

AI for Business Professionals

Duration: 60 Minutes

Session Overview

This course helps learners optimize and extend Microsoft 365 Copilot by building a strong foundation in effective prompting, responsible AI practices, and best-practice Copilot usage. It then shifts focus from individual productivity to business-ready AI by identifying high-impact use cases and applying a clear decision framework to determine when prompts are sufficient versus when reusable agents are needed. Finally, the course provides hands-on guidance for creating Copilot agents using prompts and Microsoft-approved templates, along with best practices for testing, sharing, and responsibly deploying agents across the organization.

Learning Outcomes

- Apply best practices to optimize and responsibly use Microsoft 365 Copilot
- Create effective prompts aligned to specific tasks and business goals
- Identify high-impact business use cases for Copilot beyond individual productivity
- Use a clear decision framework to choose between ad-hoc prompts and reusable agents
- Build, test, and share Microsoft 365 Copilot agents safely using prompts and approved templates

Session Agenda

Module 1: Optimize and extend Microsoft 365 Copilot

- Examine the art and science of working with AI
- Review best practices for using Microsoft 365 Copilot
- Examine how to build an effective prompt
- Review prompting best practices
- Responsible AI in the Microsoft 365 Copilot

Module 2: From Copilot Usage to Business-Ready AI

- Moving Beyond Individual Productivity
- Deciding when a prompt is sufficient and when a custom agent is required.
- Prompt vs Agent Decision Framework
 - A simple framework to choose between ad-hoc prompts and reusable agents.

Module 3: Creating Agents with Microsoft 365 Copilot

- Introduction to Copilot Agents
 - How agents act as controlled, task-specific extensions of Copilot.
- Build an Agent Using a Prompt
 - Create a scoped agent by clearly defining purpose and boundaries.
- Build an Agent Using Templates
 - Accelerate safe agent creation using Microsoft-approved templates.

- Testing, Sharing, and Using Agents
 - Validate accuracy and share agents responsibly within the organization.