting assistance can reduce the administrative effort involved in preparing routine finance documents. Teams can use Copilot to establish initial structures and drafts before applying professional review, corporate language and appropriate financial judgement.

The programme supports information governance by reinforcing the importance of appropriate data handling and human verification. Finance teams learn that AI-assisted output requires review before becoming part of an official financial record, report or management communication.

The organisation also gains a common framework for evaluating Copilot use cases. Instead of individual employees using the technology inconsistently, finance leaders can establish repeatable practices for prompting, validation, documentation and review.

Productivity gains in finance workflows can extend across accounting, budgeting, forecasting, reporting, commercial analysis and finance administration. The course helps organisations identify where Copilot provides practical support while keeping established financial controls and professional accountability in place.

Personal impact

Participants gain practical capability in applying Microsoft 365 Copilot to their existing finance responsibilities. The programme focuses on transferable skills rather than isolated demonstrations, enabling attendees to use Copilot across a range of professional activities.

Participants improve their prompt writing for finance tasks by learning how to communicate business requirements clearly to an AI system. Better prompts support more relevant outputs and reduce the need for repeated refinement.

Professionals working extensively with spreadsheets gain practical knowledge of Copilot in Excel. They learn how to approach formula generation, financial data interpretation and analytical questions while retaining responsibility for checking the results.

The course strengthens data analysis capability through structured data analysis prompts. Participants learn to frame analytical questions in ways that support clearer examination of financial information and more useful business insights.

Finance professionals also develop stronger business communication capability. Report narrative drafting and document drafting assistance provide structured support for turning financial information into clear management-oriented content.

Meeting summarisation skills help participants manage information generated during finance meetings. They learn how to organise decisions, actions and follow-up requirements into usable summaries.

The programme develops a disciplined approach to reviewing AI-generated outputs. Participants learn to distinguish useful assistance from information that requires further verification, correction or professional interpretation.

These skills support greater efficiency in day-to-day finance activities and strengthen digital finance capability. Professionals become better equipped to incorporate AI-assisted tools into established accounting, reporting, planning and commercial processes.

Who should attend

Finance Managers and Finance Directors

Designed for senior finance professionals responsible for reporting, planning, analysis and finance transformation who need structured approaches to AI-assisted workflows.

Financial Controllers

Relevant for professionals overseeing financial information, reporting processes and control activities who require effective methods for reviewing AI-assisted outputs.

Management Accountants

Supports management accountants working with analysis, budgets, forecasts, variance reporting and management commentary.

Financial Analysts

Useful for analysts who regularly examine financial datasets and prepare analytical outputs for management and commercial teams.

Budgeting and Planning Professionals

Relevant for professionals involved in budgeting, forecasting and financial planning who want to improve spreadsheet and reporting productivity.

Oil and Gas Commercial Finance Teams

Supports professionals responsible for project economics, commercial analysis, cost interpretation and financial decision support.

Project Finance Professionals

Designed for professionals working with project financial information who require efficient approaches to data analysis, reporting and documentation.

Accounting Professionals

Provides practical Copilot applications for spreadsheet work, financial documentation, analysis and routine accounting workflows.

Finance Transformation Professionals

Relevant for specialists responsible for digitalisation, automation and process improvement across corporate finance functions.

ERP and Finance Systems Teams

Supports professionals involved in finance technology who need to understand practical Microsoft 365 Copilot applications alongside existing systems and workflows.

Internal Audit and Governance Professionals

Useful for professionals assessing finance processes, documentation and information handling where AI-assisted workflows require appropriate review and governance.

Finance Team Leaders

Provides managers with a framework for identifying suitable Copilot applications and establishing consistent practices across finance teams.

Course outline

Microsoft Copilot for Oil and Gas Finance

This module establishes the foundations for Using Microsoft Copilot for Oil & Gas Finance and examines how Microsoft 365 Copilot fits into corporate finance workflows. Participants identify suitable use cases across accounting, budgeting, reporting, analysis and finance administration.

Copilot in Excel for Financial Analysis

This module focuses on Copilot in Excel and its application to financial data analysis. Participants examine how Copilot can assist with spreadsheet-based tasks involving formulas, financial comparisons, data interpretation and analytical review.

AI-Assisted Reporting and Finance Documentation

This module develops practical skills for using Copilot to support management reporting, financial documentation and business communication. Participants explore report narrative drafting and document drafting assistance while maintaining control over accuracy and professional language.

Copilot for Meetings, Collaboration and Finance Productivity

This module examines how Microsoft 365 Copilot supports collaboration and information management across finance teams. Participants focus on meeting summarisation, action tracking, document preparation and productivity gains in finance workflows.

Finance Automation, Governance and Practical Implementation

This module brings together the skills developed throughout the programme and focuses on practical implementation. Participants assess where Copilot supports finance processes, develop structured workflows and establish appropriate review and governance practices.

Scheduled dates

Dates	Venue	Format	Fee
05 - 09 Oct 2026	Abu Dhabi, United Arab Emirates	In person	£3,800
05 - 09 Oct 2026	Abuja, Nigeria	In person	£3,800
05 - 09 Oct 2026	Accra, Ghana	In person	£3,800
05 - 09 Oct 2026	Addis Ababa, Ethiopia	In person	£3,800
05 - 09 Oct 2026	Al Ain, United Arab Emirates	In person	£3,800
05 - 09 Oct 2026	Al Khobar, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Alberta, Canada	In person	£3,800
05 - 09 Oct 2026	AlUla, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Amman, Jordan	In person	£3,800
05 - 09 Oct 2026	Amsterdam, Netherlands	In person	£3,800
05 - 09 Oct 2026	Athens, Greece	In person	£3,800
05 - 09 Oct 2026	Baku, Azerbaijan	In person	£3,800
05 - 09 Oct 2026	Barcelona, Spain	In person	£3,800
05 - 09 Oct 2026	Berlin, Germany	In person	£3,800
05 - 09 Oct 2026	Boston, United States	In person	£3,800
05 - 09 Oct 2026	Brussels, Belgium	In person	£3,800
05 - 09 Oct 2026	Budapest, Hungary	In person	£3,800
05 - 09 Oct 2026	Cairo, Egypt	In person	£3,800
05 - 09 Oct 2026	Cape Town, South Africa	In person	£3,800

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05 - 09 Oct 2026	Casablanca, Morocco	In person	£3,800
05 - 09 Oct 2026	Dammam, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Dhahran, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Doha, Qatar	In person	£3,800
05 - 09 Oct 2026	Dubai, United Arab Emirates	In person	£3,800
05 - 09 Oct 2026	Edinburgh, United Kingdom	In person	£3,800
05 - 09 Oct 2026	Edmonton, Canada	In person	£3,800
05 - 09 Oct 2026	Frankfurt, Germany	In person	£3,800
05 - 09 Oct 2026	Geneva, Switzerland	In person	£3,800
05 - 09 Oct 2026	Houston, United States	In person	£3,800
05 - 09 Oct 2026	Istanbul, Turkey	In person	£3,800
05 - 09 Oct 2026	Jakarta, Indonesia	In person	£3,800
05 - 09 Oct 2026	Jeddah, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Jubail, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Khamis Mushait, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Kigali, Rwanda	In person	£3,800
05 - 09 Oct 2026	Kuala Lumpur, Malaysia	In person	£3,800
05 - 09 Oct 2026	Lisbon, Portugal	In person	£3,800
05 - 09 Oct 2026	Liverpool, United Kingdom	In person	£3,800
05 - 09 Oct 2026	London, United Kingdom	In person	£3,800
05 - 09 Oct 2026	Los Angeles, United States	In person	£3,800
05 - 09 Oct 2026	Luanda, Angola	In person	£3,800
05 - 09 Oct 2026	Madrid, Spain	In person	£3,800
05 - 09 Oct 2026	Manama, Bahrain	In person	£3,800
05 - 09 Oct 2026	Marbella, Spain	In person	£3,800
05 - 09 Oct 2026	Marrakech, Morocco	In person	£3,800

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05 - 09 Oct 2026	Miami, United States	In person	£3,800
05 - 09 Oct 2026	Milan, Italy	In person	£3,800
05 - 09 Oct 2026	Munich, Germany	In person	£3,800
05 - 09 Oct 2026	Muscat, Oman	In person	£3,800
05 - 09 Oct 2026	Nairobi, Kenya	In person	£3,800
05 - 09 Oct 2026	New York, United States	In person	£3,800
05 - 09 Oct 2026	Nice, France	In person	£3,800
05 - 09 Oct 2026	Nouakchott, Mauritania	In person	£3,800
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05 - 09 Oct 2026	Prague, Czech Republic	In person	£3,800
05 - 09 Oct 2026	Pretoria, South Africa	In person	£3,800
05 - 09 Oct 2026	Riyadh, Saudi Arabia	In person	£3,800
05 - 09 Oct 2026	Rome, Italy	In person	£3,800
05 - 09 Oct 2026	Sarajevo, Bosnia and Herzegovina	In person	£3,800
05 - 09 Oct 2026	Sharm El Sheikh, Egypt	In person	£3,800
05 - 09 Oct 2026	Singapore	In person	£3,800
05 - 09 Oct 2026	Stockholm, Sweden	In person	£3,800
05 - 09 Oct 2026	Tokyo, Japan	In person	£3,800
05 - 09 Oct 2026	Toronto, Canada	In person	£3,800
05 - 09 Oct 2026	Tromso, Norway	In person	£3,800
05 - 09 Oct 2026	Vienna, Austria	In person	£3,800
05 - 09 Oct 2026	Zagreb, Croatia	In person	£3,800
05 - 09 Oct 2026	Zurich, Switzerland	In person	£3,800
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04 - 08 Oct 2027	Accra, Ghana	In person	£3,800
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04 - 08 Oct 2027	Athens, Greece	In person	£3,800
04 - 08 Oct 2027	Baku, Azerbaijan	In person	£3,800
04 - 08 Oct 2027	Barcelona, Spain	In person	£3,800
04 - 08 Oct 2027	Berlin, Germany	In person	£3,800

Dates	Venue	Format	Fee
04 - 08 Oct 2027	Boston, United States	In person	£3,800
04 - 08 Oct 2027	Brussels, Belgium	In person	£3,800
04 - 08 Oct 2027	Budapest, Hungary	In person	£3,800
04 - 08 Oct 2027	Cairo, Egypt	In person	£3,800
04 - 08 Oct 2027	Cape Town, South Africa	In person	£3,800
04 - 08 Oct 2027	Casablanca, Morocco	In person	£3,800
04 - 08 Oct 2027	Dammam, Saudi Arabia	In person	£3,800
04 - 08 Oct 2027	Dhahran, Saudi Arabia	In person	£3,800
04 - 08 Oct 2027	Doha, Qatar	In person	£3,800
04 - 08 Oct 2027	Dubai, United Arab Emirates	In person	£3,800
04 - 08 Oct 2027	Edinburgh, United Kingdom	In person	£3,800
04 - 08 Oct 2027	Edmonton, Canada	In person	£3,800
04 - 08 Oct 2027	Frankfurt, Germany	In person	£3,800
04 - 08 Oct 2027	Geneva, Switzerland	In person	£3,800
04 - 08 Oct 2027	Houston, United States	In person	£3,800
04 - 08 Oct 2027	Istanbul, Turkey	In person	£3,800
04 - 08 Oct 2027	Jakarta, Indonesia	In person	£3,800
04 - 08 Oct 2027	Jeddah, Saudi Arabia	In person	£3,800
04 - 08 Oct 2027	Jubail, Saudi Arabia	In person	£3,800
04 - 08 Oct 2027	Khamis Mushait, Saudi Arabia	In person	£3,800
04 - 08 Oct 2027	Kigali, Rwanda	In person	£3,800
04 - 08 Oct 2027	Kuala Lumpur, Malaysia	In person	£3,800
04 - 08 Oct 2027	Lisbon, Portugal	In person	£3,800
04 - 08 Oct 2027	Liverpool, United Kingdom	In person	£3,800
04 - 08 Oct 2027	London, United Kingdom	In person	£3,800
04 - 08 Oct 2027	Los Angeles, United States	In person	£3,800

Dates	Venue	Format	Fee
04 - 08 Oct 2027	Luanda, Angola	In person	£3,800
04 - 08 Oct 2027	Madrid, Spain	In person	£3,800
04 - 08 Oct 2027	Manama, Bahrain	In person	£3,800
04 - 08 Oct 2027	Marbella, Spain	In person	£3,800
04 - 08 Oct 2027	Marrakech, Morocco	In person	£3,800
04 - 08 Oct 2027	Miami, United States	In person	£3,800
04 - 08 Oct 2027	Milan, Italy	In person	£3,800
04 - 08 Oct 2027	Munich, Germany	In person	£3,800
04 - 08 Oct 2027	Muscat, Oman	In person	£3,800
04 - 08 Oct 2027	Nairobi, Kenya	In person	£3,800
04 - 08 Oct 2027	New York, United States	In person	£3,800
04 - 08 Oct 2027	Nice, France	In person	£3,800
04 - 08 Oct 2027	Nouakchott, Mauritania	In person	£3,800
04 - 08 Oct 2027	Oslo, Norway	In person	£3,800
04 - 08 Oct 2027	Paris, France	In person	£3,800
04 - 08 Oct 2027	Port Louis, Mauritius	In person	£3,800
04 - 08 Oct 2027	Prague, Czech Republic	In person	£3,800
04 - 08 Oct 2027	Pretoria, South Africa	In person	£3,800
04 - 08 Oct 2027	Riyadh, Saudi Arabia	In person	£3,800
04 - 08 Oct 2027	Rome, Italy	In person	£3,800
04 - 08 Oct 2027	Sarajevo, Bosnia and Herzegovina	In person	£3,800
04 - 08 Oct 2027	Sharm El Sheikh, Egypt	In person	£3,800
04 - 08 Oct 2027	Singapore	In person	£3,800
04 - 08 Oct 2027	Stockholm, Sweden	In person	£3,800
04 - 08 Oct 2027	Tokyo, Japan	In person	£3,800
04 - 08 Oct 2027	Toronto, Canada	In person	£3,800

Dates	Venue	Format	Fee
04 - 08 Oct 2027	Tromso, Norway	In person	£3,800
04 - 08 Oct 2027	Vienna, Austria	In person	£3,800
04 - 08 Oct 2027	Zagreb, Croatia	In person	£3,800
04 - 08 Oct 2027	Zurich, Switzerland	In person	£3,800
04 - 08 Oct 2027	Online, Virtual	Online	£3,800

Certificate

Attendees receive a Certificate of Completion from Institute For Oil & Gas Training upon successfully finishing the course. Participants are required to attend the full course programme to receive the Certificate of Completion.