AI-Powered Productivity and Governance with Microsoft 365 Copilot and Dynamics 365

This course provides a practical overview of how Microsoft 365 Copilot and Dynamics 365 Copilot enhance productivity, streamline business processes, and support secure, compliant AI usage through Microsoft Purview.

Duration: 8 Hours

Module 1: Envision New Ideas with Microsoft 365 Copilot
Topics:

- Draft an internal email announcement using Copilot in Outlook
- Manage IT assets using Microsoft 365 Copilot in Excel
- Consolidate multiple marketing reports using Microsoft 365 Copilot in Word
- Prepare for a client meeting using Copilot in Teams
- Draft legal guidance on a new regulation using Microsoft 365 Copilot Chat
- Visualize a risk assessment framework using Microsoft 365 Copilot in Excel
- Prepare discussion topics for a town hall meeting using Microsoft Copilot
- Create a sales presentation using Microsoft 365 Copilot in PowerPoint

Module 2: Discover AI interactions with Microsoft Purview
- Understand AI security risks
- Microsoft Purview Data Security Posture Management (DSPM) for AI overview
- Configure DSPM for AI
- Review AI security reports
- Audit Microsoft 365 Copilot activities and AI interactions with Microsoft Purview

Module 3: Protect sensitive data from AI-related risks
- Apply AI security recommendations with DSPM for AI
- Use sensitivity labels to protect Microsoft 365 Copilot content
- Use Endpoint DLP to prevent generative AI data exposure

Module 4: Govern AI usage with Microsoft Purview

- Apply retention policies to Microsoft 365 Copilot prompts and responses
- Investigate and delete Copilot interactions with Microsoft Purview eDiscovery
- Detect and manage Copilot and AI communications with Microsoft Purview

Module 5: Copilot in Microsoft Sales – Accelerating Revenue Workflows

Overview: What is Copilot in Sales (Dynamics 365 Sales)

- Use Case 1: Summarizing opportunities and customer interactions
- Use Case 2: Composing personalized emails based on CRM data
- Use Case 3: Real-time meeting insights and next-step suggestions
- Use Case 4: Opportunity pipeline forecasting with Copilot assistance
- Copilot in Sales Hub: Integration with Outlook and Teams

Module 6: Copilot in Microsoft Customer Service – Enhancing Customer Experience

Topics:

- Overview: Copilot for Dynamics 365 Customer Service
- Use Case 1: AI-powered response suggestions for support agents
- Use Case 2: Real-time case summary and sentiment analysis
- Use Case 3: Automating knowledge base searches and answer generation
- Use Case 4: Copilot in Omnichannel and Voice Channel scenarios
- Escalation assistance and supervisor tools

Module 7: Copilot in Microsoft Dynamics 365 Business Central – Smarter ERP

Topics:

- Co-Pilot Chat in Business Central
- Analysis with Co-Pilot
- Enable / Disable Co-pilot Feature
- Marketing Text Suggestions
- Chat with Copilot
- Bank Account Reconciliation Assist
- Map E-Documents
- Sales Line Suggestions
- Suggest Item Substitutions
- Suggest Number Series