CONFERENCE HANDOUT

MS 365 - CHOOSING THE RIGHT TOOL FOR THE TASK

Take the Fast Track Route to IT Learning

Understanding the Purpose of Each Tool

Choosing the right tool starts with understanding what each one is designed to do. Microsoft 365 offers a wide range of apps, each built for specific types of work so you can match the tool to the task instead of forcing tasks into the wrong tool.

- **Use Word** - For structured documents, reports & formal writing
- **Use Excel** - For calculations, data tables, tracking & analysis
- **Use PowerPoint** - For presentations, visuals & storytelling

Choosing the Right Space for Your Files

Picking the correct location for storing files helps avoid duplication and confusion. The right space depends on whether the file is personal work, shared team work, or organisational knowledge.

- **Use OneDrive** - For personal drafts & individual work
- **Use SharePoint** - For team files that everyone needs
- **Use Teams channels** - For files linked to specific conversations or projects

Selecting the Right Communication Method

Choosing how to communicate affects speed, clarity, and visibility. Different communication tools support different kinds of interactions, from quick questions to long term discussions.

- **Use Teams chat** - For quick, informal messages
- **Use Teams channels** - For shared discussions & transparent updates
- **Use Outlook** - For formal external communication or structured messages

Managing Tasks in the Right Place

Organising tasks in the correct tool helps avoid scattered to do lists and improves team visibility. Clear task ownership and tracking supports smoother delivery.

- **Use Planner** - For lightweight team task management
- **Use To Do** - For personal task tracking
- **Use Project** - For structured, timeline driven work

Using AI & Automation Wisely

AI and automation support choosing the right tool by reducing manual effort. These features help ensure the right information reaches the right people while simplifying routine processes.

- **Use Power Automate** - To move information between tools
- **Use Power BI** - To help choose data driven decisions
- **Use Copilot** - To summarise, draft content & simplify tool choice

Products and Tools Referenced

- **Word** - Creates & edits documents

- **Excel** - Builds spreadsheets & data models

- **PowerPoint** - Creates presentations & visual communication

- **Outlook** - Email and calendar management

- **Teams** - Meetings, chat, calls & collaboration hubs

- **SharePoint** - Stores shared team content

- **OneDrive** - Stores personal work files

- **Planner** - Team task boards & lightweight planning

- **To Do** - Personal task tracking

- **Project** - Structured project management

- **Power Automate** - Workflow automation

- **Power BI** - Data visualisation & insight

- **Copilot** - AI assistant across apps