



Microsoft Forms Webinar

June 10th 2025



Welcome

The webinar will begin at 2pm

Your microphone and camera will be automatically disabled, but if you have questions, please use the Q&A option at the top of your screen.



Today's Speakers

James Earl,
Digital Transformation Manager

James has been with Heliocentrix for the last 3 years and works with clients to develop bespoke web applications, websites, low-code apps, and power solutions that help companies achieve more with less by fully leveraging digital technology .



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Agenda

- Introduction to Microsoft Forms
- Microsoft Forms Availability & Licensing
- How Microsoft Forms Works
- Benefits of Using Microsoft Forms
- Common Use Cases
- Best Practices for Using Microsoft Forms



Introduction To Microsoft Forms

- Part of the Microsoft 365 suite
- Create quizzes, polls, surveys and forms
- Available on both browser and mobile
- Copilot enabled

Licensing Details

- Widely accessible to both business and education users
- Included with most M365 business licenses
- Including Business Basic
- Only the creator needs the license



Creating a Form

The screenshot shows the Microsoft Forms 'Creating a Form' interface. At the top, the title 'Forms' is on the left, and 'Untitled form - Saved' is in the center. On the right, there are links for help, chat, and the user 'James Earl' with initials 'JE'. Below the title bar, a navigation bar contains icons for 'Style', 'Settings', and 'Preview', followed by two prominent buttons: 'Collect responses' (dark blue) and 'View responses' (light blue). On the left side, there is a 'Templates' button. The main area is a large white canvas. A 'Draft with Copilot' panel is open at the top of the canvas, featuring a text input field with the prompt 'Describe what form you'd like to create, including its context, purpose, intended audience and any specific requirements to be considered.' and a character count '0 / 2000'. To the right of the input field are icons for a document, a link, and a share arrow. The background of the canvas has a light blue and green gradient.

Forms

Untitled form - Saved

Style Settings Preview Collect responses View responses Present

Draft with Copilot

Describe what form you'd like to create, including its context, purpose, intended audience and any specific requirements to be considered.

0 / 2000

Templates

Additional Features

- Customised branding
- Sections
- Branching
- Answer analysis



Viewing Responses

Forms

New Client Form - Saved

James Earl JE

StyleSettingsPreviewCollect responsesView responsesPresent

I have 5 suggestions to your formView details

Templates

New Client Form

A good subtitle is like a trailer - it's a great chance to let your audience know what the form is about and get better responses.

1. Client Name *

Enter your answer

2. Date of sign up *

Please input date (dd/MM/yyyy)

3. Client Address *

Benefits of Using Microsoft Forms

- Structured Data Format
- Consistency in Data Collection
- Real-Time Insights
- Easy Data Export



Capturing Data Is Just The Beginning

- Eliminate Repetitive Tasks
- Seamless Data Connection
- Speed and Efficiency
- Automated Document Generation



Microsoft Forms Use Cases

- New client onboarding
- Project tracking
- Issue tracking
- Training request form



Microsoft Forms Best Practice

- Know Your Audience
- Clarity and Conciseness
- Utilise Branching Logic
- Professional Branding



How to learn more

- Further webinars
- Bespoke Training and Consultancy
- In person Copilot Masterclass on 17th June 2025



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