

AI-Powered Research, Analysis & Workflows

Platform Focus: Microsoft 365 Copilot + Excel + Analyst + Researcher + Copilot Agents + Workflows

Level: Intermediate

Delivery Mode: Instructor-led (Concepts + Demo + Guided Practice)

Duration: 4 Hours

Course Objectives

This course helps participants use AI for **data analysis, research, insight generation, and business decision support**.

Participants will learn to:

- Analyze business data using Copilot in Excel and Gemini.
- Use **Analyst** for deeper data analysis.
- Use **Researcher** for structured, source-based research.
- Identify trends, patterns, exceptions, and insights.
- Convert research and analysis into decision-ready reports.
- Validate AI-generated findings before making decisions.

Target Audience

- Business, finance, sales, marketing, strategy, and planning professionals who work with reports, data, and insights.
- Project managers, PMO teams, managers, and decision-makers who need AI support for planning and decisions.
- Audit, legal, risk, compliance, data, and AI teams who need reliable research, analysis, agents, and workflows.

Prerequisites

- Basic Microsoft 365 Copilot knowledge
- Basic Excel knowledge
- Familiarity with business reports and datasets
- No coding required

Tools & Platforms Required

- Microsoft 365 Copilot
Gemini

Course Modules

Module 1 — AI for Analysis and Decision Support

- Role of AI in business analysis
- Data analysis vs research
- Descriptive and diagnostic analysis
- AI-assisted decision support
- Choosing between Excel, Analyst, Researcher, Copilot Chat, and Gemini

Task: Select the appropriate AI capability for different business scenarios.

Module 2 — Data Analysis with Copilot in Excel and Analyst

- Understanding business datasets with Copilot
- Asking questions about data in simple language
- Generating and explaining formulas in Excel
- Using Analyst for deeper data analysis
- Working with single and multiple datasets
- Identifying trends, patterns, relationships, and outliers
- Creating charts, tables, and insight summaries
- Asking follow-up questions to refine analysis

Task: Analyze a business dataset using Copilot in Excel and Analyst, then create a short insight summary.

Module 3 — Data Analysis with Gemini

- Understanding Gemini for business data analysis
- Working with data and business information
- Asking questions and exploring data in simple language
- Identifying trends, patterns, relationships, and exceptions
- Using Canvas to organize analysis and findings
- Creating visual summaries and data views
- Refining and validating AI-generated insights

Task: Analyze a business dataset with Gemini and organize the key findings in Canvas.

Module 4 — Business Research with Researcher

- Introduction to the Researcher agent
- Researcher vs Copilot Chat
- Defining a research question
- Working with internal and external sources

- Multi-source research
- Source-grounded reports
- Citations and references
- Refining research results

Task: Create a structured research brief using Researcher.

Module 5 — Creating Infographics and Data Dashboards Using Copilot

- Turning data findings into visual stories
- Planning an infographic for business communication
- Using Copilot to summarize key data points
- Creating simple dashboard layouts from analysis results
- Choosing the right chart or visual for the message
- Using Copilot to create dashboard explanations and labels
- Reviewing visuals for clarity, accuracy, and business value

Task: Create a simple infographic plan and data dashboard outline using Copilot-generated insights.

Module 6 — Creating Copilot Agents

- Understanding what Copilot agents are
- Identifying business tasks suitable for an agent
- Planning the goal, instructions, and knowledge sources for an agent
- Creating a simple agent for a business use case
- Testing agent responses
- Improving the agent based on feedback

Task: Create a simple Copilot agent for a common business scenario.

Module 7 — Creating Workflows in Copilot

- Understanding what workflows are
- Identifying repeated steps that can be automated
- Planning a workflow from start to finish
- Connecting prompts, files, approvals, and actions
- Testing the workflow output
- Improving the workflow for accuracy and usefulness

Task: Design a simple Copilot workflow to automate a repeated business activity.

Q&A

Discussion around:

- When to use Excel, Analyst, or Gemini
- When to use Researcher vs Copilot Chat
- Improving analytical prompts
- Validating AI-generated insights
- Working with multiple sources
- Creating decision-ready reports
- Using AI without replacing human judgment

Course Outcome

Participants will be able to use Microsoft 365 Copilot, Excel, Analyst, Researcher, Gemini, Copilot Agents, and Workflows to analyze data, conduct structured research, create visual insights, build simple agents, design workflows, and support better business decisions.

Optional Microsoft Credential: Microsoft Applied Skills — **Generate reports with AI research agents.**