



TRAINING PROGRAM

AI-Powered Project Management & Microsoft 365 Copilot Agent Builder

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Course 1 — Project Management using AI (Microsoft 365 Copilot)

Duration	2 Hours
Audience	Project managers, team leads, and PMO professionals using Microsoft 365

By the end of this course, participants will be able to:

- Explain how Microsoft 365 Copilot supports each phase of the project management lifecycle
- Use Copilot within Word, Excel, Outlook, Teams, and Planner to accelerate PM tasks
- Write effective prompts to generate project artifacts, summaries, and reports
- Apply AI responsibly within project communication, risk management, and reporting

Session starts: 9:00 AM

Module 1 Introduction to AI-Powered Project Management 10 Min

- Overview of Microsoft 365 Copilot and where it fits in the Microsoft 365 ecosystem
- How generative AI is reshaping the project manager's role
- Mapping Copilot capabilities to the project management lifecycle (initiation to closure)

Module 2 Getting Started with Copilot for Project Managers 30 Min

- Accessing Copilot across Word, Excel, PowerPoint, Outlook, and Teams
- Understanding the Copilot chat pane, in-line prompts, and Copilot Business Chat
- Principles of effective prompt writing for PM scenarios (goal, context, format, tone)

Module 3 Project Initiation & Planning with Copilot 20 Min

- Generating a project charter and scope statement from meeting notes
- Drafting a project plan, milestones, and timeline in Word and Excel
- Building a work breakdown structure (WBS) with AI-assisted prompts
- User Case Initiation

Module 4 Task & Schedule Management 20 Min

- Creating and organizing tasks in Planner and Project with Copilot assistance
- AI-assisted scheduling, dependency mapping, and timeline adjustments
- Generating quick status snapshots and progress summaries

Module 5 Stakeholder Communication & Collaboration 20 Min

- Drafting stakeholder emails, meeting agendas, and follow-ups with Copilot in Outlook
- Summarizing Teams meetings, decisions, and action items automatically
- Using Copilot in Teams chat and channels for real-time collaboration

Module 6 Best Practices, Governance & Wrap-up 20 Min

- Prompt engineering tips and reusable prompt templates for PM tasks
- Responsible AI use: data privacy, accuracy checks, and human oversight
- Recap, key takeaways, and open Q&A

Tea/Coffee Break: 15 Minutes (11:00 AM to 11:15 AM)

Course 2 — Microsoft 365 Copilot Agent Builder

Duration	3 Hours
Audience	Business users, power users, IT professionals, and citizen developers building custom Copilot agents

By the end of this course, participants will be able to:

- Describe what Copilot agents are and when to use Agent Builder versus Copilot Studio
- Build, configure, and test a custom agent from start to finish
- Ground agents in organizational knowledge using SharePoint, OneDrive, and web sources
- Add actions and connectors to extend agent functionality
- Publish, share, govern, and troubleshoot agents in a production environment

Module 1 Introduction to Copilot Agent Builder

25 Min

- What are Copilot agents, and how do they extend Microsoft 365 Copilot?
- Licensing, prerequisites, and where Agent Builder lives (Copilot chat, SharePoint, Teams)
- User Case Initiation

Module 2 Agent Builder Fundamentals

15 Min

- Navigating the Agent Builder interface and design canvas
- Anatomy of an agent: name, description, icon, and instructions
- Creating an agent from a description vs. building from scratch

Module 3 Building Your First Agent

20 Min

- Defining an agent's purpose, scope, and instructions
- Configuring starter prompts and conversation starters
- Hands-on lab: previewing and testing agent responses

Module 4 Connecting Knowledge Sources

30 Min

- Grounding agents in SharePoint sites, document libraries, and OneDrive files
- Adding public websites and external URLs as knowledge sources
- Prioritizing and scoping multiple knowledge sources for accurate answers

Module 5 Instructions & Prompt Engineering for Agents

15 Min

- Writing clear, effective system instructions for consistent agent behavior
- Defining tone, persona, scope boundaries, and fallback responses
- Handling ambiguous questions, edge cases, and out-of-scope requests

Lunch Break: 60 Minutes (1:00 PM to 2:00 PM)

Module 6 Publishing & Sharing Agents

25 Min

- Publishing an agent for personal, team, or organization-wide use
- Sharing agents via Teams, SharePoint, and direct links
- Managing permissions, visibility, and version updates

Module 7 Best Practices & Troubleshooting

25 Min

- Common pitfalls when designing and grounding agents
- Optimizing agent accuracy, performance, and response quality
- Iterating on agents based on usage feedback

Module 8 Prototype Builder

25 Min

- Proposal Builder through Microsoft 365 Copilot

Tea/Coffee Break: 15 Minutes (3:15 PM to 3:30 PM)

Hands On Activity/Questions: Participants will perform hands on and apply what they have learned so far.