

Microsoft Copilot & Copilot Studio: Intro for Leaders

Course ISI-1615

2 Days

Instructor-led, Hands on

Course Description

A gentle, hands-on introduction to Microsoft 365 Copilot and Copilot Studio designed for small cross-functional teams of leaders and power users. This two-day course focuses on building familiarity and confidence through practical application rather than complex implementations. Participants learn to use Copilot effectively across Microsoft 365 applications with reusable prompt templates, understand how to ground responses with organizational content from SharePoint and OneDrive, and create simple Copilot Studio bots with built-in actions that can be tested safely in the organization's environment.

The goal is practical competence and confidence, not mastery of complex features. Through eight guided labs and team activities, participants will develop a personal prompt set for daily workflows, understand when and how grounding improves responses, apply basic security and quality practices, build simple Studio bots with topics and actions, produce structured outputs for business use, and identify one feasible pilot idea with a clear implementation outline. By the end of the course, each team will have a concrete, scoped pilot plan ready to present to stakeholders.

Course Objectives

In this course, you will learn how to:

- Use Copilot effectively in Outlook, Teams, Word, and PowerPoint with reusable prompt templates for common business scenarios
- Understand grounding with SharePoint/OneDrive content and recognize when grounded responses improve accuracy and relevance
- Create simple Copilot Studio bots with topics, triggers, and built-in actions that can be safely tested and published to Teams
- Apply security best practices including sensitivity labels, data protection guidelines, and prompt safety patterns
- Evaluate prompt and bot quality using simple rubrics and "golden set" test cases without complex evaluation frameworks
- Identify one feasible pilot scenario and outline implementation steps including scope, data access, success metrics, and risk mitigation

Topics

- Effective prompt patterns for Outlook, Teams, Word, and PowerPoint

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- Tone controls, meeting recaps, document drafting, and summarization with citations
- Grounding concepts and SharePoint/OneDrive integration
- Content readiness, access management, and when grounding adds value
- Security best practices: sensitivity labels, safe usage guidelines, audit awareness
- Quality assurance with quick rubrics, spot checks, and golden test sets
- Copilot Studio fundamentals: topics, triggers, variables, testing, and publishing
- Adding built-in actions with parameters and least-privilege considerations
- Structured outputs with headings, bullets, and basic JSON for downstream use
- Pilot planning: scoping, data access, success measures, risks, and guardrails

Prerequisites

Prior to attending, students should have:

- Basic Microsoft 365 fluency and regular use of Outlook, Teams, Word, or PowerPoint
- Familiarity with organizational business processes and common workflows
- General understanding of document management and collaboration in Microsoft 365
- No programming or technical development experience required
- Willingness to experiment and learn through hands-on practice

Course Outline

Module 1: Copilot in Outlook, Teams, Word, PowerPoint

- A. Effective Prompt Patterns for Business Scenarios
 - Prompt anatomy and structure
 - Tone controls and context setting
 - Common patterns: reply, recap, draft, summarize
- B. Meeting Recaps and Document Intelligence
 - Teams meeting summarization with citations
 - Document drafting workflows
 - Summarizing long documents and threads
- C. Guided Lab 1: Build Personal Prompt Set for Daily Tasks
 - Identify 5-10 common tasks for automation
 - Create reusable prompt templates
 - Test prompts across different scenarios
 - Document personal prompt library

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Module 2: Grounding Basics with SharePoint/OneDrive

- A. Understanding Grounding Concepts
 - What grounding is and why it matters
 - When grounding improves accuracy and relevance
 - How Copilot accesses organizational content
- B. Content Readiness and Access Management
 - SharePoint and OneDrive integration
 - Permission requirements and access patterns
 - Content organization for effective grounding
 - What makes content "AI-ready"
- C. Guided Lab 2: Compare Grounded vs Ungrounded Responses
 - Test prompts without organizational content
 - Enable grounding with SharePoint documents
 - Compare response quality and accuracy
 - Identify scenarios where grounding adds value

Module 3: Safe and Effective Usage

- A. Security Best Practices
 - Sensitivity labels and data classification
 - What not to paste into Copilot prompts
 - Understanding data residency and storage
 - Audit logging and compliance considerations
- B. Simple Review Steps and Guardrails
 - Human-in-the-loop review patterns
 - Spotting hallucinations and inaccuracies
 - When to trust and when to verify
 - Building organizational safe usage guidelines
- C. Exercise: Rewrite Risky Prompts with Safety Patterns
 - Analyze example prompts with security issues
 - Apply safety patterns and data protection
 - Add appropriate review steps
 - Create "safe use" note for prompt library

Module 4: Quality Without Complexity

- A. Quick Rubrics and Spot Checks
 - Simple pass/fail criteria for prompt outputs
 - Key quality dimensions: accuracy, relevance, tone, format
 - Rapid evaluation without complex frameworks
 - When to invest in deeper evaluation
- B. Building a "Golden Set" of Test Cases
 - Selecting representative test scenarios
 - Creating expected outputs for comparison
 - Maintaining small, focused test sets
 - Using golden sets for ongoing quality checks
- C. Exercise: Create Five Test Cases for One Workflow
 - Select one business workflow to evaluate
 - Define five specific test scenarios
 - Write expected outputs or pass criteria
 - Test current prompts against golden set

Module 5: Day 1 Close: Quick Look at Copilot Studio

- A. Copilot Studio Overview (Demo)
 - What is a topic and how it works
 - Where data comes from in Studio bots
 - What actions do and when to use them
 - Publishing and testing in Teams
- B. Preview of Day 2 Activities
 - Building a simple FAQ bot
 - Adding one built-in action
 - Creating structured outputs
 - Planning a pilot project

Module 6: Copilot Studio Tour

- A. Studio Fundamentals
 - Topics: triggers, questions, responses
 - Variables and data flow
 - Testing in Studio environment

- Publishing to Teams for users

B. Building Conversational Topics

- Natural language triggers
- Response nodes and message variations
- Branching and conditional logic (simple)
- Fallback and error handling

C. Guided Lab 5: Create Policy FAQ Bot Using Provided Content

- Set up new Copilot Studio bot
- Create topics for common policy questions
- Add responses with organizational content
- Test bot in Studio test pane
- Publish to Teams for team testing

Module 7: Add a Single Action

A. Understanding Actions in Studio

- Built-in actions vs custom connectors
- When to use actions vs knowledge sources
- Parameters and inputs
- Response handling and error scenarios

B. Least-Privilege Thinking

- Minimizing data access and permissions
- Choosing appropriate action scope
- Review and approval patterns
- Security implications of action selection

C. Guided Lab 6: Add Built-in Data Fetch Action

- Select appropriate built-in action
- Configure action parameters
- Map action outputs to bot responses
- Display formatted action results
- Test action with various inputs

Module 8: Simple Structured Outputs

A. Formatting for Downstream Use

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- Headings and bullet structure for readability
- Consistent formatting patterns
- When structure matters for automation
- Balancing structure with natural language

B. Basic JSON for Handoffs

- What JSON is and when to use it
- Simple key-value pairs for integration
- Passing structured data to other systems
- Minimal JSON examples without complexity

C. Guided Lab 7: Produce Structured Response

- Design response with clear headings and bullets
- Add mini JSON summary for integration
- Test structured output formatting
- Validate structure meets business requirements

Module 9: From Idea to Pilot

A. Scoping a Small Pilot Project

- Identifying high-value, low-complexity scenarios
- Defining clear success criteria
- Estimating effort and resources
- Setting realistic timelines and milestones

B. Data Access and Content Requirements

- Identifying required content sources
- Assessing access permissions and security
- Content preparation and organization
- Fallback strategies when content is unavailable

C. Success Measures and Risk Management

- Defining measurable success metrics
- Identifying potential risks and mitigation
- Building guardrails and review processes
- Planning rollout and user enablement

D. Team Activity: One-Page Pilot Outline

- Teams select one business scenario
- Define goal, users, and success metrics
- Identify inputs, allowed sources, and expected outputs



- Add review/approval steps and guardrails
- Outline next actions and dependencies

Module 10: Capstone: Planning Workshop (Not a Full Build)

A. Scenario Selection

Teams choose one scenario for planning:

- Outlook Suggested Reply: Email thread + one knowledge base
- Basic Redaction: Replace marked entities with labels on sample doc
- Transcript to Outline: Turn short transcript into clean requirements outline
- Profile Summary: Draft appraisal paragraph from approved fields

B. Demo Plan or Storyboard Creation

- Define user scenario and workflow
- Identify required Copilot/Studio components
- Sketch inputs, processing, and outputs
- Add quality checks and review gates
- Document risks, assumptions, and dependencies

C. Team Presentations

- Each team presents 5-minute pilot plan
- Peer feedback and questions
- Instructor guidance on feasibility and scope
- Discussion of next steps and implementation