

PL-7008: Create and extend custom copilots in Microsoft Copilot Studio

Trainer Preparation Guide

July 2024

Purpose

This document is for Microsoft Certified Trainers preparing to teach PL-7008 Create copilots with Microsoft Copilot Studio. This course is designed for students who are planning to take the corresponding applied skills credentials, or students who are creating model-driven apps in their daily job.

Audience Profile

Candidates for this credential should be familiar with Microsoft Power Platform and Microsoft Copilot Studio.

Audience Prerequisites

- Basic data modeling, user experience design, requirements analysis, and process analysis skills.
- A personal growth mindset and are comfortable using technology to solve business problems.
- An understanding of the operational need and have a vision of the desired outcome. They approach problems with phased and iterative strategies.

Applied Skills

The tasks covered by the Applied Skill are:

- Build an initial copilot
- Manage topics and trigger phrases
- Configure nodes
- Manage variables and entities
- Configure generative AI
- Retrieve data from Dataverse
- Deploy the copilot

Prerequisite Knowledge to teach this course

To successfully teach this course, instructors must have experience leveraging the following:

- Microsoft Power Platform
- Microsoft Copilot Studio
- Principles of Responsible AI

Note: These guidelines are not inclusive of the requirements to become a Microsoft Certified Trainer (MCT).

Required Materials to prepare for and teach this course

You need the following materials to prepare for and teach this course:

Resource	Description
Microsoft PowerPoint files	Download the PL-7008-ENU-PowerPoint.zip from the MCT Download Center .
Change Log	Download the PL-7008-ENU-Change-Log.pdf from the MCT Download Center .
Lab environment provided by your lab hosting provider	Contact your lab hosting provider for instructions on using their lab environment.
Lab instructions	The lab instructions are provided in the lab environment and in the mslearn-copilotstudio .
Student training content	See the following section for a detailed breakdown of each Learning Path covered in the course.

Student training content

The student training content for this course is in Microsoft Learn. The following table provides a breakdown of each Learning Path, the modules covered in each, and the link to each LP in Microsoft Learn.

The student training content includes links to additional reading material to help you prepare for

Learning Path	Module	Online training in Microsoft Learn
Course Introduction	N/A	Slides only
Learning Path: Create copilots with Microsoft Copilot Studio	Module 1: Build an initial copilot with Microsoft Copilot Studio Module 2: Manage topics in Microsoft Copilot Studio	Build an initial copilot with Microsoft Copilot Studio - Training Microsoft Learn

	<p>Module 3: Work with entities and variables in Microsoft Copilot Studio</p> <p>Module 4: Enhance Microsoft Copilot Studio copilots</p> <p>Module 5: Create a copilot with Microsoft Copilot Studio and Dataverse for Teams</p>	<p>Manage topics in Microsoft Copilot Studio - Training Microsoft Learn</p> <p>Work with entities and variables in Microsoft Copilot Studio - Training Microsoft Learn</p> <p>Enhance Microsoft Copilot Studio copilots - Training Microsoft Learn</p> <p>Create a copilot with Microsoft Copilot Studio and Dataverse for Teams - Training Microsoft Learn</p>
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Preparation Tasks

Instructors should complete the following tasks to prepare for teaching this course:

- If you have previously taught this class, refer to the course’s Change Log. It provides detailed information on how the course has changed over time. The Change Log is updated for each course release.
- Review all topics in the student training material in Microsoft Learn (see the link in the Required Materials section above). You should be well-versed in every topic. If you have previously taught the course and are comfortable with your knowledge of each topic, focus primarily on the new or updated topics as outlined in the Change Log.
- Review the PowerPoint slides.
 - Be able to speak to each of the talking points on the slides. Some slides include a graphic from the associated Learn content for the topic. These graphics are provided on the slide so that you can speak to them to help explain the key talking points in the topic.
 - **The bulleted items on each slide should NOT be read verbatim to the students.** The students can read the slides themselves. Rather, the bullet points reflect the key information that you should focus on when discussing each topic. You should use your experience as a subject matter expert to explain the What, the Why, and the How of each topic. **This is your opportunity to provide a real value-add above and beyond the bulleted talking points.**
- Review the Additional Reading links and other linked resources provided in the student training material. **It’s recommended that you present key points from this material to supplement the value-add you provide as an instructor.**
- As you prepare for the class, you should review each unit and determine which ones you want to perform demonstrations of the corresponding product functionality. It’s up to you to decide which product features you want to demonstrate to the class. You should use your experience to identify key

points during the demonstration process. **This is an area where you should rely on your experience as a subject matter expert to provide additional value-add to the students.**

- You should review each Knowledge Check (KC) question so that you know why the correct answer is correct for each question. Students may challenge some of the questions, so you must be able to address any of those concerns.
- You should perform the labs yourself prior to class so that you become familiar with them and with any of the difficult points in the lab exercises. This will prepare you for helping students in case they get stuck.

Demos

There are many demonstrations indicated in the slides.

You can either use the demos as indicated or create your own demos.

Course Timing

Daily Agenda

The following agenda provides estimated times to complete each classroom activity. However, the estimated times may vary depending on the background of your students, which may affect whether you can move faster or slower through the course material.

Estimated times for each Module include the time to complete:

- The module's PowerPoint slide deck presentation.
- Any pre-defined product demonstrations.
- Time to review Knowledge Check questions (see the section on Additional Timing Notes below).
- Time to complete a classroom discussion activity if a Discussion slide is included in the module slide deck.

You should adjust the agenda accordingly based on any classroom activities that you personally created or plan to deliver that are not included in the slides for this course. For example, if you plan to present:

- ad-hoc demonstrations
- review activities
- classroom games
- and so on...

Note: Each Module activity in the following agenda is the slide deck presentation for that module.

This course is expected to take 1 full (8 hour) day, including labs (with breaks taken into consideration). We appreciate any feedback you can provide about timing considerations or scheduling changes that emerge during a live course.

Labs are divided by module. The PowerPoint slides indicate when labs should be performed. You can find the labs that correspond to that module in the trainer PowerPoint slides in the GitHub repository.

Day	Estimated Time	Classroom activity
1	15 minutes	Course Introduction slide deck (time may vary due to the number of student introductions in a given course) Optional slides to cover Introduction to Power Platform. Timing is not included for this. Should only be delivered if the audience is not familiar with Power Platform.
	15 minutes	Lab 0: Import Dataverse solution
	50 minutes	Module 1 - Build an initial copilot with Microsoft Copilot Studio
	20 minutes	Lab 1: Build an initial copilot
	60 minutes	Module 2 - Manage topics in Microsoft Copilot Studio
	45 minutes	Lab 2: Manage topics Lab 3: Manage nodes
	30 minutes	Module 3 - Work with entities and variables in Microsoft Copilot Studio
	15 minutes	Lab 4: Work with entities
	60 minutes	Module 4 - Enhance Microsoft Copilot Studio copilots
	60 minutes	Lab 5: Create copilot actions Lab 6: Use Generative AI in Microsoft Copilot Studio
	10 minutes	Module 5 - Create a copilot with Microsoft Copilot Studio and Dataverse for Teams
	10 minutes	Lab 7: Deploy copilot to Microsoft Teams

Additional Timing Notes - Knowledge Check questions

Knowledge check (KC) questions are provided throughout the course to check the student's knowledge of the material that was covered. Instructors can use these KC questions in several ways:

- Conduct a formal classroom exercise in which you go through the questions in a module before moving on to the next module.
- Sprinkle the questions into the content as you cover the related material for a module
- Let the students review the questions after class as a daily homework assignment. You can set aside time at the start of each day to answer any questions they have regarding the prior day's questions. This may be the most feasible option given the tight time constraints that most classes work under.

It will be left up to each instructor to determine how they want to incorporate the KC questions into their class.

If you provide students with time to review the KC questions at the end of specific topics and at the end of each module, you should provide a couple of minutes per question, along with a few extra minutes per

question to respond to student questions or challenges concerning certain questions they may not understand or whose answers they disagree with. This may add an extra 15 to 30 minutes to complete each module.

Labs

The labs must be completed within the lab environment provided by your lab hosting provider. Detailed, step-by-step instructions are provided for each lab and presented as part of the UI experience within your lab environment.

At the time the courses were released, the lab instruction had been thoroughly tested and the lab steps were 100% accurate. However, given the nature of Microsoft's cloud products and the fact that Microsoft releases UI updates on a regular basis, it's possible that at some point in time, the UI for a given feature may change so that it no longer matches the lab instruction.

If students encounter lab steps that don't accurately reflect the UI, they'll have to work through the UI to determine what needs to be done. Typically, UI changes are quite subtle, so hopefully you don't find yourself in a situation where a feature was completely overhauled.

However, if you do run into major UI changes, challenge your students to work through it, and only offer help if they definitely need it. Product UI changes will be part of their daily life in today's cloud-centric world. As IT/Pros, they must learn how to work through such situations.

One thing Microsoft does ask of you is that if you run into situations such as this where lab instructions no longer match the corresponding UI, please document the issue in the course's GitHub repository. This will help Microsoft's World-Wide Learning team update the lab instructions to keep them as up to date as possible. For information on how to submit an issue, please see [GitHub User Guide for MCTs](#).

Feedback

In this course, we have provided a framework for you to work with. Take time to prepare and think about the value that only an instructor can bring to training. We hope to partner with you to provide an exceptional student experience, and we welcome your feedback.