

Training Programme

Microsoft 365 Copilot

Chat & Agents Deep Dive

Extended Session — Table of Contents & Learning Objectives

Prepared for: Critical TechWorks | Prepared by: Koenig Solutions | July 2026

Programme Overview

Programme	Microsoft 365 Copilot — Chat & Agents Deep Dive
Client	Critical TechWorks
Delivery Partner	Koenig Solutions
Format	In-Person / Virtual, Instructor-Led
Duration	2 Hours 30 Minutes (150 minutes)
Courses Referenced	MS-4004 — Copilot Use Cases MS-4019 — Transform Business Processes with Agents
Licence Tier	Microsoft 365 Copilot (Premium) — paid, per-user licence
Audience	Open session — all M365 Copilot Premium licensed users across functions
Lab Environment	Participants have individual M365 Copilot Premium licensed tenants

How the Session is Structured

This 150-minute session is designed as a progressive journey from using Copilot Premium features across Microsoft 365 apps, through exploring pre-built agents, to building custom agents hands-on. The session assumes all participants have completed the foundational MS-4023 Copilot Chat session and holds a valid Microsoft 365 Copilot Premium licence.

The session follows a Hook → Concept → Demo → Practice → Reflect rhythm throughout, with the second half dedicated to a structured hands-on lab where each participant builds, tests, and shares their own agents.

Module	Title	Duration	Focus
1	M365 Copilot Premium in Practice	25 min	In-app use cases: Teams, Pages, Notebooks, Excel

2	Pre-Built Agents: Analyst & Researcher	30 min	Demo + guided practice with pre-built agents
3	Build Agents: Concepts & Demos	25 min	Agent components, instructor-led agent build demos
4	Hands-On Lab: Build, Test & Share	55 min	Participants build two agents independently
5	Wrap-Up & What's Next	15 min	Governance, Copilot Studio awareness, Q&A

Session Learning Outcomes

By the end of this 150-minute session, participants will be able to:

- Use Copilot in Teams and Excel to complete cross-function business tasks grounded in Microsoft Graph data
- Apply the GCSE prompting framework to write effective, context-rich prompts for in-app Copilot features
- Turn a Copilot Chat response into a persistent, editable Copilot Page and collaborate with colleagues in real time
- Create a Copilot Notebook grounded in reference documents, explore content with mind maps, and generate insights
- Launch and interact with the Analyst agent to analyse structured data, surface trends, and generate insight summaries
- Launch and interact with the Researcher agent to synthesise information from web and organisational sources into structured, cited output
- Describe the capabilities and limitations of each pre-built agent and choose the right agent for a given task
- Identify the five components of a no-code agent: Name, Description, Instructions, Starter Prompts, and Knowledge Source
- Create a custom agent in the Copilot Chat agent builder, writing clear instructions and starter prompts
- Create a custom agent in the SharePoint agent builder, grounded in a document library
- Test, iterate, and edit agents in both Copilot Chat and SharePoint
- Share agents with colleagues and in Microsoft Teams

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Time	Topic
0:00–0:05	Session Kickoff & Objectives
	MODULE 1 — M365 Copilot Premium in Practice (25 min)
0:05–0:12	1.1 What M365 Copilot Premium Adds
	In-app Copilot across Teams, Excel, Outlook and collaborative surfaces
	Microsoft Graph grounding: Work mode vs Web mode recap
	GCSE prompting refresher: Goal, Context, Source, Expectations
0:12–0:18	1.2 Use Case: Synthesise Project Communications with Copilot in Teams
	Summarise emails and chats on the Helios programme from the past week
	Generate a list of key decisions made by the programme steering committee
0:18–0:24	1.3 Use Case: Collaborate & Create with Copilot Pages
	What is a Copilot Page: a persistent, editable canvas built from a Copilot response
	Demo: Brainstorm Vega programme milestones in Copilot Chat → send to a Page
	Add a colleague, co-edit in real time, and share the Page in Teams
	Convert a Page into a starting point for a Word document or PowerPoint presentation
0:24–0:30	1.4 Use Case: Organise & Research with Copilot Notebooks
	What is a Copilot Notebook: an AI-powered workspace grounded in your reference materials
	Demo: Create a Notebook for the Atlas programme — add files, SharePoint content, and emails as references
	Provide custom instructions to shape how Copilot responds within the Notebook
	Explore content with mind maps, audio overviews, and study guides
	Notebooks in OneNote: how they stay in sync across the M365 Copilot app and OneNote
	MODULE 2 — Pre-Built Agents: Analyst & Researcher (30 min)
0:30–0:35	2.1 What Are Agents — and How Do They Differ from Copilot Chat?
	Agents as pre-configured, multi-turn, knowledge-scoped AI assistants
	How agents extend Copilot Chat: persistent support, guided navigation
0:35–0:48	2.2 The Analyst Agent
	What the Analyst agent does: data interpretation, chart summaries, insight generation
	Demo: Analyse Lumen programme end-user satisfaction survey data
	Guided practice: participants use the Analyst agent on programme data in their tenant
	Capabilities and limitations of the Analyst agent
0:48–1:00	2.3 The Researcher Agent
	What the Researcher agent does: deep research synthesis from web and organisational sources
	Demo: Research electric vehicle battery supply chain trends for Velora MotionWorks
	Guided practice: participants use the Researcher agent on a business question
	Capabilities and limitations of the Researcher agent
	MODULE 3 — Build Agents: Concepts & Demos (25 min)

1:00–1:08	3.1 The No-Code Agent Ecosystem
	Two tools: Copilot Chat agent builder and SharePoint agent builder
	Key differences: when to use each tool based on where knowledge lives
	Agent types: pre-built Microsoft agents vs custom organisational agents
1:08–1:16	3.2 Components of an Agent
	Name and Description: how they shape agent identity
	Instructions: behaviour rules — what the agent will and will not do
	Starter Prompts: suggested queries that guide users to the agent's strengths
	Knowledge Source: documents, sites, or uploaded content the agent draws on
	Writing effective instructions: clarity, scope boundaries, tone guidance
1:16–1:25	3.3 Instructor Demo: Build Two Agents
	Demo A: Build a Velora MotionWorks Programme FAQ agent in Copilot Chat
	Demo B: Build a Safety Protocols agent in SharePoint grounded in a document library
	Testing, editing, and iterating on both agents
	HANDS-ON LAB — Build, Test & Share Agents (55 min)
1:25–1:30	Lab Briefing & Setup
	Lab scenario overview: two agent-building exercises using Velora MotionWorks context
	Confirm tenant access and lab guide distribution
1:30–1:52	Lab 1: Build a Copilot Chat Agent
	Task: Create a Velora MotionWorks HR Policy Assistant agent
	Write instructions, starter prompts, and upload knowledge source documents
	Test the agent with sample employee queries
	Iterate: refine instructions based on test results
1:52–2:12	Lab 2: Build a SharePoint Agent
	Task: Create a Helios Programme Knowledge Base agent in SharePoint
	Ground the agent in a pre-populated SharePoint document library
	Configure knowledge source, write instructions and starter prompts
	Test the agent with programme-specific queries
2:12–2:20	Lab 3: Share & Collaborate
	Share the Copilot Chat agent with a colleague
	Share the SharePoint agent in Microsoft Teams
	Interact with a peer's agent and provide feedback
	MODULE 5 — Wrap-Up & What's Next (10 min)
2:20–2:25	5.1 Governance Essentials
	Roles: agent creator, agent user, IT administrator
	Licence requirements and admin controls for agent deployment
	Responsible AI: what agents should and should not be used for
2:25–2:28	5.2 What's Next: Beyond No-Code
	Awareness: Copilot Studio for declarative agents and advanced workflows
	When to graduate from no-code to Copilot Studio

Learning Objectives by Module

Module 1: M365 Copilot Premium in Practice

1.1 What M365 Copilot Premium Adds

- Identify the key capabilities that Microsoft 365 Copilot Premium adds over free Copilot Chat: in-app integration, Microsoft Graph grounding, and cross-app orchestration
- Distinguish between Work mode (Microsoft Graph — emails, files, meetings, chats) and Web mode (public internet content) and choose the correct mode for a given task
- Apply the GCSE prompting framework (Goal, Context, Source, Expectations) to construct effective, context-rich prompts for in-app Copilot features

1.2 Synthesise Project Communications with Copilot in Teams

- Use Copilot Chat in Teams to summarise emails and chat threads on a specific business topic from a defined period
- Generate a structured list of key points and decisions from meeting participants on a given topic

1.3 Collaborate & Create with Copilot Pages

- Turn a Copilot Chat response into a persistent, editable Copilot Page using the Edit in Pages action
- Add a colleague to a Copilot Page and describe how real-time co-editing works within the Microsoft 365 environment
- Share a Copilot Page in Teams or Outlook as a Loop component for inline collaboration
- Use Copilot within a Page to refine, expand, or restructure content without returning to Copilot Chat

1.4 Organise & Research with Copilot Notebooks

- Create a Copilot Notebook and add reference materials including Word documents, Excel spreadsheets, PowerPoint decks, PDFs, SharePoint content, and Outlook emails
- Provide custom instructions within a Notebook to shape how Copilot responds to queries about the referenced content
- Generate a mind map from Notebook content to visualise key topics, themes, and relationships across references
- Describe how Copilot Notebooks stay in sync between the Microsoft 365 Copilot app and OneNote

Module 2: Pre-Built Agents — Analyst & Researcher

2.1 What Are Agents?

- Explain how agents differ from standard Copilot Chat prompts: agents are pre-configured, multi-turn capable, and scoped to specific knowledge
- Describe three things agents can do that a single Copilot prompt cannot: provide persistent knowledge-grounded support, automate multi-step processes, and offer guided navigation

2.2 The Analyst Agent

- Launch the Analyst agent from within Microsoft 365 Copilot Chat
- Describe what the Analyst agent does: connects to structured data sources, produces chart summaries, identifies trends, and generates insight narratives
- Use the Analyst agent to analyse a dataset, surface key themes, and produce a visual summary
- Identify at least two limitations of the Analyst agent and explain when a manual approach may be more appropriate

2.3 The Researcher Agent

- Launch the Researcher agent from within Microsoft 365 Copilot Chat
- Describe what the Researcher agent does: synthesises information from web and organisational sources into structured, cited research output
- Use the Researcher agent to gather information on a defined business topic and produce a structured brief with cited sources
- Identify at least two limitations of the Researcher agent and explain when a manual research approach may be more appropriate

Module 3: Build Agents — Concepts & Demos

3.1 The No-Code Agent Ecosystem

- Identify the two no-code agent building tools available in Microsoft 365: the Copilot Chat agent builder and the SharePoint agent builder
- Explain the difference between the Copilot Chat agent builder (for web-grounded or upload-grounded agents) and the SharePoint agent builder (for document library-grounded agents)
- Choose the appropriate tool for a given agent use case based on where the knowledge lives

3.2 Components of an Agent

- Name and describe the five components of a no-code agent: Name, Description, Instructions, Starter Prompts, and Knowledge Source
- Explain how Instructions govern agent behaviour: what the agent will and will not do, the tone it uses, and how it handles out-of-scope questions
- Explain what Starter Prompts are and why well-written starter prompts improve user adoption of an agent
- Write a clear, concise set of instructions for an agent that includes scope boundaries, tone guidance, and out-of-scope handling

3.3 Instructor Demo: Build Two Agents

- Observe the creation of a Copilot Chat agent from scratch, including naming, instruction writing, starter prompt design, and knowledge upload
- Observe the creation of a SharePoint agent grounded in a document library, including knowledge source configuration and behaviour guardrails
- Describe how to test and edit agents in both Copilot Chat and SharePoint

