

KOENIG SOLUTIONS • COURSE OUTLINE

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.

8 Hours

DURATION

7

MODULES

40

TOPICS

LEARNING OBJECTIVES

- Draft content and reports using Copilot in Outlook, Word, Excel
- Prepare for meetings and presentations with Copilot
- Explain AI security risks and Purview DSPM for AI
- Configure DSPM for AI and review AI security reports
- Apply sensitivity labels and Endpoint DLP to protect Copilot content
- Apply retention policies and investigate Copilot interactions
- Identify Copilot use cases in Dynamics 365 Sales and Customer Service
- Identify Copilot features in Dynamics 365 Business Central for ERP tasks

7 Modules, 40 Topics

01

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

02

Discover AI Interactions with Microsoft Purview

TOPICS

- 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

03

Protect Sensitive Data from AI-Related Risks

TOPICS

- 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

04

Govern AI Usage with Microsoft Purview

TOPICS

- 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

05

Copilot in Microsoft Sales - Accelerating Revenue Workflows

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

TOPICS

- **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

06

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

07

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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

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Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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