

Microsoft 365 AI Business Professional: Copilot Productivity and Intelligent Automation

Course Overview

Item	Details
Primary certification alignment	AB-730: Microsoft Certified AI Business Professional
Recommended duration	3 days
Target audience	Business users, project professionals, support teams, Microsoft 365 users and automation beginners
Technical requirement	No coding or advanced Microsoft 365 administration experience required

Course Objective

This course enables participants to understand generative AI and use Microsoft 365 Copilot effectively in everyday projects and business tasks. Participants will learn prompting, content creation, meeting support, research and agent-based experiences aligned with AB-730. The course also introduces simple automation using Microsoft Forms, SharePoint and Power Automate. Limited administration topics are included only to explain licensing, permissions, data protection and responsible AI.

Prerequisites

- Basic familiarity with Microsoft 365 applications
- Experience using Teams, Outlook, SharePoint or OneDrive
- Microsoft 365 Copilot access for hands-on exercises
- Power Automate and Microsoft Forms access for automation exercises

Course Table of Contents

Module 1: Generative AI and Microsoft 365 Copilot Fundamentals

- Introduction to artificial intelligence and generative AI
- How Microsoft 365 Copilot supports everyday work

- Difference between Copilot Chat, application-based Copilot and agents
- How files, emails, meetings and business context influence responses
- Common Copilot use cases for business and project teams
- Responsible use of AI in the workplace

Module 2: Effective Prompting and Conversation Management

- Key elements of an effective prompt
- Providing clear goals, context, source information and output format
- Referencing documents, emails and meeting information
- Refining prompts and improving responses
- Saving, sharing and reusing prompts
- Creating reusable prompts for routine business tasks

Module 3: Copilot for Documents, Email and Presentations

- Drafting and summarizing documents
- Creating management summaries and project updates
- Rewriting content for tone, clarity and professionalism
- Drafting and summarizing emails in Outlook
- Creating presentation outlines and slide content
- Moving information between Microsoft 365 applications

Module 4: Copilot for Teams, Meetings and Collaboration

- Preparing meeting agendas
- Summarizing discussions and decisions
- Identifying action items and follow-up tasks
- Using Copilot Pages for collaboration
- Creating project plans and task lists
- Using Copilot with SharePoint and OneDrive content

Module 5: Research, Analysis and Copilot Agents

- Using Copilot for business research
- Introduction to Researcher and Analyst

- Identifying suitable use cases for prebuilt agents
- Difference between Agent Store solutions and custom agents
- Creating a simple agent from a template
- Configuring instructions, knowledge and suggested prompts

Module 6: Responsible AI and Basic Copilot Administration Awareness

- Identifying incorrect or fabricated responses
- Verifying sources and applying human review
- Protecting confidential and sensitive information
- Understanding how permissions affect Copilot responses
- Basic awareness of Copilot licensing and access
- Recognizing SharePoint and OneDrive oversharing risks

This module provides awareness only and does not cover advanced Microsoft 365 administration.

Module 7: Introduction to Power Platform and Business Automation

- Overview of Power Apps, Power Automate and Dataverse
- Identifying suitable low-code business scenarios
- Introduction to Microsoft Forms and SharePoint lists
- Understanding Power Automate triggers and actions
- Creating conditions and simple workflow logic
- Sending notifications through Teams and Outlook

Module 8: Approval Workflow and Capstone Project

- Creating a request form using Microsoft Forms
- Storing request information in SharePoint
- Building a basic approval workflow
- Sending approval notifications through Teams or Outlook
- Updating the request status automatically
- Using Copilot to prepare a management summary