

AI Transformation for Leaders

Level: Executive / Business Leadership

Delivery Mode: Instructor-led

Duration: 4 hours

Recommended Cohort Size: 15-20 participants

Course Objectives

This course prepares senior business leaders to identify high-value AI opportunities, make informed investment decisions, establish responsible AI governance, and lead successful AI-enabled transformation across their functions — using Microsoft 365 Copilot and the broader Microsoft AI portfolio as the reference platform.

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

- Explain AI, generative AI, copilots, and AI agents in plain business language.
 - Identify the business value of generative AI solutions, including scenarios where scalability, automation, and ROI justify investment.
 - Recognize the challenges and limits of generative AI, including fabrications, reliability issues, and bias.
 - Decide when to **use, extend, or build** using the Microsoft 365 Copilot extensibility framework.
 - Produce a 90-day executive AI transformation action plan.
-

Target Audience

- Chief officers and business executives
- General managers, directors, and vice presidents
- Practice heads and business-unit leaders
- Senior managers and functional heads across marketing, sales, operations, HR, finance, and strategy
- Transformation sponsors and change-management leaders

Course Modules

Module 1 — AI Transformation in the Business Context (25 minutes)

Topics

- AI, generative AI, copilots, and agents in business language
- Differences between generative AI and other types of AI
- Differences between AI models, including fine-tuned and pretrained models
- Challenges of generative AI: fabrications, reliability, and bias
- Why human oversight remains essential
- The leader's role in setting direction, guardrails, and accountability

Module 2 — Business Value of Generative AI Solutions

Topics

- Selecting a generative AI solution to meet a business need
- Scenarios where generative AI provides business value, including scalability and automation
- Cost drivers in generative AI usage, including tokens and return-on-investment (ROI) considerations
- The impact of prompt engineering, grounding, and retrieval-augmented generation (RAG)
- The impact of data on AI solutions, including data type, data quality, and representative datasets
- The importance of secure AI
- When machine learning adds value versus when generative AI adds value
- Security considerations for AI systems, including application security, data security, and authentication requirements

Module 3 — Microsoft AI Capabilities for Decision-Makers

Topics

- Microsoft 365 Copilot Chat capabilities on web and mobile
- The Copilot experience across Microsoft 365 apps (Word, Excel, PowerPoint, Outlook, Teams)
- Differences in capabilities between versions of Copilot
- Capabilities of **Microsoft Copilot Studio** for extending Copilot
- Capabilities of **Microsoft Graph** for grounding responses in trusted organizational information
- When to use **Researcher** or **Analyst** agents in Copilot
- The Microsoft 365 Copilot extensibility framework: **use, buy, extend, or build**

- Benefits of an integrated Microsoft AI solution, including risk mitigation and safety benefits
- Scalability and security benefits of Microsoft Foundry and Foundry Tools

Module 4 — AI Opportunity Identification and Prioritization

Topics

- Mapping business processes and use cases to Copilot and to Microsoft's AI apps and services
- Balancing value, feasibility, readiness, risk, and urgency
- Distinguishing quick wins from strategic transformation initiatives
- Recognizing repeatable, high-frequency, low-risk tasks best suited to Copilot
- Recognizing when workflow redesign is required before AI deployment
- Assessing dependencies on data quality, permissions, and Microsoft Graph grounding

Module 5 — Responsible AI, Governance, and Risk

This module addresses the accountability dimension that senior leaders must own directly. Participants translate Microsoft's responsible AI principles into governance decisions for their organization.

Topics

- Why responsible AI is a leadership responsibility
- Microsoft's six responsible AI principles: **fairness, reliability and safety, privacy and security, inclusiveness, transparency, and accountability**
- Establishing an **AI council** to guide strategy, oversight, and cross-functional alignment
- Aligning AI policies with existing corporate governance for data governance, security, and risk management

Module 6 — Leading AI Adoption and Organizational Change

Topics

- Establishing an **adoption team**
- Identifying common barriers to adoption (awareness, trust, fear of job impact, weak management support, unclear policies, lack of relevant use cases)
- Establishing an **AI champions program**
- Understanding potential impacts to data, security, privacy, and cost
- Understanding **Copilot license types**, including pay-as-you-go, monthly, and included with Microsoft 365 subscription

- Measuring adoption, usage, value, and sentiment
- Using the Microsoft Copilot Optimization Assessment to evaluate data-governance maturity and data-security controls before deployment

Module 7 — Executive AI Action Plan

This module converts insight into a decision. Participants complete a controlled-pilot plan that they can activate immediately after the workshop.

Topics

- Moving from idea to controlled pilot
- Defining scope, success measures, ownership, governance checkpoints, and review points
- Pilot decision criteria: scale, improve, or stop
- Capturing learning for future initiatives

Course Outcome

On completion, participants will be able to:

- Explain generative AI, copilots, and agents in business terms and articulate their limits (fabrications, reliability, bias).
- Map business processes and use cases to Microsoft 365 Copilot, Copilot Studio, Microsoft Graph, Researcher, Analyst, and Foundry Tools.
- Apply the **use / buy / extend / build** decision framework using the Microsoft 365 Copilot extensibility model.
- Align AI strategy with Microsoft's six responsible AI principles and integrate governance with existing corporate risk, security, and compliance processes.
 - Establish an AI council, adoption team, and champions program.
- Measure adoption, value, quality, and risk.
- Deliver a 90-Day AI Transformation Action Plan for a prioritized opportunity.

Optional Certification Alignment

The workshop is aligned to — but does not fully replace — the **Microsoft Certified: AI Transformation Leader** credential. Leaders who wish to certify may pursue **Exam AB-731**